WITS

WINE INDUSTRY
TECHNOLOGY
SYMPOSIUM

Salesforce Automation

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salesforce.com

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Echo Lane

Jim Thompson – Founder and CEO
Rogue IT

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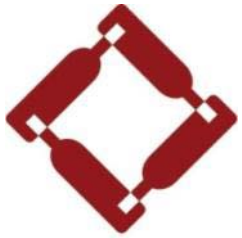
Salesforce.com Overview

- Salesforce.com (NYSE: CRM) is a vendor of Customer Relationship Management (CRM) solutions, which is delivered to businesses over the Internet using the Cloud Computing model
- $1B+ in revenue with nearly 60,000 customers
- Founded in 1999 with HQ in San Francisco, CA
- The CRM solution is broken down into several applications: Sales, Marketing, Service & Support, Partner Relationship Management, Content, Ideas and Analytics.
- The flagship Salesforce SFA solution is used by companies around the world to help grow revenues, increase customer satisfaction, and reduce expenses.
- High user adoption, a complete suite of tools, and powerful customization to support any sales process make it the only choice for sales reps, managers, and executives looking for success.



Echo Lane Overview

- Consulting firm dedicated to using Software as a Service (SaaS) solutions to improve efficiency and profitability
- Primary SaaS Platforms
  - ***Salesforce.com***: leading on-demand platform for sales, marketing, operations
  - ***Eloqua***: leading on-demand marketing automation platform
  - ***Big Machines***: leading on-demand quoting and configuration management system
- Certified Salesforce.com partner
- Highly experienced 30-person team with salesforce.com certified business analysts, developers, data architects, and project managers
- Founded in 2002 and headquartered in San Francisco, CA
  - Offices in Chicago, Detroit, Portland, Boston and Pittsburg

Rogue IT Rebels with a cause... Yours.

- Advanced Applications Development – Marketing and E-commerce
- Focus on “Cloud” Applications
  - ***GreatVines CRM:*** Total sales and marketing solution for wineries
  - ***Chargent Payment Processing***: E-commerce, orders and transaction management
  - ***Outpost Web CMS***: Website content, publishing and media tools
- Certified Force.com Developers and Salesforce.com Consultants
- Engineering, data and systems integration expertise
- 2009 Finalist, Force.com 40 Innovation Award (GreatVines)

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Why should CRM matter for you?

- Do you track real customers?
- Are you responsible for revenue growth?
- Can you measure revenue growth?
- Do you want more customers?
- Do you want to engage your customers more?
- Looking to maximize the efficiency of your distribution channel?
- Or maximize the results from your own sales activities?

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The wine industry and CRM

- Unique government-instituted barriers between wineries and customers
  - 3-tier system
- CRM =customer relationship management
  - Prospects
  - Customers
  - Distributors
  - Employees
  - Media

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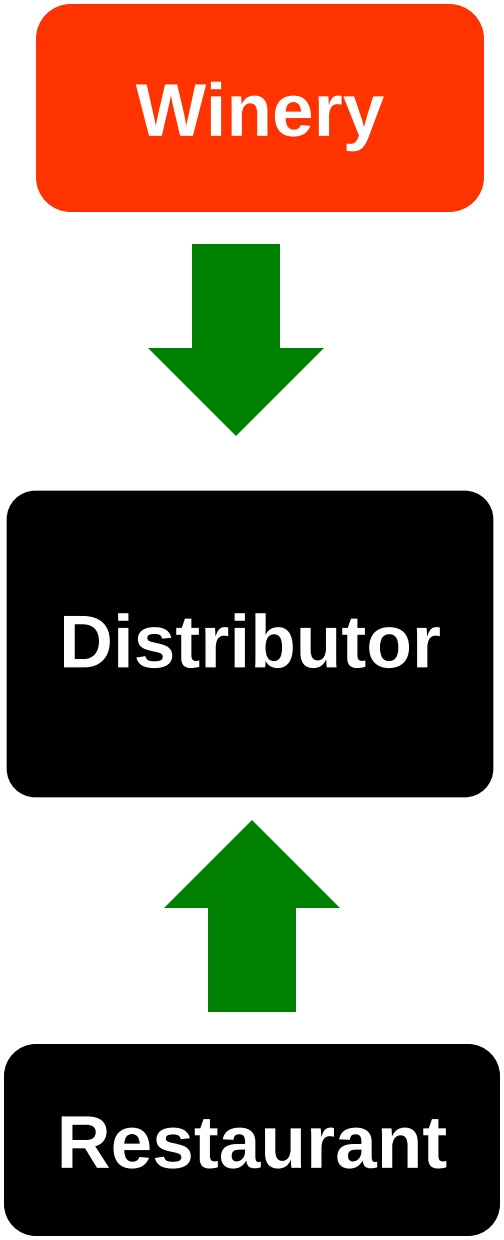

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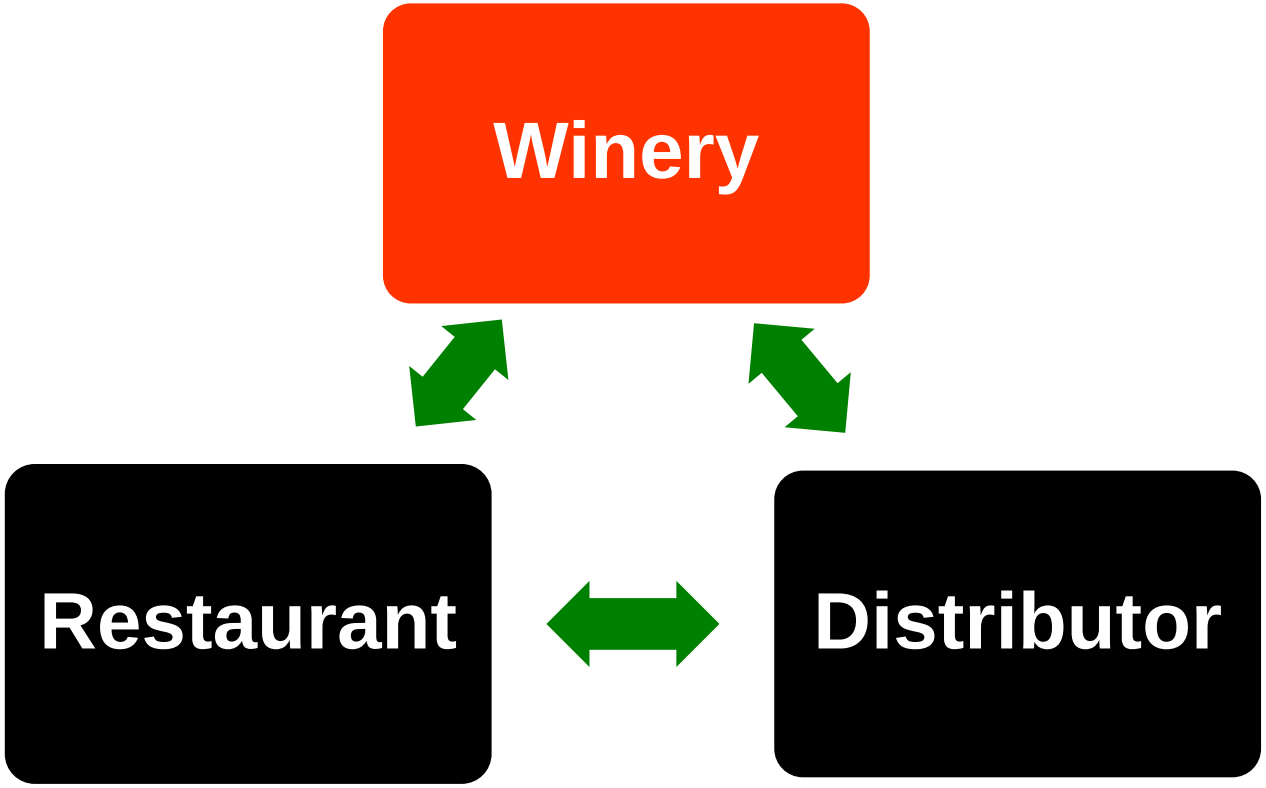
Tomorrow's Solutions



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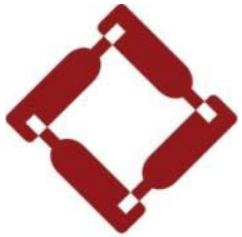
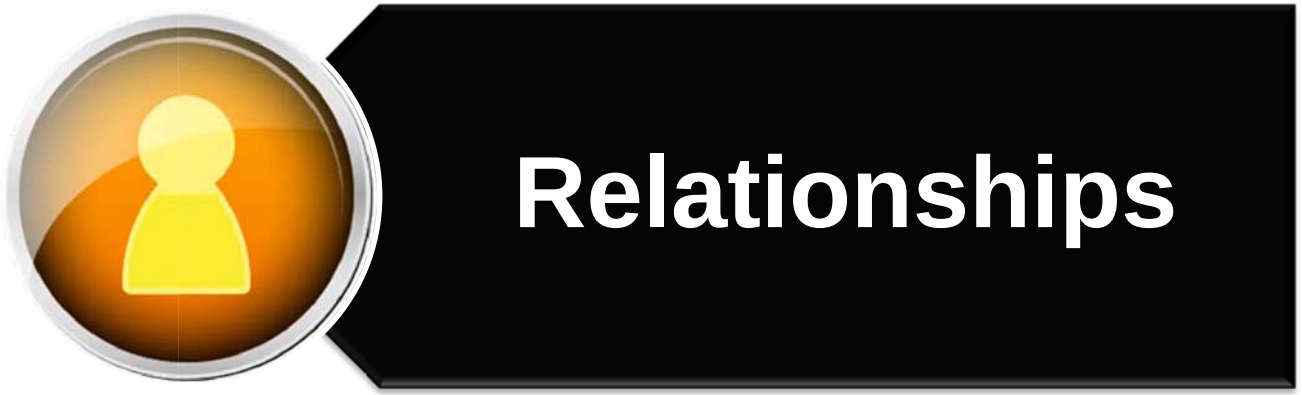
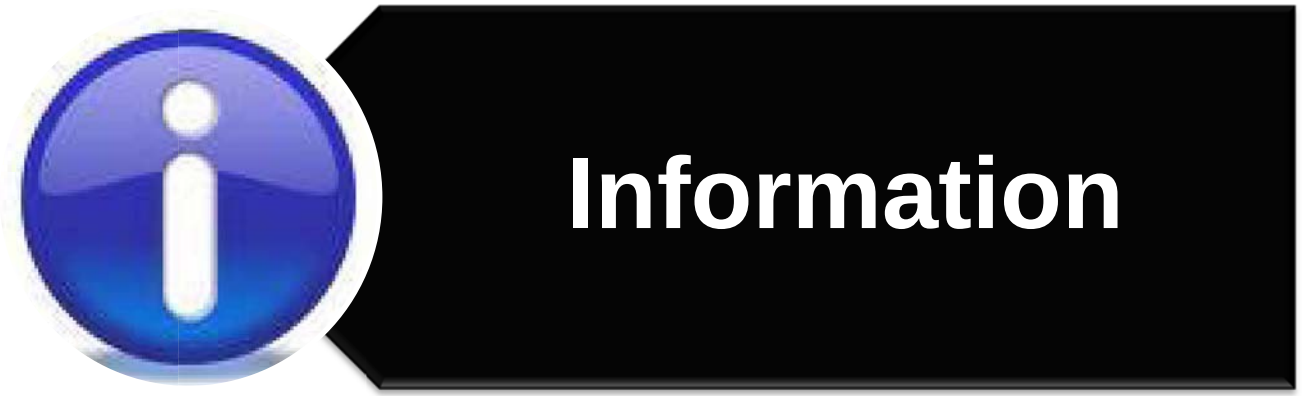
Tomorrow's Solutions

- Link information from all sources
- Provides a single point of reference for:
  - Sales
  - Marketing
  - Operations
  - Inventory
- Offers a unified view and reporting
- Always on, always available
- Easy-to-use



Managing Relationships





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The Relationships

- Winery and Restaurateur/Retailer
- Winery and Distributor
- Restaurateur/Retailer and Distributor
- Allocation and Individuals or Distributors
- Inventory, Allocation, and Depletion

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On the road

- Look up and update info from the road
  - Contact info
  - Track opportunities
    - Product interest
    - Key contacts
    - Status
  - Notes
    - Meeting
    - Observation
    - Follow ups

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In the sales office

- Plan your day
  - See Opportunities and stages
  - Create Follow up activities
  - View your daily task list
- Build a prospect list
- Check on trip reports and opportunities

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In the executive office

- Marketing
  - Run campaigns
  - Track ROI
- Manage depletions
- Analyze opportunities
  - By wine
  - By month
  - By territory
  - By distributor

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ECHOLANE

salesforce.com
Success On Demand.™

From the Vineyard to the CRM in the Clouds

Robert Sinskey Vineyards runs a high-end organic/biodynamic winery in Napa Valley. Sinskey sells wine throughout the country, and has a small sales team that spends most of their time on the road, visiting restaurants and wine retailers, performing demos, and nurturing customers.

Sinskey was handling all of their sales data through a Filemaker Pro client/server system, integrating reports from eWinery. After four years, the system's maintenance needs, necessity for server synching, and lack of data integrity rules had become frustrating.

Robert Sinskey was interested in a customer relationship management system that freed them from maintenance, allowed users to roam freely with both laptops and mobile devices, and permitted easy updating, had built-in reminders and routing rules, and could be expanded to handle future integrations with distributors through POS and eWinery.

Challenge

Sinskey wanted to migrate over to a more customizable and flexible solution with no interruption in service or the ability of sales to work on the road.

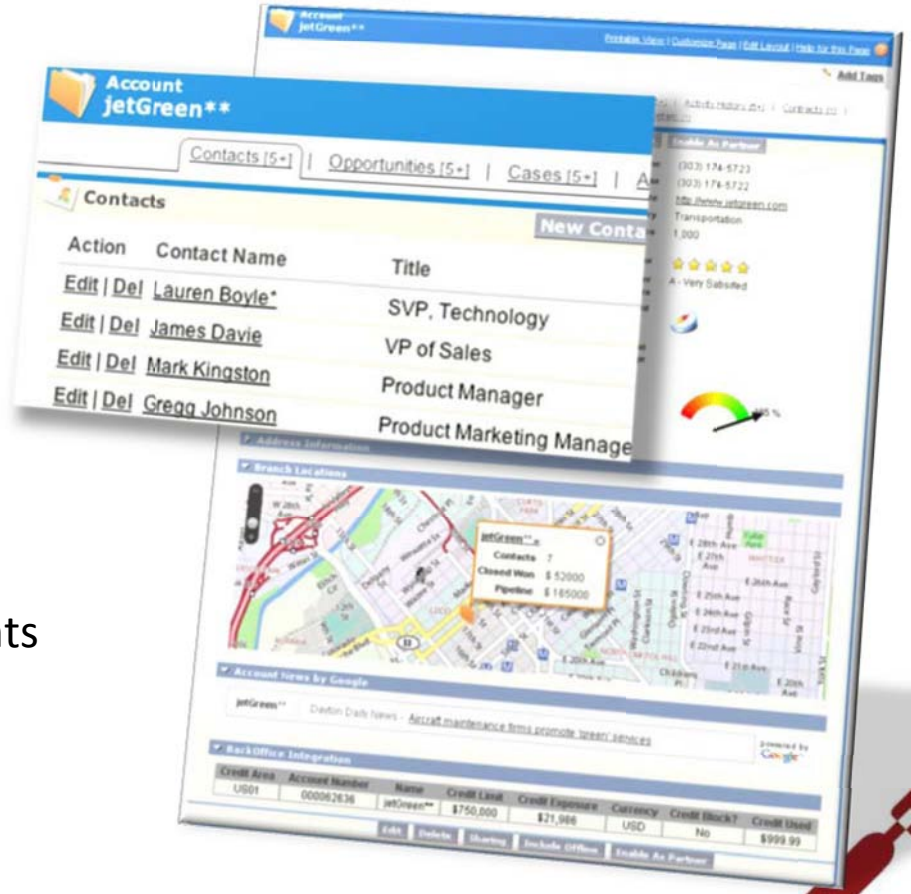
Solution

- Echo Lane worked with Robert Sinskey to model and streamline their business process and data, then created an instance of Salesforce.com to work with these new processes and data. Echo Lane also created custom Allocation object and data process for future distributor integrations.
- Echo Lane migrated a clean set of historical data from Filemaker into salesforce.com on go-live day, and the sales team was working with salesforce.com and salesforce.com mobile that day.

Results

- Robert Sinskey's sales team can now access the same dataset from the road, and avoid all data conflicts.
- Salesforce.com's improved reporting and automation capabilities have improved organizational efficiency and allowed the sales team to maximize their time on the road, without having to spend any more physical time on the road.

Manage All Your Accounts & Contacts



Maximize Rep Productivity

- Gain a 360°customer view
- Plan account strategies
- Log calls, emails, tasks, and events
- Track activity history

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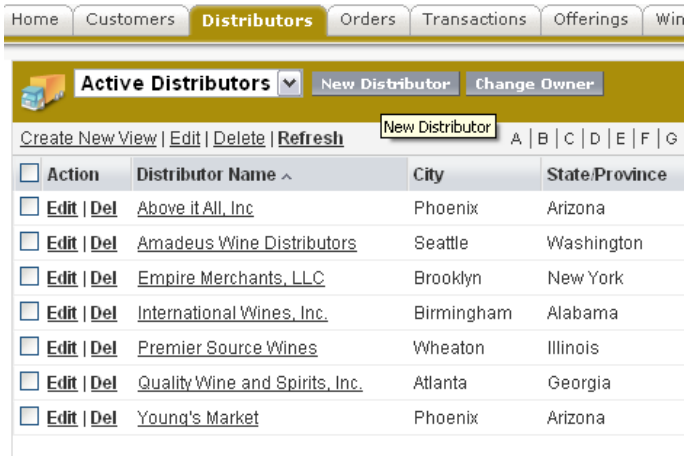
Multi-Channel Sales, Single System

Holistic view of all sales and marketing activity



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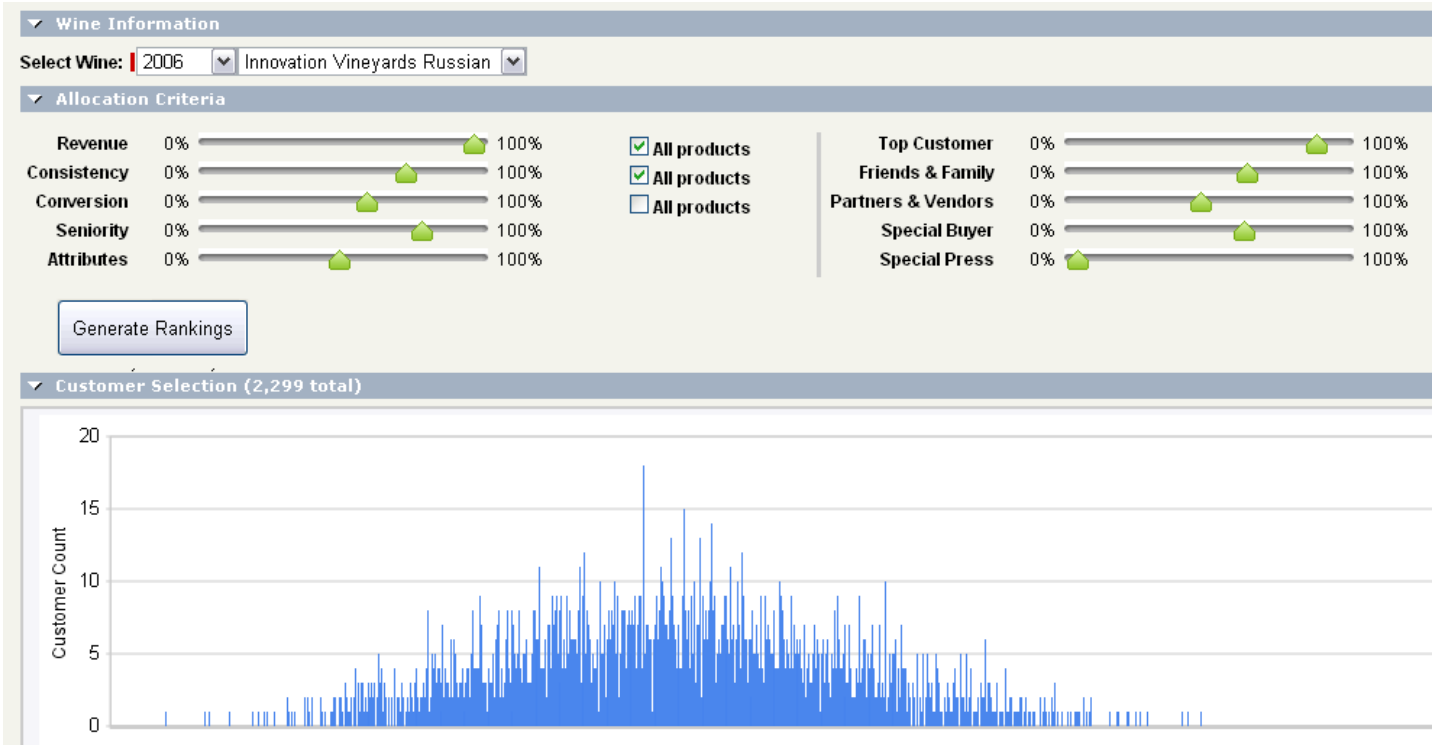
Customer Ranking and Analysis

Quickly and *visually* determine your best channels and customers with dynamic ranking criteria



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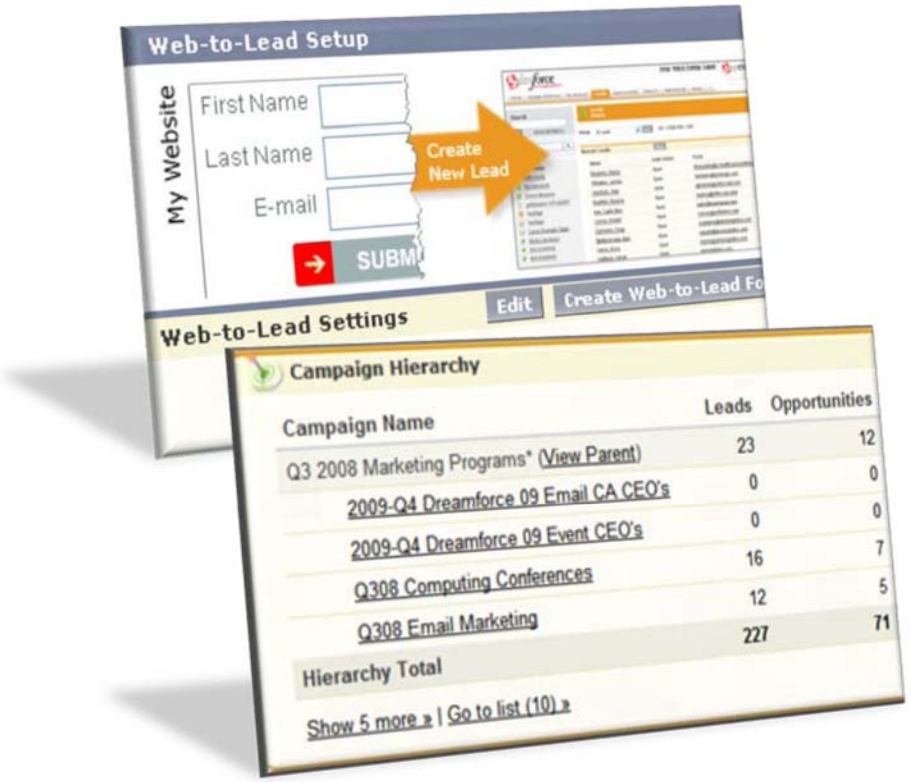
Generate More Leads and Align Marketing with Sales



Grow the Sales Pipeline

- Attract leads with Google AdWords
- Manage multi-channel campaigns
- Capture and route leads automatically
- Measure return on marketing spend

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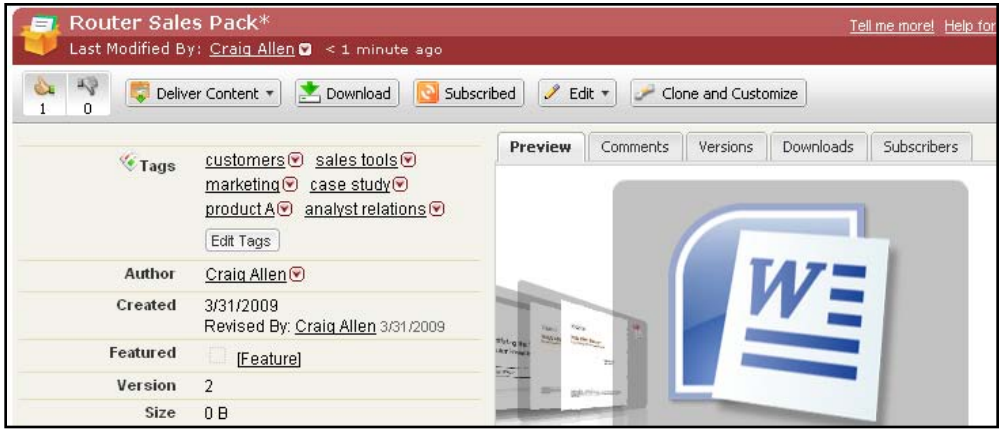
Content Delivery – Sales 2.0

- Hosted and Personalized Sales Collateral
- No more large file attachments and spam problems
- Activity tracking, subscriptions and expirations!



Wholesale Distribution

Allocation Winery

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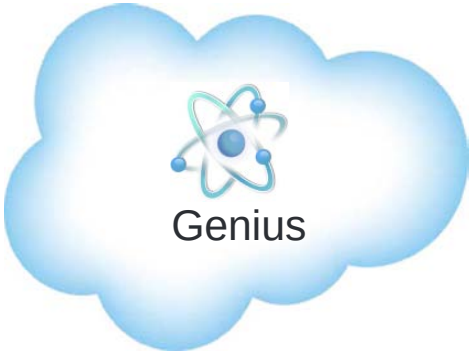
Leverage the Collective Genius of Your Organization



Close More Business

- Find experts in your company who have closed deals like yours
- Get smart about which sales strategies work
- Get smart about which content works

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Simplified Order Management

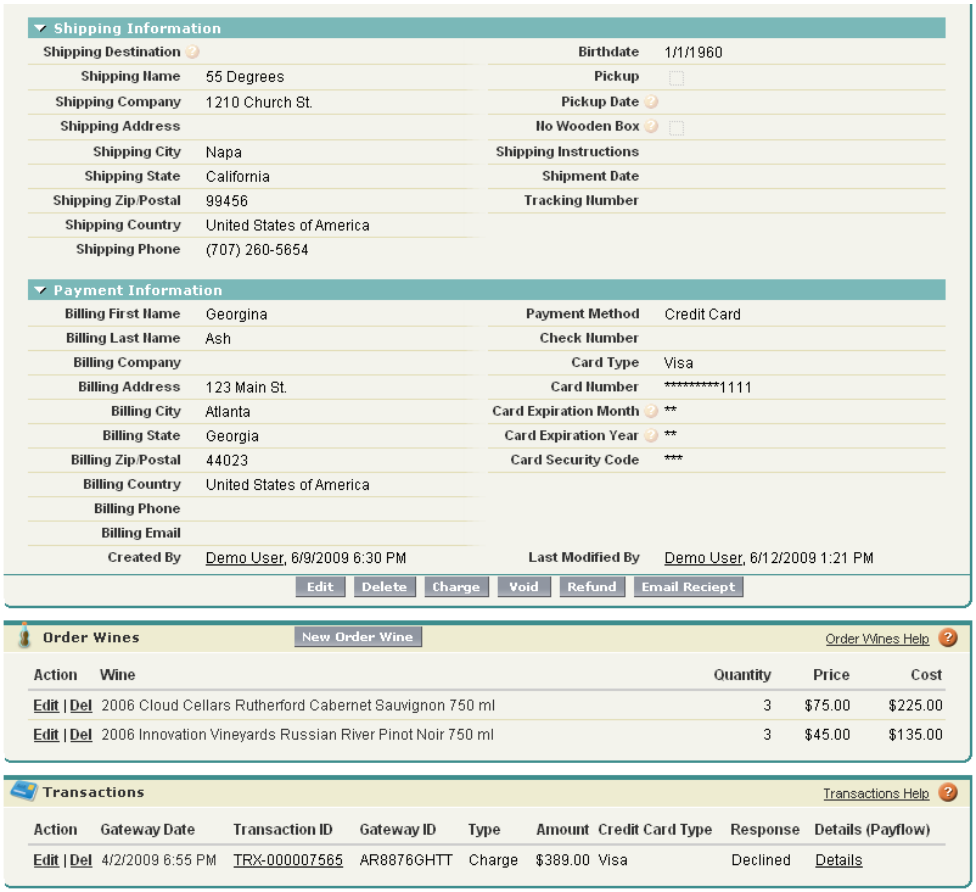
Multiple Business Functions, Instant Access

Fulfillment and Shipping

Customer Marketing

Compliance Checks

Accounting Reconciliation



Shipping Information

Shipping Destination		Birthdate	1/1/1960
Shipping Name	55 Degrees	Pickup	
Shipping Company	1210 Church St.	Pickup Date	
Shipping Address		No Wooden Box	
Shipping City	Napa	Shipping Instructions	
Shipping State	California	Shipment Date	
Shipping Zip/Postal	99456	Tracking Number	
Shipping Country	United States of America		
Shipping Phone	(707) 260-5654		

Payment Information

Billing First Name	Georgina	Payment Method	Credit Card
Billing Last Name	Ash	Check Number	
Billing Company		Card Type	Visa
Billing Address	123 Main St.	Card Number	**********1111
Billing City	Atlanta	Card Expiration Month	**
Billing State	Georgia	Card Expiration Year	**
Billing Zip/Postal	44023	Card Security Code	***
Billing Country	United States of America		
Billing Phone			
Billing Email			
Created By	Demo User, 6/9/2009 6:30 PM	Last Modified By	Demo User, 6/12/2009 1:21 PM

Edit | Delete | Charge | Void | Refund | Email Reciept

Order Wines — New Order Wine — Order Wines Help

Action	Wine	Quantity	Price	Cost
Edit | Del	2006 Cloud Cellars Rutherford Cabernet Sauvignon 750 ml	3	$75.00	$225.00
Edit | Del	2006 Innovation Vineyards Russian River Pinot Noir 750 ml	3	$45.00	$135.00

Transactions — Transactions Help

Action	Gateway Date	Transaction ID	Gateway ID	Type	Amount	Credit Card Type	Response	Details (Payflow)
Edit | Del	4/2/2009 6:55 PM	TRX-000007565	AR8876GHTT	Charge	$389.00	Visa	Declined	Details

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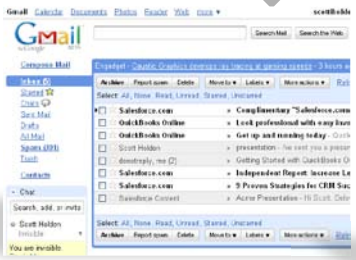
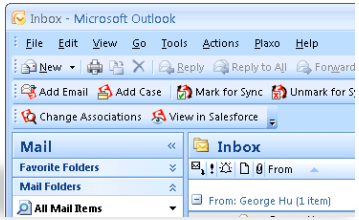
Reports and Dashboards – Metrics 2.0

Real-Time Updates

Real-Time Updates

Automated Email Delivery





Real-Time Visibility with Easy to Create Reports

- Customizable by End Users
- Real-Time Reporting
- Integrated Analytics Across All Apps
- Security Controls
- Mobile Access
- Email Dashboard Delivery

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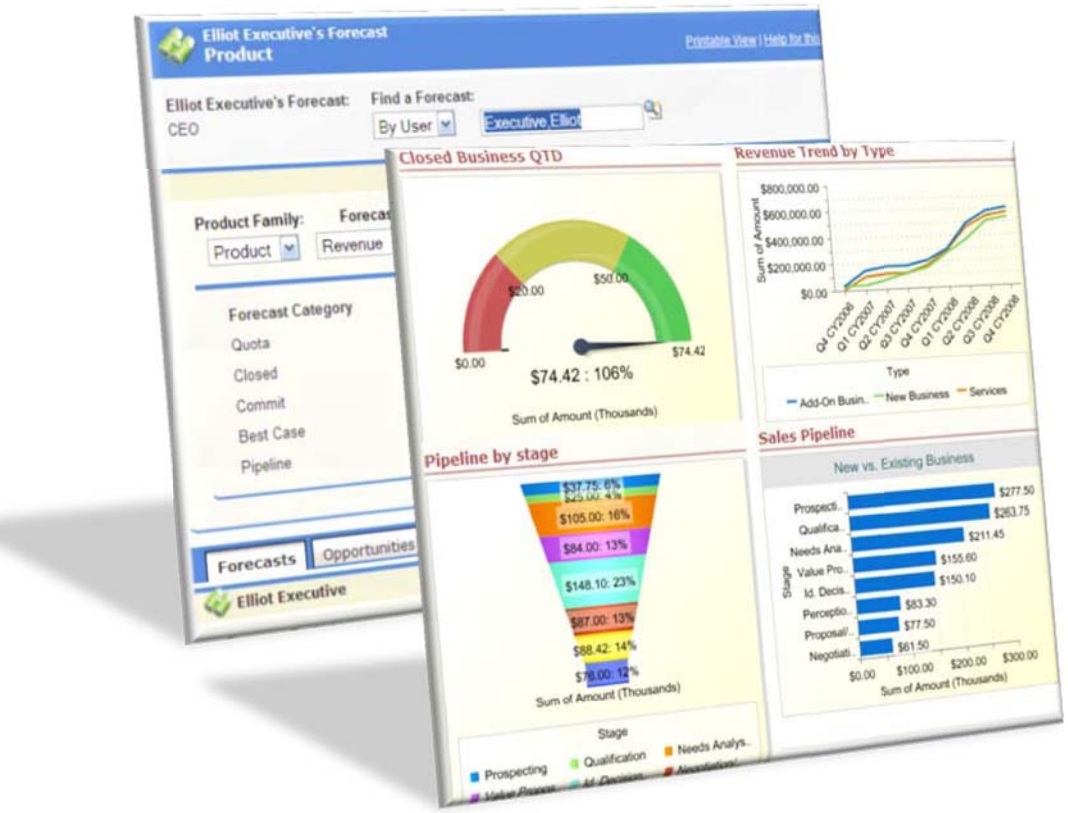
Forecast and Analyze Your Sales in Real-Time



Maximize Forecast Accuracy
with customizable forecasting

Gain Real-Time Visibility
into performance, pipeline, revenue, win rates, and activities

Real-Time Mobile Deployment
Allows Visibility on the road

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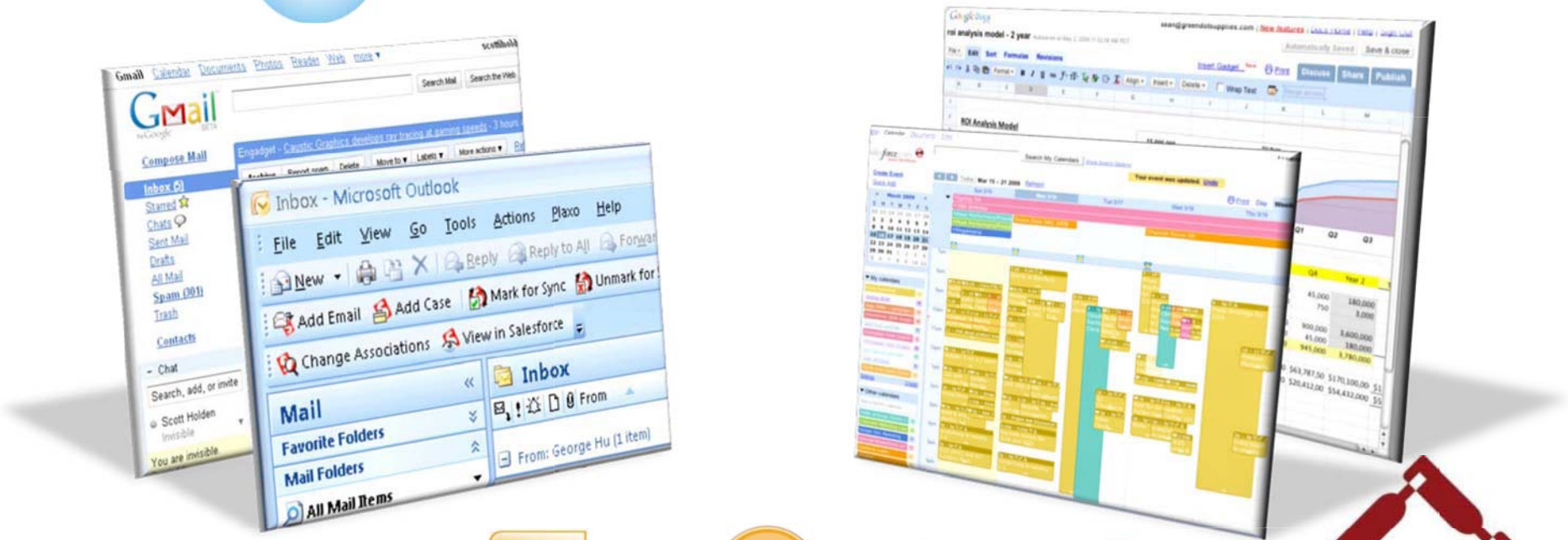
Work Seamlessly with Office Productivity Apps

Spend More Time Selling

When all your desktop apps work together



Microsoft Outlook

Lotus Notes

Google Apps

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