



# The ultimate Salesforce guide

to maximizing revenue



Welcome to the  
**revolutionary world  
of Salesforce!**

Salesforce is more than just a CRM; it's a transformative toolset designed to supercharge your sales, marketing, and customer service efforts. With a comprehensive suite of products and services tailored for various industries, Salesforce offers the flexibility and power to adapt and thrive in any environment.

But how can this guide specifically help you? If you are looking to dive into insights, trends, and use cases tailored to your industry, we've got you covered. Whether you're in the retail, finance, travel, sports, or manufacturing sector, we'll provide you with actionable strategies to elevate your business.

Our approach is simple yet powerful: With Salesforce we can transform complex ecosystems into unified hubs of productivity and collaboration. By harnessing the full potential of Salesforce, businesses can increase revenue, optimize costs, and mitigate risks with confidence.

**Join us on the journey to success, where every opportunity becomes a reality, and every challenge becomes an opportunity for growth.**



A hand is holding a tablet displaying a CRM dashboard. The dashboard includes a 'CRM' logo at the top left. Key metrics shown are 'This Month Sales \$28.3K' and 'Expected Sales \$42K'. Below this, there are sections for 'Lead Sources' (a donut chart), 'Main Markets' (a world map with location markers), 'This Month Orders 24' and 'Expected Orders 33', and 'Average Order Value \$1179'. Other sections include 'Cost / Sales / Profit' (a bar chart), 'Orders by Status' (a donut chart), 'Orders by Type' (a donut chart), '10 New Customers' (represented by icons), and '14 Returning Clients' (represented by icons).

# How can companies use Salesforce to boost sales across industries?

By harnessing the power of Salesforce, companies can revolutionize their customer relationship management and skyrocket sales across diverse sectors. With Salesforce's full suite of products and services, businesses can streamline sales processes, optimize lead management, and leverage customer insights to drive revenue growth.

Whether you're in retail, finance, travel, sports, or manufacturing, Salesforce offers

tailored solutions to meet your unique needs and propel your business to new heights. From centralized customer data to real-time insights and marketing automation, Salesforce empowers businesses to unlock their full potential and achieve unparalleled success.

So, if you're ready to transform your CRM and elevate your sales game, it's time to harness the power of Salesforce.



# Top Salesforce trends revolutionizing the world of CRM

Salesforce has firmly established itself as the leading force in the CRM industry, outpacing its competitors and earning the trust of most Fortune 500 companies. Its impact is evident in the significant boost in sales productivity reported by its users, showcasing its effectiveness in enhancing customer engagement and business operations.

Let's dive into the world of Salesforce, and its latest trends:

Sources: Salesforce, IDC 2023H1 Revenue Market Share Worldwide

### 01 Salesforce dominance:

Salesforce leads as the largest CRM player, boasting over 20% market share, surpassing the combined share of its closest competitors at 17.7%.

Category	Market Share
Largest CRM (Salesforce)	20%
Combined share of closest competitors	17.7%

### 02 Fortune 500 adoption:

An impressive 90% of Fortune 500 companies have chosen Salesforce as their CRM provider, showcasing its widespread adoption among industry leaders.

Salesforce, provider of **90%**

**FORTUNE 500**

### 03 Enhanced sales productivity:

Customers have reported a remarkable increase of approximately 40% in sales productivity after implementing Salesforce, highlighting its effectiveness in driving sales performance.

Increase sales productivity up to **40%**

Let these trends light up your path to Salesforce success, inspiring strategies that elevate your business to unprecedented levels in today's digital landscape.



# Boost revenue through Salesforce

As we've seen from the trends, Salesforce offers unparalleled opportunities to increase revenue, optimize costs, and mitigate risks. Imagine a world where sales processes flow seamlessly, where leads are nurtured effectively, and opportunities are seized with precision. With centralized customer data and real-time insights, businesses can not only enhance their sales effectiveness but also optimize marketing efforts, ensuring a higher return on investment.

Now, let's explore how Salesforce provides solutions to address these critical needs.

01

Increase revenue

Transform your sales game: From traffic, to lead, to close, Salesforce optimizes every step, boosting efficiency, insights, and ROI to skyrocket revenue and nurture lasting customer connections.

02

Optimize costs

With Salesforce's flexible payment models and scalable infrastructure, invest smarter, scale effortlessly, and optimize resources for maximum ROI without the burden of upfront costs.

03

Mitigate risks

Let Salesforce's automation experts bolster efficiency, ensure continuity with disaster recovery, and fortify security to safeguard your brand and maintain operational resilience with confidence.

Applications

- Centralized customer data
- Efficient lead management
- Increased sales effectiveness
- Real-time insights and analysis
- Marketing automation and tracking
- Improved marketing ROI
- Consolidated systems
- Process optimization
- Tasks and process automation
- Improved resource allocation
- Reduced operational costs
- Lowered IT expenses
- Data centralization
- Data redundancy
- Data resilience
- Disaster recovery
- Data security and compliance
- Encryption

Check the following use cases and tips on how to apply them to your industry:



Increase **revenue** by providing:

- Targeted campaigns
- Loyalty programs
- Easy shopping experience

Craft personalized marketing campaigns tailored to customer preferences and behavior, incentivizing repeat purchases with rewards and exclusive promotions, while seamlessly integrating e-commerce platforms and sales channels for an enhanced shopping journey.



Optimize **costs** by enabling:

- Inventory management
- Orders management
- Suppliers' management

Maximize inventory efficiency by maintaining optimal stock levels to prevent stockouts or overstock, while streamlining order processing through workflow automation to minimize manual intervention, and monitoring supplier performance to track key metrics like delivery times and product quality for seamless operations.



Mitigate **risks** by delivering:

- Fraud prevention
- Supply chain risk management
- Security access controls

Ensure business resilience by proactively detecting and preventing fraudulent activities, identifying potential disruptions like supplier issues or natural disasters, and implementing robust security measures such as role-based access controls, encryption, and multi-factor authentication to safeguard against threats and maintain operational continuity.





Increase **revenue** by providing:

- Financial recommendations
- Loan processing
- Self-service portals

Enhance client services by tracking portfolios, offering tailored investment advice, and providing real-time updates on loan processes, while empowering self-service with account, loan, and insurance applications for enhanced customer experience.



Optimize **costs** by enabling:

- Opportunity management
- Loan origination
- Omnichannel service

Optimize sales efficiency by tracking pipelines, forecasting revenue, and automating document management and approval workflows, while centralizing customer interactions to enhance support responsiveness and streamline processes for seamless operations.



Mitigate **risks** by delivering:

- Fraud detection
- Disaster recovery
- Regulatory reporting

Ensure robust security measures by detecting and addressing fraudulent activities, while maintaining operational resilience through comprehensive business continuity planning and managing compliance obligations and regulatory changes for sustained stability and reliability.



Increase **revenue** by providing:

- Guest’s recommendations
- Guest interactions
- Omnichannel guest support

Enhance guest experiences by offering personalized packages, centralizing guest data for a comprehensive view, and providing omni-channel service across various platforms, ensuring seamless interactions and satisfaction throughout their journey.



Optimize **costs** by enabling:

- Reservations and bookings management
- Resource allocation
- Routine task automation

Optimize operations by streamlining booking, reservation management, and cancellation processes, analyzing demand trends to optimize pricing across hotel rooms, airline seats, and rental cars, while efficiently managing check-in/check-out procedures, housekeeping schedules, and maintenance requests.

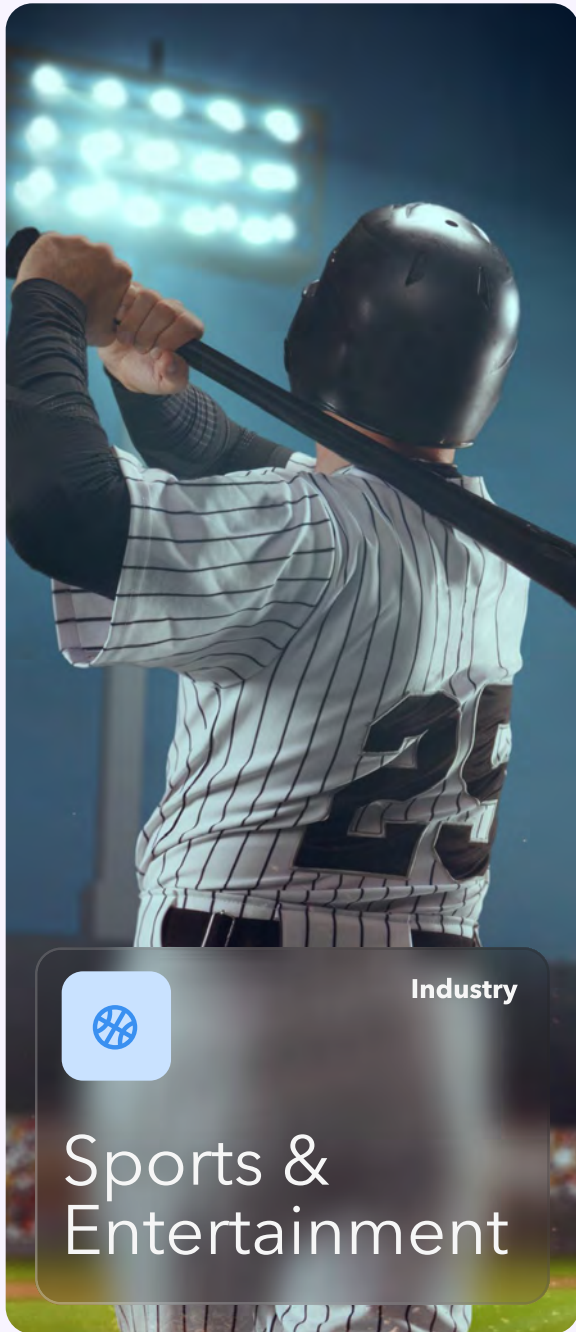


Mitigate **risks** by delivering:

- Travel risk monitoring
- Emergency response
- Privacy compliance

Ensure traveler safety and security by assessing and monitoring risks, developing emergency response protocols for natural disasters and pandemics, and strengthening security measures to safeguard guest information and confidential data, ensuring a secure and resilient travel experience.





Increase **revenue** by providing:

- Fans experience
- Season tickets renewal
- Fans loyalty programs

Leverage customer insights to deliver tailored experiences like personalized greetings and surprise giveaways, seize upselling opportunities by targeting personalized offers for ticket upgrades, and incentivize loyalty with rewards, discounts, and exclusive experiences, enhancing overall customer satisfaction and engagement.



Optimize **costs** by enabling:

- Tickets and events management
- Venue management
- Sponsorships management

Optimize event management by integrating ticketing systems for sales and distribution, overseeing venue operations including maintenance and staffing, and efficiently tracking agreements, activations, and commitments for seamless execution.



Mitigate **risks** by delivering:

- Venue contracts management
- Security management
- Information security

Ensure operational efficiency by centralizing contract management to track terms and obligations, consolidating safety protocols and emergency response plans for effective crowd management, while safeguarding sensitive information, including fan data and intellectual property, to maintain security and compliance across your organization.



Increase **revenue** by providing:

- Customer targeting
- E-commerce integration
- Business insights

Maximize e-commerce success by segmenting customers, enabling personalized shopping experiences, and providing insights into sales performance and market trends to optimize strategies, streamline operations, and drive online sales growth.



Optimize **costs** by enabling:

- Supply chain management
- Real-time inventory tracking
- Quality management

Enhance inventory management by optimizing levels, streamlining order processing, and tracking defects in real-time to minimize stockouts, improve fulfillment, and mitigate compliance risks, ensuring seamless operations.



Mitigate **risks** by delivering:

- Compliance management
- Business continuity
- Equipment maintenance

Ensure operational resilience by centralizing information to meet industry standards, enabling remote access for business continuity, and proactively monitoring equipment performance to predict maintenance needs and optimize asset utilization, safeguarding against disruptions and maximizing efficiency.



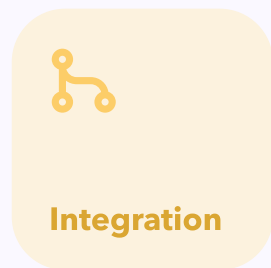
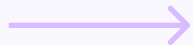
# Armed with these powerful tips,

let's now dive into crafting effective Salesforce strategies for success.

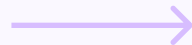
Ready to supercharge your business with Salesforce? Let's break it down. First up, pin those clear objectives and customize Salesforce to fit your processes like a glove. As you ease into it, start with the basics, storing contacts, managing leads - you know the drill. Next, integrate Salesforce with your other systems for smooth sailing and better insights. Then, dive into analytics to make data-driven decisions and align Salesforce with your big-picture goals. Finally, unleash the AI magic for automated workflows and personalized interactions. Trust us, this journey is worth it - let's get started!



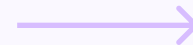
Used for basic functions: store contacts, manage leads, log activities. Organization starts to expand its functionalities.



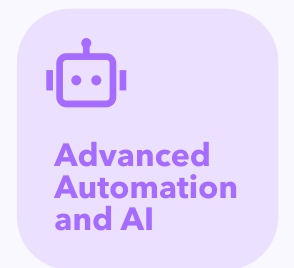
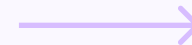
Integrated with other systems to enable data flow: ERP, marketing and customer support platforms. Organization explores analytics.



Focused on data integrity and governance. Organization leverages reports, dashboards and AI-powered analytics.



Aligned with strategic objectives and goals. Organization enhances efficiency and drives innovation to deliver top customer experience.



Organization leverages intelligent workflows, predictive analytics, and machine learning to automate tasks and personalize interactions.

# Client Success Stories







## North America's leading roofing and waterproofing manufacturer

### OVERVIEW

An integrated home solar system firm, part of the largest roofing materials company in the world, started working with Applaudo's teams to develop Salesforce-integrated automated systems to streamline the internal process to enhance their partner's sales tools and employee experience. This strategic initiative was aimed at increasing efficiencies for Manufacturer's employees.



### CHALLENGE



As a high-tech solar energy industry player, the client was facing challenges of promptly addressing customer inquiries, organizing customer data efficiently, and reducing human error.

Accelerate product development and release cycles to match swiftly evolving market demands while managing limited resources effectively.

Identify and implement operational efficiencies to counter rising costs, ensuring they remain competitive within the dynamic market environment.

### HOW WE SOLVED IT



**Faster customer service,**  
better data management, and mitigated errors.

**Client releases updates faster and smarter**  
with agile delivery and leading CD/CI tools.

**Optimized operations helped our client**  
cut costs and boost competitiveness.

### RESULTS



Sales and revenue growth: Through Salesforce-accelerated response to customer inquiries, we efficiently managed customer information and reduced human errors.

Faster feature release: With an agile model of delivery, our client was able to reduce the time and resources required to release new features and updates.

Reduced operational costs: Our streamlined operations helped our client reduce cost to remain competitive in the market.

# Innovate, integrate, and thrive with Salesforce solutions:

This powerhouse platform isn't just about managing customer relationships - it's a game-changer for driving revenue growth, boosting efficiency, and scaling your business. From the Sales Cloud to the Analytics Cloud, Salesforce has got you covered with a suite of products tailored to your needs. Plus, with tools like APIs and Salesforce Flow, customization is a breeze. Whether you're in retail, finance, travel, or manufacturing, Salesforce has industry-specific solutions to take your business to the next level. And let's not forget about the benefits - increased sales productivity, improved customer relationships, and enhanced reporting and analytics.

So, let's take what we've learned and unleash the full potential of Salesforce together.





# Gain your competitive edge with Applaudo

Applaudo is dedicated to assisting organizations across various industries in delivering exceptional and seamless experiences on a large scale. With our extensive expertise, we comprehend the distinctive challenges and opportunities inherent in engaging audiences, optimizing operations, and maximizing revenue streams.

Partner with us to cultivate unforgettable experiences for your stakeholders, streamline your workflows, and achieve success in the ever-evolving business landscape. Explore the vast potential of Salesforce with Applaudo to increase revenue, optimize costs, and mitigate risks for your business.

Leverage our expertise today [APPLAUDO.COM/CONTACT](https://applaudo.com/contact)





# Victor Cárcamo

## **Salesforce Consultant and Software Engineer**

Victor brings over 5 years of hands-on experience in the Salesforce ecosystem and a solid foundation in software development technologies. He consistently brings a wealth of knowledge and expertise to each project he engages in. Committed to continuous learning and staying abreast of digital innovations, he remains proactive in expanding his skillset and staying up-to-date with the latest industry trends.



