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How to Use Salesforce.com for Non-Revenue Purposes

– David Taber, CIO

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As a "horizontal application," Salesforce.com can be used for SFA and CRM across a wide range of companies and use cases. It's also a platform for building business applications in vertical industries such as financial services or real estate. Almost all these classic CRM applications involve customer acquisition, service, and relationship management—all related to revenue.

CRM Definition and Solutions

But Salesforce.com is also used for business processes that have little to do with "customers," and this is where the definition of "CRM" may be a little limiting.

CRM for Fundraising

For example, fundraising is a function done by vendors (finance), private equity / venture capital (investor relations), and non-profits (donor development). The details of each of these fundraising efforts are very different, but they have common process elements. The fundraising function requires tight communications with the target audience, collaboration among the participants, and development of a pipeline. It's beginning to sound something like the sales function, but in a very different context.

CRM systems already know how to manage contacts, accounts, and communication sequences. It can be easily extended to handle relationships among contacts and accounts (such as affiliations, board memberships, reporting relationships, and other types of influence). The CRM system knows about pipeline status and forecasting the outcome of a sales quarter; it's not that big a jump to managing the pipeline of a fundraising campaign.

To keep things effective for the users, however, some modification is required. If you're already using a CRM system, it's almost always best to have a separate instance of your CRM for fundraising. The reasons? Most CRM systems just aren't flexible enough to present distinct user environments for different use-cases. Most CRM systems' data access isn't flexible enough to keep the fundraising records cleanly separated from the rest of the users.

What are the modifications needed? Of course, you'll need new fields and screen layouts. You'll need different data validation and trigger thresholds. Workflows and alerts will need to be severely reworked. And reports will be totally new. The more challenging changes, however, are the pointers among the tables and values. For corporate finance, there's the abstraction of a road show, the board member relationship, the earnings call, and the investor briefing. In private equity and venture capital, fundraising management adds many more abstractions such as:

• limited partner, discretionary advisor, non-discretionary advisor relationships, bank, and referring relationships
• entrepreneur, banker, due diligence consultant relationships
• fund requests, allocations, and capital calls
• fund investments, commitments, performance, and wind-down

Non-profits need different fundraising abstractions, such as:

• One2One and Person-Account types
• Fund drives and events
• Donors, pledges, commitments, and donor classes
• Proposals and grants
• Applicants and beneficiaries

To make things simpler, Salesforce.com has created special configurations of its CRM system for Private Equity and Non-Profits. These configurations are actually more complicated than the standard sales, marketing, and customer support applications, because they have to track more relationships. But they make a big difference to the efficiency and smoothness of a fundraising operation.

CRM for Recruiting

Even though HR systems have very little to do with CRM systems, the recruiting function bears a resemblance to sales development. There are people you are trying to track, they work for companies, and there's a clear sequence of communications and activities that lead to an outcome (selection and employment, or not). It's not much of a stretch to use terms like leads, contacts, tasks, and companies when discussing recruiting. And the process is fairly systematic, with events, workflows, and approval cycles.

For reasons similar to the fundraising function, it's usually best to not use your main CRM system for the recruiting function. It can be done, but it requires more care and complexity than running the recruiting system as a separate CRM instance.

Where a recruiting system needs some special attention is email templates, alerts, workflows, and approval cycles. The system should send automatic acknowledgement mails to each candidate submitting a resume. Alerts should be created for scheduled meetings, to make sure that expectations and deadlines are being met. And an approval cycle should be set up to automatically monitor:

• interviews completed
• candidate ranking memos submitted
• offer letter written
• offer letter approved
• offer letter accepted
• lack of response to offer letter

Salesforce.com hasn't done a special configuration for these features, but there is a free plug-in in the AppExchange that provide the core objects, page layouts, reports, and workflows that the recruiting function would need.

CRM for Public Relations

There are dedicated applications for PR and analyst relations, and they provide some real innovation in tracking reporter, editor, and analyst writings and opinions. But these applications are overkill for many organizations: the main thing they need to do is manage press contacts, track communications, and foster collaboration between spokespeople and the PR agency. Does this begin to sound like a CRM function to you?

The setup for PR is simpler even than for the recruiting function, and there is a free plug-in on the AppExchange. The main thing to think about in advance isn't the CRM system, but how much content and reporter output you want to track—and where you want to store it. Most firms just store the links to the articles, rather than filling up disks with their own copies. But this limits the searchability of the content, which may be critical to the PR management function.

While any of these functions could be handled by custom-built software on a dedicated RDBMS or CMS, the long-run costs of developing such an application may be prohibitive. Using licenses in your SaaS CRM system to deploy a streamlined application for non-revenue functions is almost always going to be faster and, in the long run, more flexible than a DIY approach.

David Taber is the author of the new Prentice Hall book, "Salesforce.com Secrets of Success" and is the CEO of SalesLogistix, a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

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