

Article

A Study: Salesforce CRM in a Cloud Environment

Apoorva Badaya¹, Nilaksh Gupta²

^{1,2}Department of Computer Science and Engineering, Global Institute of Technology, ITS 1 & 2, IT Park Rd, EPIP, Sitapura, Jaipur.

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Corresponding Author:

Apoorva Badaya, Department of Computer Science and Engineering, Global Institute of Technology, ITS 1 & 2, IT Park Rd, EPIP, Sitapura, Jaipur.

E-mail Id:

erapoorvabadaya@gmail.com

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A B S T R A C T

Customer Relationship Management (CRM) has shifted in emphasis during last few years with tech related aspects of CRM applications especially in cloud based solution. Today it is widely acknowledged that how we understand and treat the customers. CRM have been in air ever since people starting exchanging things and then CRM came into existence in mid 1990s and companies are making bigger and bigger investment just to understand the customers so they can create a loyalty among them and also can treat them well. And even the companies are already pouring many into CRM solutions and services designed to help business more effectively to manage customer relationship through direct and indirect channel and this is the reason why CRM technology exploding.

In short CRM is total process of getting customers, keeping customers, maximizing customers profitability, behavior and satisfaction.

Keywords: Cloud Environment, CRM, force.com platform, On-Demand Computing, PaaS, Salesforce.com, SaaS

Introduction

Salesforce was born cloud. Epicenter to distributed computing or cloud computing is the indication of software design transported as a Service, or SaaS. Salesforce helps you deal with your customer connections, incorporate with different frameworks, and make your own particular applications. This means you don't have to install any application on your computer. All you need is Internet connectivity and a browser, and you can sign in from anyplace to access Salesforce. Salesforce helps you assemble more important associations with your customers; to better comprehend their needs, recognize new chances to help, and address their issues speedier. Salesforce is a customer-success platform, designed to help users sell, service, and market, analyze and connect with their customers. It has everything required to run a business from anywhere.³

This document focuses on the Customer Relationship Management stored and managed in the Cloud Environment on Salesforce.com platform. CRM is a process used to learn more about customer's needs and behavior in

order to develop stronger relationships with them. This expertise allows users to accomplish relationships with their customers and track data related to all of their interactions. It too assistances groups cooperate, both inside and outwardly, collect understandings from social media, track significant metrics, and interconnect via email, phone, social, and other channels. In Salesforce, all of the material is deposited firmly in the cloud. Salesforce CRM systematizes your data into objects and records. An object is a tab on a spreadsheet, and record is like a single row of data.

It is represented in the form of a table and it is here referred as what an entity in database. We can create objects using Point and click in Salesforce.¹⁰

Salesforce is creating application or emergent application which are helpful to other business in order to increase the productivity or in order to work effectively in today's time & initially it started with Salesforce.com which use to help sales executive & sales manager to do the sales effectively.¹

The Force.com is a Platform-as-a-Service (PaaS), artifact

Table 1. On-Premise Vs. On-Demand functions

Function	On Premise	Cloud Computing
Software	Installed on your computer	Delivered via service over Web
Access	Through your computer	Through the Internet
Upgrades	Manual and complex	Automatic and easy
Versions	Multiple versions to maintain	Single code base with no infrastructure maintain
Hardware	Purchase, Maintain and Manage	Pay for what you need

intended to make simpler the progress and placement of cloud-based presentations and websites. Designers can create apps & websites finished the cloud IDE & organize them rapidly to Force.com multi-tenant server.²

Force.com have unlocked up the foundation and made it accessible for anybody for beginning any business application and successively it on the servers using the Force Platform.

Force Platform permits to store organized information, execute business method with work process rules, supported methodology and custom code, coordinate with different applications, do reporting and investigation and scale up or down-all with sub second reaction time, high accessibility, and security. It is used to create and deploy next-generation cloud apps. Because there are no servers and software to buy or manage, developers can focus solely on building apps that include built-in social and mobile functionality, business processes, reporting and search.

Salesforce Crm architecture



Figure 1. Architecture of Salesforcecrm

Salesforce is a cloud company and it offers a trusted and multitenant cloud.

- Chatter: Makes the business social and facilitate connections.
- Sales Cloud: Manage sales process end-to-end.
- Service Cloud: Support customers after the sales.
- AppExchange: Salesforce AppExchange is Salesforce.com's cloud computing marketplace.
- Data.com: Data.com is a cloud-based automated system for acquiring & managing CRM records within a user's Salesforce.com account.
- Heroku: It is a cloud Platform as a service supporting several programming languages.
- Site.com: It is a content management system available on cloud.
- Database.com: Database engine for cloud application developers.

Salesforce CRM Objects

Objects are represented in the form of table that allows storing data specific to any company or organization. There exist two types of objects in Salesforce i.e. Standard Objects and Custom Objects.

Standard objects

These are the objects included with the Salesforce by default. Ex- Accounts, contact, leads and opportunities etc. Salesforce CRM includes these standard objects.

- **Account:** An Account is a business entity, it's a company. Accounts are companies that we are doing business with. An Account is an association that is a qualified potential customer, an existing customer, partner, competitor, or has a relationship of similar significance.
- **Contacts:** Contacts store an individual's demographic information, such as phone numbers and e-mail addresses, and are linked to accounts.
- **Leads:** Lead object is used to store info about a person interested in the product or service we are delivering. In business terms leads are the people who are your potential customers. It contains some information about a company and the information of person working into that company. Hence it can be considered as a business card.
- **Opportunities:** Opportunities represent a transaction between your company and an Account. In other words we can say that opportunities are deals.
- **Campaign:** Campaign object is used to store information about a campaign organized usually for lead generation or brand building.

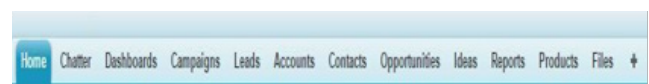


Figure 2. Salesforce CRM Custom Objects¹⁵

- **Dashboard:** Dashboards are graphical demonstration of reports. It demonstrates data from source reports as visual components. These components provide a snapshot of key metrics and presentation indicators of the association at a glance.
- **Report:** Report is a list of criteria which gives answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.
- **Deal:** Deals are a thought on which clients are allowed to remark and vote, for instance, a recommendation for an improvement to a current item or process.

Custom Objects

The objects made by the users are the custom objects. These are new objects created to accumulate information unique to an organization. Custom objects extend the functionality that standard objects provide. Custom objects have properties such as Custom Field

- Relationship to other object
- Page layouts
- A custom user interface tab⁵

Challenges Towards Salesforce CRM

Receiving any new business preparation up and running can be a problematic task to be done. Salesforce CRM is the modest way to assemble and preserve the data stored on cloud. Even nevertheless there exist some problems for using it.⁶

Lack of Strategic vision

A successful CRM application begins with clearly defined objectives. Each effective CRM extension begins with an unmistakable vision of what you need to fulfill. One needs to have a strategic vision whether they want to witness such changes with changing dynamics of businesses.

Complicating Implementation

To be fruitful, we require the upfront investment and support of individuals with different points of view. It has a wide range of CRM service designed to improve business processes. Organizations usually end up complicating things by opting more features than required ends up costing them.

Integrating Salesforce with other system and Inadequate Business Process

To leverage the benefits of the Salesforce it needed to be applicable with business applications in the organization. A business IT Environment is disparate from a premise application and cloud environment with other applications so they also require planning and strategy

Training and Adaptations for Staff

Change is a given. Since, it is so unassuming to change the

Salesforce CRM. Technology that our team don't understand is as good as useless and team views Salesforce as separate as a chore of entering data. Creating a change administration arrangement keeps our association's vision, procedure, and objectives firmly adjusted.

Inadequate Training

Proper training is dangerous to the success of a CRM in a diversity of actual significant methods. As it intensifies acceptance rate, recovers knowledge of topographies, helps assimilate the CRM into daily routines. Many customers create an Education Web tab to bring about their training resources.

Dealing with Data

A massive favourable advantage of a CRM application is that you get complete visibility of our data, so we can do exact determining of data. Messy information frustrates the customers and destinies that target. In Salesforce implementation of data migration, interpretation and maintenance of significant experiments are faced during the development. It is a separate task which involves approach, budget, and team. During Salesforce employment this strategy has to be such that it improves efficiency of our new system which in turn gives a better ROI.¹²

Salesforce CRM Advantages

Salesforce CRM helps in many ways like Reporting to higher authority, Manage clients' data, Reminds of the tasks or activities, for tracking the leads, Analyze the market etc. Listed Below is some of the compensations of using Salesforce CRM.¹³

- Get more leads, close more arrangements, and do speedier.
- Help sales staff close deals faster and make call centers more efficient.
- Increase customer revenues, retention, and satisfaction.
- Simplify promotion and sales processes.
- Connect 1-to-1 with customers on social, mobile, and more.
- Provide better customer services and discover new customers.
- We can monitor and manage business from anywhere.

Conclusion

CRM manages the relationship with customers and track data related with all of their interaction. The more useful way to think about CRM is as a process that will help bring together lots of pieces of information about customers, sales, and marketing effectiveness, responsiveness, and market trends. CRM provides high level of security and scalability to its users and can be easily used on mobile phone to access the data. It helps organizations to anticipate customer needs based on their past requirements and choices.

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