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Where's the Sweet Spot for Salesforce.com?

How closely does your company match the profile of typical Salesforce.com customers?

By David Taber | July 10, 2009

There are dozens of [CRM vendors](#) in the marketplace, and since they all have customers each of them has at least been right for somebody at one point. But not every customer will get the most out of the CRM system they choose. What are the characteristics that make for a really superb match? And what kinds of customers will get the highest possible impact out of choosing Salesforce CRM? No single business will fit all of the characteristics below, but the more they sound like you, the higher the likelihood of a solid business payoff.

While many of the topics below apply to other [SaaS](#) (Software as a Service) CRM systems, the ordering and emphasis is tailored to Salesforce.com.

GEOGRAPHICALLY DISTRIBUTED ORGANIZATION, MOBILE WORK FORCE

The more geographically distributed your organization is, the more the cloud model of CRM makes sense for you. The ability to access the system from anywhere in the world with essentially the same performance makes SaaS CRM a natural fit (this also removes excuses — a big plus).

Geographically-dispersed organizations are also more likely to have variation in users and needs — different languages, business rules and policy variations. This is an area where Salesforce.com shines: its configurability and extensibility for workers in different departments and locations. This isn't just a matter of user interface screens, it's also tweaking business process, [security](#) and workflow variations to accommodate local needs.

A CULTURE THAT VALUES FAST TIME-TO-MARKET

Let's face it: there's a huge variation in company management teams and corporate cultures. Some are highly deliberate and process-driven, while others pride themselves in being fast-moving and decisive. The faster your corporate culture, the more likely your fit with Salesforce CRM.

There are a number of reasons for this. SaaS systems have an initial "system turn-on" that's nearly immediate — the first users will be on the system in a matter of weeks. Salesforce.com's system modularity and extensibility mean that your organization can be much more effective with an incremental deployment style, which lowers cost and contains risk.

Carrying the incremental style further, Salesforce.com is very well suited to agile deployment styles that allow you to prove business value along the way. You can run experiments to find out what works best for your teams, and tune your policies and business processes. They will add new features or users to the system only as they see the business value of doing so. In highly competitive markets, companies that can turn on a dime to accommodate customer changes have an advantage. These kind of companies benefit from the ongoing malleability of Salesforce CRM.

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Although there is disagreement on this issue, a strong case can be made that the [SFA](#) and CRM product categories represent a continuum of feature sets and usage patterns. At the simple end of the spectrum, SFA tools are used for tactical improvement of the sales cycle — that is, opportunity, account and [lead management](#). At the more comprehensive end, CRM systems provide not only complete management of the sales and marketing process, but a [360-degree view](#) of the customer relationship over time.

Here are some ways to think about the SFA-CRM continuum:

- Do you want to monitor sales rep behavior (SFA) or understand customer behavior (CRM)?
- Are you focused on sales rep productivity (SFA) or improving all customer-facing business processes (CRM)?
- Are you trying to manage the transaction (SFA) or grow lifetime value (CRM)?
- Are you worrying about quarterly revenue (SFA) or optimizing annual profitability (CRM)?

ON-TARGET: MARKETING • SALES • CALL CENTERS

If you're not certain where your company is along this continuum, Salesforce.com can be used very effectively as either an SFA system or a CRM system (it's a matter of how you invest in customization and which behaviors your team takes on).

NO CENTRAL IT, OR WANTING TO FOCUS IT ON BUSINESS VALUE

Regardless of whether your firm has an IT department, you may not be willing to dedicate IT resources to the development, evolution and maintenance of the CRM system. This biases your decision strongly toward a SaaS system.

So much for core functionality, but what about extensions, integrations and configurations to fit your needs? The stronger your desire to focus or minimize internal IT, the more you must look at the ecosystem around the CRM system. Compare the number of add-on products, the range of integration adaptors and the number of implementation partners. Although there will be significant competitive action on this front over time, on these axes Salesforce.com is currently without peer.

HIGH NEED TO INTEGRATE, ACCOMMODATE

In most companies, the CRM project is not a "greenfield" implementation that can dictate the systems interfaces around it. Instead, the CRM system must fit in to existing technical architectures, security systems and business processes.

The more you need to [integrate](#) with incumbent systems, the more important Web services and flexible APIs will be as a success factor. Further, the ability to do mashups and quick demos become important to selling system enhancement projects internally.

When it comes to integration APIs, CRM systems are not created equal, particularly in terms of:

- Breadth of functionality accessible via API
- Ease of integrating via PHP, Ruby, JavaScript and other scripting languages
- Ability to call out and call in with full security controls
- Code samples, tools and reference documents
- Number of libraries and third-party modules available

In integration, Salesforce's platform and partner ecosystem have a big lead over other vendors at this time.

TRYING TO AVOID HEAVYWEIGHT PROCESSES

Some companies need rock-solid, complex processes with standards enforced at every stage. In these situations, customization is a problem, not a need. Where centralized decisions and top-down mandates are the way to get things done, enterprise application suites and heavyweight architectures are popular.

More nimble companies try to avoid excessive controls in the belief that flexibility leads to faster growth and better customer support. These companies have little need for "religion" and do not invest in rigid processes. Some companies even blow up existing policies or sales methodologies every few years just to avoid build-up of institutional plaque. How this is accomplished varies by organization, but SaaS CRM systems have a natural advantage here.

Generally speaking, the more your firm values flexibility, the better Salesforce.com will fit. It has security and process facilities to enforce the controls and approvals you need, but I don't know of a system that provides a better balance of policy enforcement and reconfigurability.

NEED FOR EASE OF USE

While fairly subjective, ease of use is a core issue for many CRM customers. Sales reps are surprisingly sensitive about ugly user interfaces and will use UI clunkiness as an excuse for not following directions or simply not using the system at all. The objective measures of ease of use, therefore, are how quickly reps get on the system, and how fully the system's data represents the reality of your business.

In thinking about this issue, don't use too narrow a definition of "ease of use." It should include:

- How accessible is the system?
- How much uninteresting stuff can be removed from my screen?
- How long does it take to do common tasks?
- How malleable is the system to match the needs of different user groups?

- How easy is it to tr

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While there is a lot of room for debate and individual opinion, Salesforce.com's ease of use is very highly regarded by customers, being cited in surveys as one of the top 10 reasons for customer satisfaction.

DEPLOYMENT ORDER: SALES FIRST

Looking at industry analyst data, CRM systems seem to be most commonly adopted by the sales teams, with marketing teams close behind, and customer support a distant third. Of course, there are different segments of the CRM market where, for example, customer support staff are the biggest customers — and cost reduction is the main metric. These niche segments are served by specialist products.

But for the mainstream CRM market, the focus is on revenue increases resulting from better sales productivity.

CRM is typically first sold into sales organizations, where the initial deployments happen. The sales people are well compensated, and small increases in their productivity make a big difference to company profits. The second area of deployment is typically marketing, because of its need for close interaction with the sales team and, again, the potential for revenue impact. A third area of expansion is often ecommerce or order operations, again because of the effect on revenue.

David Taber is the author of the Prentice-Hall book, "Salesforce.com Secrets of Success," and the CEO of SalesLogistix.

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