20 Great Salesforce Guides for Sales and Marketing

ringDNA + RingLead

INTRODUCTION: GOING TO THE SALESFORCE GURU

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▶ MEASURING SUCCESS ▶ INSIDE SALES SUCCESS ▶ OPTIMIZING PRODUCTIVITY

▶ SETUP & IMPLEMENTATION ▶ INTEGRATION

Salesforce is an extremely powerful platform for any company's sales and marketing operations. But just like your smartphone, Salesforce is designed for flexibility. The platform is waiting for you to customize it, add apps to it, and define rules for how it should be used within your company. That's what makes it the world's best CRM.

But exactly how should you do that? By using Salesforce CEO Marc Benioff's "Go to the guru" approach, of course.

Benioff built used this guru-seeking mantra while creating Salesforce's branding and strategy, which led him to seek out proven success steps from the industry's best minds. In addition to giving himself a very high probability of success, he also avoided reinventing the wheel.

We've made it easy for you to go to the guru by curating this incredible list of the best guides for getting the most out of Salesforce. Whether you're at the beginning of your Salesforce journey or much farther along, there's something here for you.

2014-2015 The State of Salesforce

Value: See how top companies are leveraging Salesforce to drive business outcomes and emulate their success.

When thinking about your own goals with Salesforce, it's often helpful to emulate those who have already established best practices. **Bluewolf's** annual review distills insights from over 1,000 global Salesforce users. See how forward-thinking companies are using Salesforce and apps from AppExchange to drive innovation across all departments.

# 9 Principles of Killer Dashboards

Value: Get the data you need to see the big picture and always make the right call.

This guide from **Salesforce** will help you visualize the data that you need the most. Reading this eBook will help you build exceptional dashboards so your team can:

- ▸ Align around similar objectives
- ▸ Track success in the same ways
- ▸ Focus on moving the same needles
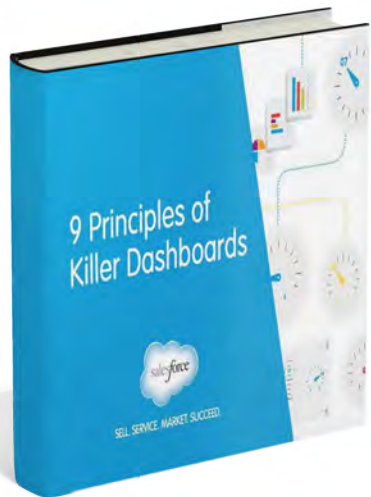
Marketer's Guide to Salesforce Reports

Value: Quickly learn to build and customize Salesforce reports.

For marketers, truly leveraging Salesforce's potential requires knowing how to both create and customize reports. In this guide, the **Bizible** team walks you through how to create reports, customize reports, make your reports actionable and effectively use custom fields to drive marketing ROI. Quickly learn how to connect your sales and marketing data in order to optimize ROI.

7 Essential Salesforce Dashboards for Predicting and Influencing Inside Sales Success

Value: Manage your inside sales team like the world's top sales experts.

This eBook from **RingDNA** reveals the most important sales metrics that you should be tracking in Salesforce dashboards. This guide will show you how the world's best sales leaders track their sales performance. It also features a questionnaire that you can use to build the perfect dashboards for your business.

The 5 Must-Dos of Successful Salesforce Campaigns

Value: Five tips to help you rock revenue using Salesforce campaigns.

Though most companies are "using" the campaign object in Salesforce, it's rare to find companies that are fully leveraging campaigns in Salesforce to maximize sales and marketing ROI. This article by **Appirio** reveals five vital tips that can help you use campaigns more effectively than ever before.

Salesforce for B2B Marketers - The Complete Guide

Value: Learn how to leverage Salesforce and Pardot together to market smarter.

If you're evaluating marketing automation systems, or have already invested in Pardot, this **Pardot** eBook is a powerful resource for learning more about how Salesforce CRM and Pardot can work together to help you market smarter — not harder. **Salesforce for B2B Marketers** takes a look at common goals and pain points of business-to-business marketers, like improving lead quality, collecting buyer data, personalizing marketing communications, enabling sales, and more.

The Marketers' Definitive Guide to Salesforce

Value: Quickly become a master at marketing in Salesforce.

This eBook is the definitive guide to marketing in Salesforce. By reading this eBook by **RingDNA** and **RingLead**, you can quickly become an expert at using Salesforce to align sales and marketing into a fearsome revenue machine.

Included:
- ▶ 14 must-track Salesforce metrics
- ▶ How to use Salesforce campaigns
- ▶ Best practices for using Lead, Contact and Opportunity objects
- ▶ How to keep your prospect data clean
- ▶ Powerful sales & marketing alignment tips

Marketer's Field Guide to Salesforce

Value: Quickly get up to speed at how to market effectively using Salesforce.

This comprehensive guide from **Hubspot** gives marketers the tools they need to successfully use Salesforce, including:

- ▶ How to leverage the data in Salesforce to supercharge your marketing
- ▶ How your sales team can use marketing data to transform their sales process
- ▶ A best practices setup of a marketing software platform connected to Salesforce
- ▶ How Salesforce can help foster sales and marketing alignment
- ▶ A plain-English glossary to help marketers navigate through "Salesforce jargon"

7 Ways to Prepare for the Salesforce Analytics Cloud

Value: Be fully prepared to leverage Salesforce's Analytics Cloud to maximize ROI.

Salesforce Analytics Cloud allows customers to easily interact and explore data to arrive at answers that lead to faster business decisions and actions. This guide from **Appirio** reveals some ways that you can prepare to utilize Salesforce's analytics to attain new levels of business intelligence horsepower.

OPTIMIZING PRODUCTIVITY

13 Dead-Simple Salesforce Admin Hacks

Value: Increase your team's productivity with these 13 killer Salesforce hacks.

This blog post from **RingLead** features 13 top hacks that any marketer can implement in Salesforce in order to optimize productivity. These hacks, which don't require coding knowledge, can be easily implemented. The post links to videos that show you how to execute each hack effectively, including how to flag cases that don't have comments, how to report on recordless users, and how to send new users introduction emails automatically.

Webinar: 7 Salesforce Hacks to Help Your Team Hit Quota

Value: Learn some actionable ways to help your sales team crush quota.

This on-demand webinar reveals seven key hacks that you can use to support your sales team's success, including:

▶ How to build good sales habits through increased accountability
▶ How to better inform your sales strategies with Salesforce.com insights
▶ 7 tactical hacks to get more out of your Salesforce implementation and help your team hit quota faster

Ultimate Book of Salesforce Magic

Value: Learn best practices from top Salesforce administrators.

In this eBook, **Backupify** distills the collective knowledge of several expert Salesforce administrators from divergent backgrounds. The guide reveals tips, tricks and best practices that top Salesforce admins are using to ramp up productivity. Salesforce administrators from companies of all sizes can use these tips to accelerate success.
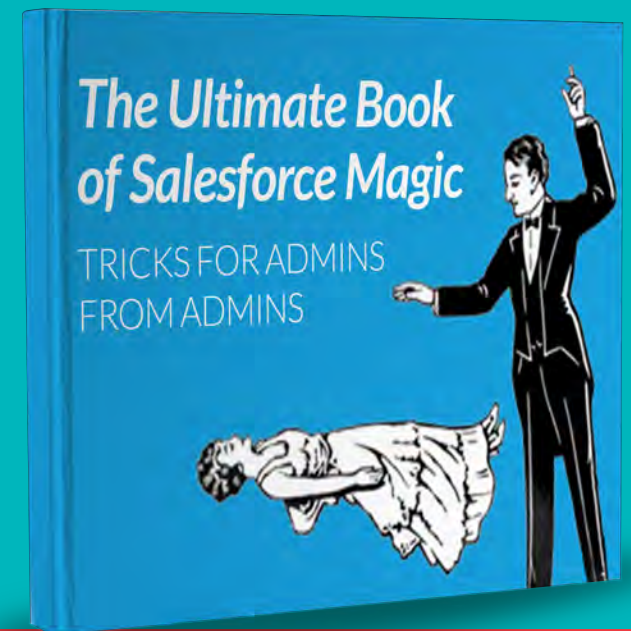
3 Salesforce Hacks Your Inside Sales Reps will Be Thankful For

Value: Three high-impact Salesforce hacks that will empower sales reps.

This blog post from **The Bridge Group** reveals three hacks that you can start using immediately to support sales at your company. Learn how to display the timezone of phone numbers and how to reinforce process by stage and status.

18 Must-Have AppExchange Apps for Sales Teams

Value: Discover third-party apps that can work with Salesforce to help accelerate sales ROI.

One of the best ways to maximize your Salesforce investment is by investing in the right AppExchange apps. The Salesforce AppExchange gives you the power to tailor-fit Salesforce to meet your specific business objectives. This eBook from **Run Consultants** reveals some sales apps that can help sales teams improve connections, collaborate quickly, store contact information, deliver quotes faster and close more deals.

Expert Guide to Salesforce Integration: 22 Salesforce Experts Share the Biggest Mistakes Companies Make During a Salesforce Integration

Value: Benefit from top experts' Salesforce implementation experience.

In this eBook from **Docurated**, a panel of 22 Salesforce experts share some of the biggest mistakes they've seen companies make during implementation. The result is that you can learn some crucial "dos" and "don'ts" that can help you implement Salesforce to expertly support your sales team.

Your Complete CRM Handbook
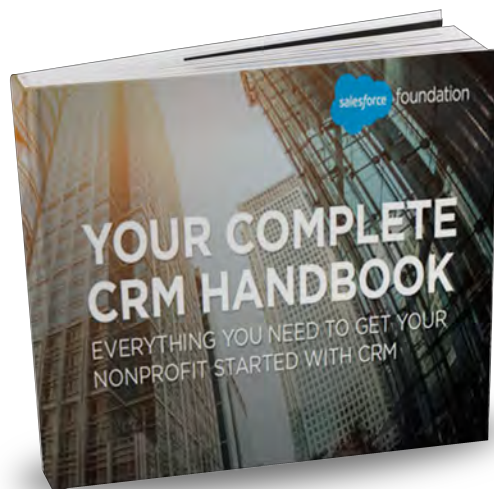
Value: A valuable resource for companies considering a Salesforce implementation.

Are you considering implementing a CRM or switching to Salesforce? This eBook from Salesforce gives newcomers valuable information about how customer relationship management platforms can help accelerate sales ROI. **You'll get helpful advice on:**

- ▶ Signs your business needs a CRM
- ▶ How CRM can improve sales and productivity
- ▶ Building your CRM strategy
- ▶ How to maximize your ROI

Salesforce Implementation Mistakes and How to Avoid Them

Value: Effectively plan your Salesforce roll-out with these actionable tips.

Whether you are implementing Salesforce for the first time or you are looking to optimize your existing instance, the tips in this eBook from **RingLead** will help.

In this eBook, you'll learn:

- ▶ How to incorporate teams and customers in your implementation process
- ▶ How to plan your Salesforce roll-out
- ▶ The importance of feedback

Best Practices: Pardot & Salesforce Campaign ROI

Value: Learn to set up campaign ROI reporting in Salesforce.

This article from **Pardot** explains how to use Pardot and Salesforce together to measure and optimize campaign ROI. It's vital to be able to identify which marketing campaigns have influenced an opportunity. This guide shows marketers how to set up Salesforce reports. The guide includes how to attribute primary campaign sources in opportunities as well as how run an ROI report in Salesforce.

Definitive Guide to Salesforce Security

Value: This primer covers almost everything you need to know about Salesforce security.

Bluewolf released a definitive guide to Salesforce security as a multi-part blog post. While Salesforce is becoming the global leader in cloud technology, there can be a variety security concerns prior to implementation. This series of blog post breaks down cloud security into terms that anyone can understand. The blog post outlines all of the security components available in Salesforce.com & Force.com, including definitions and proposed use. Check below to get the additional guides.

- ▶ **Part 2**
- ▶ **Part 3**
- ▶ **Part 4**

One of the biggest mistakes I see companies make is assuming that Salesforce can create harmony between sales and marketing right out of the box. To be truly successful, you need to do two things. First, invest in change enablement and training - the insights sales and marketing can capture from the proper use of Salesforce can be earth-shattering. Second, ensure that the Salesforce platform is personalized to meet your organization's individual needs.

Sal Partovi
*Director of Online Marketing, **Appirio***

One of the biggest things sales teams can do to use Salesforce more effectively is to align goals of management with the goals of sales reps. Salesforce is sometimes implemented for promise of visibility to management, but fails to make the sales reps' lives easier. By first understanding the workflow of sales reps and making major efficiency gains it becomes easier to achieve the level of visibility desired by sales management.

Paul Fischer
*Senior Consultant, **GearsCRM***

Salesforce is an extensible platform, but when designing the solution architecture of Salesforce, it's better to solve for 85% of the business scenarios that occur every day or every month rather than configuring Salesforce to accommodate the random one-off occasions which just muddy the waters of a solid business process. Concentrating on standard processes that can be defined, automated and measured will provide efficiencies and time-savings.

Geraldine Gray
*Principal Consultant, **Endiem***

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