

Case Study

Salesforce.com Deploys Own CRM Application on BlackBerry for Its Worldwide Sales Force



Company: Salesforce.com is the market and technology leader in on-demand customer relationship management (CRM). The company's Salesforce suite of on-demand applications enables customers to manage and share all of their sales, support, marketing and partner information on-demand.

Industry: Technology

Region: Americas

Company Size: Large Enterprise

Email Environment: Microsoft® Exchange

Type of Solution: Sales Force Automation and CRM - wireless access to Salesforce.com solution

BlackBerry Partner Solution: RainMaker® from Vetro and Wireless Salesforce Automation® from Sendia

Business Challenge: With business growing exponentially, Salesforce.com wanted to equip its sales teams with the same kind of wireless CRM tools its customers use for business success. The company decided to engage their current partners to extend wireless use of their own application to their field sales reps.

Solution: Working with several partners, Salesforce.com built on their existing deployment of the BlackBerry Enterprise Solution™. Favorite features of Salesforce were made accessible to sales reps on BlackBerry® devices via two wireless applications: Vetro RainMaker and Sendia Wireless Salesforce Automation. Salesforce.com has standardized on BlackBerry for their executives and worldwide sales reps.

Results:

- Effectiveness on-the-move
- Competitive advantage
- Improved business intelligence



The Challenge: Build Competitive Advantage

Founded in 1999, Salesforce.com has been experiencing rapid market growth. Today, more than 351,000 subscribers from 18,700 customers depend on the Salesforce.com suite of on-demand applications to manage and share all of their sales, support, marketing and partner information.

But the Salesforce.com sales team, located in multiple locations around the world, faced a challenge. They wanted to ensure they could access the information they need from the Salesforce application to drive action in the field.

For a company that markets a range of enterprise CRM applications, the answer was obvious. Put your own solution to the test, with help from trusted wireless partners, and show your customers that you undeniably practice what you preach.

In 2004, the North American Salesforce.com selling team adopted wireless access as a secondary resource for tapping into Salesforce. Already a BlackBerry Alliance Partner and BlackBerry user for five years, Salesforce.com chose to move forward with a wireless platform it believed in – the BlackBerry Enterprise Solution.

To make the final connection – between their CRM solution and their BlackBerry devices – they deployed wireless solutions from two business partners, Sendia and Vetro.

Realizing their Business Goals with BlackBerry

"We had a pretty straightforward business goal," says Brett Queener, Vice President of Worldwide Operations. "Our sales reps were accessing Salesforce via laptops, which as we all know, can be trying if you travel a lot. We wanted a way of keeping them connected with prospects and customers."

Since Salesforce.com was already a BlackBerry user and a BlackBerry Alliance Partner, it seemed like an obvious decision to extend the proven abilities of the BlackBerry Enterprise Solution to make their own CRM solution wirelessly available to their team. Salesforce.com also uses BlackBerry devices, with applications and mobile email, across other departments including IT, Corporate Marketing and senior executives.

"BlackBerry is easy to use," says Queener. "Our teams get all the functionality they need in one device; a phone, Outlook email, and a wireless calendar that requires no need to synch with the desktop. With wireless CRM access on the device, it's the whole package. BlackBerry helps them keep up even when they're in the field and not at their desks."

"Before I had access to Salesforce in the field with my BlackBerry device, I would look up information via our offline edition on my laptop," says Erik Yewell, Sales Engineer. "That meant making sure I would synch my laptop before I left, and pulling it out to find the information, which isn't always convenient, especially while traveling."

The goal was to deploy a wireless application that would connect the CRM application to the BlackBerry devices. Salesforce.com would draw upon their partners, Vetro and Sendia for assistance.

"We decided to deploy both wireless CRM solutions offered by both Vetro and Sendia, and give our sales reps the choice of using one or, in some cases, both of them," says Stephanie Gilmour, Manager of Field Operations. "It was an excellent way for our reps to really understand the functionality of the two solutions, and they use this know-how to demonstrate this wireless functionality to customers on their own devices."

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~ BRETT QUEENER, Vice President of Worldwide Operations, Salesforce.com

Partner Profile:

VETTRO

Company: Vetro

- Vetro's applications unlock the value of enterprise CRM investments, driving business and service improvements for field operations
- Vetro offers two product lines to the market – Vetro RainMaker for field sales and Vetro FieldMaster for field service and fleet operations
- Vetro RainMaker combines a unified scheduling feature – which automatically synchronizes calendar and PIM across the user's Salesforce application, BlackBerry, and desktop Outlook or Lotus Notes
- With automatic logging of inbound/outbound calls and emails, Salesforce helps to streamline data capture

Featured Product: RainMaker by Vetro

Application Type: Sales Force Automation and CRM

Business Value:

"We did pilot projects with the two solutions to help us understand the subtleties of the two products from a field perspective and troubleshoot the integration. The entire integration process was seamless and had few challenges associated with it."

~ BRETT QUEENER, Vice President of Worldwide Operations

For more information, visit www.vetro.com

New Tools: More Powerful Sales Team

Every employee at Salesforce.com uses the company's CRM application to streamline their work process and maximize productivity. But for the sales team, the solution is particularly important for meeting the demands placed on them. With wireless access to their CRM solution on BlackBerry devices, sales reps gained the ability to view more data on-the-fly such as:

- leads and accounts
- customer contact information
- contracts
- analytical data and reports

"For the sales team, one of the most popular features of the Salesforce.com solution on the BlackBerry device is Opportunity Management – managing customer meetings and follow up," says Queener. "If they have time between meetings, they can check to see if there is a customer in the area they can meet with – because they now have all the information with them. This increases their productivity while in the field working towards their sales objectives."

Sales reps also use the contact management tab to input information about prospects. The on-the-spot recording ability helps them ensure that they don't forget to note a new lead they might meet informally at a conference. This gives them an accurate resource to continually check to see who they've met over the course of many months.

"I am often traveling throughout a territory with the lead sales person to meet with accounts and answer technical questions about the Salesforce application or demonstrate the product," says Yewell. "Access to Salesforce via BlackBerry has really helped because I can now check contact information while we're en route, brush up on sales activity history, or reach out to the customers by email or phone if we encounter delays. It allows both me and my prospects to make the best use of our time."

"BlackBerry is extremely easy to use and it allows our executives and sales personnel to keep up to date on their email, calendar, and information in the Salesforce applications."

~ BRETT QUEENER, Vice President of Worldwide Operations, Salesforce.com

Partner Profile:



Company: Sendia

- Sendia's mission is to make wireless work flawlessly for the business user
- Their Wireless WorkSpace technology provides third-party developers with the tools they need to extend the core functionality of virtually any business application to the handheld
- Sendia's Wireless Salesforce Automation uses their next generation SmartClient™ technology
- Robust device-side database storage and a reliable and secure data transport system work together to create a mobile experience that is fast, easy to use, and shields users from the complexity of wireless computing

Featured Product: Sendia's Wireless Salesforce Automation

Application Type: Sales Force Automation and CRM

Business Value:

"A lot of times, when you are working with a customer, they've decided they need a certain kind of functionality that is offered by either Vetro or Sendia. We wanted our reps to be familiar with both solutions so they can demonstrate our partners' solutions on their own BlackBerry devices while with the customer."

~ BRETT QUEENER, Vice President of Worldwide Operations

For more information, visit www.sendia.com

Getting More Valuable Business Intelligence

Having conveniently accessible CRM data on BlackBerry devices has made an impact at the executive level as well. Because sales figures are inputted more regularly by sales reps, it is easier to provide executives with an overview of business performance on a more regular basis.

This is particularly important at the end of the month, when these business leaders are keenly interested in finding out how the month has closed out. Before the wireless solution was in place, most executives made several phone calls a day or had to dig through numerous reports to get the information they wanted.

Now, they get this information faster, when they need it, just by using their BlackBerry devices. Having such readily accessible sales results makes a significant impact on their ability to make decisions that improve the company's competitive advantage.

"It's great that they can now get this information this way," says Queener. "We've created a reporting feature for the BlackBerry devices that allows them to see the results by sales region. This information is much more up-to-date because the sales rep is inputting the information more often. There is a huge advantage to them in having this information accessible almost up-to-the-minute."

"Access to Salesforce via BlackBerry has really helped because I can now check contact information while we're en route, brush up on sales activity history, or reach out to the customers by email or phone if we encounter delays. It allows both me and my prospects to make the best use of our time."

~ ERIK YEWELL, Sales Engineer



Results

Effectiveness on-the-move: Their new solution offers sales reps an easier way to access customer information on-the-go. "Most of us agree that our working lives have improved because of BlackBerry," says Yewell. "For me, it means I don't have to come back to the office after being on the road all day to try and read 200 to 300 emails. It helps me avoid being a bottleneck when there is a multi-step approval process. I can stay in the loop, and push things through, so business keeps moving."

Competitive Advantage: Sales reps gained increased ability for on-the-spot action and decision-making. "If sales reps have time between meetings, they can check to see if there is a customer in the area they can meet with—because they now have all the information with them. This increases their productivity while in the field working towards their sales objectives," says Queener.

Business Intelligence: Because sales reps input data on-the-go, it is easier to generate reports that contain the most up-to-the-minute business intelligence. This enhanced reporting system keeps sales executives in the loop in order to evaluate company performance and formulate future priorities.

For more information on BlackBerry solutions, visit www.blackberry.com/go/success

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