



Essential apps from **Salesforce** for implementing CRM business flow

index

01	Introduction	01
02	How to select apps for Salesforce CRM	02
	a. The benefits of installing apps	
	b. How to choose the right apps	
03	Essential Apps – The best apps for:	03
	a. Sales	
	b. Operations	
	c. Project Management	
	d. Accounting	
	e. Customer Support	
04	About Suyati	10

01

Introduction

A CRM plays a crucial role in making business processes seamless. Leveraging the many benefits that the Salesforce CRM offers, however, requires installing it in the right way. This requires careful planning and commitment across-the-board, especially with regard to deciding which apps to install from the AppExchange.

The first task of the CRM implementation team is to understand the requirements of the organization, and take end users of the system into confidence, to identify what exactly is required and to draw up a blueprint of the required features and specs of the CRM. Any CRM that takes cognizance of user needs invariably requires customization from the standard or default version offered by the vendor. What gives Salesforce its reputed flexibility is the availability of a large pool of apps in the AppExchange. The CRM implementation team may choose to install the desired apps that best suit the desired requirements and functionality, and this facilitates customization in a big way.

02

How to select apps for Salesforce CRM

At times, custom objects and configuration tweaks can achieve the same functionality that apps offer with a smaller footprint. However, in most cases, selecting apps from the AppExchange offers the best solution to enhance the features or functionality of the CRM. The apps in the AppExchange offer ready-made solutions for specific tasks, and spare users from the hassle of having to deploy developers to create and maintain the applications on their own.

However, deciding which app to install can be quite a challenge, considering the huge number of apps available in the AppExchange. There are literally hundreds of apps that fulfill a host of functions related to sales, lead and opportunity management, projects, operations, accounts and all other enterprise functions. These apps enhance the functionality of the CRM, improve the productivity of users, and keep the business flow smooth through the various stages of the customer lifecycle.

The Salesforce CRM implementation team would do well to:

- Select apps that further the business requirements
- Select apps that enhance the functionality of the CRM

Essential Apps Sales

The biggest beneficiary of a CRM is the sales and marketing teams, and it is imperative that the CRM contains apps that make their lives easier.

1. PowerDialer

An app to manage telephone calls is a basic requirement for any marketing or sales personnel, and the PowerDialer app facilitates this task. The app uses a CTI dialer to dial and log calls, and track related metrics in Salesforce. The app facilitates one-touch calling, and besides optimizing the calls made by the sales team, delivers some add-on features such as gamification, email tracking and Neuralytics for predictive lead scoring. The app requires payment, with several custom pricing options.

2. DupeCatcher and DupeBlocker

CRM improves productivity by optimizing leads and thereby sparing the sales team of wasted time and efforts. The DupeCatcher app facilitates real time deduplication of leads. The app allows users to identify and block duplicated leads, accounts, and contacts in real-time at the point-of-entry. The DupeCatcher app comes free of cost.

An alternate is the DupeBlocker app, which also blocks or merges duplicate leads, accounts in real time. DupeBlocker 3 costs \$5,000 USD per company per year.

3. Cirrus Insight app

The Cirrus Insight app integrates Salesforce with Gmail and Google Apps, and syncs Salesforce with Google Calendar. It tracks emails and attachments to Salesforce and makes it possible to view Salesforce info in Gmail and Google Apps. The app costs \$19 per user per month.

4. DocuSign Electronic Signatures - DocuSign for Salesforce

The DocuSign app for Salesforce makes it easy to sign and send documents to anyone at any time, across any device. The app offers many intuitive features such as facility to sign online or in-person with a single click, merge data from any object, real-time updates through Chatter, native integration with other apps such as Conga and Apttus, and more. Users get a free trial, and a custom pricing applies later.

5. Configure Price Quote CPQ by Apttus

The CPQ app by Apttus automates all critical Configure Price Quote (CPQ) processes on Salesforce1, making it easy to manage configuration, quoting, pricing and proposals. The app leverages Salesforce prospect and account details to create complex service and product configurations, and thereby enable selling channels to find the right products and options for the right customers. Custom pricing apply.

6. Salesforce for Twitter and Facebook

No marketer can ignore social media and get away with it. The Salesforce for Twitter and Facebook app enables the basic requirement of connecting Salesforce with social media, and also automates some key tasks. For instance, the app creates cases, contacts and leads, based on tweets and comments on the Facebook wall. This is a free app.

7. InsideView

The InsideView app is the top analytics apps available in AppExchange and a must have for any high end CRM. This app triangulates contact information, corporate data intelligence, data from social networks, blogs, news feeds and several other sources to offer valuable information for sales and marketing team. Using this app allows them to engage the right prospect at the right time. This is a free app.



Operations

Any CRM installation must have some basic apps that make possible some core functionality, enhance productivity and perform integrity checks.

1. Salesforce CRM Dashboards

Salesforce CRM Dashboards is a free app that offers a set of pre-built example dashboards. This is a good starting place for users to construct a customized dashboard to suit their requirements.

2. Action Plans

The Action Plans app makes it possible to create reusable task templates for key functions, including accounts, contacts, opportunities, and leads. Including this free app in the CRM would ensure a big productivity boost for users. This is a free app.

3. Drag, Drop, and Upload

Another big productivity booster is the “Drag, Drop and Upload” app. This free app enables the user to drag, drop or upload multiple files in one go.

4. AddressTools Free App (formerly: CountryComplete)

The AddressTools Free app offers address validation, standardization and autocompletion tools. It overrides Salesforce.com text-entry fields and enhances the functionality of the app. This app is free of cost, and was formerly known as CountryComplete.

5. DemandTools

DemandTools is another productivity booster app, which performs basic and essential tasks such as taking backups, merging duplicate records, batch normalization and deletion, duplicate prevention and reconciling external data with data stored in Salesforce.

DemandTools is a paid app, with the base price starting at \$5,000 for the first administrator and \$2500 for each subsequent administrator, per year.

6. Conga Composer

Conga is an intuitive app that makes it easy to create and present custom proposals, account plans, contracts, presentations and emails in MS-Word, MS-Excel, MS-PowerPoint, PDF Forms and many other formats, drawing content from multiple objects and related lists. Pricing starts at \$15 USD per user per month.

7. Chatter Apps

Chatter is today a basic requirement in just about any Salesforce CRM. Chatter connects employees with the files, data, and experts. The Dreamforce Chatter app makes this functionality available in a customized user interface.

While including Chatter, make sure to include the free well. This app makes sure every user actively agrees to comply with the laid down terms of use.

Chatter Terms of Use app

8. MailChimp

MailChimp ranks very high in popularity, and is used by millions to design, send, and track email marketing campaigns. This free app helps to keep MailChimp and Salesforce.com data in sync, besides build campaigns, manage subscribers, create custom queries, and more. The MailChimp app is available free in the AppExchange.

9. Informatica Cloud Data Loader

Informatica Cloud Data Loader is a free app that automates the import and export of Salesforce and Force.com data between databases and files. This is another free app.

07

Project Management

1. SmartSheet for Salesforce

The SmartSheet for Salesforce app equips the CRM with basic online project management capability. It allows users to create and track task lists, track projects, import from MS-Excel, share project sheets and more, all while linking SmartSheet projects to customer records. The basic version of the app costs \$14 per month.

2. TaskRay Project Management for Salesforce

The TaskRay app makes it easy to get things done. The app facilitates drag-and-drop actions, chatter conversations and other features that allow users to track, manage and communicate the work easily. It offers a beautiful interface as well. The app costs \$19 per user per month.

Accounting

Many business managers underestimate the magnitude of accounting related tasks, especially billing and invoicing. The AppExchange offers many apps that automates much of this otherwise tedious process, integrates the same to sales, and makes the process seamless.

1. Accounting for Salesforce - FinancialForce

The FinancialForce app automates all basic accounting tasks, including invoicing, billing, accounts receivable, collections, general ledger and more. There are several plans, starting at \$750 per month.

2. bill.ON

The bill.on app makes the task of billing and invoicing easy. The app automates the billing process based on contracts and is very handy for complex pricing models. This app is priced 59 Euros per user per month.

3. AccountingBook

The AccountingBook app is ideal for small and mid-sized businesses to manage their accounting, time and expenses in the CRM. This app makes it possible to run accounting tasks in Salesforce CRM while still using existing Accounting systems such as QuickBooks, MS GreatPlains or Intacct. It also offers Salesforce1 Mobile Ready Payment functionality. The app costs \$600 USD per user per year.

4. Invoices for Salesforce

The Invoices for Salesforce app makes it possible to undertake invoicing and billing from within Salesforce. The app aggregates invoice data scattered across customers and sales records, without the user having to re-key anything. Pricing starts at \$49 USD per user per month.

5. Invoice IT Billing Automation App

The InvoiceIT app automates the entire sales ordering and billing process from within Salesforce. It integrates quotes, orders, subscriptions, invoicing and payments, all in one place. This is a paid app, with custom pricing.

Customer Support

Many a time, the only reason businesses go in for a CRM suite is to improve their customer support functions and thereby delight their customers. The AppExchange offers many apps that not just facilitate smooth and seamless customer support functions, but also strengthen this core function.

1. Zendesk for Salesforce

Zendesk is a comprehensive app that allows customer support executives to respond faster. The app provides complete visibility into customer relationships that enables the closing of the loop between sales and support. The app routes incoming calls to mobile seamlessly, and creates a customer portal for help desk agents, including important customer information pulled in from Salesforce. It also becomes possible to view Zendesk tickets directly from Salesforce, for Accounts, Leads, Contacts and Opportunities and perform a few other intuitive actions. This is a free app.

2. Desk.com for Salesforce

The Desk.com app for Salesforce offers a wide array of features, including self-service portals, productivity tools, customer profiles and many third-party integrations. It is specifically designed to help small enterprises deliver impeccable customer support. This is a free app.

3. ServiceMax IQ

ServiceMax IQ offers visibility to Salesforce1 Mobile users across the organization. For instance, it offers sales managers insight into installed products, service contract, and work orders for each account. Finance managers remain updated with on-the-go notifications and real-time reports on SLA attainment and service contract renewals. Marketing managers gain visibility into customer satisfaction metrics and reports on installed products. This app comes free of cost.

All things considered, the best approach when setting up Salesforce CRM and drawing in apps from the AppExchange is to keep it simple. Keep the initial implementation straightforward, with only the basic apps installed. Move on to the next level of complexity only after having gained experience with the present set and ironing out the glitches.

About Suyati

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of ecommerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

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