



Salesforce Easy simplifies consumption choice

Making it easier for small businesses and outlying
teams in large organizations to get on board with
Customer 360 at their own pace



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The art of persistent customer relevance

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About this report

Salesforce announced [Salesforce Easy](#) at Dreamforce 2022. It provides a new way of consuming CRM built on the Customer 360 Platform. The design goals were to make it easier for small businesses or teams in larger organizations to adopt CRM at their own pace via self-service and without the need for an implementation partner.

While Salesforce’s meteoric growth continues, mainly on the back of large enterprise sales, with its flagship CRM platform Salesforce Customer 360, behind the scenes, the vendor has been busily developing a more elastic and lower-cost option at \$25 per user per month for small businesses or remote teams in large companies. There is, however, considerably more to Salesforce Easy than an attractive price point. Following a detailed briefing from Kris Billmaier, GM & SVP responsible for the development and success of Salesforce Easy, and his colleague, Eddie Cliff, Sr. Director, this report provides an overview of the solution, its context, and why startups, small and medium-sized businesses or larger companies with outlying teams, should take a closer look.

To aid understanding of the potential value of Salesforce Easy and where it fits best, we follow the story of a fictitious product company and the typical challenges faced as it moves through five ‘life’ stages from startup to large enterprise.

[CX-Create](#) is an independent IT industry analyst and advisory firm focused on advances in customer engagement technologies and strategies. Founder and Chief Analyst Jeremy Cox, the author of this report, has more than 30 years of CRM and customer engagement experience as a practitioner and advisor.

Highlights:

- The business context for Salesforce Easy and five stages of growth
- Business advantages of Salesforce Easy at each of the five stages of growth
- Summary of the main features and benefits of Salesforce Easy
- CX-Create's viewpoint on Salesforce Easy and recommendations

The business context for Salesforce Easy

Maximize opportunities for growth and evolve without disruption

Successful businesses go through multiple transitions and face different challenges as they grow. Figure 1., illustrates five different stages and their associated challenges. Naturally, not all companies will follow this idealized path, and no solution today is sufficiently elastic to suit businesses from the solopreneur up to the largest global enterprise. However, a significant design advantage offered by Salesforce Easy is that it is built on the same underlying technology as Salesforce Customer 360, its established CRM platform for mid-market up to the largest enterprise. As businesses grow and become more complex, they can evolve into Salesforce Customer 360, selecting the modules they need and avoiding technical debt and disruption.

The Salesforce Easy product development team shares regular R&D briefings with its Salesforce Customer 360 counterparts. The reason for being closely aligned is to ensure a smooth evolutionary path to the full-blown Customer 360 platform through modular progression.

Before getting into the detail of Salesforce Easy, it helps to understand the different stages and challenges faced by companies as they grow and where Salesforce Easy fits. Figure 1 illustrates the various life stages of a company and how its challenges and needs evolve. It is for illustration only. Priorities will differ by company, as will the adoption of different Salesforce modules.

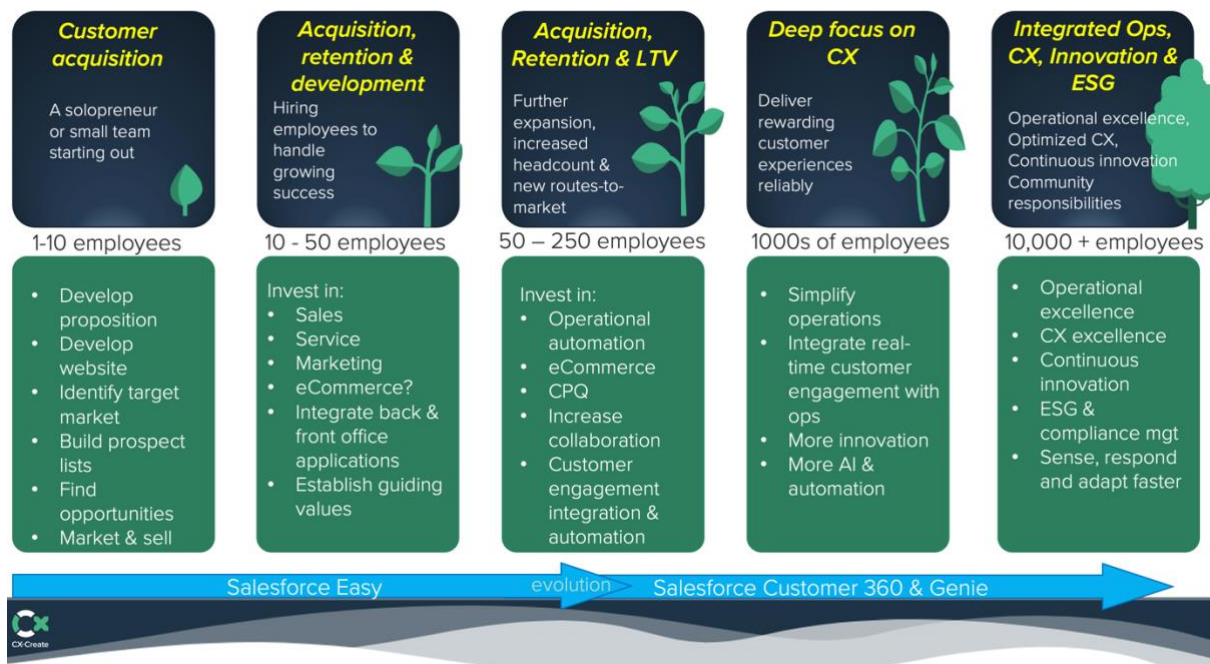


Figure 1: Common priorities and challenges across five growth stages of a business (for illustration only)

Stage 1 - Customer acquisition – the challenge for the solopreneur or small startup team

We'll follow the life of a fictional company with big ambitions in the waste recycling industry to illustrate the impact on CRM needs as it grows.

A small team of former colleagues and experienced engineers pooled their redundancy money and decided to strike out independently. They previously worked for an industrial waste recycling company acquired by a larger international company. After an evening's brainstorming, the idea came to them to use their expertise to radically change the time-honored process of household waste collection and inefficient municipal recycling.

After several months of trial and error, they developed an ingenious low-cost device for home waste recycling that converted food waste into fertilizer that could be used as garden compost and plastic waste that could be compressed into small pellets for recycling.

They establish a company and pay a third party to develop a website as their online shop window. They find their first willing customer, someone introduced by word of mouth. At this stage, their business IT needs are limited to email and applications like Microsoft Office 365. They are not ready for CRM other than a simple contact list. But over time, as their blog posts generate site visitors from prospects and referrals to potential buyers, keeping up-to-date prospect lists becomes an administrative headache. Their sales approach is a mix of direct sales taken at various home exhibitions and indirect through white goods retailers.

They also want site visitors who have given their details to receive an automatic welcome and to keep track of all emerging opportunities they wish to be automatically prompted to follow up on leads promptly. It would also be helpful to keep records of prospects from other sources and receive timely prompts to recontact prospects that exhibited interest but were not at that time ready to buy.

As website traffic increases and sales mount up, a simple and low-cost CRM system with basic automation would be helpful and ensure that no opportunities are missed and that any follow-up calls are made at the right time. At \$25 a month, Salesforce Easy could be the ideal solution, especially if a plugin for their WordPress website automatically updates the prospect list and sends a welcome email notification and follow-up reminders. Starting on the right foot will save missed opportunities further down the line when they are tied up in demonstrations or proposal writing. The three clicks signup process and templated guidance based on just a few questions make it easy to sign up and get going. They also have free access to [Trailhead](#), Salesforce's online tutorial platform, to learn from a vast community of Salesforce experts and practitioners.

Stage 1 advantages of Salesforce Easy

- The current version includes sales and service – marketing coming in 2023. Email templates and forms and integration with your website create automated responses.
- Try before you buy.
- Three clicks signup.
- Low cost \$25 per user per month.
- Prescriptive out-of-the-box experience incorporating established Salesforce best practices.
- Easy to import contact data from existing spreadsheets and emails.
- Easy onboarding with guidance and templates based on best practices shortens the time to value.

Stage 2 - Acquisition, retention, and development

After a brilliant first year that exceeded expectations, the team recognized that to cope with the influx of business; they must hire more salespeople and focus on customer service. Instead of selling their device one at a time at exhibitions, they have caught white goods retailers' attention and signed up one with one of the premier stores with branches in most cities in the country. It's critical to hire the right people who will have some credibility with buyers and keep up the sales momentum. With a few teething problems experienced by customers associated with confusing instructions, they know any negative word of mouth could undermine their growth ambitions, so customer service must be on top of its game. Proactive service enables the firm to pre-empt early teething problems by offering hints, tips, and video examples online and via email. Resolving issues quickly will also encourage wider use and customer retention, generating more revenue and higher levels of customer satisfaction.

The possibility of adding eCommerce was considered, but the CEO judged that the firm was already facing considerable change and moving too early might negatively impact customer service. It will undoubtedly be on the agenda on the next horizon. Getting the underlying operational 'plumbing' in place was essential before moving forward on eCommerce.

At this stage of the firm's development, it is critical to establish values as guiding principles for new employees. Salesforce owes much of its success since starting with just four people and now with over 50,000 by religiously following its [V2MOM](#) approach for strategic alignment across the company (follow the embedded link for more information). Vision and values drive culture, and for this firm to succeed, new employees must embrace the core values and gain a sense of common purpose and identity that translates into trusting customer relationships.

By now, work patterns had been established, and processes were formalized so new employees could get on board rapidly and deliver consistent results. Back-office functions and accounting systems will need to be integrated with CRM so that all customer-related data, including past orders and transaction values, are unified into a single customer database. As the firm evolves into a larger organization, it is essential that whoever interacts with a customer has all the information to hand, from sales to service and finance.

Stage 2 advantages of Salesforce Easy

- Integrated sales and service based on best practice templates, ensuring new starters learn quickly and follow processes consistently.
- Customizable to meet any unique process needs.
- Consistent unified view of the customer, allowing for full ROI transparency.
- Having access to a unified view of customers and prospects eliminates silos and fragmented customer data that lead to poor decision-making and lost opportunities for sales, and poor customer service – as the business continues to expand, the importance of this will only increase.
- Free access to Trailhead provides additional employee development opportunities, equipping them to handle new challenges and boosting employee retention.
- Dashboards allow the leadership team to monitor progress and make decisions based on accurate data.

Stage 3 – Acquisition, retention, and Lifetime Value (LTV)

Fast forward three years and the firm has received a substantial capital investment while remaining independent. This enabled them to move from its small workshop into larger premises to increase the production of its innovative device. It also paid for new low-energy digital tooling to speed up manufacturing and enhance the quality. Plans for a more advanced version of their device will make it easier to operate. With over 150 employees and broader business application adoption, including ERP, a new FD has been appointed. Most business comes via white goods retailers, a B2B2C approach that.

One of FD's first tasks was to analyze sources of income over the years and perform customer profitability (CPA) and lifetime value analysis (LTV) to focus the company's efforts on acquiring, retaining, and developing new customers with the greatest profit potential. This would provide a greater focus for the growing marketing and sales teams and boost cash flow for further R&D investment. The analytics from Salesforce Easy contributed to the rapid CPA analysis.

The leadership team had set its sights on expanding the business overseas and improving cross-organizational collaboration to swarm around opportunities to solve challenges faster, boosting productivity and removing departmental barriers. With these two goals in mind, the decision was taken to expand the use of Salesforce Easy and add eCommerce, [Slack](#), and [CPQ](#). CPQ would provide sales with the tools they needed to set up contracts with major retailers and ensure pricing was correct and profitable, whatever features and options were required.

It was essential to tie operations to marketing, sales, and eCommerce to generate a demand-led approach to procurement and supply, eliminating the need for expensive buffer stocks. The aim was to create a fluid end-to-end growth machine in which all parts of the organization worked fluidly and productively. Operational excellence would be the backbone for reliability, delivering on customer promises, and reinforcing the company's burgeoning reputation.

Stage 3 advantages of Salesforce Easy

- The integrated Salesforce Easy platform ensures that data flows smoothly to everyone who needs it, and advanced analytics generate trusted insights and aid decision-making.
- The platform's modular nature will ensure that the eCommerce module snaps into the Salesforce Easy platform without disruption and generates quick time to value.
- Slack proves a boon in bringing the organization together and supporting ad hoc collaboration as new opportunities or challenges emerge. It also facilitates faster decision-making and speed to action.
- CPQ ensures that sales can confidently establish annual contracts with retail buyers and price correctly
- Embedded best practices, guidance, and Trailhead courses ensure effective deployment of the new eCommerce module and accelerate learning and adoption.
- Position the company for expansion and, when required, migrate seamlessly to Customer 360

Stage 4 – a deep focus on Customer Experience (CX)

Over the last two years, the company has expanded quickly but in a carefully managed manner. It has come a long way, with now around a thousand employees and climbing, as new markets come onstream. Direct from eCommerce and indirect retail sales have increased, and the company has won considerable industry recognition for its operations

and reliability. It is known for delivering highly responsive customer service, aided by its ability to make rapid decisions and cross-organizational collaboration with Slack.

Nevertheless, it has become a more complex organization with offices in several countries in Europe and intentions to gain a footprint in the US and Singapore with the aid of partner organizations in manufacturing and distribution. Further efforts to simplify operations and shorten supply chains are underway. The CEO is also keen to eliminate any bureaucracy that has crept into the organization as the business has grown. Operational and customer engagement silos have surfaced in some areas, and it's time to shift the emphasis from make, market, and sell to a more customer-driven, customer-adaptive enterprise with the customer as the trigger for adaptation and innovation. Competitors have also caught up in some countries. To avoid margin erosion and commoditization, the company must differentiate by delivering a superlative real-time omnichannel customer experience and, through continuous innovation, give them a reason to return.

The top priority is delivering compelling customer, retail channel, and partner experiences. Salesforce Easy has served the company well, but keeping up-to-date customer and product information and reacting in milliseconds across all buying journeys, online and offline, will be essential for delivering a responsive and relevant customer experience and continued growth. It's time to evolve to [Salesforce Customer 360](#) and take full advantage of [Genie](#) and [Einstein](#) and the richer reporting capabilities offered by [Tableau](#).

The CEO and leadership team want to take the organization to the next level with a relentless focus on the customer and the ability to sense, respond and adapt the experience at the individual customer level outlined in Figure 2. – a customer-adaptive enterprise.

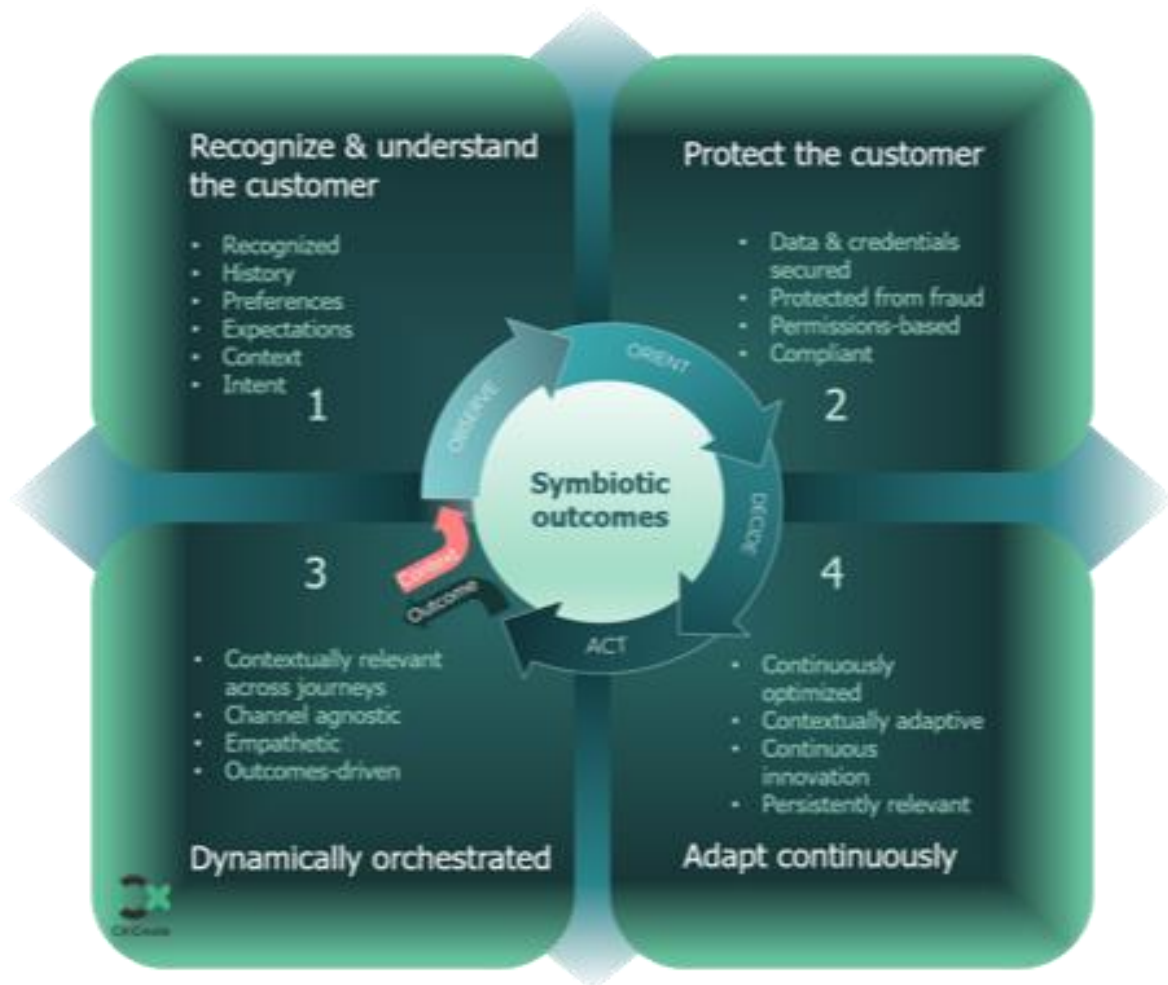


Figure 2: Vision of a customer-adaptive enterprise

Delivering relevant responses across all customer journeys will shift from static pre-planned responses relying on intelligent guesswork to intelligent responses that depend on unified and contextual customer data, AI to derive learnings from the outcomes, and sub-200-millisecond responses when that is critical to the experience. Genie, Salesforce’s enterprise customer data platform (CDP), provides real-time contextual information, and Einstein tees up the most relevant response and monitors outcomes. Customer 360 provides the platform and functions to help employees deliver outstanding experiences and business outcomes. It also provides a platform for low-code app development that the firm’s software and product engineers can use to innovate. Embedded IoT is also on the agenda to provide live performance monitoring and software upgrades to improve the performance of its waste recycling products, even when the customer is asleep. [MuleSoft](#) from Salesforce will provide the integration capabilities. Voice activation is an example of its latest upgrade.

Fortunately, having built the company’s customer engagement capabilities on Salesforce Easy, the transition to Salesforce’s enterprise CRM platform can be executed rapidly and with minimum disruption.

Stage 4 – advantages of Salesforce Easy

- Salesforce Easy uses the underlying Customer 360 technology, which is already compatible, making the transition to the enterprise edition straightforward.
- Salesforce Easy enables companies to upgrade to Salesforce Customer 360 with minimum disruption when the time is right. Existing data, processes, and practices can be maintained with Trailhead educational support to help employees take advantage of new capabilities.

Stage 5 – Integrated operations, CX and Innovation

The company is now a big player in waste management and recycling on a global scale. The Customer 360 platform is helping the organization sense, respond, and adapt quickly to ensure persistent customer relevance and a competitive edge. Its entire value chain is driven by its customers. Operational excellence adaptations, CX, and continuous innovation are triggered by customers changing needs and behaviors. As the company has developed, so has its need to onboard and train software engineers to work at a detailed code level on software embedded in its products. However, in the business domain, especially in CX, there is a need for less qualified employees to rapidly develop and spin up applications, especially mobile apps, to give customers more control and a better experience. Fortunately, the Customer 360 platform provides [low code tools](#) for the business user through the [Lightning App Builder and Trailhead](#) courses to develop their expertise and confidence.

Beyond operational excellence, CX, and continuous innovation, the company also has responsibilities to the communities it serves. Its core business is fundamentally environmental, and irrespective of changes in external reporting requirements, the CEO wants the company to be a leader in the Environmental, Social, and Governance (ESG) domain and the drive to a zero-carbon footprint. Salesforce's [Net Zero Cloud](#) is on the agenda with the Customer 360 platform. It will help the company manage real-time sustainability data, automate the tracking of supplier emissions to ensure the entire supply chain contributes to net zero, and provide further recommendations and mitigations to reduce carbon emissions.

Summary of the main features and advantages of Salesforce Easy

As the name suggests, the design philosophy behind Salesforce Easy is to make it simple for small businesses to use Salesforce's CRM technology to grow efficiently and maximize opportunities. The simple onboarding process involves three clicks, providing a consumer-grade buying experience. Potential customers can also try before buying without the need to provide credit card details. A simple questionnaire tailors the onboarding experience, supported with online guidance based on best practices.

As the business needs grow, firms can subscribe to additional modules or relevant bundles without investing more heavily in elements they may not need. Optional bundles are being

developed, so Salesforce Easy today should be considered the 'starter pack' at \$25 per user per month to help small businesses get up and running, supported by best practices guidance. Easy Expansion Paths, including Advanced Sales and Service bundles, are currently under development.

Development timeline

- A home page for all things Easy will soon be launched where customers can learn about key features and guidance on getting started. The home will evolve into a Cross-Cloud Business Center, allowing users to explore other modules or bundles as they emerge.
- Service Easy updates, including a simplified email-to-case feature, is imminent. A Console and omnichannel and success spotlight will be published in November 2022
- In-app and web messaging is expected in January 2023
- Marketing Easy, including templates, email builder, and campaign model supported by intelligent reporting, is expected in 2023.
- Sales experience enhancements, [Activity Management](#), and quoting support will come in 2023.
- Easy Expansion Paths – advanced sales and service bundles and advanced marketing, including journey mapping and workflow support, will come in 2023.

CX-Create's viewpoint and recommendations

Salesforce Easy lives up to its name, offering a low-cost CRM platform that can be expanded as a business grows. While a more detailed roadmap would be helpful, the integrated sales, service, and customer data management offers a good start for a small company or an outlying team at a remote location in a large organization. Salesforce's decades of CRM expertise and market-leading position have enabled the vendor to harvest best practices in sales, marketing, and service across a wide range of industries. Embedding best practice guidance during the easy onboarding process will help small companies, perhaps with limited exposure to CRM, embed positive disciplines and avoid common pitfalls.

The growth stages outlined above illustrate that Salesforce Easy is suitable not just for startups and small companies but also for mid-sized businesses that do not need the level of sophistication delivered by Salesforce Customer 360. It is also suitable for large organizations needing to provide a fast start, for an outlying team, or following an acquisition. It also allows these companies to start their journey toward Customer 360 by adding expansion paths/bundles progressively.

The Easy development teams' frequent interactions with their Customer 360 product teams will likely benefit both parties. Introducing greater simplicity in the Customer 360 platform and ensuring that Salesforce Easy remains aligned to minimize disruption for companies migrating from Easy to Customer 360.

Appendix

Further reading

[Introducing Salesforce Easy](#) - Salesforce

[Platforms are needed to eliminate silos](#) – CX-Create

[Salesforce takes a principled approach to ethical AI to maintain trust](#) – CX-Create