



# **SALESFORCE IN YOUR INBOX**

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**BETTER SALES ENABLEMENT,  
BETTER SALESFORCE ADOPTION**

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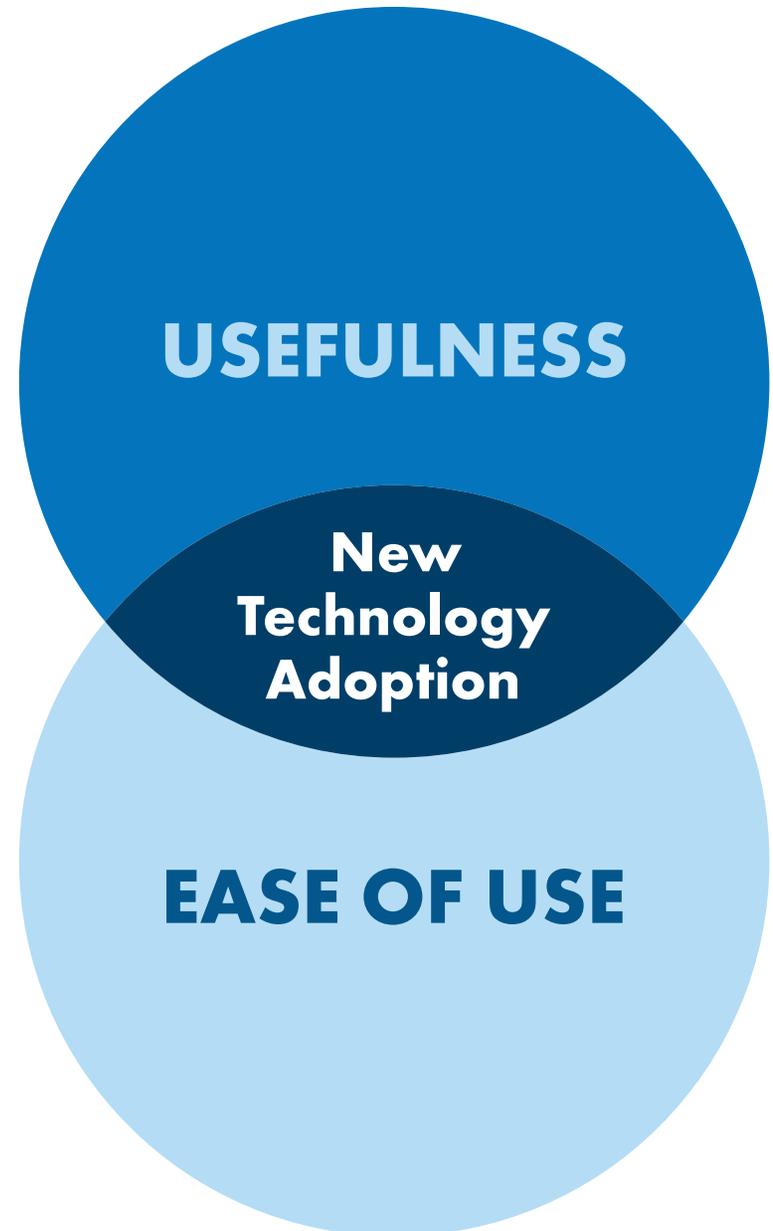
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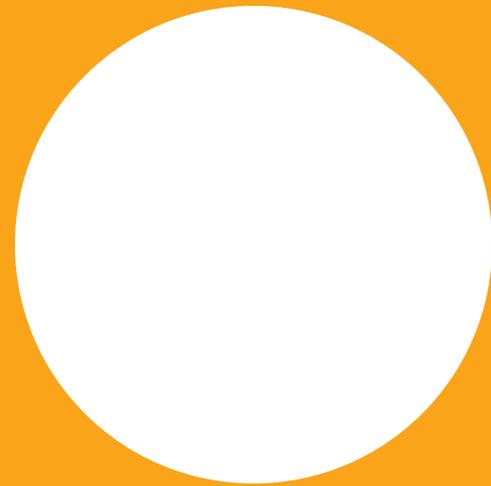
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## Introduction

Adoption of a new technology hinges on two factors: **usefulness** and **ease of use**. There's no argument—a properly functioning Salesforce deployment is useful. **But many users find Salesforce overwhelming and inefficient, hurting adoption rates and the usefulness of the CRM.**







**Native solutions**  
**do little** to remedy  
this problem.

**BCC-to-Salesforce**

Con: Only works on outbound emails,  
only relates emails to contacts

**Salesforce for Outlook**

Con: Not cloud-based, difficult to set up  
and configure

**“Flip-flopping” between Salesforce  
and the inbox**

Con: Time-consuming, produces  
low-quality data



Cirrus Insight:  
**Easy &  
Integrated**

**Email-to-Salesforce** to any record—  
opportunities, cases, custom objects

**Deep integration with enterprise  
support** for custom objects, related lists,  
and email tracking

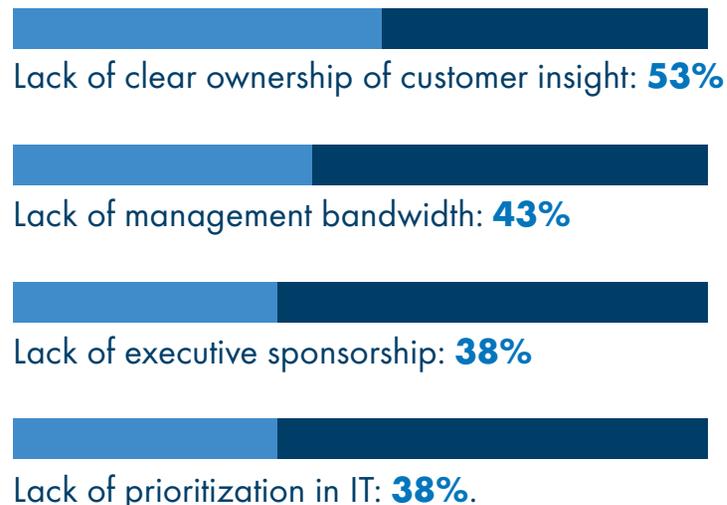
**See relevant Salesforce  
information** right in the inbox

# THE #1 REASON FOR LOW SALESFORCE ROI

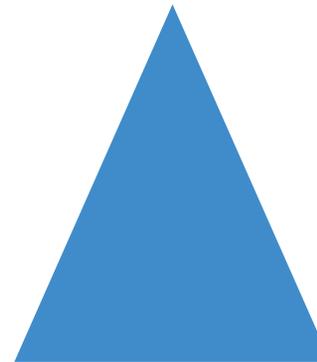
Salesforce can be incredibly hard to get people to use. **In fact, the #1 reason for poor Salesforce ROI is poor Salesforce adoption.**

## Consider that:

CRM initiatives fail primarily due to:

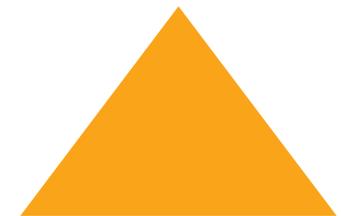


80%



**of senior executives** say their biggest CRM challenge is getting their staff to use the software.

47%



**of companies** have a comprehensive Salesforce adoption strategy.



# Meet the Users Where They Are

The inbox is where customer communication happens.

1.



## Love starts in the inbox.

- A fast and efficient turnaround drives customer loyalty.

**90%** of customers expect a response within one day.

2.



## Customers arrive in the inbox.

- **In 2013, 100 billion emails were sent** and received daily in the business space.
- **In 2017, 132 billion emails are expected to be sent** and received daily.

3.



## Employees build their homes in the inbox.

- On average, **employees check their email 288 times a day.**

4.



## The inbox is where sales happen.

- **Revenue from email has increased** proportionately by **28%** in one year.

- **Sales workflow:**
  - Create opportunity
  - Create new contact
  - Log email
  - Set followup task
  - Set meeting appointment
  - Create opportunity
  - Send followup emails and track opens
  - Make and log phone calls
  - Update opportunity to closed/won

5.



## It's where support happens.

- **60% of customers list email** as their preferred method of communication.

- **Support workflow:**
  - Update contact
  - View and manage case
  - Log email
  - Update custom object
  - Close case

More and more, **businesses are turning to products that enhance email capabilities.** They expect **hard data, visible results, and advanced business intelligence.**



### Key Analytics:

- **Advanced business intelligence:** See who's opening your emails, whenever and wherever they do it.
- **Visible results:** Gamify your business and see who's saving the most emails, logging the most calls, creating the most leads, and more.
- **Hard data:** Use your already-built Salesforce templates, and see which email messaging is most effective for you.



### The Race is On:

- **Native solutions for email + Salesforce integration** offer little that truly helps a business. At some point, the training wheels need to come off. Cirrus Insight is the solution for organizations that want the most robust, powerful, and effective productivity app on the market.
- **Cirrus Insight is the only mobile inbox app on the market that integrates with Salesforce 1.** That means you get access to the full power of Salesforce right from any email in your inbox.

# DID YOU KNOW? MOBILE CRM...

Increases  
average  
sales by  
**20%**



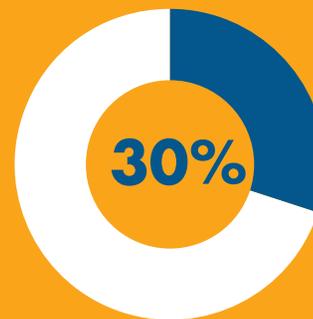
Lowers  
the cost of  
sales by  
**15%**



Achieves  
90% key  
field  
completion  
in customer  
records



Reduces  
billing lag  
time by  
**30%**



**INCREASES**

the average number of  
sales calls per week by

**15%**

Source: "Why Go Mobile? Six Strategic Objectives You Can Conquer with Mobile CRM," CRM Software Blog 2013

# ENTERPRISE-READY: MANAGE CHANGE AND MAXIMIZE ROI

Let Cirrus Insight tie everything together for you. **We serve some of the world's biggest and fastest-growing companies**, including several of the Fortune 500. Cirrus Insight offers:



**Employee training** and customizable deployment schedules



**1-to-1 screenshare** with lightning-fast support response



**Best practices and years of experience** with change management

**We truly believe that no one offers as effective a Salesforce + email integration as we do.**

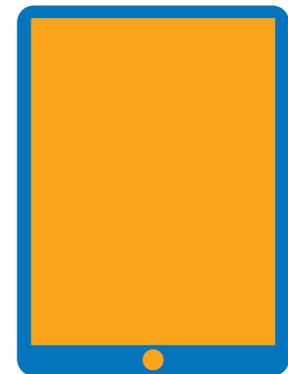
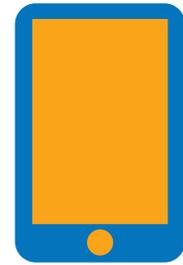
As you look for the solution that works best for you, consider these factors:

Criteria	Cirrus Insight	Company A	Company B
Email Tracking	✓		
Salesforce Templates in Gmail	✓		
Fully featured mobile app	✓		
Automatically tracks usage with deep analytics	✓		
Serves support, marketing, and sales employees	✓		
Automatic support for custom fields and custom objects	✓		
Two-way calendar sync	✓		
Contact sync	✓		
Supports record types, dependent picklists, custom fields, and validation rules	✓		
Integrates with leading AppExchange apps	✓		
Quick/easy installation	✓		
Account management dashboard	✓		
Create and update Salesforce leads/contacts inside Gmail	✓		
Create and update Salesforce records inside Gmail	✓		
Works across multiple company domains	✓		
One-to-one screenshare support with video guides	✓		

3

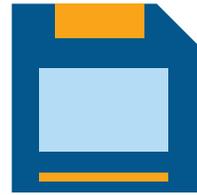
# EVERYWHERE YOU WANT TO BE

**Cirrus Insight supports all email and device platforms.** We're a cloud-first, mobile-first company. Whether you're in Gmail, Office 365, Outlook, or use an iPhone, iPad, Android, or Windows Phone, Cirrus Insight natively supports you and your business.



# CIRRUS INSIGHT FOR GMAIL

## Save and Track Emails to Salesforce



Never miss a sales conversation again. With Cirrus Insight, you can track and save emails to Salesforce with just a click. Relate emails to any object in Salesforce, standard or custom. See who's opening your emails and when. Discover which emails and subject lines are connecting and which need work.

## Create and Edit Salesforce Records



Create new leads, contacts, opportunities, and cases right from Gmail. Update existing records and manage your entire sales pipeline and support tickets without leaving your inbox. Even access custom fields and related lists!

## Sync Salesforce with Google Calendar & Contacts



Automatically sync your Salesforce and Google calendars with the only solution that automatically relates events to attendee records. Sync Salesforce contacts to Google, as well.

## Automatically View Contextual Salesforce Information



You communicate with your customers in Gmail, but their information is in Salesforce. Now you can automatically view contextual Salesforce information inside Gmail as you talk with your customers. Always know exactly who they are and where they are in the pipeline.

# CIRRUS INSIGHT FOR OFFICE 365

- 1. Save Emails & Attachments** to Salesforce
- 2. Track Emails:** See who, where, and when your emails are opened
- 3. View Salesforce Info** right in Office 365
- 4. Manage Salesforce Tasks & Activities** in Office 365
- 5. Use Salesforce Email Templates** right in the inbox
- 6. Create & Edit Salesforce Records** in Office 365

## **Save and Track Emails to Salesforce**

Never miss a sales conversation again. With Cirrus Insight, you can track and save emails to Salesforce with just a click. Relate emails to any object in Salesforce, standard or custom. See who's opening your emails and when. Discover which emails and subject lines are connecting and which need work.

## **Create and Edit Salesforce Records**

Create new leads, contacts, opportunities, & cases right from Office 365. Update existing records and manage your entire sales pipeline and support tickets without leaving your inbox. Even access custom fields and related lists!

## **Manage Salesforce Tasks & Activities right in Office 365**

Create and keep track of all your calls, emails, tasks, and activities right inside your inbox. Log calls and relate them to Salesforce records quickly and easily, and never miss a followup.

## **Automatically View Contextual Salesforce Information**

You communicate with your customers in Gmail, but their information is in Salesforce. Now you can automatically view contextual Salesforce information inside Gmail as you talk with your customers. Always know exactly who they are and where they are in the pipeline.

# CIRRUS INSIGHT FOR IPHONE, IPAD, ANDROID, AND WINDOWS PHONE

## List of Features

1. **Save Emails** to Salesforce
2. **Track Emails:** See who opens, when, and where
3. **Create and Edit Records** from your inbox
4. **Automatically View** contextual Salesforce info
5. **Make and Log Calls** from your inbox
6. **Set Followup Tasks** and schedule meetings

### Works With Any Email Client

Cirrus Insight isn't just for Gmail anymore. Cirrus Insight Mobile works with any email client including Gmail, Outlook, and Lotus Notes. All Exchange ActiveSync or IMAP-enabled email platforms are supported.

### Save and Track Emails to Salesforce

Never miss a sales conversation again. With Cirrus Insight, you can track and save emails to Salesforce with just a click. Relate emails to any object in Salesforce, standard or custom. See who's opening your emails and when. Discover which emails and subject lines are connecting and which need work.

### Create & Edit Salesforce Records

You talk to your customers in your inbox, but their data is in Salesforce. Now you can quickly create and edit records right from your inbox. Create new leads, contacts, opportunities, and cases, as well as update existing records. That's the power of Salesforce right in the mobile inbox.

### Automatically View Contextual Salesforce Information

Customer communication occurs in your inbox, but their information is in Salesforce. Now you can automatically view contextual Salesforce information inside your mobile inbox as you talk with your customers. Always know exactly who they are and where they are in the pipeline.

# EQUIP WITH THE BEST

Cirrus Insight allows you to maximize your resources for sales efficiency. By bringing together email and CRM into one powerful app, you harness the full potential of your two most important business productivity tools. Make your software work for you.

**1-844-287-0950** | **[sales@cirruspath.com](mailto:sales@cirruspath.com)**

