

Salesforce and Microsoft

Make things simpler. Make more sales.

Introduction

Since our founding in 1999, Salesforce's guiding principle for our product, our strategy, and our partnerships has always been maximizing the success of our customers. Any initiative that will help make our customers more successful is something we must consider and pursue.

That is why in mid-2014, Salesforce announced a long-term partnership with Microsoft. This partnership is much more than a mere PR announcement. It is a serious step toward improving the workflow and Salesforce experience for thousands of our users.

A large portion of the Salesforce user base also uses Microsoft products on a daily basis, and vice versa. The lack of an official partnership between the two companies was creating a bottleneck of efficiency for sales, marketing, and service teams alike. Both companies decided it was time to break down any obstacles between their respective products and usher in a new era of efficiency and effectiveness for their users.

So what does this partnership look like? Salesforce and Microsoft have built integrations for more than 10 products, from Outlook to Excel. Salesforce is seamlessly included across all major product lines. No more hassle, no more headaches.

The two companies now have access to internal resources like never before. Salesforce and Microsoft are two of the most innovative companies in the world. Imagine what can be accomplished when they have access to each other's R&D resources, senior executives, and product experts. There's no limit to what Microsoft and Salesforce can achieve together.

Ready to find out more? Turn the page, and let's dive into the three ways this partnership between Salesforce and Microsoft will transform the way you work.

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Chapter 1

Stay Up to Speed

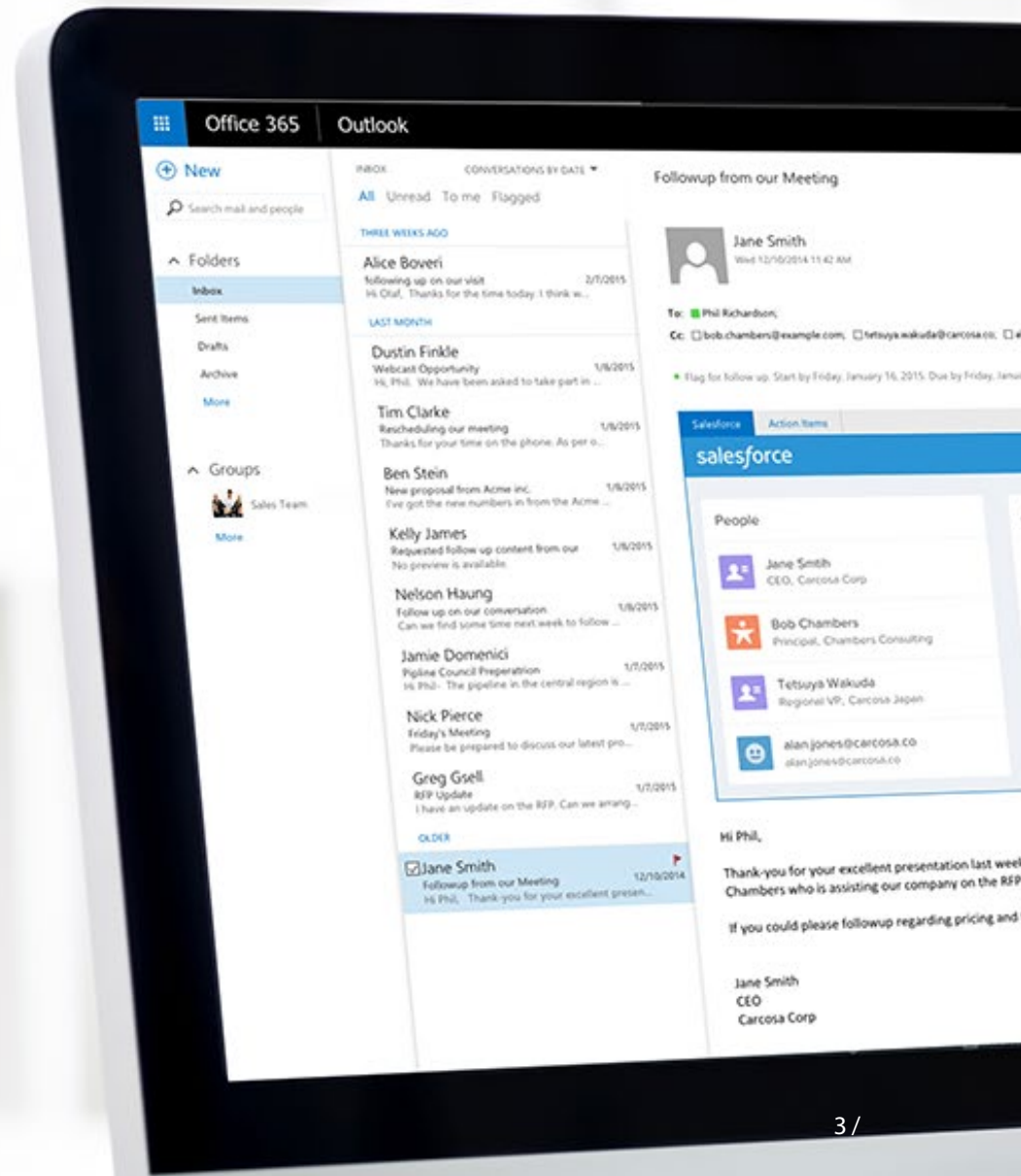
Outlook and Calendar

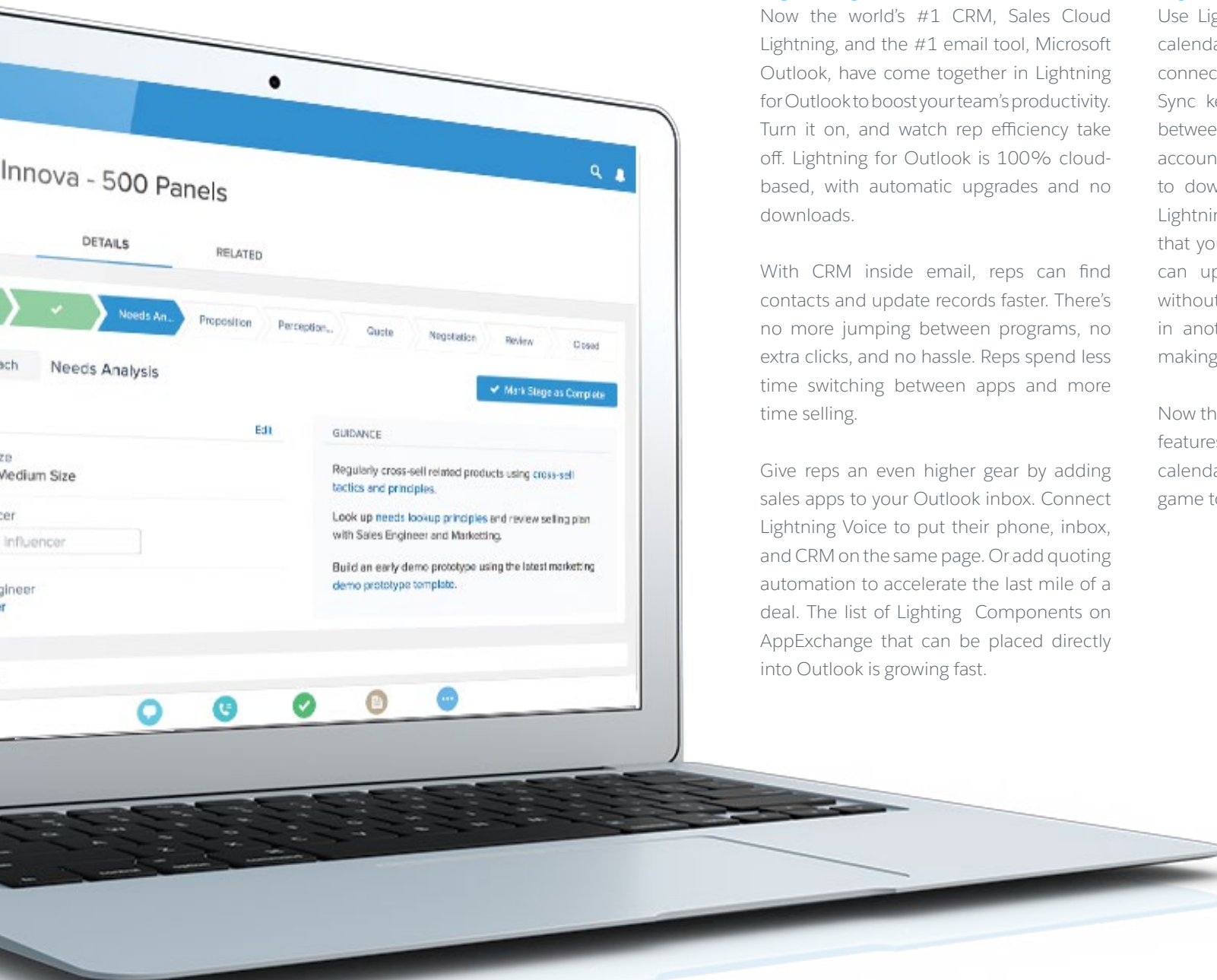
No matter what industry you work in or what product you sell, there are two systems that sales professionals use each day, almost without exception: Outlook and Salesforce.

No matter how many new channels of communication are introduced into the sales cycle, email remains the most commonly used – and the most effective – way to communicate with prospects and clients. That won't change anytime soon. Also not likely to change anytime soon is the fact that a huge portion of those emails are being sent and received through Microsoft Outlook. The email program is the product of choice for thousands of companies around the world and is used by millions of employees each day.

When sales reps aren't sending emails through Outlook, they're likely to be recording activity, consulting notes, updating accounts, or analyzing reports and dashboards in Salesforce. Just as Outlook is the de facto email app for most businesses, Salesforce is the dominant leader in the customer relationship management (CRM) market.

Sales professionals usually spend their day jumping between these two systems to perform their most essential job functions. But not anymore.





Lightning for Outlook

Now the world's #1 CRM, Sales Cloud Lightning, and the #1 email tool, Microsoft Outlook, have come together in Lightning for Outlook to boost your team's productivity. Turn it on, and watch rep efficiency take off. Lightning for Outlook is 100% cloud-based, with automatic upgrades and no downloads.

With CRM inside email, reps can find contacts and update records faster. There's no more jumping between programs, no extra clicks, and no hassle. Reps spend less time switching between apps and more time selling.

Give reps an even higher gear by adding sales apps to your Outlook inbox. Connect Lightning Voice to put their phone, inbox, and CRM on the same page. Or add quoting automation to accelerate the last mile of a deal. The list of Lightning Components on AppExchange that can be placed directly into Outlook is growing fast.

Lightning Sync

Use Lightning Sync to sync contacts and calendar events from any Exchange-connected device, and Salesforce. Lightning Sync keeps contacts and events in sync between Microsoft Exchange Server accounts and Salesforce without any need to download or maintain software. With Lightning Sync, you can have confidence that your calendar is up to date. Now you can update contacts and events once, without having to duplicate the effort in another system, saving you time and making you more productive.

Now that we've tackled the most important features of the sales workflow with email, calendars, and CRM, let's take your sales game to the next level.

Chapter 2

Have the Right Tools

Skype for Salesforce

Today's informed customers expect sales reps to be prepared to answer their questions right away. If not, they'll go elsewhere. So it's imperative for you to help your reps be prepared, increase their ability to collaborate internally, and find the right answers to drive more deals forward.

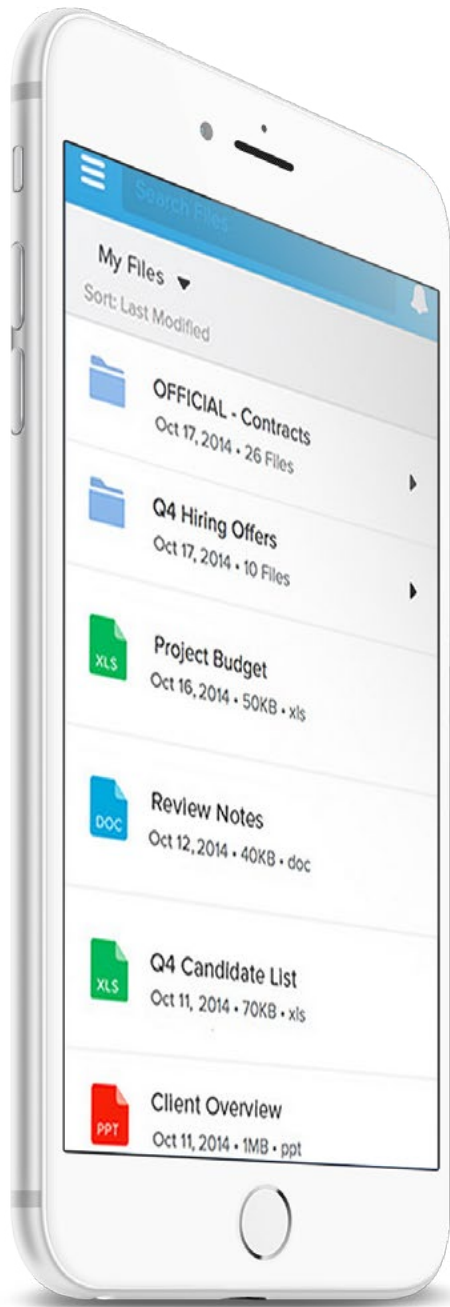
Introducing Skype for Salesforce, an intuitive way to reach out to colleagues by message, audio, or video call without leaving Salesforce. Collaborate faster and more effectively with the latest breakthrough integration between Salesforce and Microsoft.

Salesforce Files Connect

Files are critical to every aspect of business. From advertising copy to sales presentations, bills of material and support FAQs, files are core to every process. As you work, you constantly create new files, and these files are stored across a variety of systems and repositories – creating quite a challenge when you need to find them again. In fact, according to recent IDC research, 61% of employees typically access four or more systems to get the information they need to do their jobs. The result? Thirty-six percent of the average workday is spent looking for files.

Salesforce and Microsoft are determined to fix this problem with the new Salesforce Files Connect. This allows users to quickly and easily browse, search, and share files located in any repository from a single interface, so they can stop searching – and spend their days getting work done.





Now employees can connect files to Salesforce business processes and records regardless of where those files reside. So a sales rep can attach a presentation to a lead residing in Salesforce, or a service rep can share FAQs to close a case – regardless of whether those files are located in Microsoft SharePoint, OneDrive for Business, or Salesforce Files. In addition, connectors for other popular enterprise repositories will be added over the coming months, including support for Google Drive. Salesforce Files Connect delivers the true power of universal file sharing for every business.

Stay Mobile

Business moves fast. With Salesforce, your files will too. Now you can instantly access, view, and share any file, anytime, anywhere, starting with iOS and moving to other platforms like Android and Windows.

Be Secure

By enforcing existing access permissions for the original file, Files Connect ensures secure sharing. And with advanced permission-sharing parameters, you can be sure that only the people who are allowed to see your files will be able to.

Build Customized Solutions

Engaging partners and customers is easier than ever with the Salesforce Files Connect API, which provides universal file access and sharing capabilities to any app built on the Salesforce1 Mobile App. For example, now you can build a custom app for manufacturing distributors to share files from Salesforce, OneDrive for Business, or SharePoint, and easily distribute business-critical information such as product catalogs, training manuals, and promotional materials across multiple repositories.

Rethink the Old Rules of File Management

As the first company to combine CRM and file integration with the most popular file platform, Salesforce has unleashed files from third-party repositories. So employees across your entire organization can work smarter, faster, and more efficiently.

Chapter 3

Always Be Connected

A mobile workforce must be able to access all the important and relevant information they may need, right when they need it. Whether you are looking for a refresher on your prospect's most recent account activity, support cases, or purchase history, or you want to arm yourself with all the latest product and pricing information, a mobile CRM solution can help you do it in the moment or even onsite at your next meeting. It's like having a virtual cross-functional team that is always with you, ready to brief you on all the information you need to know.

Not too long ago, being away from your computer meant you were armed only with what you were able to cram into your bag or briefcase. Now, with the Salesforce1 Mobile App and a Windows phone, you can access all your customer and company data at any time, allowing you to keep in touch with more prospects and collect new and relevant information as it comes in. Being able to update your CRM on location and in real time turns what was once a tedious chore at the end of the day (or even worse, if you happened to leave it to the end of the week or month) into a simple process that ensures you always have the most current information at hand. Access to this information provides sales reps with a number of advantages.



Improve Insights

The amount of available data about a sales lead has grown tremendously in the past few years. A prospect is no longer just a name and a phone number on a card in your Rolodex; she is a collection of online tracking data, social profiles, company information, account history, and much more. All of this data gives sales reps an exciting opportunity to provide a more personalized sales process than ever before. However, all that data does little good if you are unable to access the most relevant information when you need it most.

Mobile sales teams have robust profiles for all their prospects, compiled from dozens of sources and distilled into one cohesive view that puts the most important and relevant information front and center. Today, for the first time, sales reps have a complete 360-degree view of each and every customer.

The advantages of data-rich selling cut both ways. Mobile sales teams can also turn the magnifying glass back on themselves and use improved tracking metrics to gain a better understanding of their sales

performance. With this new insight, managers can provide valuable coaching in real time, not just once or twice a quarter.

Put Data to Work

Analytics has long been the domain of IT or specialized data teams, viewed as far too complex to be used by the average sales professional. But as the amount of accessible data has skyrocketed, analytics has become too valuable a tool to hide away in a back office. With the new Sales Analytics, Salesforce is bringing analytics to everyone.

To be truly actionable, the right data must be applied to the right context. With mobile functionality, Sales Analytics is accessible from the palm of your hand, anywhere you need it. With so much data available to sales professionals, the problem is no longer merely obtaining data, but sorting through massive data sets to find the insights you really need. Sales Analytics makes this easy with robust filtering options and a visual interface that helps identify patterns and insights.

It is not just about your existing customer data. In addition, with prospect tracking, you'll never have to wonder what your prospects are up to. You can automatically track the pages they visit on your site and set notifications that let you know when they take purchase-ready actions like viewing your pricing page.



Chapter 4

Stay a Step Ahead

Power Query for Excel + Salesforce Integration

When it comes to dealing with data sets, creating reports, or building graphs and charts, there are few professionals who haven't used Microsoft Excel. Often, we see Salesforce users export data and upload to Excel to stay consistent with their organization's workflow. Today, that workflow has become much easier with Power Query for Excel plus Salesforce Integration. With this integration, customers can now connect and work with data from their Salesforce accounts in Excel to build reports, visualize information, and discover new insights.

Salesforce Objects

Salesforce Objects connects directly to the underlying object tables. Selecting Salesforce Objects displays a full list of all objects to which the user has access. Users can choose one or more tables and import them into the workbook.

Salesforce Reports

Salesforce Reports connects using the Reports API and lets users import reports built in Salesforce into Excel. This option lets users access data in a form similar to what they see in Salesforce, without having to connect to the underlying objects and rebuilding these views on top.



Salesforce Wave Connector for Excel

If you were at Dreamforce last year or have stayed up to date with our recent product announcements, you know that Salesforce is doubling down on analytics with the release of our Wave Analytics tool. The Wave platform brings the power of business intelligence to every employee, and with the Microsoft and Salesforce partnership, Wave becomes even more accessible.

We are thrilled to announce the Salesforce Wave Connector App for Excel. The app is available in the Office Store. With the Wave Connector, you can instantly transform an Excel spreadsheet into interactive graphs, tables, and charts in the Salesforce Analytics Cloud.

Professionals have all used Excel before, whether reviewing financials, building timelines, or even managing a to-do list. Power users create pivot tables, dynamic macros, and multivariable regression analyses, getting big insights from agile

spreadsheets.

With the Wave Connector for Excel, everyone can be a power user, getting a new perspective by visualizing data.

With the Wave Connector, you can turn spreadsheets with data about lead capture or sales performance into interactive, intuitive visualizations in just a few clicks, letting everyone explore Excel data right inside Salesforce.

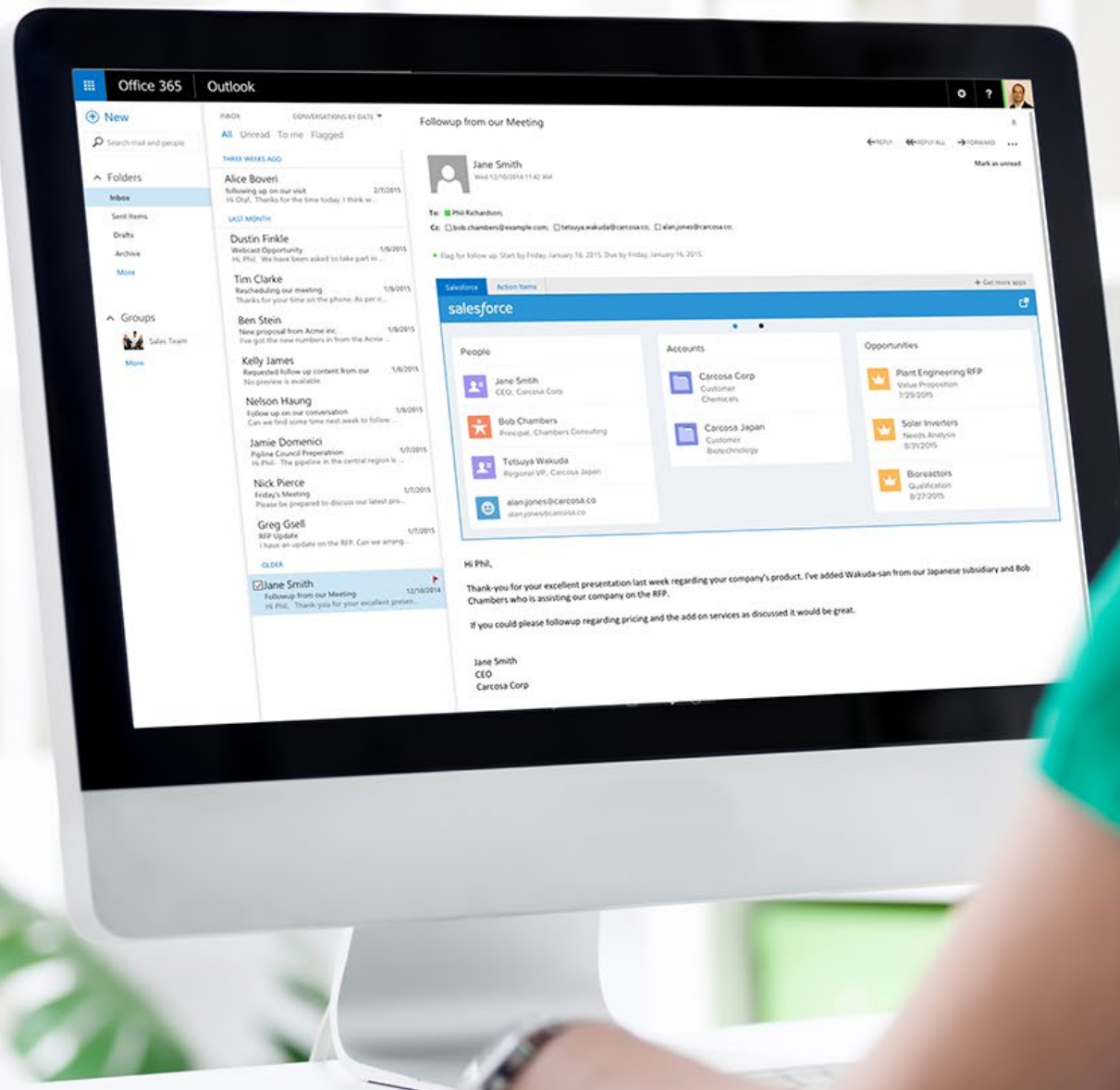
Just download the new Wave Connector and import any Excel spreadsheet into the Analytics Cloud. It's time to get a new view of Excel data and ride the Wave to faster insights and greater productivity.



Conclusion

Salesforce and Microsoft Office have been staples of the modern workforce for over 15 years. Every day thousands of professionals utilize each tool to help them reach peak productivity and performance. Now Salesforce and Microsoft are taking that productivity and performance to new heights.

With the Salesforce and Microsoft partnership, users have integrations for more than 10 products, from Outlook to the Salesforce1 Mobile App and there is even more to come. Edit Office documents on the go. Analyze Salesforce data directly in Excel. Salesforce connects seamlessly to the tools you already use, so you can sell the way you want.



SALES SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

If you want to grow your sales and establish a transparent sales process, you need an easy-to-use customer relationship management system. Salesforce allows you to store customer and prospect contact information, accounts, leads, and sales opportunities in one central location.

[Learn more ›](#)

32% Improvement in win rate.

40% Increased sales productivity.

32% Increase in sales revenue.



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