

CSAconsultants Pvt Ltd
CMMI Level 3 & ISO 9001/27001 Certified Company



**authorized
cloud reseller**

Proposed Salesforce Solution Presentation for Startups and Greenfield Ventures



Overview

- About Salesforce
- Salesforce Functionalities & Features
- Salesforce Advantage / Features
- What Salesforce can do for you?
- What value CSA brings for you?
- Team
- Quick look to Salesforce

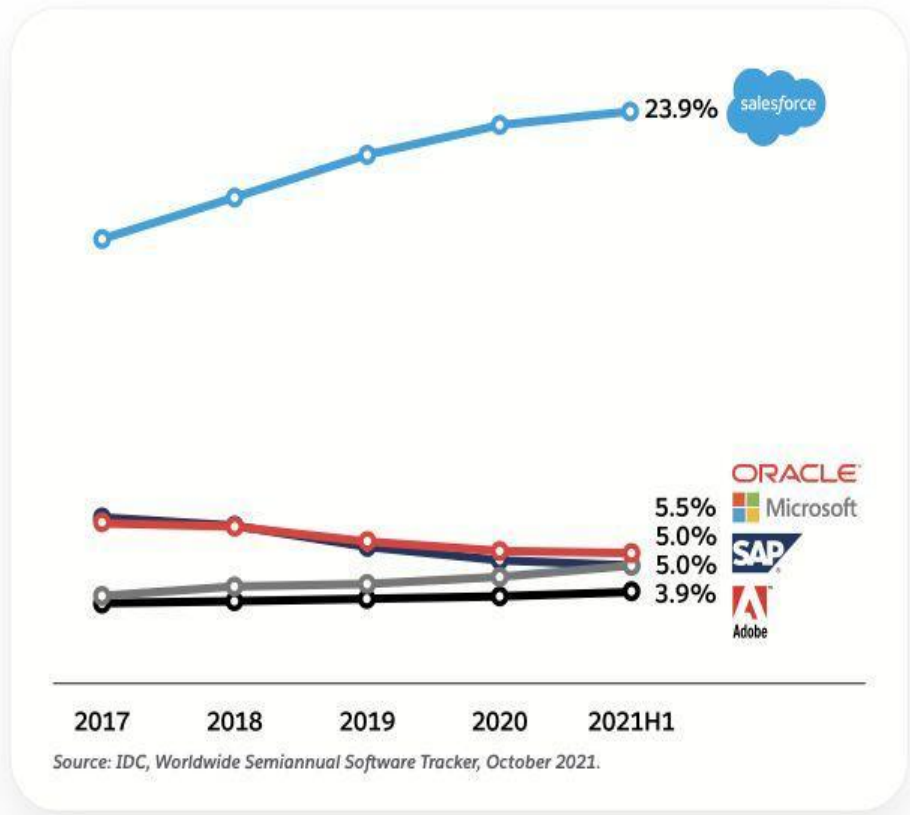
SALESFORCE

Salesforce. #1 CRM.

Ranked #1 for CRM Applications based on IDC 2021 H1 Revenue Market Share Worldwide.



salesforce.com/number1CRM



Salesforce CRM

- The #1 Growth Platform for Sales.
- Salesforce helps deliver better experience through Single Source of Truth
- Salesforce can unite all your teams in one platform.

SALESFORCE FUNCTIONALITIES



SALESFORCE FUNCTIONALITIES THAT CAN DRIVE YOUR BUSINESS FROM ANYWHERE

Lead/ Enquiry Management

- Lead capturing from multiple sources
- Lead Allocation
- Lead Evaluation / Nurturing

Account / Contact Management

- Managing Existing/ New database at one place

Alerts & Triggers

- Contract Expiry/ Renewals
- Birthday / Anniversary / Any Event Triggers
- Follow up / Visits / Pending Tasks etc

Quote/ Contract management

- Send /Manage quotes and contracts directly

Opportunity Management

- Open Opportunities
- Sales Forecast

Case Management

- Help Desk Support

Reports & Dashboard

- Target vs Achieved Report
- Sales Team Performance Report

Email Integration

- Integration with Outlook/Gmail

Mobile App Capabilities

- Customized App Functionality

Attachments & File Upload

- Invoice / Contract/ Images/ Screenshots

Chatter

- Salesforce free chat functionality for internal communication

Other Features

- Hierarchy Management
- Task & Activity management
- Customer 360

SALESFORCE ADVANTAGE / FEATURES

- Enhanced Lead Generation
- Management and Monitoring
- Customer Service and Satisfaction with enhance support
- Centralized Data
- 360-Degree Customer View
- Detailed Analytical Reports
- Task Automation
- Learn as you Grow with Trailblazer success and community
- Efficient Business Operation & Decision making
- Scalability - Options to upgrade as your business grows
- Edge over the competition with a Appexchange community to drive your business

WHAT CAN SALESFORCE DO FOR YOU ?

- Close more deals and drive growth
- Accelerates Productivity by reducing the span of sales cycle
- Make Insightful decisions backed by data
- Reduce dependency on manpower
- Pipeline Management from Enquiry to Closure and even post sales
- Creates upselling & cross selling opportunities
- Quick Response and Enhanced customer satisfaction
- Empower your salesforce team with a tool to drive success
- Increase ROI by optimising your marketing Expenditure
- Gives You a Bird's Eye View of your customer

WHAT VALUE CSA AS SALESFORCE PARTNER WILL BRING FOR YOU ?

- We know enterprise wide processes and their linkage with Sales to find the right Salesforce Solutions for your business.
- Latest and best in class Technology with 31 Years of Industry relevant Experience to Deliver unmatched services and Training
- End to End Salesforce solution service starting from Licensing to Implementation followed by Post Go-Live Support
- CMMI Level 3 & ISO Certified 9001:2015 & 27001:2013 to adhere to industry best practices
- Cost Effective & Quality Work Deliverance to achieve maximum ROI
- Seasoned Team of functional and technical professionals to ensure 100% success rate
- True Enterprise Solution Partner with A 360 partnership

OUR TEAM

(ALL OUR SALESFORCE EXPERT CONSULTANTS ARE TRAINED TO THE HIGHEST LEVEL)

1

Salesforce
Certified
Application
Architect

2

Salesforce
Certified
Platform
Developer I

3

Salesforce
Certified
Platform
Developer II

4

Salesforce
Certified
Administrator

5

Salesforce
Certified
CPQ
Specialist

6

**Salesforce
Certified
Platform App
Builder**



7

Salesforce
Certified
Service
Cloud
Consultant

8

Salesforce
Certified
Sales Cloud
Consultant

9

Salesforce
Certified
Marketing
Cloud
Consultant

10

Salesforce
Certified Field
Service
Lightning
Consultant

11

Salesforce
Certified
Business
Analyst

QUICK LOOK TO WORLD #1 CRM SOLUTION



CUSTOMER 360

★ + ? ⚙️ 🔔

☰ Retail Banking
Home
Accounts ▾
Contacts ▾
Financial Accounts ▾
Financial Goals ▾
Dashboards ▾
Leads

CONTACT

Carrie Lawder

GOLD ACTIVE

AUTHENTICATION

PHONE (2) +	EMAIL
1 (415) 223-1998	rachel.adams@gmail.com
ADDRESS	AGE
133 Bay St. San Francisco, CA 94133	35
EMPLOYER	
RAD Designs	

PROFILE SNAPSHOT

CUSTOMER SINCE	CLIENT SEGMENT
07/06/2009	Sophisticated Opportunist
MARITAL STATUS	CREDIT RATING
Married	95%
CHILDREN	PROFILE COMPLETENESS
2	80%

RESPONSIBLE

Caroline Birkin

NEEDS & LIFE STAGE

CLIENT SEGMENT

Investment Advice

JOURNEY STAGE

Small Business Interest

PREFERRED CHANNELS

RELATED INTELLIGENCE FINANCIAL ACCOUNTS GOALS

▾ Customer service data

Call center logs
Online chat logs
Complaints & Inquiries

DATE ↓	ISSUE	RESULT	CONTENTMENT	RESPONSIBLE
08/07/17	Internet banking question	Completed	★★★★★	Russell Ferraro
08/20/17	Internet banking question	Completed	★★★★	Russell Ferraro

ACTIVITY CHATTER

Email
Task
Log a call

Create

Filter Timeline ▾ ↻

NEXT STEPS

DASHBOARD

★
+
?
⚙️
🔔
👤

STEPS
Home
Chatter
Accounts
Contacts
Leads
Donations
Campaigns
Cases
Reports
Dashboards
Engagement Plan Templates
More

DASHBOARD
Development Forecasting
As of Jul 17, 2017 2:54 PM · Viewing as Ben Mozenter

+ Follow
Refresh
Edit

Open Opportunities By Stage

7.3M

Stage | ● Prospecting ● Pledged ● LOI Submitted ● Application

[View Report](#)

Open Opportunities by Record Type

7.3M

Donation Record Type | ● Donation ● Grant ● Major Gift

[View Report](#)

Open Opportunities by Campaign

7.3M

Primary Campaign Source | ● 2014 Acquisition Campaign - Email

[View Report](#)

Overdue Payments

Payment Amount

Expected Payments Next 90 Days

Payment Amount

Top Delinquent Accounts

ACCOUNT NAME	SUM OF PAYMENT AMOUNT
Steven Whitmore Household	\$27,200
Joette Manzo Household	\$21,500
Garret Huynh Household	\$21,500

REPORTS

Report Options:

Summarize information by: Summarize information by:

Time Frame

Date Field: Range:

From: To:

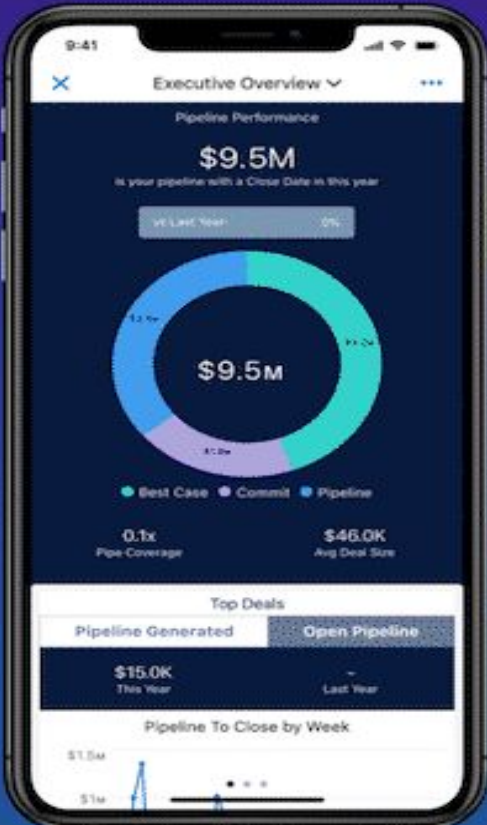
Show: Opportunity Status: Probability:

- Run Report
- Show Details
- Customize
- Save
- Save As
- Delete
- Printable View
- Export Details
- Subscribe

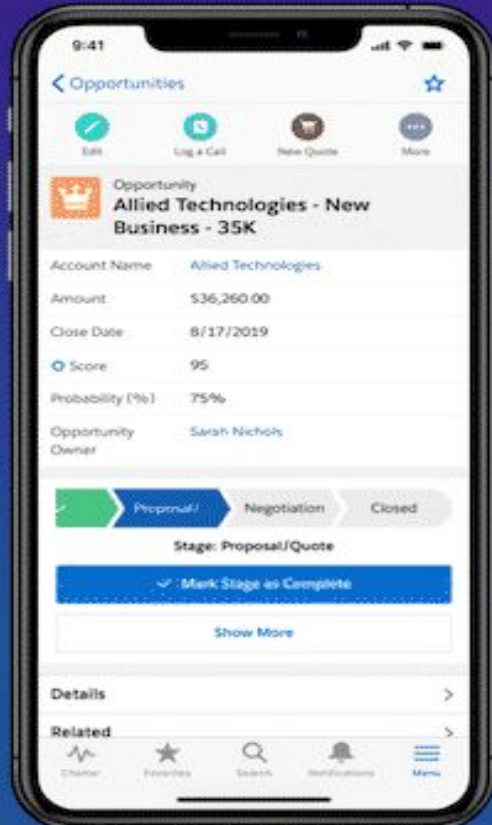
		As of Date			Grand Total
	Historical Stage	10/1/2021	11/1/2021	12/1/2021	
<input type="checkbox"/>	Prospecting	Sum of Historical Amount Record Count	\$100,000.00 1	\$100,000.00 1	\$100,000.00 3
<input type="checkbox"/>	Qualification	Sum of Historical Amount Record Count	\$15,000.00 1	\$15,000.00 1	\$15,000.00 3
<input type="checkbox"/>	Needs Analysis	Sum of Historical Amount Record Count	\$675,000.00 1	\$675,000.00 1	\$675,000.00 3
<input type="checkbox"/>	Value Proposition	Sum of Historical Amount Record Count	\$330,000.00 2	\$330,000.00 2	\$330,000.00 6
<input type="checkbox"/>	Id. Decision Makers	Sum of Historical Amount Record Count	\$110,000.00 3	\$110,000.00 3	\$110,000.00 9
<input type="checkbox"/>	Perception Analysis	Sum of Historical Amount Record Count	\$120,000.00 1	\$120,000.00 1	\$120,000.00 3
<input type="checkbox"/>	Proposal/Price Quote	Sum of Historical Amount Record Count	\$370,000.00 2	\$370,000.00 2	\$370,000.00 6

MOBILE VIEW

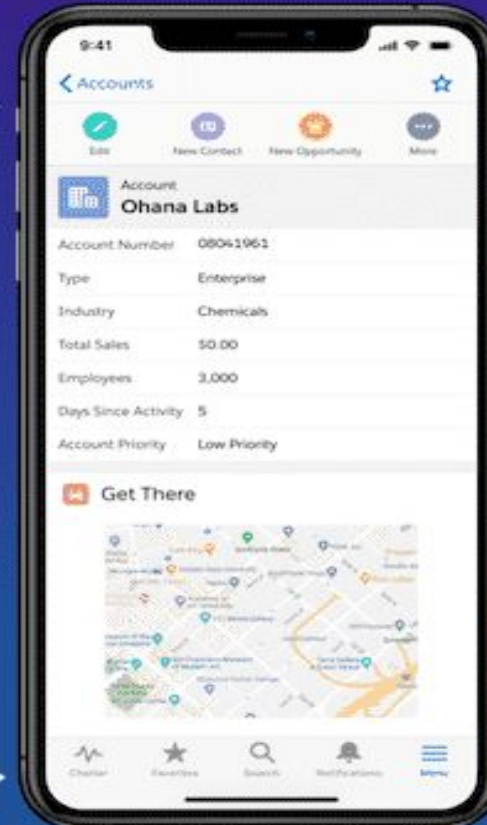
Make smart decisions with AI



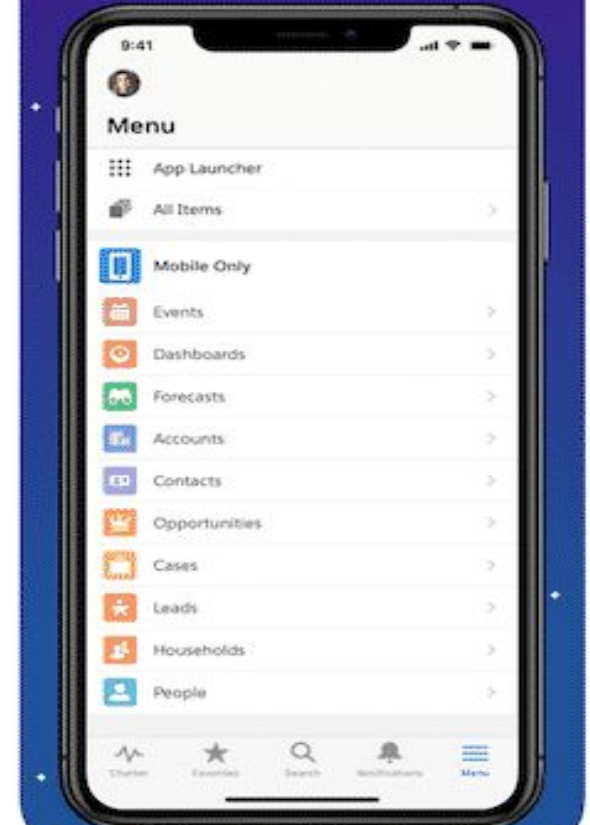
Manage all your records even when you are offline



Access your Salesforce objects while on the go



Access all your apps and CRM data



CSAconsultants Pvt Ltd
CMMI Level 3 & ISO 9001/27001 Certified Company



**authorized
cloud reseller**

Thank You

Address

28, Naresh Mitra Sarani (Beltala Road),
2nd Floor, Kolkata - 700025, West Bengal,
INDIA

Website

www.csaconsultant.in

Email

shiwank.b@csaconsultants.in

Phone

+91 98309 24108, +91 98309 44464,
033 24862480, 033 2486 3298