

# *A New Force For Customer-Centric Innovation*

Wendy Close  
CRM Success Expert  
August 27, 2008

salesforce.com ~~SOFTWARE~~  
Success On Demand.™



## Question #1

What Enterprise Feedback Management (EFM) and Customer Relationship Management (CRM) solutions do you currently use?

- a) CustomerSat & Salesforce.com
- b) CustomerSat & another CRM solution
- c) CustomerSat only, no CRM solution
- d) Salesforce.com only, no EFM solution
- e) None of the above

## Question #2

If you use CustomerSat, which CRM solution have you integrated it with?

- a) Salesforce.com
- b) Another CRM solution
- c) We are not integrated with a CRM solution

## Salesforce.com Safe Harbor Statement

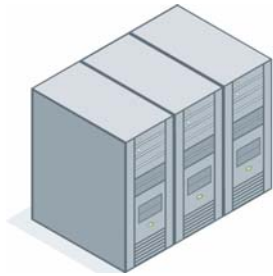
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The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K filed on February 29, 2008, and in other filings with the Securities and Exchange Commission. These documents are available on the SEC Filings section of the Investor Information section of our Web site.

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# Salesforce.com's Mission: Innovation Driver, Catalyst & Evangelist

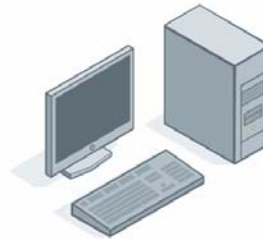
Mainframe



Mid 20<sup>th</sup>  
Century Platforms



Client/Server



Late 20<sup>th</sup>  
Century Platforms



Software as a  
Service



21<sup>st</sup>  
Century Platforms



# Our Inspiration: The Consumer Web



# Our Goal: Help Companies Manage all Business Information On Demand

You should be able to  
easily...

Gain Visibility

Drive Adoption

Customize & Integrate

Change

**INNOVATE!**



You should **not** have  
to...

Manage Hardware

Upgrade Software

Wait for Changes

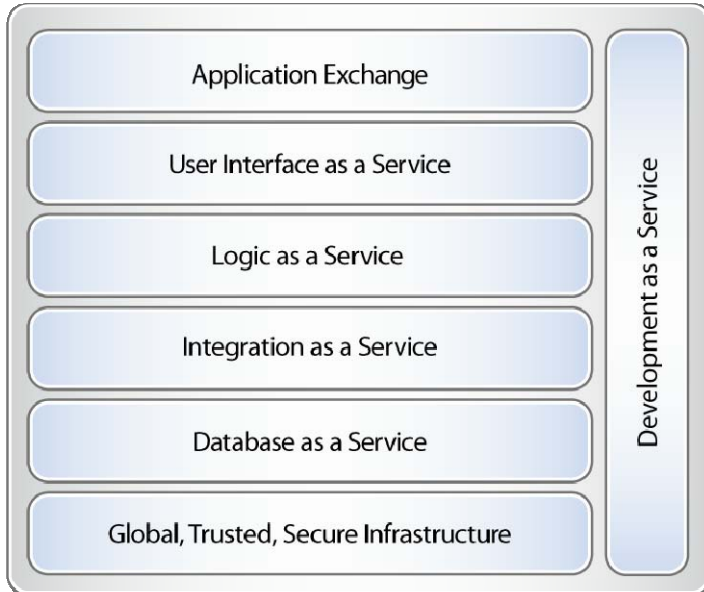
Tune Databases

Manage Disaster Recovery

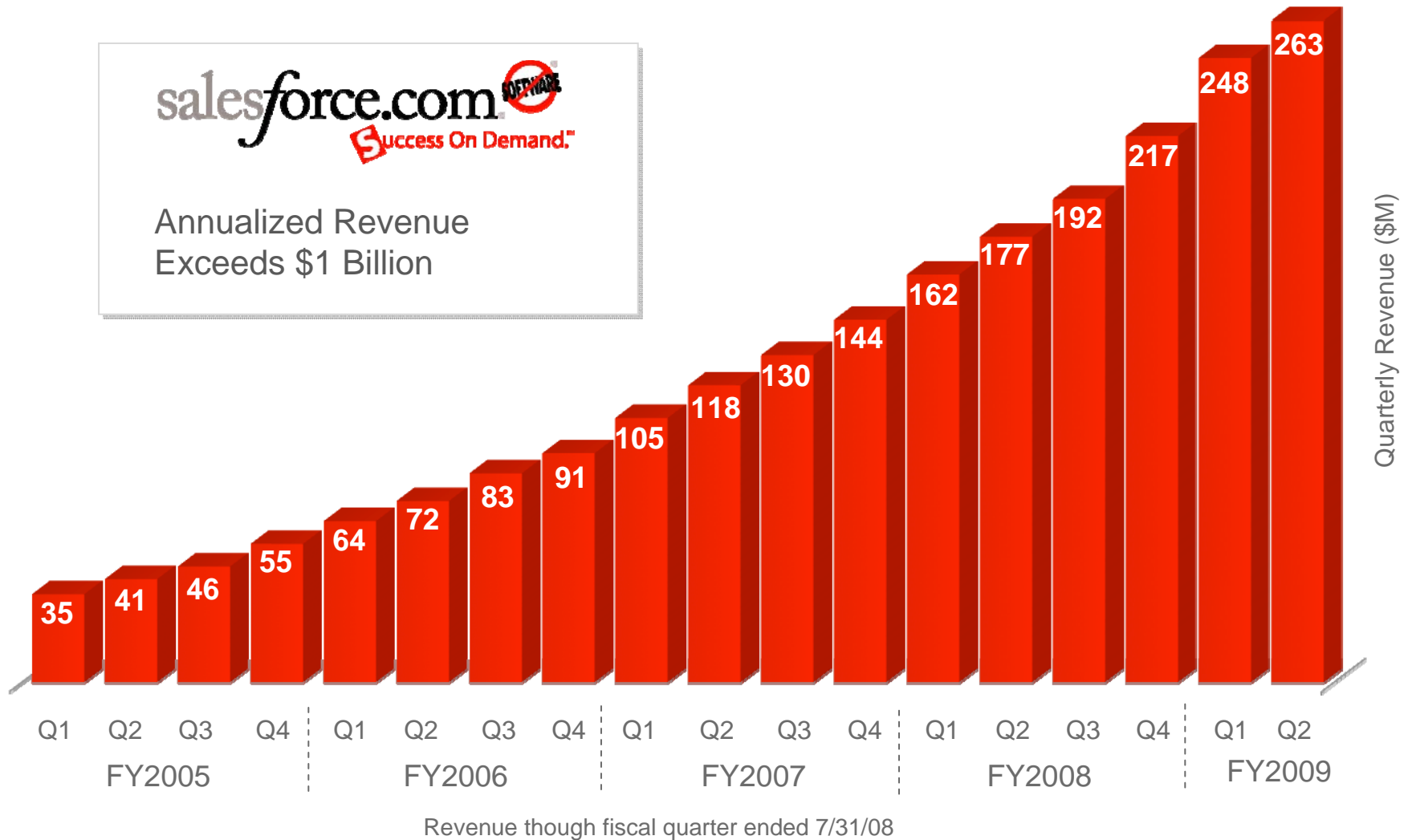
# Our Vision: The World's First Multi-Application, Multi-Category SaaS Company

**force.com™**  
platform as a service

**Salesforce™**  
software as a service



# First SaaS Company to Exceed \$1 Billion Annual Run Rate



# Strong Growth in New Customers

**salesforce.com**   
**Success On Demand™**

**47,700+** Paying Customers  
**1,100,000+** Paying Subscribers

July 31, 2008



Based on publicly available customer and subscriber numbers. Bars represent fiscal quarters.



# Our Results: Incredible Loyalty and Recommendation Rates

- **94% Will Continue to Use**
- **94% Would Recommend to Others**
- **74% Have Already Recommended**

*Source: Salesforce.com Relationship survey conducted in July 2007 and Feb. 2008, by an independent supplier CustomerSat, Inc. Sample size for continue to use = 4147, recommend to others = 4140, and already recommended = 4150, WW respondents, randomly selected. Success Rate reflects respondents indicating "Definitely will" or "Probably will" continue to use salesforce.com. "Would recommend to a Colleague" reflects respondents indicating "Definitely will" or "Probably will."*

# Our Program: “Voice of the Customer”

**Objective:** Represent the “Voice of the Customer” to **all Employees and our Partners**

**Tools:** CustomerSat and Salesforce.com

**Actions:** Analyze and recommend actions to all

**Results:** Empower the right people

**Timing:** Every 6 months

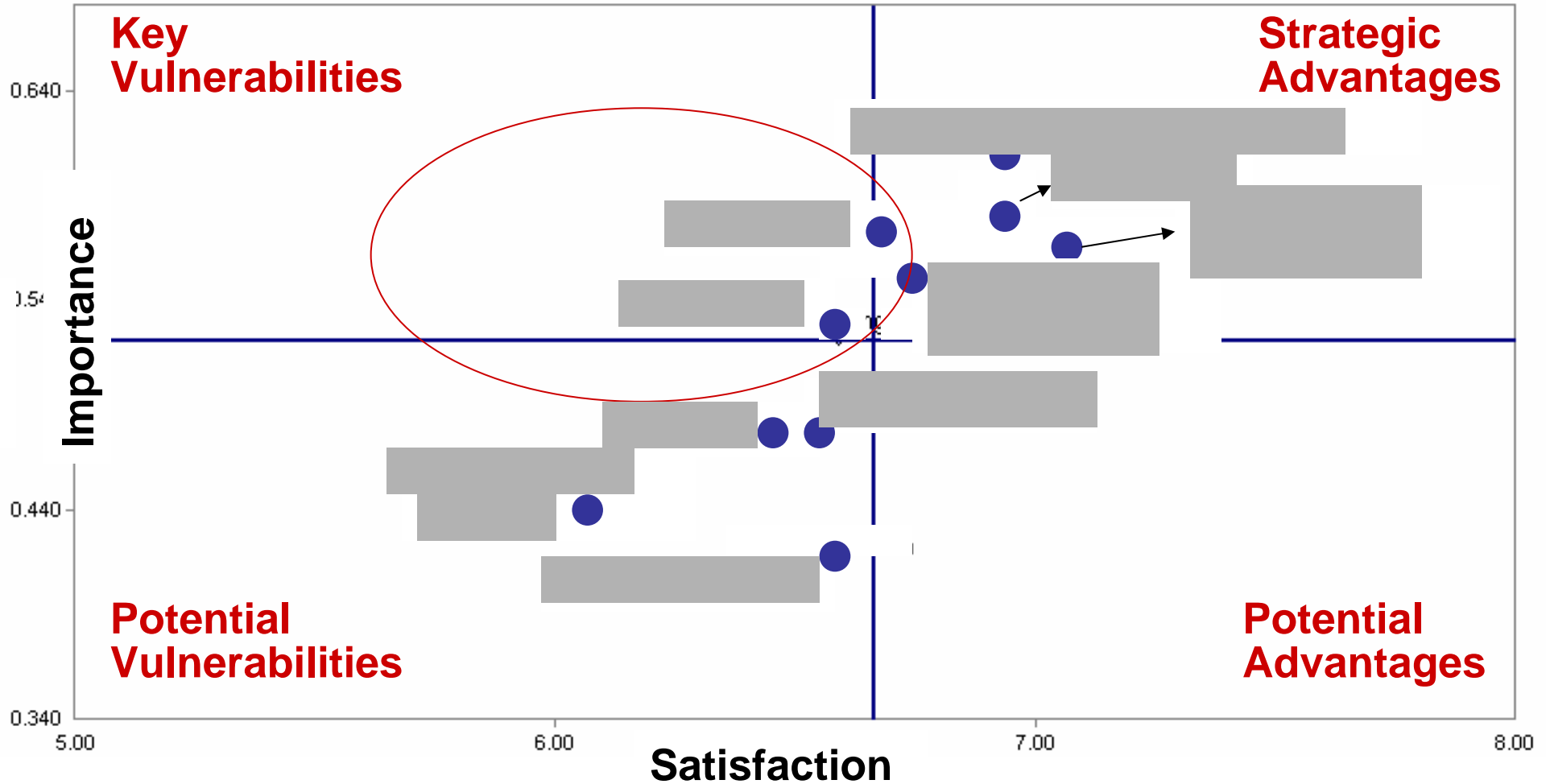
**Scope:** Global

# Our Business Performance Framework: Metrics for Measuring Customer Success

1. Market Awareness/Branding Effectiveness
2. Product and Technology Effectiveness
3. System Performance and Reliability
4. Customer Success
5. Customer Evangelism
6. Customer Loyalty: Renewal and Attrition
7. Future Services to Provide
8. Prioritization of Improvement Opportunities

# Sample Prioritization of Application Improvement Opportunities

*Drivers of Satisfaction with Our Application Features*



# How We Drive Action

CustomerSat

Immediate CustomerSat **Action Alerts** sent to account executive from customers that ask for a follow-up

Salesforce

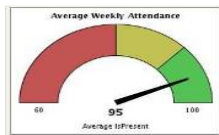
All employees see CustomerSat survey results in our **Salesforce CRM System**



Salesforce.com **Reports** used to find survey results by rep or region or any other criteria



Salesforce.com **Campaigns** and **Workflow** used to trigger **Tasks** for account executives to complete



Salesforce.com **Dashboards** used to measure tasks completed, opportunities created, and opportunities closed

# Sample **Action Alert** Email

Subject Line – Your customer would like you to contact them

Hello – We are in the process of conducting our bi-annual customer relationship survey to over 2600 global customer contacts randomly selected. Your customer requested that you follow-up with him/her regarding their survey response. To view the entire survey response your customer completed for us, please click on the link below.

Nothing is more important than customer success. Please review your customer's survey response and reach out to your customer now. Thank you for contacting your customer.

If you have any questions regarding our survey process, please feel free to contact me.

<*SURVEY LINK HERE*>

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# Survey Data Loaded into Salesforce

The screenshot shows the Salesforce interface with the 'Accounts' tab selected in the navigation bar. Below the navigation bar, there is a search bar and a list of sections: 'AppExchange Offerings', 'Opportunities', and 'Customer Sat Surveys'. The 'Customer Sat Surveys' section is circled in red and contains a table with survey data.

Action	Survey Response ID	Contact Name	Contact Email	Likelihood to Continue Using SFDC	SFDC Believed to be a Long-Term Solution	Sales Ap
<a href="#">Edit</a>   <a href="#">Del</a>	003559			Definitely will	Yes	Competit intelligen enrichme SFDC on devices

Information	
Survey Response ID	003559
Account Name	
Contact Name	
Contact Email	
Complete Survey Results	

Customer Survey	
Survey Date	2.08.2008
Primary Involvement with SFDC	Business sponsor/project champion
Primary Job Function/Dept.	Other (CEO)
Likelihood to Continue Using SFDC	Definitely will
SFDC Believed to be a Long-Term Solution	Yes
Why SFDC is a Long-Term Solution	We are building our processes and information usage around it
Why SFDC is Not a Long-Term Solution	
Customer Satisfaction Level	8
How We Can Improve Your Cust.	make it a one-stop shopping experience for my staff, better integrate the CRM with my needs.
Back Office Integration	
Considering Use of SFDC Call Center/SSS	
Sales Apps of Interest	Competitive intelligence; Data enrichment services; SFDC on mobile devices
Marketing Apps of Interest	Drip / multi-step Campaigns; Search engine optimization; Web site tracking and analytics; Market research mgmt.; Marketing resource mgmt.
Service & Support Apps of Interest	Advanced knowledge management; Call scripting; Computer Telephony Integration; Customer satisfaction surveys
Other Apps of Interest	cleansing, data quality services; Electronic signatures + workflow; Financial portfolio management; Forums and discussion boards; Inbound email capabilities; Instant messaging/employee chat; Project Management apps; RSS Integration
Business Objectives Leading to CRM Eval.	Increase sales revenue; Acquire new customers; Improve sales pipeline visibility; Reduce operational costs; Improve customer data quality/mgmt

Full Survey Link



Loyalty

Satisfaction. Improving the Customer Experience

New Areas of Interest

<b>Business Objectives Leading to CRM Eval.</b>	Increase sales revenue; Acquire new customers; Improve sales pipeline visibility; Reduce operational costs; Improve customer data quality/mgmt	
SFDC Increased Customer Satisfaction		
SFDC Increased Sales Revenue	Yes	<b>Fulfillment of Business Objectives</b>
SFDC Increased Customer Loyalty		
SFDC Acquired New Customers	Yes	
SFDC Increased Customer Retention		
% Increase in Sales Revenues	50%	
% Increase in Win Rate	10%	
% Increase in Sales Productivity	75%	<b>Measurable Business Impact Achieved Using SFDC</b>
% Increase in Customer Satisfaction	10%	
% Increase in Customer Retention	0%	
% Decrease in Service/Support Costs	15%	
% Increase in Lead Volume	50%	<b>Implementation Strategy Used</b>
% Increase in Profit Margin	10%	
Implementation Strategy Used		
% of CRM Employees Using SFDC		<b>Account Penetration and Opportunity</b>
% of non-CRM Employees Using SFDC		
Willing to Serve as a Customer Reference	Not at this time	<b>Willing to Be a Reference</b>

# Survey Data in Salesforce Reports

The screenshot shows the Salesforce Reports Home interface. The 'Reports' menu item in the top navigation bar is circled in red. Below it, the search bar contains the text 'Customer Survey', also circled in red. The 'Find Report' button is visible next to the search input. In the 'Report Folders' section, a table lists various reports. The report titled 'Customer Survey Results 7.07 and 2.08' is circled in red. The table columns include report name, description, and folder.

Folder	Report Name	Description	Folder
Unfiled Public Reports	<a href="#">CS - SF Customer Sat Scores</a>	Customer Satisfaction Scores from Survey	Corporate Sales - SF
	<a href="#">Q1 FY09-Customer Sat Survey</a>		Reference Reports
	<a href="#">Qlv Report - EMEA</a>		PS Cust Sat Survey
	<a href="#">Cus Sat Survey</a>	results of customer satisfaction survey	EMEA CS CSM Reports
	<a href="#">Customer Satisfaction Survey</a>		Alliances - Partner Enablement
	<a href="#">Customer Survey &lt;5 SFDC not long term</a>	Customer survey respondants with satisfaction level less than 5 and indicate that salesforce.com is not a long term solution for their business	Unfiled Public Reports
	<a href="#">Customer Survey Results 7.07 and 2.08</a>	Which customers have we surveyed in the past 12 months and what do they say about us?	Unfiled Public Reports



# Review, Customize, and Create Reports in Salesforce Using Integrated CustomerSat/Salesforce Data Sets

Home Documents Campaigns Leads **Reports** Accounts Contacts Opportunities Contracts Orders Solutions Dashboards Intranet Google Maps Success Plans IdeaExchange

**CustomerSat data** [Help for this Page](#)

**Report Generation Status:** Note: 2,000 of 2,487 records are displayed below. Select Export Details to Excel for a complete view of your data.

**Report Options:**

Summarize information by:  View:

**Time Frame**

Columns:  Duration:

Start Date:  End Date:

[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details](#)

**Generated Report:**

Customer Sat Survey: ID	Customer Sat Survey: Survey Response ID	Considering Use of SFDC Call Center/SSS	Customer Satisfaction Level	How We Can Improve Your Cust. Experience	Primary Involvement with SFDC	Primary Job Function/Dept.	Customer Sat Survey: Created Date	Account Name: Account Name	Account Name: Account Classification
a2Z3000000000Jb	<a href="#">001211</a>	-	7	-	Salesforce.com end user	Sales Staff	11/6/2007		
a2Z3000000000Fq	<a href="#">000978</a>	No	9	-	Salesforce.com administrator	Marketing Executive/Management	11/6/2007		
a2Z3000000000F7	<a href="#">000933</a>	-	6	-	Salesforce.com end user	Sales Executive/Management	11/6/2007		
a2Z300000000020	<a href="#">000120</a>	-	-	I would like to be able to get my E-mail in Salesforce.	Salesforce.com end user	Sales Executive/Management	11/6/2007		
a2Z300000000021	<a href="#">000121</a>	-	9	Offer consulting services to ensure product maximization. Offer suggestions on how to enhance the user experience.	Business sponsor/project champion	Sales Executive/Management	11/6/2007		
a2Z30000000002C	<a href="#">000132</a>	-	7	It's just right	Salesforce.com administrator	Marketing Staff	11/6/2007		
a2Z3000000000Dv	<a href="#">000859</a>	-	6	-	Salesforce.com end user	Sales Staff	11/6/2007		



# Official Survey Results Stored in Salesforce “Content”

The screenshot displays the Salesforce Content application interface. At the top, the Salesforce logo is on the left, and navigation links for 'Setup', 'Help & Training', and 'Logout' are in the center. On the right, the 'force.com apps' logo is visible, along with a dropdown menu currently set to 'Content'. Below the navigation bar, a breadcrumb trail shows 'Home', 'Workspaces', 'Content', 'Subscriptions', and 'Contribute'. The main content area features a red header with the document title 'Content SFDC Relationship survey results 3.08' and links for 'Tell me more!' and 'Help for this Page'. A 'Content Search' sidebar on the left includes a search box and a dropdown for 'All Workspaces'. The document details section shows a PDF icon, the title 'SFDC Relationship survey results 3.08', and a 'Not Subscribed' button. The description reads: 'our official Salesforce.com Relationship survey results on CustomerSat Letterhead approved for external use. Highlights: 94% of customers indicate they definitely or probably will continue to use salesforce.com. Business executives report achieving an average return on investment of 49% within 10 months.' Below the description are tags: 'Customer Survey', 'Customer Survey Results', 'CustomerSat', 'Ease of use', 'customer satisfaction', 'customer success', and 'roi'. The author is listed as 'Wendy Close' and the creation date is '3/20/2008'. A comment section on the right shows one comment: 'Great for sending to prospects' by 'Wendy Close' less than a minute ago.

# How We Did The Integration

- **Tools Used:** CustomerSat's "Export Feedback" feature, Microsoft Excel, and Salesforce.com Apex Data Loader.
  - We use Export Feedback to create the Excel file of data we want to import into SFDC. We use Excel to massage the data, and Apex Data Loader to upload the information into Salesforce.
  
- **Time:** One to two business days per survey wave
  - About one business day Business Operations to review the changes to make to the Salesforce application, and 1-2 business days for a Salesforce admin to prepare and load the data.
  
- **Resources/Skill Set Needed:** One Information Technology Support Analyst/SFDC Admin.
  - Knows how to in Salesforce, create a custom object, create fields, manipulate page layouts, and have experience with Salesforce Apex Data Loader. Intermediate Excel skills needed.

# CustomerSat Export Feedback Options



## EXPORT FEEDBACK OPTIONS



Export Feedback enables the export of all data or a sub set of the data to a text file.  
For more information on this feature click on Help above.

<b>Report name</b>	<input type="text"/>
<b>Email address</b>	<input type="text"/>
<b>Display options</b>	Create Alpha Value file <input type="button" value="v"/>
<b>Null (empty) values</b>	[blank] and "." <input type="button" value="v"/>
<b>Non numeric rating values</b>	Choice Text/Rating Value <input type="button" value="v"/>
<b>Apply a filter (optional)</b>	None <input type="button" value="v"/>
<b>Apply a date filter (optional)</b>	None <input type="button" value="v"/> 2008 <input type="button" value="v"/> From <input type="text"/> To <input type="text"/>
<b>Date format</b>	Display Date <input type="button" value="v"/>
<b>Add link to response in export file</b>	No <input type="button" value="v"/>
<b>Delimiter</b>	Tab <input type="button" value="v"/>
<b>Column names</b>	Question Text <input type="button" value="v"/>
<b>Custom footer (optional)</b>	<input type="text"/>
<input type="button" value="Hide Questions in Exported Feedback"/> <input type="button" value="Generate New Feedback File"/> <input type="button" value="Download Feedback File"/>	

# Salesforce Apex Data Loader

- **Easy-to-Use Wizard:** Guides you through selecting data sources, mapping fields, and viewing errors.
- **Reusable Maps:** Save mapping files so you can easily load files from multiple data sources and reuse existing maps.
- **Large File Support**
- **Scheduled Imports and Repeated on an Automated Basis**

## Apex Data Loader



Available in Salesforce Enterprise, and Unlimited Editions

[http://blogs.salesforce.com/features/2006/03/apexchange\\_dat.html](http://blogs.salesforce.com/features/2006/03/apexchange_dat.html)

# Sample Task and Campaign

**Task:** Sat score is 5 or less and/or not considered a long term solution — Triggers email alert to sales person read survey results and to contact account.

Collaboration 

Activity History 

Visibility 

Open Activities		New Task	New Event						Help
Action	Subject	Name	Related To	Task	Date	Status	Priority	Assigned To	
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Technical Issues, Please Follow Up</a>	<a href="#">Noland, Edward</a>	<a href="#">00001041</a>	✓	6/21/2005	Not Started	Normal	<a href="#">Sam Oliver</a>	
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Approve Contract Revisions</a>	<a href="#">Goldberg, Scott</a>	<a href="#">Patch Manager (120 V5)</a>	✓	6/21/2005	Not Started	High	<a href="#">Scott McIntosh</a>	

Activity History		Log A Call	Mail Merge	Send An Email	View All				Help
Action	Subject	Name	Related To	Task	Date	Assigned To	Last Modified Date/Time		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Inbound Call: Needs Tech Support</a>	<a href="#">Goldberg, Scott</a>	<a href="#">00001041</a>	✓	6/21/2005	<a href="#">Brent Drake</a>	6/21/2005 4:54 PM		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Inbound Email: Adjustment to Special Terms</a>	<a href="#">Bobe, Jason</a>	<a href="#">Patch Manager (120 V5)</a>	✓	6/21/2005	<a href="#">Brent Drake</a>	6/21/2005 4:50 PM		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Call: Final Negotiations</a>	<a href="#">Goldberg, Scott</a>	<a href="#">Patch Manager (120 V5)</a>	✓	6/20/2005	<a href="#">Brent Drake</a>	6/21/2005 4:48 PM		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Meeting: Presented to the CEO &amp; CIO</a>	<a href="#">Baker, Alex</a>	<a href="#">Patch Manager (120 V5)</a>		6/17/2005 2:00 PM	<a href="#">Brent Drake</a>	6/21/2005 4:54 PM		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Meeting: Breakfast at Elias</a>	<a href="#">Bobe, Jason</a>	<a href="#">Patch Manager (120 V5)</a>		1/21/2005 8:00 AM	<a href="#">Brent Drake</a>	6/21/2005 4:51 PM		

**Campaign:** If interested in XYZ Product = yes or maybe – send email alert to sales to follow up on sales opportunity and associate it with ABC Campaign.

# Dashboards to Measure Success



## Action Advice

**“Integrate your customer feedback with your CRM system (If you use CustomerSat and Salesforce.com -- it’s easier then you think).”**

*– Wendy Close, CRM Success Expert,  
Salesforce.com 2008*

## Lessons Learned

“**Start Simple.** Pick a few key pieces of customer relationship survey data per contact that will give your employees the greatest insights. Move these nuggets into your CRM system first. Then over time add more survey data.”

– Wendy Close, CRM Success Expert,  
Salesforce.com 2008

# Wendy's Top Ten List

1. Full survey link
2. Primary involvement with XYZ (pick list of roles)
3. Customer **Satisfaction Level** (1 to 10)
4. **Likelihood to Continue Using** (definitely will, probably will, probably will not, definitely will not)
5. Why XYZ is a **Long-Term Solution** (Free form)
6. Why XYZ is Not a Long-Term Solution (Free form)
7. How We Can **Improve Your Experience** (Free form)
8. **Additional product/services** of interest (List)
9. **Would recommend** to others (definitely will, probably will, probably will not, definitely will not)
10. Willing to be a **Reference** (Y/N/Not right now)

## Question #3

After today's presentation, do you now plan to integrate your Enterprise Feedback Management and Customer Relationship Management Solutions?

- a) Yes
- b) No
- c) I'm thinking about it.

# Questions?

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