8 Ways to Unlock the Full Power of Salesforce

salesforce app cloud

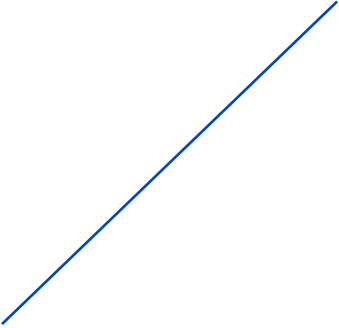# Table of Contents

You're using Salesforce already and doing a great job, but did you know you can be doing even more?

More often than not, businesses that use Salesforce feel they're still at the beginning of their Salesforce journey. Perhaps they uncovered the basic sales and service functionality of Salesforce, but they're interested in doing more and improving how their organization is using all that Salesforce has to offer across various teams, departments, and use cases. So, how do you empower all the Salesforce users throughout your entire organization with Salesforce functionality they need to be most productive?

In this guide, you'll discover eight steps to help you do more with Salesforce, and keep your users happy, and your security and IT teams productive.

Customize more. Test more. Deploy faster.

Salesforce is great out of the box, built to help you with increasing employee productivity and better engaging with your customers. But the real magic starts when you begin to customize your organization by building and deploying applications and integrating more and more data. These customizations will help you better address the nuances of your business. However, as you think about customizing and augmenting your Salesforce implementation, you're likely to encounter a few challenges. For example, you can build custom objects, workflows, and apps, on your own, but where do you even begin? Who has the ability to build? How do they test what they've built? And where do they do this work?

Regardless of whether you're building apps, or installing from the AppExchange, you'll need a place to test the customizations before you push to production and roll out to your users. Salesforce sandboxes are the perfect place to test customizations before you push to production and roll out to your users. Salesforce sandboxes give builders – developers and point-and-click admins – the freedom to bring their ideas to life in collaborative playgrounds that can be used for development, quality assurance, integration, staging, testing, and end-user training. They're independent yet fully functional, so now you can test integrations, API calls, and apps before you push to production.

There are several different types of sandbox environments you can choose from to get the level of flexibility you need. Everything from full copies of your production data, to partial copies, to Developer and Developer Pro. You determine the data you need copied, the size, and the refresh interval, then select the type of sandbox you need. Because Salesforce sandboxes are in the cloud, you can reduce the delivery time of innovative apps by removing the complexity of maintaining on-premises infrastructure.

"With Salesforce you get this ability to easily evolve and rapidly prototype – helping you get new apps into the hands of the business early and often. It's so agile."

Stephen Simons,
CIO, Direct Energy Solar
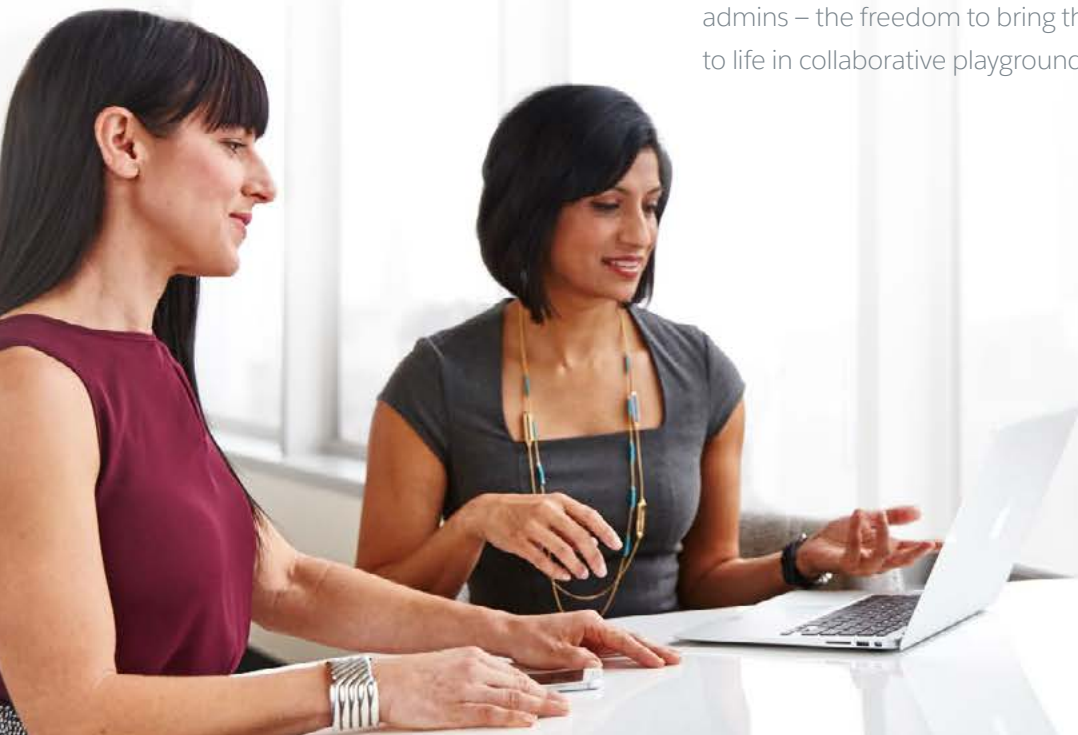
Install apps to get you moving faster.

Before you build, always look through the AppExchange for prebuilt apps that you can install right away.

Building apps on Salesforce App Cloud can help you solve a range of business challenges – but why build apps if they already exist?

The AppExchange is the world's leading business app marketplace, with over 3,000 apps and nearly 4 million installs. AppExchange apps are customized for Salesforce with built-in solutions for every department and every industry, so you can quickly browse the marketplace, identify the solution to address your particular needs, and quickly install that app into a sandbox environment. Then you can test it out before you deploy. There are hundreds of free apps to get you started, as well as full-blown, enterprise-grade apps that your IT team will thank you for evaluating, and helping to keep their backlog moving.

AppExchange apps are pre-integrated with Salesforce, and share a secure data and identity management model, so you don't have to worry about integration or security hassles. Plus, you can continue to customize these apps – which means you can install the app you want, and leverage developer tools to make it work even better for your business.

By turning to AppExchange to install apps built by partners, you can solve a wide range of business challenges in a matter of minutes, rather than days, weeks, or months. You'll be saving valuable IT resources and customizing how you use Salesforce all at the same time. The possibilities are endless with the variety of apps available on AppExchange.
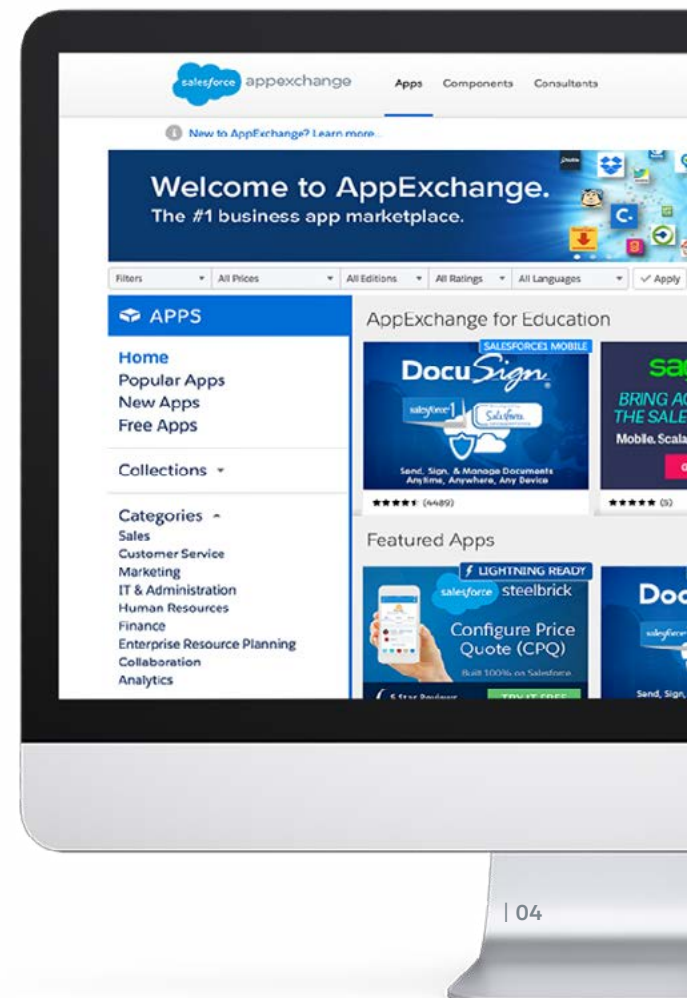
Turn every employee into an app developer.

For many businesses, developers are the driving force behind innovation. But with developers in short supply and IT resources squeezed, every organization needs to find a way to expand the pool of people who can build apps. The Lightning Platform enables almost anyone within your business to build apps and customizations fast for desktops and mobile devices using powerful drag-and-drop tools. Lightning was designed so that anyone at anytime can customize their CRM solution, ensuring that no matter the business process, Salesforce allows its users to be more effective and successful.

And Salesforce Lightning Ecosystem is the #1 enterprise apps ecosystem with third-party components for better customization and app building. You can boost collaboration and agility for your developers by implementing a development culture that takes full advantage of Salesforce sandboxes.

You can run your business faster by building robust, customized apps that your employees and customers will love. Giving developers, admins, and line-of-business users the flexibility and agility they need to respond to requests and deliver innovation to the business faster is great for your bottom line. By fostering a collaborative development culture, and leveling the playing field through declarative development, you'll be able to iterate applications on a two week cycle – versus months or years.

"Salesforce has enabled us to innovate and iterate in ways that were simply not possible before. With Salesforce as our partner, the quality of our apps, and time to market, is now unparalleled."

Andrew O'Hare,
VP, Digital Technology,
Forever Living
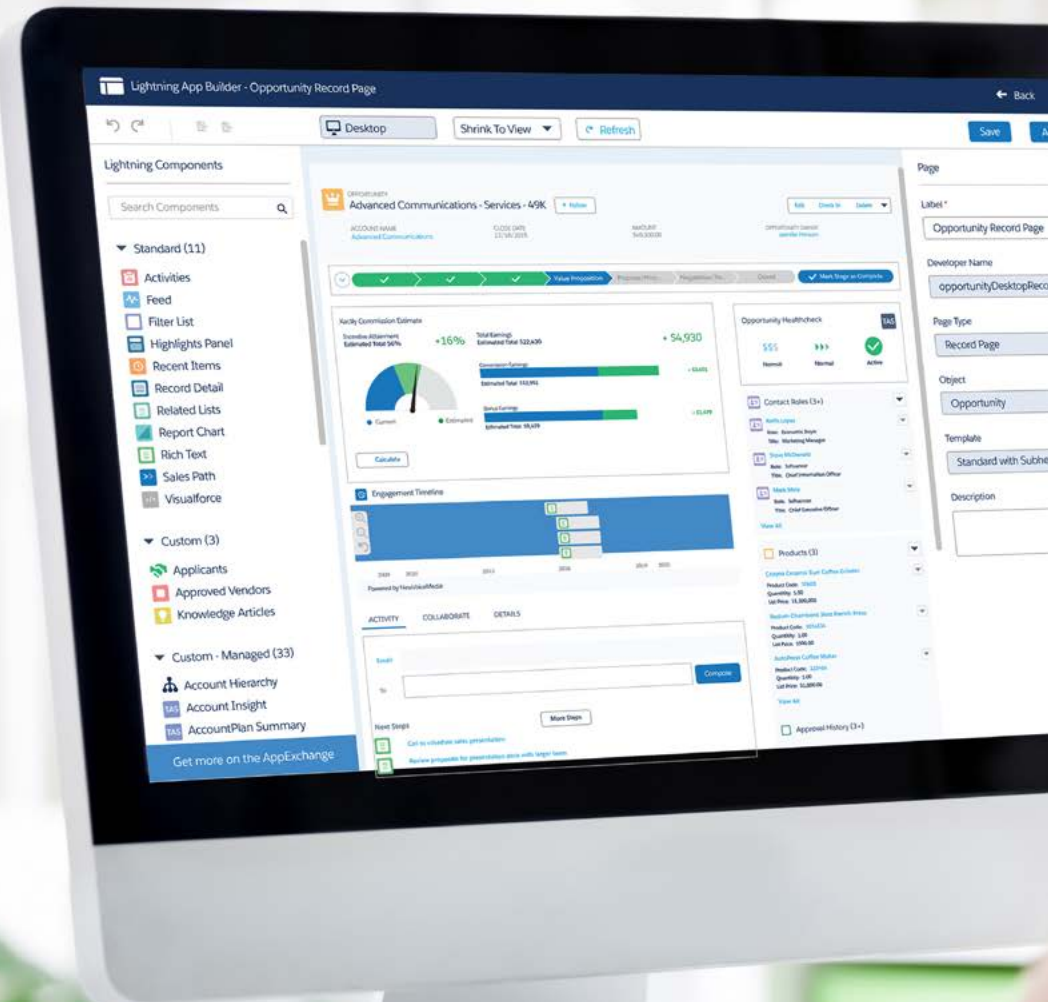
Use insights to improve employee and system performance.

As your organization increases its use of Salesforce, you'll gain more insight into employee performance and how they conduct their business – making Salesforce adoption even more important. Not only does Salesforce help you understand the type of data being accessed and how it's accessed, it also identifies the key work habits of your top performers.

Event Monitoring gives you greater visibility into user actions to help you better support your applications, audit your users, and optimize business processes. By unlocking this valuable usage data, you can analyze and visualize events and gain insights like never before.

With Event Monitoring enabled, you can monitor your top performers and underperformers, see how and when reports and pages are accessed, and track adoption of key features such as the Salesforce1 Mobile App. All of this will help you ensure your teams have access the resources they need, while identifying best practices and trends of top performers.

Salesforce App Cloud delivered

478% ROI Business Value

" IDC White Paper, sponsored by Salesforce, title, forthcoming June 2016

Add real-time protection for enhanced security.

Modern businesses are mobile businesses. Teams are often global – working in different regions and time zones, and using a range of mobile devices carried from cafe to cab, hotel lobby to airport gate. With this freedom and flexibility to work anywhere comes extra work for teams in charge of ensuring proper system usage, access, and security. The old way of addressing these risks was to build walls around sensitive data, which impacted the user experience whenever someone tried to access data using an irregular pattern. There had to be a better way to ensure policies were being followed and prevent any breaches to those practices.

But implementing real-time security policies is no small feat. How can you enable employees to work from anywhere on any device while simultaneously ensuring only the right people have access to the right data? And how can you instantly block a suspicious transaction while maintaining a great user experience for your employees?

Identify and prevent malicious or unintended user actions with automated policies.

Event Monitoring gives customers the ability to not only monitor, but also to act on usage behavior in real time with Transaction Security. This new feature provides a flexible, customizable security engine that gives you the power to identify and prevent malicious or unintended user actions with automated policies. The response to these actions changes dynamically based on context such as device, profile, and location – delivering a great user experience and reducing risks.

Now you can create policies with clicks or code to protect data in real time. Your Salesforce developers and admins can create an unlimited number of dynamic Transaction Security policies with code, or select from a set of standard policies via Setup interface.

"As a leading financial services company operating in Australia, we chose Salesforce to transform how we interact with our customers. With Salesforce Shield, we've been able to move our sensitive, regulated data to the cloud quickly without compromising our user experience. With Transaction Security, we'll be able take real-time action on user behavior to further bolster our compliance and governance."

Matthew Doughty,
General Manager
Corporate Technology
The Australian Security Exchange

Quickly take your salesforce security vitals.

You're tracking business-critical information and customer data in Salesforce and granting access to so many people across your employees, partners, and contractors. How are you making sure you're taking the right steps to ensure your data is protected?

Companies of all shapes and sizes share the same challenges: How to understanding and stay up to date on security, while seeing how it relates to your business applications? How to configure security within a range of environments? And how changing security

requirements impact your configuration and settings, posing challenges for administrators to ensure compliance across the full application portfolio range.

Lightning Security Health Check bridges the gap between your security requirements and actual implementation in a unified , providing a central location for managing security settings across all your Salesforce organizations. The percentage-based visual benchmark bar instantly compares your security settings to Salesforce's best-practice recommendations. You can edit

settings directly from the dashboard and ensure all your settings are aligned with our recommended standards. Up-leveling your security on Salesforce has never been easier.

Now, when your CISO or head of IT security come by your desk to discuss the health of your salesforce implementation you can have a single dashboard to manage security for all Salesforce organizations, benchmark-driven recommendations to bolster security, and a single-click configurations to up-level security and compliance.

"We're continuously integrating innovative security services so customers can always set the level of security that meets their business needs."

Taher Elgamal,
CTO, Salesforce Security
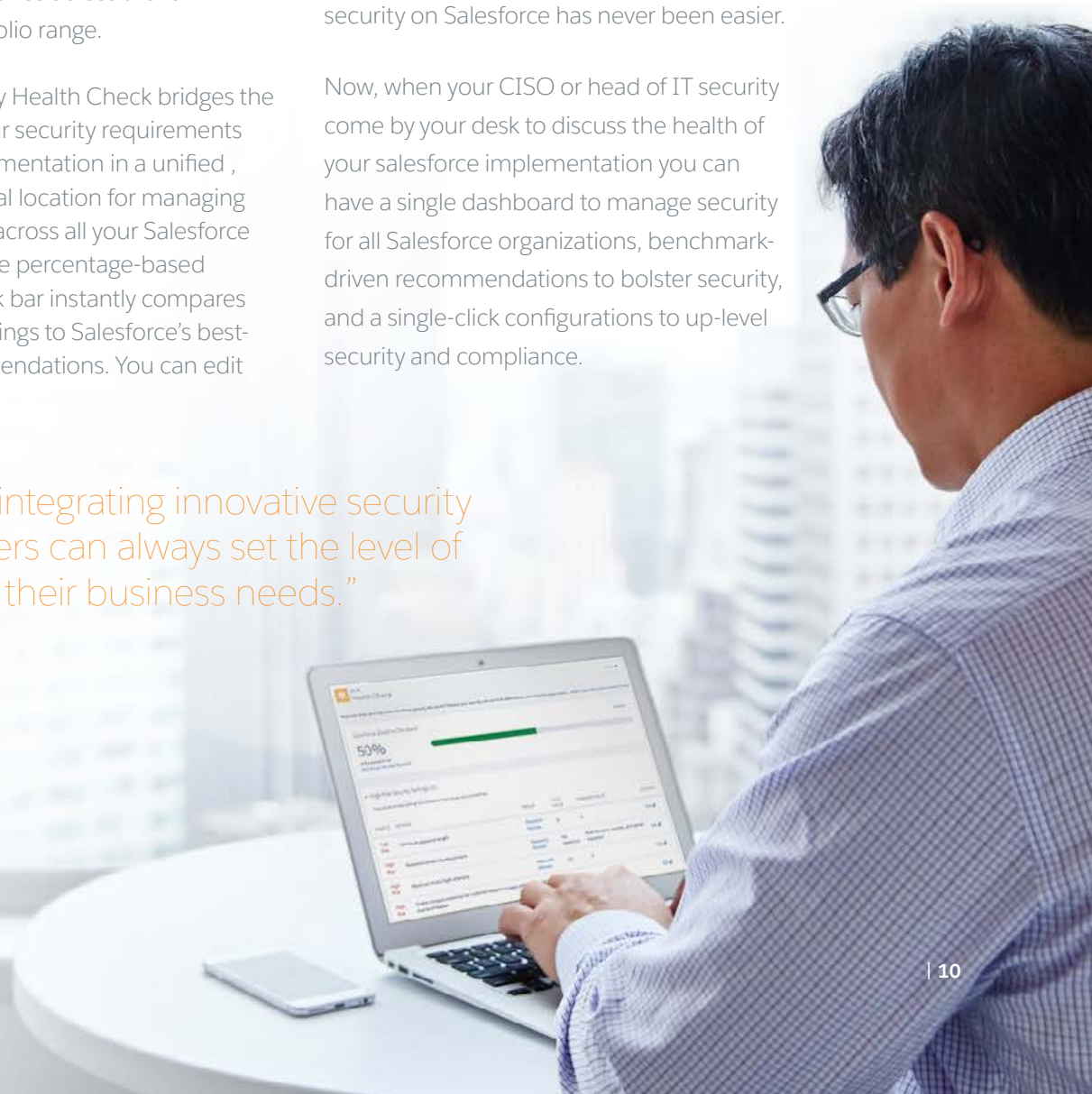
Say hello to the back office.

As the "2016 State of IT" report revealed, two-thirds of teams are integrating with 11 or more systems. This expensive, time-consuming (and often out of date by the time it's completed) approach to accessing siloed data systems will soon be a thing of the past.

Now you can use Salesforce Connect to represent and edit your external object right within Salesforce. By turning to Salesforce Connect, your business can quickly pull external data into your organization so you can build custom apps, run queries, and create related lists with all your data from Oracle, Workday, SAP, additional Salesforce organizations, and more.

Salesforce Connect allows you to tightly integrate external data sources into your apps, giving your employees and customers seamless access to data from across your organization, from any device. Now, both

Business users will immediately be able to access these once inaccessible data sets for a true 360-degree view of customers.

admins and developers have ways to connect data. Admins can use point-and-click tools to connect to any APIs using the Open Data Protocol (OData) in minutes. Developers can write simple Apex adapters to connect to data from any web service API.

External data sources are connected to Salesforce using OData, and metadata describing external data sources is stored in Salesforce an external object. Admins and developers can build data from external objects right into their apps, but the data is only ever referenced in real time, and never copied to Salesforce.
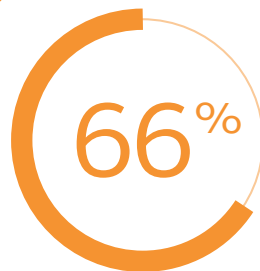
66% *of IT teams are integrating 11 or more systems.*

Your business can change the way it thinks about integration, transforming it from a burden into an opportunity.

Business users will immediately be able to access once-inaccessible datasets for a true 360-degree view of customers, empowering your organization with a single source of truth between all your disparate systems and resulting in improved business workflows for your employees.

- Read/write external data in real time, without copying data to Salesforce

- Connect multiple Salesforce instances across your enterprise

- Tightly connect any API-accessible data source to Salesforce

- Integrate in hours with more point-and-click tools and less code

Create one trusted identity for all your apps.

The ways in which we access information keeps increasing thanks to apps. Companies are using dozens of apps to run their businesses; from ADP and Workday to Google Drive. The proliferation of apps creates more logins, passwords, and security codes to remember. As your company continues to build and adopt more applications, your employees, customers and/or partners, are continuously faced with the need to set user logins and passwords. This can cause friction, slow people down, and usually results in a poor experience. Additionally, the rapid deployment of cloud applications is challenging legacy identity systems and adds a heavy burden on IT resources.

What if you could solve this, and provide a seamless way to access multiple disconnected apps?

Salesforce Identity is the industry's most flexible identity provider with support for extensible schema, declarative validation rules, batch processing, triggers, workflow, and more. Salesforce Identity is an Identity and Access Management (IAM) service that enables you to manage and extend identity across your company's entire library of apps. This gives your employees and partners instant access to the apps they need from one trusted login. And it helps you create a 360-degree customer profile that enables more meaningful relationships, better user experience, and increased security, all customized to your business.

With Salesforce Identity, you can integrate all of your users' applications on one secure platform, with one set of login credentials, thereby accessing existing external directories and incorporating two-factor authentication for added security. This will help you deliver a single identity to all your users, ensure access from anywhere, and provide the right apps to the right people.

This ease of use can transform how your organization works and boost your IT environment with Identity and Access Management services for all of your employees, partners, customers, applications, and devices. By creating a single identity for every app and providing single sign-on for all your cloud, mobile, and on-premises applications, your business can work faster than ever, all the while freeing up your valuable IT and security resources. Now you can have a single platform for all your identity services including: single sign-on; mobile identity; social sign-on and collaboration; external identities; user and access management; cloud directory; multi-factor authentication; and customizable open APIs.

> *More than a third of surveyed respondents said that up to 25% of annual help desk calls were related to password issues.**

*Benchmark Your Employee Password Policies And Practices The Good, The Bad, And The Ugly: S&R Pros Have No Choice But To Coexist With Passwords While Assessing Alternatives", by Merritt Maxim and Jennie Duong, September 9, 2015 | Updated: September 14, 2015

salesforce app cloud

The fastest-growing companies are using Salesforce to drive innovation.

By leveraging the #1 enterprise cloud platform, App Cloud, organizations can build business critical applications that keep employees, customers, and partners happy, engaged, and inspired. By taking advantage of these eight steps, you can ensure that you too are getting the most out of your Salesforce investment, strengthening your Salesforce organization so you can optimize your investment.

Want to learn more about Salesforce App Cloud?

WATCH DEMO

Or call a sales representative at
1-844-463-0828