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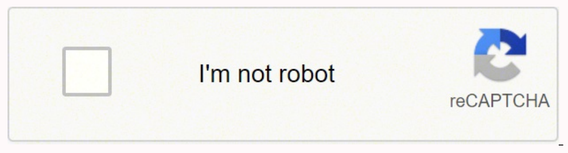

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ProsSalesforce is a really great product I loved the tools used and tips to help you create sales and serve better for customers.Salesforce is the best customer relationship management tool in the market right now. The best thing I like about this software is the features.ConsIt gets a bit frustrating. I also hate the double authentication because I do not always have my phone with me when I need to get on the software.There is little to be said about cons. I experienced minor trouble when accessing customer support at some point which would probably be the worst of it.PricingProduct Demo & Screenshots Explore product images Advisor Recommendations & User Awards FrontRunnersThe top products based on usability and customer satisfaction, as rated by user reviews. Check out our full methodology description for more detail. Advisor RecommendationsOur industry-specific advisors recommend products based on specific business needs. Connect with us to get your personalized recommendations. 34 Recommendations N/AAdditional Info Ideal Customer Size Deployments Desktop - MacDesktop - WindowsDesktop - LinuxDesktop - ChromebookOn-Premise - WindowsOn-Premise - Linux Desktop - MacDesktop - WindowsDesktop - LinuxDesktop - ChromebookOn-Premise - WindowsOn-Premise - LinuxSupport and Training Support 24/7 (Live Rep) Training Thinkstock Sales Cloud projects are the bread-and-butter of most consultancies' Salesforce.com work, so there probably isn't an issue of general competence and ability to execute. However, there is a huge range of business models and sales channels out there, and it is critical that the consultant understand how your sales function works, and the difference between one of your profit-driving deals and a break-even "sustainer." If the consultant doesn't get it, the system they build for you will be clunky or just get in the way. This brief set of questions is designed to help you evaluate the suitability of a Salesforce.com (SFDC) consultancy. It is not meant to be delivered as a questionnaire for the consultancy to fill out in the RFP. Instead, use the questions conversationally so you can see their flinches and know where to probe. Since client requirements vary, there's no single "correct" set of answers to these questions. Instead, score the vendors on how closely they fit your organizational needs and corporate IT style—and no firm is going to get a perfect score (be happy if you find a "solid B+"). Sales Cloud experience If you are looking to have a call center for telesales or a virtual office environment, does the consultant have experience building and deploying these configurations? What third-party products do they recommend? If you are looking for a solid mobile strategy (where the first CRM tool the rep reaches for is their phone), does the consultant have experience building and deploying SFDC for the smart phone models your reps use? What third-party products do they recommend? If you are looking to have a web store (with transactions totally hands-free), what third party products do you recommend? How does the consultant recommend implementing "telesales intrudes on potential upsells" for web-based customers? If you sell to customers who are also your suppliers, how should those customers be represented in the system? If you sell to large multinational (and multi-divisional) customers (such as Mitsubishi or Boeing), how should these customers be represented in the system? Does the consultant plan to use Parent Accounts or Divisions? What are the issues with each of these? How many levels of parent account are practical? Does the consultant plan to use Person Accounts? Why? What are the issues with this technology? If you use the Named Account Model of selling, ask the consultant (1) what it means and (2) have they implemented it. What is the consultant's recommendation for using Leads vs Contacts? If you use purely geographic territories, what is the consultant's recommendation for how to define/specify the territories in the system? How many fields on the Opportunity should be required and enforced by validation rules? What techniques can be used to improve the quality / fidelity of pipeline data? What should happen to an Opportunity once it is closed? What quote-to-cash system does the consultant recommend, and why? If you have lots of bundles and short-term specials, what pricebook structure does the consultant recommend? What sort of "screen pops" are effective for SFDC users? (Take points off if they don't mention CTI, qualification questions, or upsell prompts.) For the sales rep, what is the appropriate level of access for the case management, licensing, and accounts receivable systems? What are the lessons learned from implementing this? What parts of the renewal process do you recommend for full vs partial automation? What dashboarding system do you recommend? Why? Can you show an example of a sales dashboard you are particularly proud of? What scorecard system do you recommend? Why? Can you show an example of a sales scorecard system you are particularly proud of? If you are planning to use a formal sales methodology, has the consultant ever worked with it? What third party products for sales and marketing process does the consultant have experience with? If you are considering using gamification for the sales team, what is the consultant's experience implementing Work.com? What are the lessons learned about effective gamification? If the consultant is recommending something else, what are their reasons? Sales Cloud deployment What should be the general deployment strategy for go-live? If you have an international sales force, what strategy does the consultant recommend for: Discovery of local requirements? Implementation of country-specific requirements? UAT of country-specific features? Sequencing / prioritization of country roll-outs? User training? Make no mistake about it, the biggest problem in Sales Cloud projects is adoption by the most senior and productive reps. Every one of them will have a good reason to not use the system correctly, so just expect a ton of noise from their direction. The more successful deployments start with the "inside sales" or telesales teams that are more (1) process-oriented, (2) intensely transactional, and (3) tightly managed. When done right, CRM will seem to them a more natural tool that actually makes their job easier. Once you get these folks on board, use them to pull in the more senior folks. Find the best Salesforce Sales Cloud alternatives and competitors. Take an in-depth look at 15 popular Accounting platforms to find out which one is right for your needs. Discover how these Accounting software products compare to Salesforce Sales Cloud when it comes to features, ease of use, customer service and support, and real user reviews.Top 5 Alternatives at-a-glanceDynamics 365 Business CentralNetSuiteSage 100cloudSage 300cloudAccuFund Accounting SuiteWith an integrated system that includes ERP, financials, commerce, inventory management, HR, PSA, supply chain management, CRM and more – NetSuite enables fast-growing businesses across all industries to work more effectively by a...Read more about NetSuite4.13 (888 reviews)34 recommendationsSage 100cloud is a market-leading cloud-connected ERP platform for medium-sized manufacturers, distributors, and professional service businesses. 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