APPEXCHANGE:

23 APPS RECOMMENDED BY APP PROS

salesforce | appexchange

INTRODUCTION

THE REAL STORY ON THE VALUE OF APPS

For one customer, an AppExchange app saved the company's largest client. Another customer found that an app saved them months of work. Where did we discover these stories? During several recent World Tour stops in New York, Houston, Minneapolis, and beyond, AppExchange sessions included customers sharing their favorite apps, and the use cases behind each one. We've gathered the best of them for you in this e-book. Straight from 12 AppExchange customers, here's a look at 24 of their selected apps and stories. ⊙

"I feel like we're making heroes. You're going to install an app in five minutes. You're going to be an instant hero by saving your company money."

Michelle Seufert
Senior System Administrator
formerly at SunGard Financial Systems

What is Lightning? And what is Lightning ready?

Lightning is a new user experience that lets you quickly build and customize apps with a rich set of drag-and-drop components. Lightning's most recent updates help to maximize user productivity, featuring comprehensive analytics and in-line intelligence that will drive transformation across your organization.

Lightning ready Apps

Lightning ready apps are designed to deliver the most consistent user experience as you move your organization to Lightning. Look for the "Lightning Ready" symbol on AppExchange. Learn more.

Lightning Components

Lightning components are responsive, reusable building blocks for creating apps and customizing pages. Find components on the Lightning Exchange and use the Lightning App Builder to build apps via simple drag and drop. Learn more.

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01 / SALES APPS

Distribution Engine

Lead management

"This lead routing tool is customizable to your sales needs. We found that sales reps were in and out of the office. Distribution Engine enables our sales managers to customize and set the routing rules. It can be based on territories, weighted assignments, or load balancing. For instance, if a salesperson has too many opportunities, rules can be set up to ensure other objects are routed their way. If a sales rep is at a Salesforce World Tour, they can be taken out of rotation for the day. It's all done automatically, which is awesome."
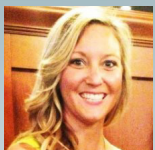
Michelle Seufert
Senior System Administrator
formerly at SunGard Financial Systems

SALESFORCE WORLD TOUR NEW YORK

Geopointe

Location-enable Salesforce

"Geopointe takes the geographical information that you have in Salesforce and presents it on a map. Oftentimes it's a challenge to quickly determine your best territories, but with this app, instead of spending a day or week figuring that out, you can spend 15 minutes and have all of the information you need. It's not just software, it's an opportunity to do things you only once imagined."

Lincoln Rowley
Director, Salesforce Strategy and Operations
Wyndham Hotels

SALESFORCE WORLD TOUR NEW YORK

eMapping
Map your data
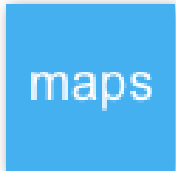
"Honeywell's salespeople were seeking more time in front of their customers. eMapping allows our salespeople to visualize our customers on a Google map. Then, it optimizes the route. With this app, our sales team was able to visit twice as many customers as they were before installing the app. The other benefit of the app is territory planning for sales managers. They can plot accounts for their team, and mass reassign accounts to various people simply by drawing a circle on the accounts and right-clicking. This app is going to help sales sell more and generate more revenue for our business."
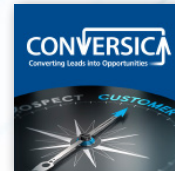
Kathy Ecklund
Salesforce Supervisor, Honeywell
SALESFORCE WORLD TOUR MINNEAPOLIS

Conversica
Convert leads into opportunites

"Conversica is not just artificial intelligence (AI), it's a virtual assistant for Hotze. Whether it's lead routing, lead response, or organizing and coordinating leads, Conversica's virtual assistant, Sarah, is there from the moment the lead comes in, to the end of the sales process. A lead could come in at 3 a.m. on a Sunday, or in the middle of a workday, and Sarah is there, responding to leads, routing them, and taking care of the back end. There are no worries about finding someone to speak to regarding a lead, or routing leads. Sarah handles it all. It's so popular that prospects and customers ask for Sarah by name, and we have to make excuses why she's not able to come to the phone."

Brenda Gonzalez
Project Manager, Hotze Enterprises
SALESFORCE WORLD TOUR DALLAS

02/ CUSTOMER SERVICE APPS

Clicktools

Survey for Salesforce

"We were looking for a better way to survey customers. By using Clicktools, the process is automatic. Every time someone calls customer service, they're sent a survey. Before Clicktools, surveys were disparate. Now, everything comes right into Salesforce, so survey results are trackable and visible to salespeople. We can create reports, auto-assign tasks for follow-up, and more. We are also using it internally to track adoption for Salesforce users, such as sending out a Clicktools survey to determine areas of improvement. With Clicktools, not only did we have better participation in our survey responses, but we saw a dramatic decrease in our negative survey results."

Kathy Ecklund
Salesforce Supervisor, Honeywell
SALESFORCE WORLD TOUR MINNEAPOLIS

HeyWire

Real-time text and SMS

"HeyWire is a two-way conversation via text. With this app, we no longer put customers on hold. Our customer support agents can talk to multiple customers at once via text, decreasing our support time. It has increased customer satisfaction. You can be in the middle of a meeting and carry out orders, take care of customer support cases, and more, all via HeyWire's easy-to-use, automated process. It is our favorite app by far. It's the best thing for our company since sliced bread."

Brenda Gonzalez
Project Manager, Hotze Enterprises
SALESFORCE WORLD TOUR DALLAS

"With Clicktools, not only did we have better participation in our survey responses, but we saw a dramatic decrease in our negative survey results."

Kathy Ecklund
Salesforce Supervisor, Honeywell

03 / MARKETING APPS

Milestones PM

Project management

"Before this app, Honeywell was tracking ideas, tasks, and projects in Excel spreadsheets. Now, everything is in Milestones PM. The app allows us to manage and track projects and tasks for our users. We customized the app with a drop down to track ideas versus projects. We track high-level projects, simple projects, or very complex projects with milestones, tasks, and budget information. In fact, I created a dashboard showing 55 projects in one pipeline, and with only two people on my team, I was able to convince leadership that more resources were necessary. I doubled my staff all because of an app."
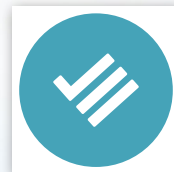
Kathy Ecklund
Salesforce Supervisor, Honeywell
**SALESFORCE WORLD TOUR MINNEAPOLIS**

TaskRay

Project management

"TaskRay is a project management app, and we find that the best use case is for software companies deploying products. TaskRay helps you templatize that entire process. It's user-friendly, and you can do it as a config admin. TaskRay automatically creates the project, pushes the project out to the whole team, and schedules from there. You can assign people to it, schedule emails that go out to customers, and more. You can tie it to other apps, such as Drawloop, so when a deal closes, you can send documents to customers. It is a massive time-saver. We're a huge fan of TaskRay, and a lot of our clients use it."
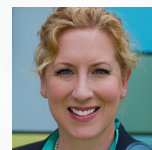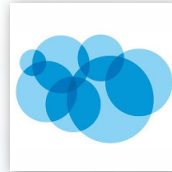
Geraldine Gray
CEO, Endiem
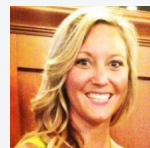**SALESFORCE WORLD TOUR HOUSTON**

CalendarAnything

Create customizable calendars

"We run our entire campaign cycle through Salesforce. Campaigns trigger tactics, which trigger tasks, and all of those tasks are based on the case object. Therefore, it was a challenge to manage the entire campaign lifecycle, from launch to completion, with all of the tasks and tactics in between. We installed CalendarAnything to monitor and track the campaign calendar. This customizable app offers color coding, a mobile version, the ability to move dates around, and filtering. We tested it in our sandbox first, and had it up and running in two days. By testing it first, we were able to determine that it was the right fit, and moved to the purchased version from there. We use CalendarAnything for more than campaigns now, including maintenance releases, certification deadlines, and more. It's an app with many use cases."

Michelle Seufert
Senior System Administrator
formerly at SunGard Financial Systems
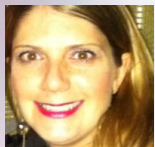**SALESFORCE WORLD TOUR NEW YORK**

04/ ADMIN APPS

The Permissioner

Assign and revoke permissions

"We assign and revoke permissions to multiple users with The Permissioner. Qumu is a public company, and we use the app to be notified when an employee is leaving Qumu. From the app, we can determine what permissions the user has, what they can keep until their end date, and what permissions we will need to take away. It ensures data security, protects against insider trading, keeps our information private from competitors, and more. It allows us to calm some of the executives' fears, and that's really important."

Carrie Philipp
Senior Business Analyst, Qumu Corporation
SALESFORCE WORLD TOUR MINNEAPOLIS

Chatter Dashboards

Manage Chatter adoption

"This free app built by Salesforce Labs is an easy way to gauge Chatter usage. Oftentimes Chatter will be rolled out across an organization, but there's no clear way to see if it's being used, or if your company is getting the most out of it. This app offers eight dashboards and over 130 reports. It's a huge time-saver and answers all of your questions around Chatter, from groups to individual usage and more. Compared to the time it would take to build that many reports, and compared to installing this app in five minutes, it's a huge time-saver. This was a quick win for us. And it was free, which is also my boss' favorite four-letter word."
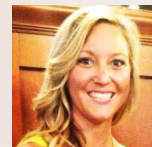
Michelle Seufert
Senior System Administrator
formerly at SunGard Financial Systems
SALESFORCE WORLD TOUR NEW YORK

DemandTools
Data quality

"Do you have duplicates in your database? If you didn't answer yes, you're lying, because we all have duplicates. If you have a database full of junk data, and need to clean it up easily, DemandTools can help. It de-dupes, fixes addresses, applies reassignments, and other big fixes that can save a day's worth of work. As an admin, I will not do my job without it. I not only cannot, I will not."

Leyna Hoffer
CRM Manager, Edmentum
SALESFORCE WORLD TOUR MINNEAPOLIS

Field Trip
Manage fields in Salesforce

"Field Trip answers the questions about how our users are using Salesforce. What fields do they use? What do they do with these fields? Do they need all of these fields? With Field Trip, you can run a report of all of the fields on a particular object, and find out the percentage of use based on the number of records you have for that object. It allows you to clean your page layout based on usage. Field Trip creates a conversation about the processes that take place, and what fields should be in that process. It's a great application."
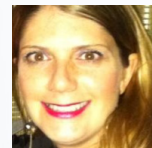
Carrie Philipp
Senior Business Analyst, Qumu Corporation
SALESFORCE WORLD TOUR MINNEAPOLIS

Conga

Document generation

"Conga provides additional and flexible capabilities in Salesforce for admins. For instance, if you're looking to pull engagement for the year on a particular account, without Conga, it is a very manual process. Think about all of the scrolling you would be doing on one record. Also, what does engagement mean? Is it opportunities, orders, and invoices? What about other apps that tie into that account? Conga answers all of these questions. Conga tracks meeting information, such as number of meetings, and meeting attendees. It tracks speaking engagements, conference attendance, and more. All of this ties into account engagement. Conga not only pulls all of this information, but it bubbles it up to one page in an easy-to-read account summary. On top of all of that, the support is unbelievable. I've never seen such amazing support. Ever."

Josh Monson
President, One Point One Group
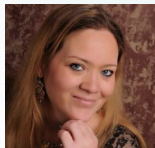
SALESFORCE WORLD TOUR DALLAS

Skuid

Build apps without code

"The time to market widgets, tools, and wizards typically takes developers hours, days, or weeks. It required custom Visualforce and apex code. With Skuid, all you need is an understanding of data models, and any admin can quickly create these tools, wizards, and more. It puts the power to build in the hands of the admin."

Melissa Butler
Salesforce Architect, RealPage
SALESFORCE WORLD TOUR DALLAS

ChangeIt

Track and approve requests

"ChangeIt creates transparency and gives ownership to stakeholders when you're making changes to your Salesforce org. Before the app, our employees didn't know when changes were taking place in our Salesforce org. Now, Qumu sends a report to all of the stakeholders for the project, and that report is used as a way to conduct the meeting and create accountability, as well as track what people are doing against the changes. ChangeIt also allows us to connect our changes to an object, creating a history log by object."

Carrie Philipp
Senior Business Analyst, Qumu Corporation
SALESFORCE WORLD TOUR MINNEAPOLIS

05 / BACK-OFFICE APPS

AscentERP

ERP order management

 "Xtreme Lashes uses ERP (enterprise resource planning) to run a lot of our operations, such as inventory management, order management, incoming components, supply chain, and our warehouse. Ascent helps us manage all of this. When we get an order, it is scanned and tracked in Salesforce using AscentERP. The app is also helping to manage vendors. The app is a mobile, social platform, and that ties in perfectly with Xtreme Lashes, which is a very mobile and interactive business. It allows our quality control manager, our warehouse manager, and our purchasing manager to collaborate and swarm around an issue. They have the visibility through the dashboards. It's a very comprehensive app. Before we installed it, we read the reviews. We interviewed the vendors, and we decided AscentERP was the right fit for us."

Ali Moshfeghian
Chief of Operations, Xtreme Lashes
SALESFORCE WORLD TOUR HOUSTON

DocuSign
Document management

"Many of us have experienced electronic signing, especially if we're completing bank documents or contracts. DocuSign was our go-to app for five to 50 contract attorneys to do electronic reviews. We handle a lot of paperwork, such as offer letters, contracts, and more, and before DocuSign, it was all sent via a very manual process. DocuSign made the entire process electronic. Even more, we can sync data with the attorneys, so they're able to see contact information on forms, make changes, and more, all with Salesforce. It's an amazing tool. We're saving our clients about $10,000 every time."

Marcel Hobizal
Director of Training & Support Services
Equivalent DATA
SALESFORCE WORLD TOUR HOUSTON

MuleSoft
Salesforce data loader

"MuleSoft is a middleware or connector that moves data from your ERP into Salesforce. Endiem has customers using MuleSoft, ranging from energy to high tech. The connector allows the data to flow back and forth between the ERP and Salesforce, helping salespeople close deals. Now, all of the opportunity information from Salesforce pushes into their ERP, without losing any data along the way. On the other end, our clients use it to move invoice information into Salesforce. This not only ensures the data is up to date in Salesforce, but it also provides insights; for instance, with this data, salespeople can learn opportune times for outreach."
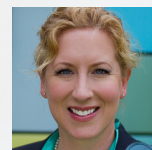
Geraldine Gray
CEO, Endiem
SALESFORCE WORLD TOUR HOUSTON

Spanning
Backup for Salesforce

"Do you know how often you can back up Salesforce data with automatic backup support? The automatic backups in Salesforce are weekly. You can schedule it, they run automatically, they go in a zip file that you can save. However, when we came to the realization that it was possible for someone to delete a week's worth of orders by accident, and a lot of money could be lost because of it, I knew a solution was needed. We researched backup tools and found Spanning, which allows you to back up Salesforce daily, with ease. You can see what has changed day to day on an account. The backups are unlimited, so you can go back and recover data as far as the date you installed the app. It's like a time machine for Salesforce, and it helps you sleep better at night. It's an investment worth making, and you don't need it until you need it."

Ali Moshfeghian
Chief of Operations, Xtreme Lashes
SALESFORCE WORLD TOUR HOUSTON

Drawloop

Document generation

"We are using Drawloop for mass emailing of all DocuSign documents. This is a great example of how all of the apps on AppExchange are friendly with each other. The classic use case is salespeople need to generate a contract; instead of doing it in Word, they hit a button and generate a contract in Drawloop, which pulls data from Salesforce and other places, creates it, and sends it out through DocuSign. Then, the customer signs it, and the deal is done. Onto the next one. This happens to be one integration that's pretty amazing. We're more than a little excited about its functionality."

Marcel Hobizal
Director of Training & Support Services
Equivalent DATA
SALESFORCE WORLD TOUR HOUSTON

SteelBrick

Configure, price, and quote

"There are areas in Salesforce where you may find you need more robust capabilities, and CPQ can be one of those areas. SteelBrick fills that CPQ need. You don't need a developer – it's all drag and drop. It's fast and easy to build and use. There are templates, product picks, and everything you need to get the deal done. Ensuring success in sales is like installing bumpers in a bowling alley; it's a lot easier to get a strike when you're set up for success, and SteelBrick does just that."

Josh Monson
President, One Point One Group
SALESFORCE WORLD TOUR DALLAS

KnowledgeNow

Videos inside Salesforce

"This app has transformed the way that we do Salesforce training. We have one Salesforce trainer for roughly 400 remote users. Before KnowledgeNow, training included a one-hour non-interactive webinar. KnowledgeNow is an interactive video tool that allows you to put different videos (your own or pre-existing) with a more personalized experience. For example, if a salesperson gets an opportunity, and they want to know when to add a contact role to this opportunity, they click on the contact role link and a video pops up on the screen and walks them through what they're supposed to do. You can include supporting documentation as well for support training. It has worked really, really well."

Leyna Hoffer
CRM Manager, Edmentum

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APP Q&A WITH APPEXCHANGE APP PROS

AppExchange sessions at Salesforce World Tours often carve out helpful Q&A time, and we've collected some of the most popular questions and helpful answers right here. ⊙

With so many apps to choose from, how do you go about selecting the right one?

"Start with a search on AppExchange and filter to your needs, such as filtering by 'free.' Then, if there are multiple apps in the results, look at the reviews. Look to see what people are saying. Do they like them? Do they not like them? If you still haven't decided, ask the Salesforce Success Community. Ask about certain apps and ask for thoughts. Ask what they liked and didn't like. From there, download it into your sandbox. You won't really know until you test it out and determine what works best for you."

Kathy Ecklund

"Many Salesforce MVPs write reviews on apps, and those are the people I know and trust, because they really understand Salesforce and these apps. Read their positive and negative reviews."

Leyna Hoffer
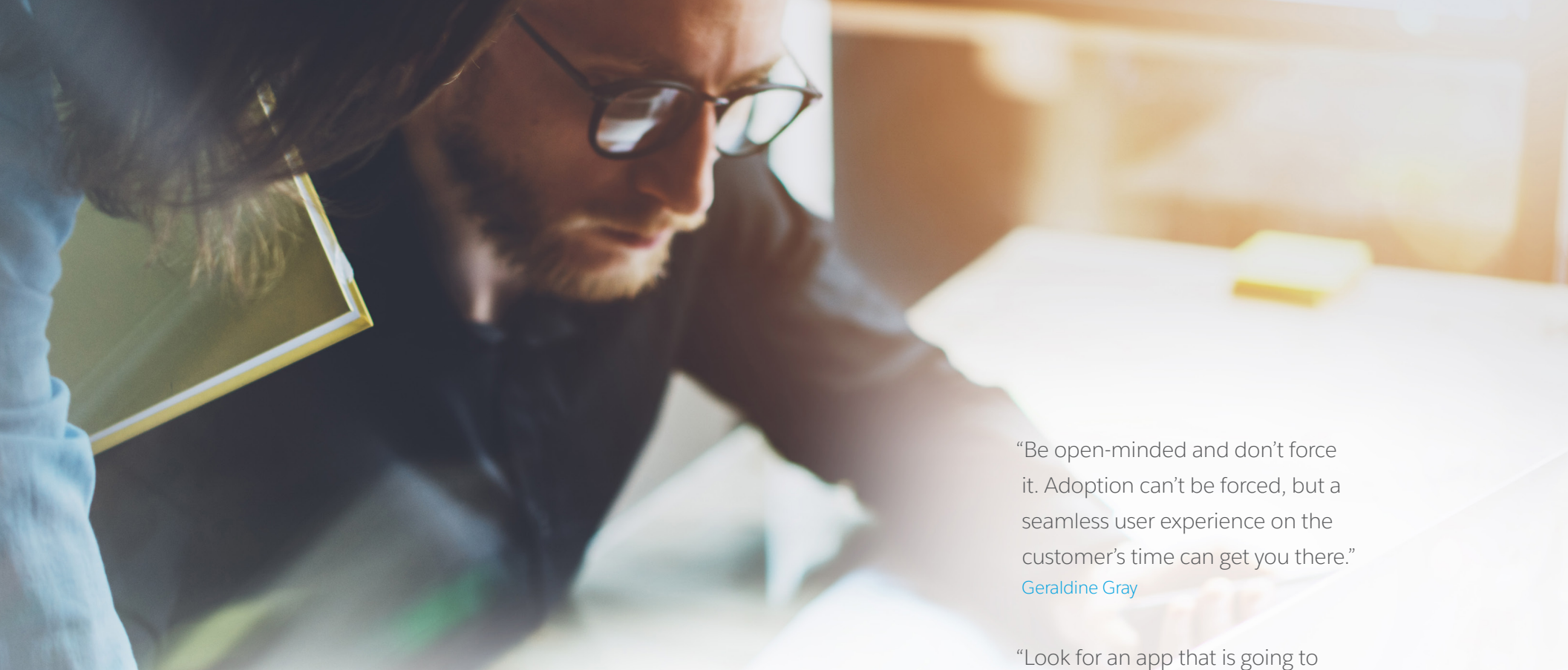
What's your advice on getting started with AppExchange?

"Be open-minded and don't force it. Adoption can't be forced, but a seamless user experience on the customer's time can get you there."
Geraldine Gray

"Look for an app that is going to solve some sort of problem, perhaps something that you need to expedite in your organization. Start with the free apps in order to get your feet wet early, without costing your company money."
Marcel Hobizal

"Test apps in your sandbox. Make sure that it works the way you want it to, and then install it in production. As you install and test, you'll prove the value."
Ali Moshfeghian

What are some best practices to navigating AppExchange?

"Look for small, free apps that can solve a business problem. Look for apps that will speed you up and make you look like a rock star. AppExchange started in order to make admins smarter, faster, and more successful. As your company grows, you can get more apps."
Melissa Butler

"If you have a challenge, I can guarantee that there's an app on AppExchange that will solve that problem. You are the problem-solver, and it's so easy to get it up and running. There's no reason not to try it."
Brenda Gonzalez

"Many of my financial services clients face the challenge of legal approval and compliance. Download the app into your dev org, understand the use cases, the requirements, the ROI, and more. Give all of that information to your attorney, legal, or compliance team. They'll appreciate that. By doing the upfront work and understanding the app, you just solved a business problem in a few hours."
Josh Monson

Customer success is all about staying ahead of the curve to meet customer needs. How do you stay ahead with AppExchange?

"Go to AppExchange frequently to see what's new. It's like Christmas every time I go, because there are different applications that I can review and test and learn about. I always have a solution to bring to my clients, because I'm up to speed on the latest apps."
Josh Monson

"I look on AppExchange whenever there is a business challenge that needs to be solved. Within minutes, I find something, put it in my sandbox, and try it out. Typically by the end of the day it's in production."
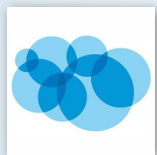Brenda Gonzalez

"Reach out to app vendors when you have recommendations to make the apps better. Vendors want to help you, so never be afraid to ask."
Melissa Butler
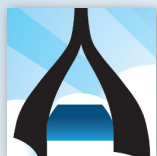
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ERP order management

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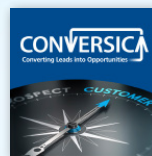Track and approve requests

⚡ LIGHTNING READY

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Manage Chatter adoption

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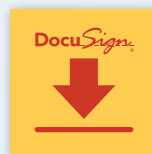## Conga
Document generation

⚡ LIGHTNING READY

Conversica
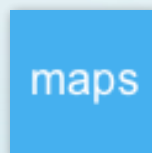Convert leads into opportunites

DemandTools
Data quality

Distribution Engine
Lead management

DocuSign
Document management

Drawloop
Document generation

⚡ LIGHTNING READY

eMapping
Map your data

FieldTrip
Manage fields in Salesforce

Geopointe
Location-enable Salesforce
⚡ LIGHTNING READY

HeyWire
Real-time text and SMS

KnowledgeNow
Videos inside Salesforce

Milestones PM
Project management
⚡ LIGHTNING READY

Mulesoft
Salesforce data loader
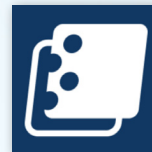
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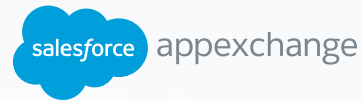## SteelBrick
Configure, price, and quote
⚡ LIGHTNING READY

TaskRay
Project management
⚡ LIGHTNING READY

THE OPTIONS ARE LIMITLESS

The big takeaway of AppExchange, and all these stories, is that for every app shared here, there are three other options out there. While apps mentioned are these customers' recommendations, they're not necessarily the only options out there and there may be others that fit your needs.

No matter how you use apps, all of these customers would agree that installing one on AppExchange is better than writing your own code, freeing you up to do what you do best: running your business.

GET THE APPS