

The word "salesforce" is written in a black, serif font with a lowercase 's' and 'f'. It is centered within a large, light blue, stylized cloud shape that has a subtle gradient and a soft shadow. The background of the entire slide is a solid, vibrant blue, and it is decorated with numerous white, stylized clouds of various sizes and shapes, some of which have a slight drop shadow, giving them a 3D effect.

salesforce

PRESENTED BY: Mazhar K

Agenda

- Customer Relationship Management (CRM)
- Need for a CRM
- Salesforce as a CRM solution
- Overview of **SFDC** (**SalesForce.com**)
 - Sales Cloud
 - Marketing Cloud
 - Service Cloud
- Certifications
- Basic interview questions

CRM

- **Customer Relationship Management**
- **CRM - Approach/ Strategy to manage a Company's interactions with clients ensuring the 'Connect' sustains throughout the relation.**
- **Typically involves:**
 - a **Marketing automation platform**
 - **Sales tracking software/ module**
 - **contact mgmt for customer Service**
 - **technical Support**



Need for CRM

Advantages of using a CRM:

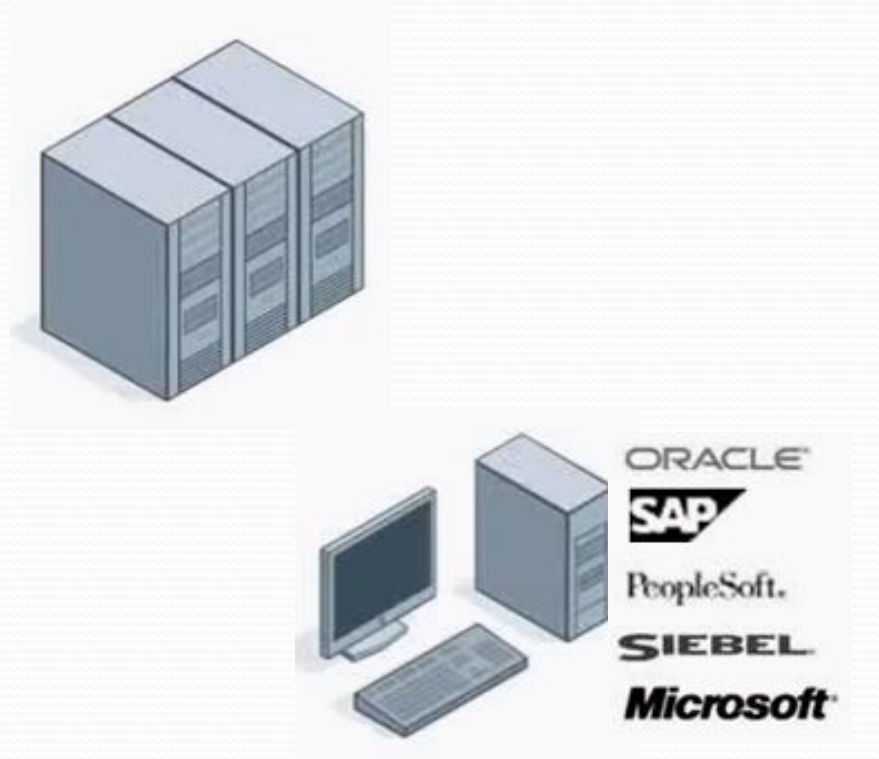
- Streamline the sales process
- Centralize customer information
- Accompany the customer journey
- Foster inter-departmental cooperation
- Improves customer Data Quality & Management



Types of CRM

2 main types:

- On Premise/ Traditional (Siebel CRM)
- On Demand/ Cloud-based (SFDC)



Salesforce.com



- **SFDC** is the World's #1 CRM platform.
- It's cloud-based (SaaS) **CRM** applications for sales, service, marketing, and more (IT experts can do set-up or manage).
- It helps automate business processes and extend powerful APIs for added security.
- Tools in the App Cloud include: Force.com (PaaS), allows admins and developers to create websites and applications with Apex that integrate into the main **Salesforce.com** application.
- **Lightning & Apex** (a proprietary Java-like prog language)
- **Lightning & Visualforce** (a framework - XML syntax typically used to generate **HTML**)

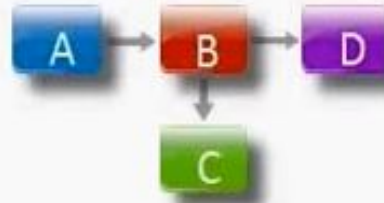
How SFDC helps?



Database



Web Services
API



Workflow
Engine

Overview	
Owner	Ariel I
Track	IT Exp
Event	Drean
Session Name	Auton
	Case

Forms & Page
Layout Editor



Access Control &
Audits



End User
Administration



Multi-Device



Reporting &
Analytics



Coding Based systems

Clicks

80%

20%

Code

20%

80%

Sales Cloud

- A tool for Sales Rep's that helps them build stronger relationships with their customers and close more deals.
- Features include:
 - Lead Management
 - Opportunity Management
 - Account & Contact Management
 - Activity Management
 - Approvals & Workflow
 - Territory Management
 - Partner Management



Marketing Cloud

- Collection of cloud-based marketing services that make internal marketing functions efficient & external marketing functions effective.
- Features include:
 - Campaign Management
 - Workflow Automation
 - Marketing Analytics
 - Lead Management
 - Email Marketing
 - Search Marketing



Service Cloud

- Refers to providing Customer Service through internet including managing the entire customer service cycle.
- Raising customer service request to solving the request and informing the status of the request to the customer.



SFDC Certifications

Basic Certification(s)	Logo
Salesforce Administrator (ADM 201)	 The logo for the Salesforce Administrator certification. It features a blue circular icon with a white cloud inside, a blue banner with the word "CERTIFIED" in white, and the text "SALESFORCE ADMINISTRATOR" below.
Salesforce Developer (DEV 401)	 The logo for the Salesforce Developer certification. It features a blue circular icon with a white cloud inside, a blue banner with the word "CERTIFIED" in white, and the text "FORCE.COM DEVELOPER" below.
Salesforce Advanced Administrator (ADM 301)	 The logo for the Salesforce Advanced Administrator certification. It features a blue circular icon with a white cloud inside, a blue banner with the word "CERTIFIED" in white, and the text "SALESFORCE ADVANCED ADMINISTRATOR" below.
Salesforce Sales Cloud Consultant (CON 201)	 The logo for the Salesforce Sales Cloud Consultant certification. It features a blue circular icon with a white cloud inside, a blue banner with the word "CERTIFIED" in white, and the text "SALESFORCE SALES CLOUD CONSULTANT" below.
Salesforce Sales Cloud Consultant	 The logo for the Salesforce Service Cloud Consultant certification. It features a blue circular icon with a white cloud inside, a blue banner with the word "CERTIFIED" in white, and the text "SALESFORCE SERVICE CLOUD CONSULTANT" below.

Basic Interview Questions

1. Can 2 **users** have the same **profile**? Can 2 **profiles** be assigned to the same **user**?
2. What are **Governor Limits** in Salesforce?
3. What is a **sandbox org**? What are the different types of **sandboxes** in Salesforce?
4. Explain the term “**Data Skew**” in Salesforce.
5. What are **dynamic dashboards**?
6. What is a **bucket field** in reports?
7. Why are **Visualforce** pages served from a different domain?
8. What are the different types of **object relations** in Salesforce?
9. Explain **Skinny Table**. What are the considerations for **Skinny Table**?
10. Which **fields** are automatically **Indexed** in Salesforce?
11. What are the different types of **reports** available in Salesforce? Can we mass delete reports in Salesforce?
12. What are the different types of **object relations** in Salesforce?
13. What are custom labels in Salesforce? What is the character limit of custom label?