

# FORVIS<sup>®</sup>

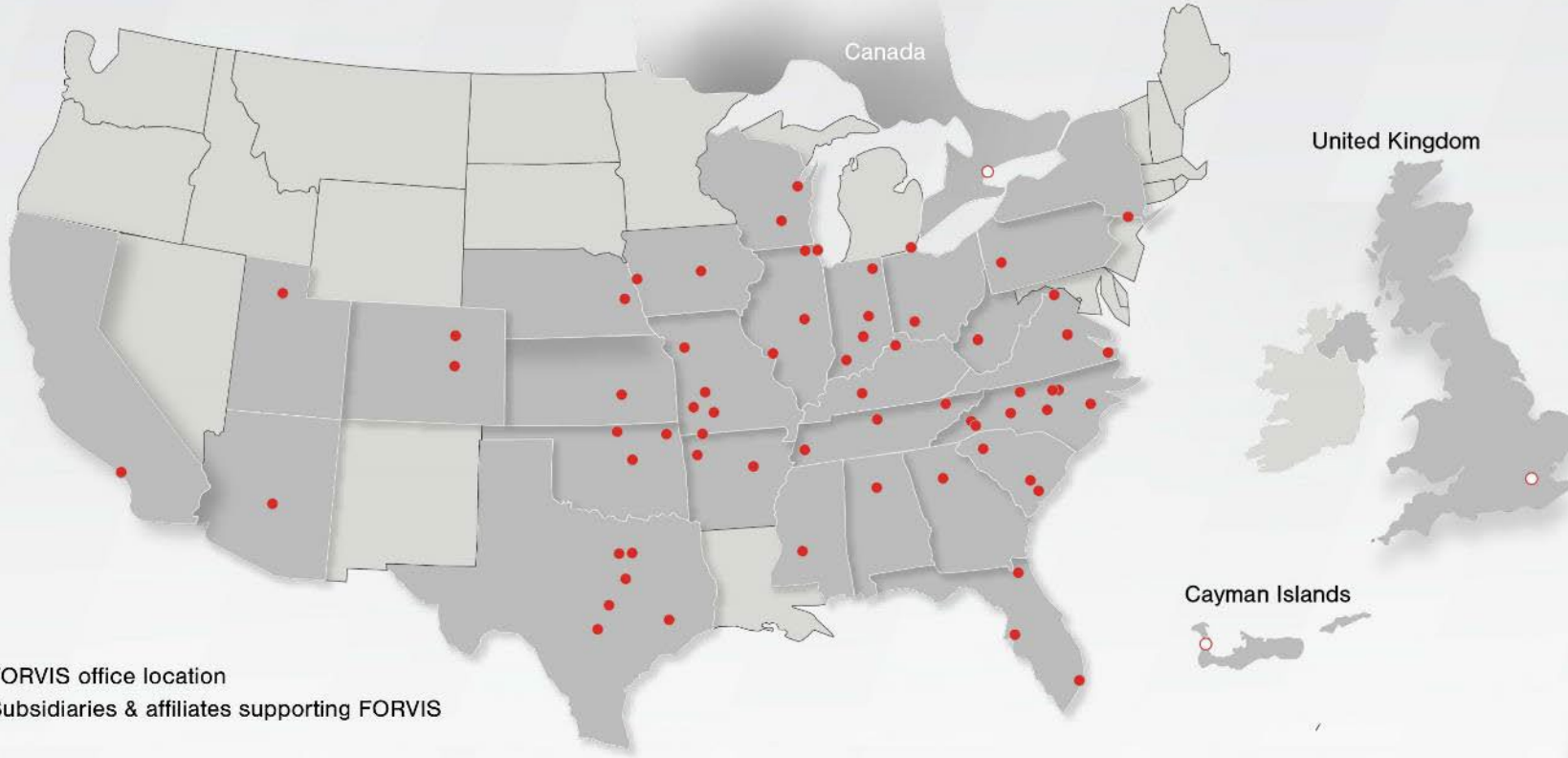


Business Technology Solutions

## Salesforce Sales Cloud vs. Service Cloud: Finding What Fits

May 1, 2024

# Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

## Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Global Advisory Canada ULC\*\*
- TALENT SHIFT, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Ltd. UK\*\*

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\*\*FORVIS was ranked number eight on Inside Public Accounting's 2022 annual ranking of accounting firms by revenue.

## By the Numbers

**Top 10**  
U.S. Public Accounting Firm \*

**27**  
States + Canada, U.K., & \*\*  
Cayman Islands

**10+**  
Industries

**68**  
Markets

**500+**  
Partners & Principals

**6,000+**  
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

\*\*Services outside the United States are provided through our subsidiaries and/or affiliates supporting FORVIS.

# Business Technology Solutions

**FORVIS** provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.



In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.

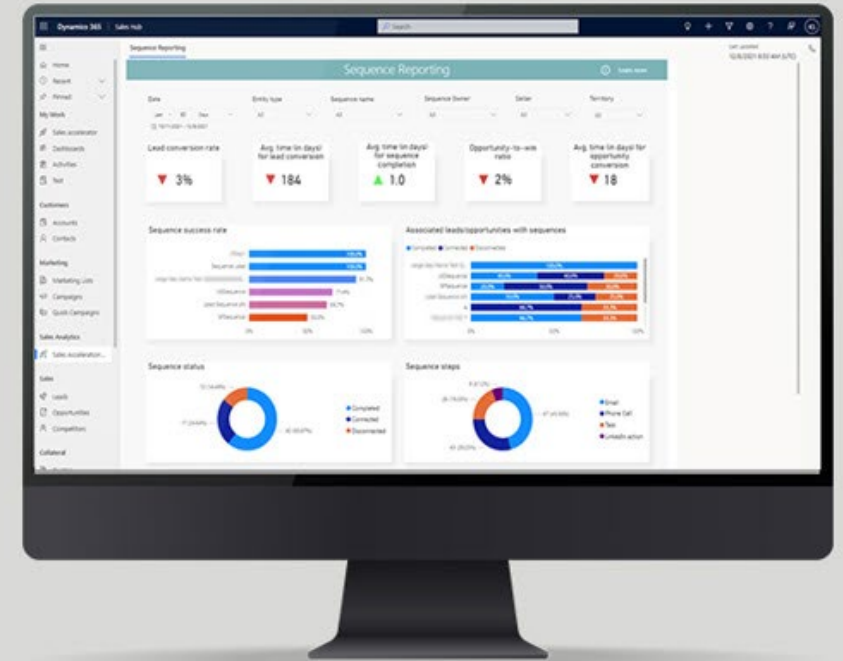
# FORVIS

Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

# Meet the Presenters



**Kristin Voelz**  
Senior Consultant

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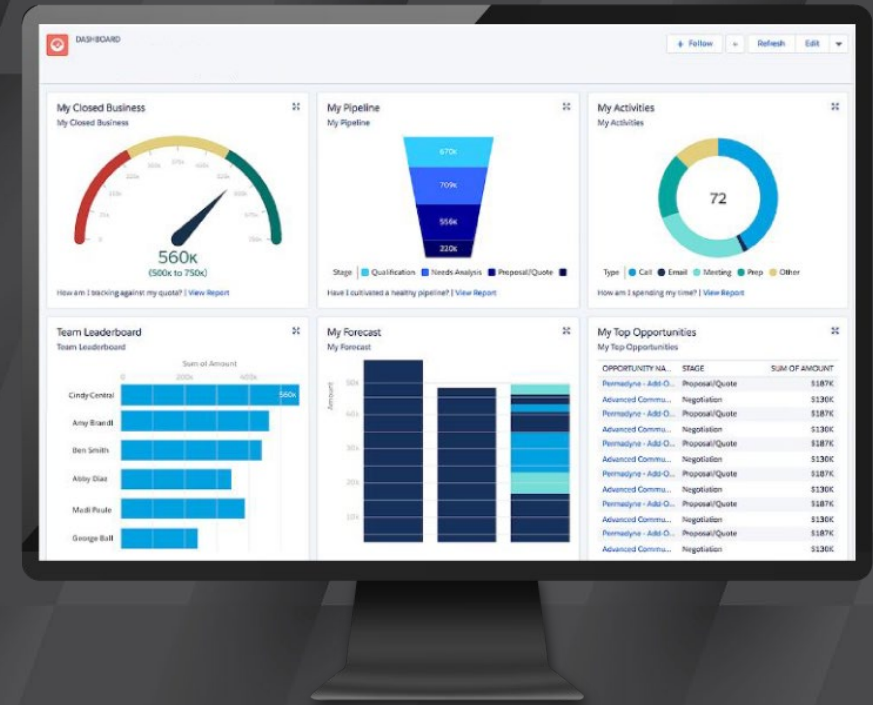


**Sheri Wanasek**  
Senior Consultant

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Business Technology Solutions

## Salesforce Sales Cloud vs. Service Cloud: Finding What Fits

May 1, 2024

# Objectives

- Describe the key differences between Salesforce Sales Cloud & Service Cloud & the intended use cases
- Discuss the main features & capabilities of each platform
- Identify the factors to consider when deciding between Sales Cloud & Service Cloud for your business requirements





# Agenda

- Shared Features of Sales Cloud & Service Cloud

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- Sales Cloud Focus & Target Audience

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- Service Cloud Focus & Target Audience

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- Considerations for Platform Decision

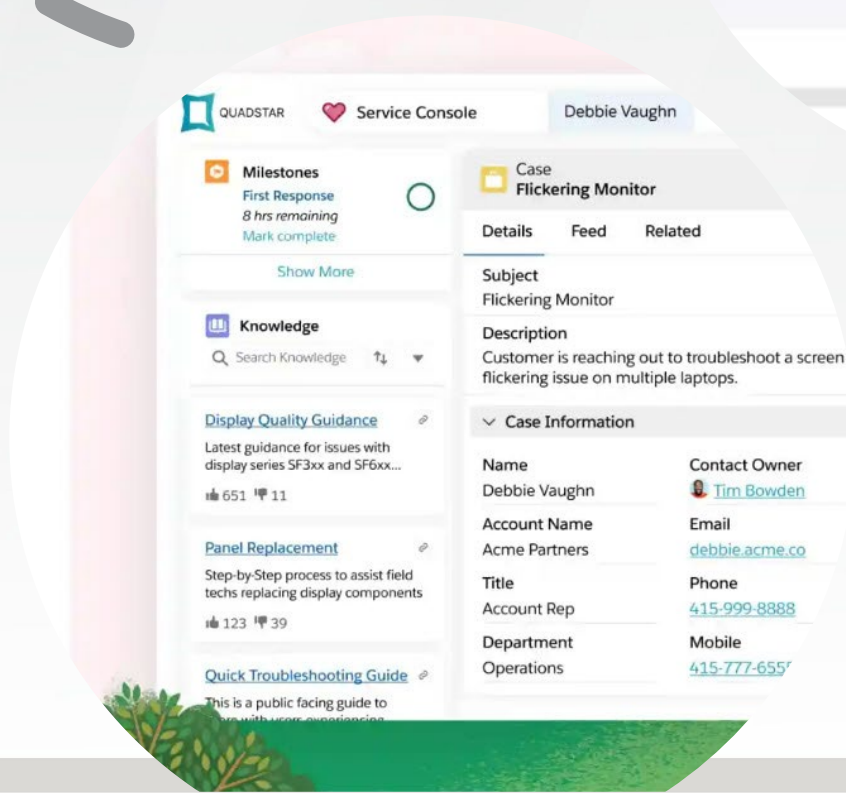
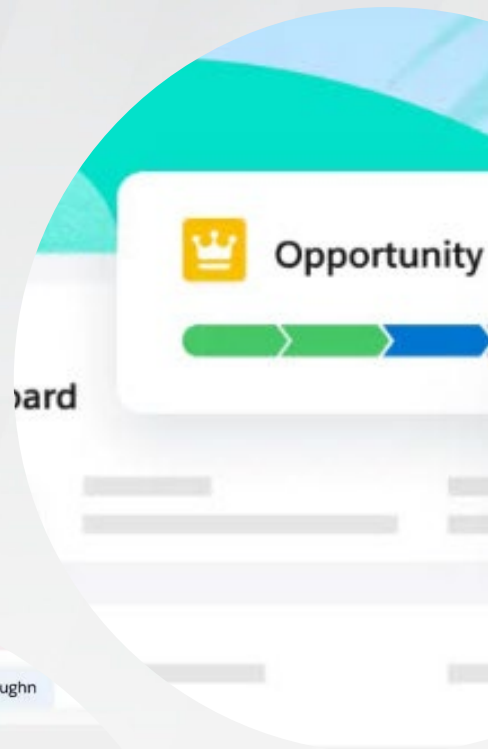
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- Q&A

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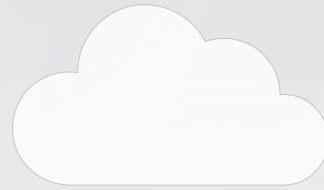
# Shared Features

- Built on the core Salesforce platform
- Help organize **Accounts & Contacts**
- Can help organizations grow
- Can help improve customer satisfaction
- Offer basic **Case Management**
- Can be enhanced with add-ons





# Shared Features



## Sales Cloud

- **Basic** Case Management
- Reports & Dashboards
- Tasks, Activities, & Campaign Management
- Calendars & Event Scheduling
- Integrated Content Library & Access to Self-Service Portals
- Can Seamlessly Integrate With Chatter, Einstein Analytics, & Other Salesforce Clouds
- Salesforce Mobile App

## Service Cloud

- **Robust** Case Management
- Reports & Dashboards
- Tasks, Activities, & Campaign Management
- Calendars & Event Scheduling
- Integrated Content Library & Access to Self-Service Portals
- Can Seamlessly Integrate With Chatter, Einstein Analytics, & Other Salesforce Clouds
- Salesforce Mobile App

# Self-Service Portal

- Experience Cloud
- Add-on
- Available for both Sales Cloud & Service Cloud

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# Self-Service Portal

- Salesforce's portal technology is called **Salesforce Experience Cloud** (formerly Salesforce Portals, Community Cloud)
  - Salesforce Experience Cloud helps you create branded digital experiences to share information & collaborate with people who are key to your business processes, such as customers, partners, or employees
  - Whether you call it a portal, help forum, support community, or something else, an Experience Cloud site can be a great place to connect with your audience



Experience  
Cloud

Learn more: <https://www.forvis.com/forsights/2023/11/how-a-salesforce-customer-self-service-portal-can-help-cx>

# Self-Service Portal

- Allow customers to do some of the work that their customer service representative would need to do
- Make information available 24/7 to the customer
- Allow customers to maintain their own data so it's accurate & up to date
- Allow customers to submit cases



# Use Cases

- **Product & Service Information**
  - Offering detailed information about products & services, including specifications, features, pricing, & availability
- **Appointment Scheduling**
  - Allowing customers to schedule, reschedule, or cancel appointments for services, consultations, or support
- **Community Forums & User Discussions**
  - Creating a space for customers to engage with each other, share experiences, & seek advice in community forums or discussion groups
- **Feedback & Surveys**
  - Gathering customer feedback on products, services, & the customer experience through surveys, ratings, & reviews
- **Returns & Exchanges**
  - Providing a self-service process for initiating & managing product returns, exchanges, or warranty claims
- **Training & Onboarding**
  - Offering training resources, tutorials, & onboarding materials to help customers get started with products or services

# Sales Cloud – Focus & Target Audience



## Target Audience

- Sales Representatives
- Sales Managers



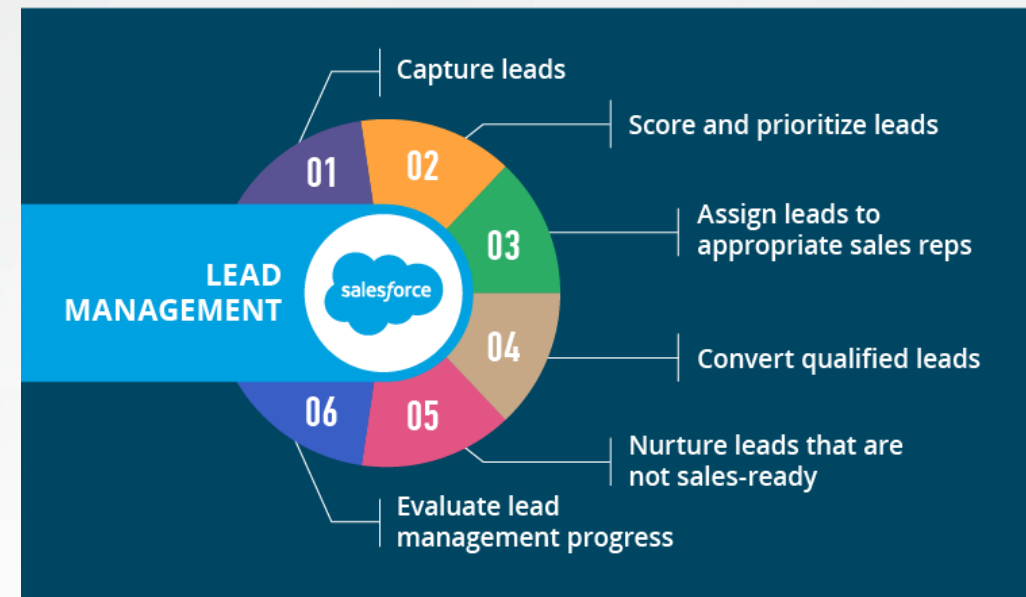
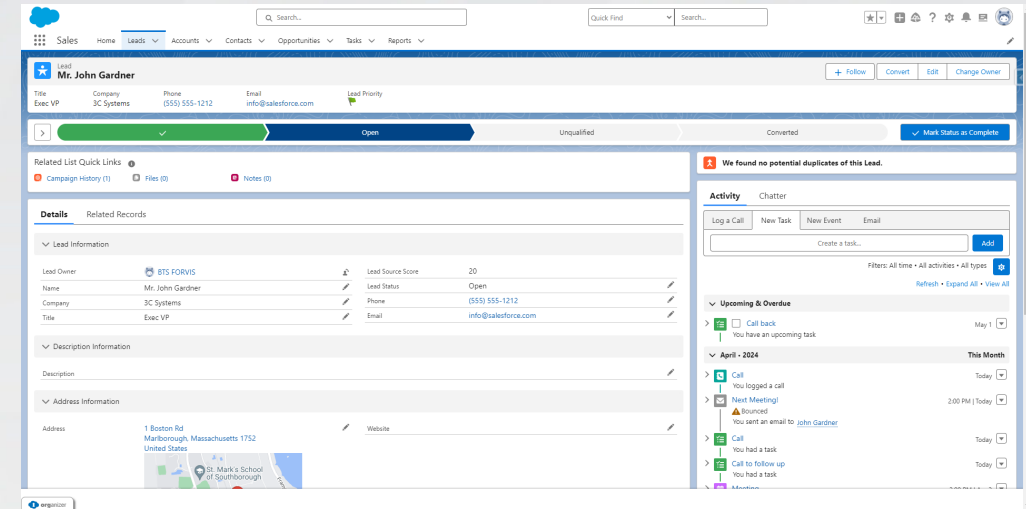
## Focus

Enhancing sales processes & improving sales team efficiency

Key areas: Lead Management, Opportunity Management, Quoting & Contract Management, Sales Collaboration, Sales Analytics, Mobile Accessibility, Email Integration, Automated workflows, AI-Powered Insights

# Sales Cloud – Lead Management

- **Lead Management** is a critical process that involves collecting, organizing, tracking, & nurturing potential customers from lead generation to conversion



The screenshot displays the Salesforce Opportunity Management interface for an opportunity named "Acme - 1,200 Widgets". The interface includes a navigation bar at the top with options like Sales, Home, Leads, Accounts, Contacts, Opportunities, Tasks, and Reports. Below the navigation bar, there are search and utility icons. The main content area shows the opportunity details, including the account name "Acme", close date "2/1/2021", amount "\$140,000.00", and opportunity owner "ITS FORVIS". A progress bar indicates the current stage is "Prospecting", with other stages like Qualification, Needs Analysis, Value Proposition, etc., shown as completed. A "Key Fields" table lists Stage (Prospecting), Amount (\$140,000.00), and Close Date (2/1/2021). A "Guidance for Success" section provides tips such as "Remember to update Stage" and "Determine if an Opportunity Team is needed." Below this, there are quick links for Contact Roles (3), Files (1), Notes (0), and Stage History (3). An "Account Details" panel on the right shows information like Account Name (Acme), Type (Prospect), Phone ((212) 555-4444), Website (www.website.com), Industry (Manufacturing), and Billing Address (10 Main Rd., New York, NY 11104, USA). At the bottom, a table shows related records with columns for Name, Close Date (2/1/2021), and Stage (Prospecting).

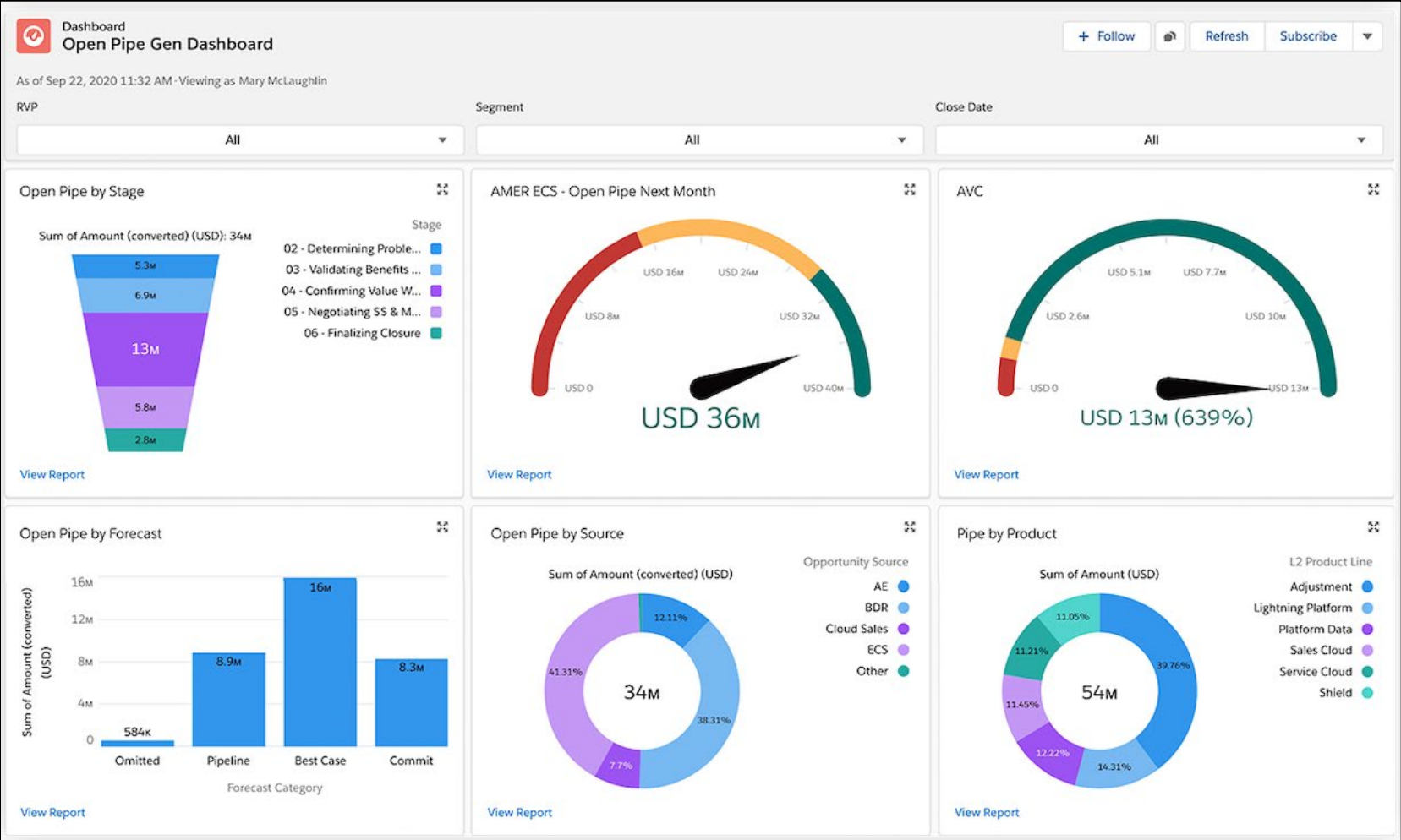
# Sales Cloud – Opportunity Management

- **Opportunity Management** helps streamline the sales process by providing tools for tracking deal stages, forecasting revenue, & enhancing team collaboration to efficiently close deals



# Sales Cloud – Sales Management Funnel

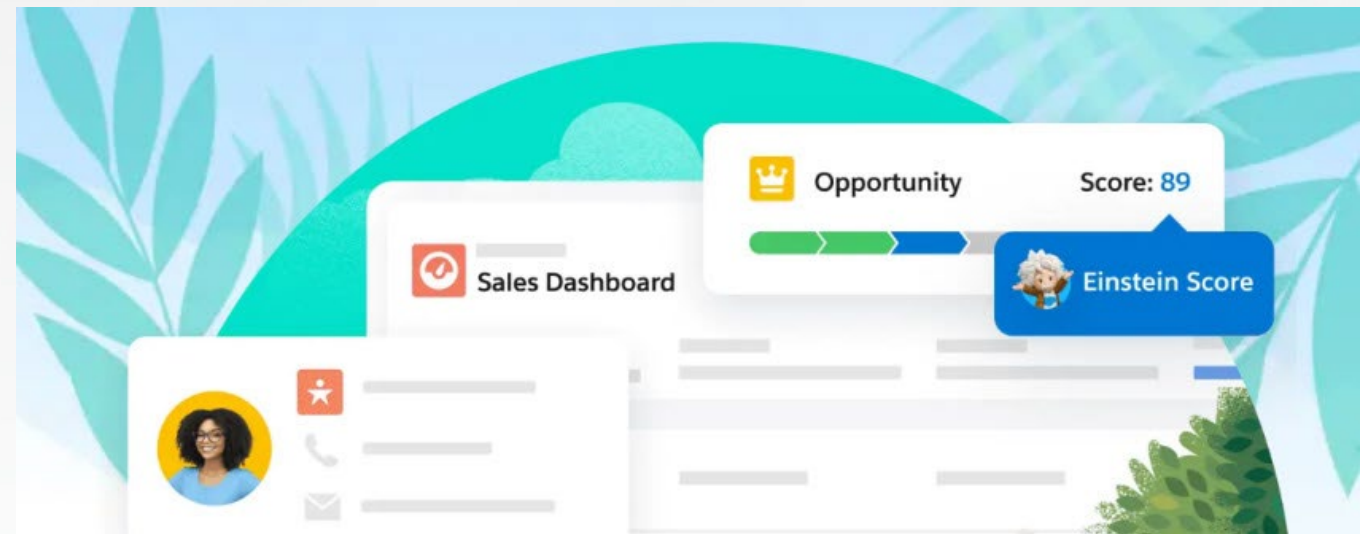
Effective **sales funnel** management involves tracking of leads, opportunities, & conversions, enhancing each stage to drive efficiency & improve revenue generation



# Sales Cloud Key Benefits



- Quick Wins
  - Automate & streamline processes
  - Centralized Data
  - Can integrate CRM & ERP
  - Lead prioritization
  - Enhanced data quality
  - Reports & dashboards



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# Service Cloud – Focus & Target Audience



## Target Audience

- Service Agents
- Service Managers



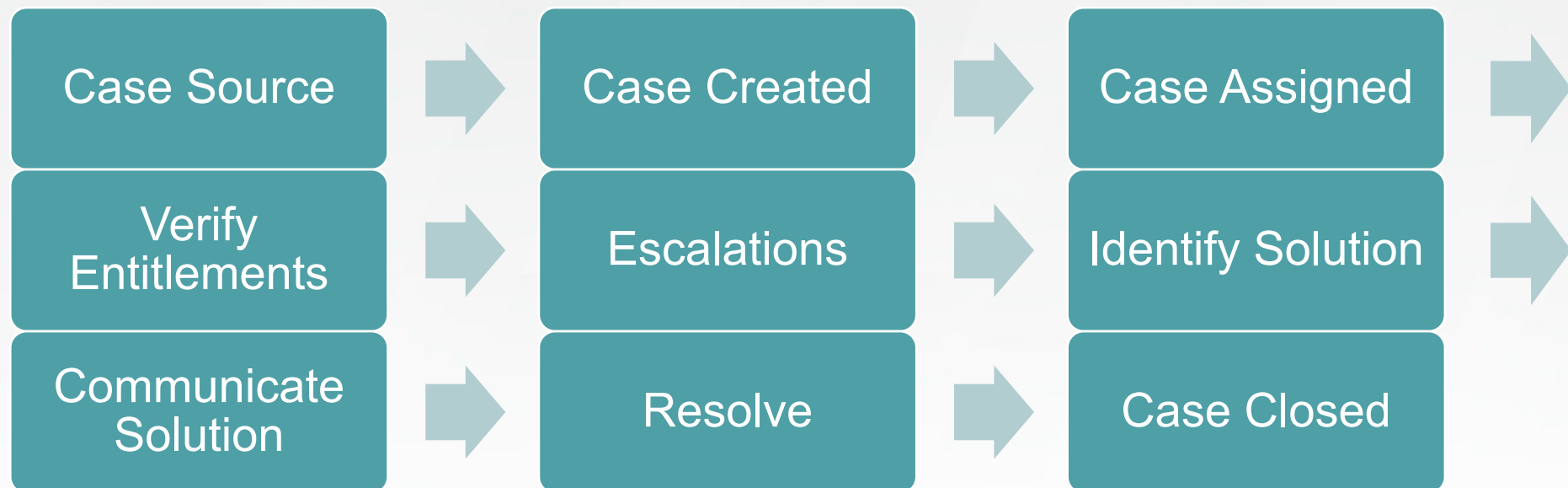
## Focus

Enhancing service agent efficiencies & elevating the customer experience

Key areas: Case Management, Entitlement Management, Omni-Channel, AI-Driven Insights, Email to Case

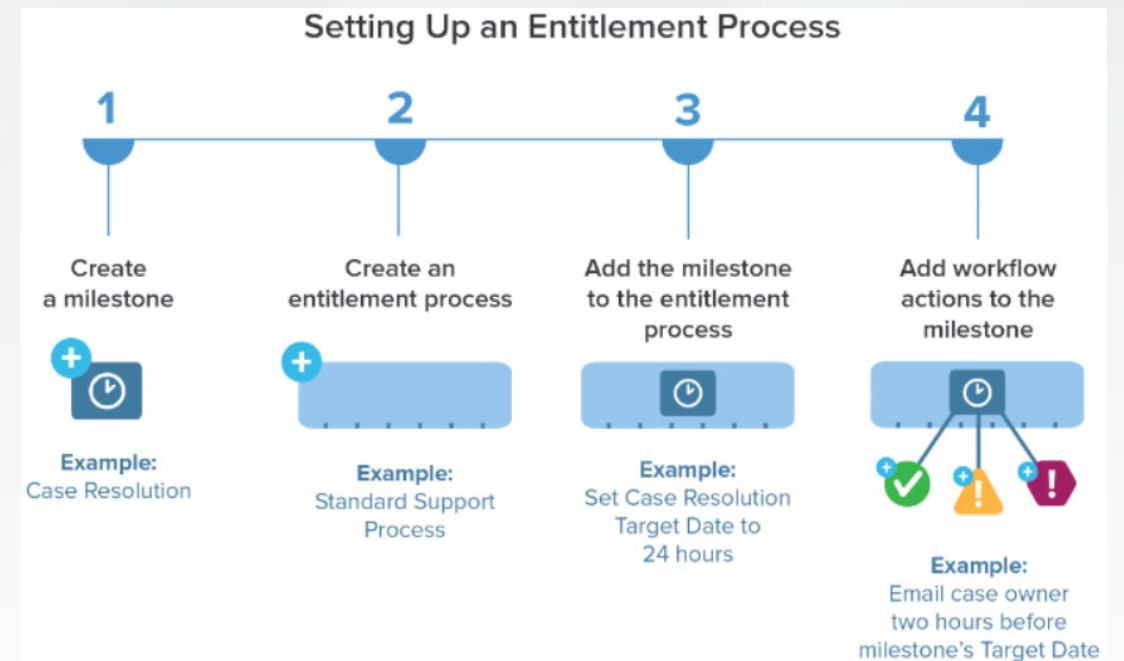
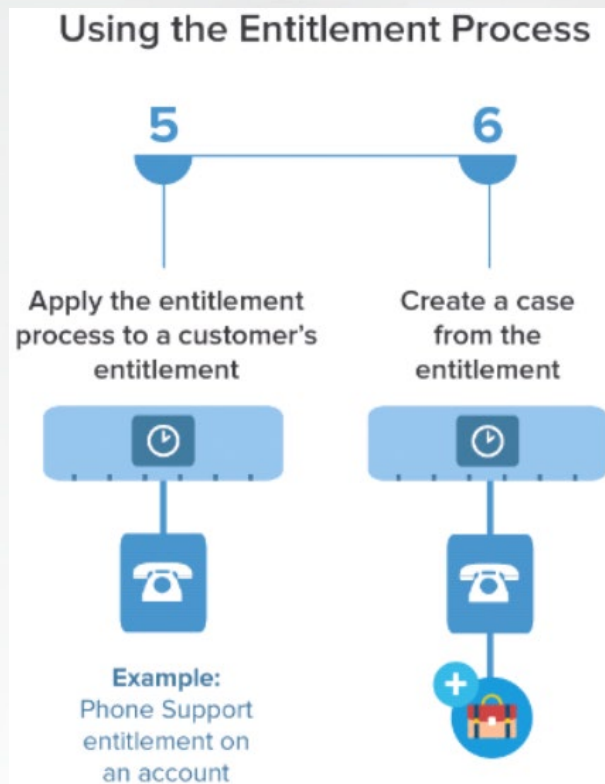
# Service Cloud – Case Management

- **Case Management** is the process to record, track, & resolve customer issues by sales, service, & support
- Case life cycle:



# Service Cloud – Entitlement Management

- Salesforce entitlement management helps your customers receive the right level of support, enhancing their overall experience
- Three general ways to set it up:
  1. Entitlement only (simplest)
  2. Entitlements + service contracts
  3. Entitlements + service contracts + contract line items (most complex)



# Service Cloud – Omni-Channel

- Salesforce Omni-Channel helps you provide an inclusive, consistent customer experience & keeps work connected for your agents
- Three routing options:
  1. Queue based
  2. Skill based
  3. External



# Service Cloud – Console

Service Cloud **Console** provides a unified view of customer interactions, consolidating data across channels & devices

The screenshot displays the Service Cloud Console interface. At the top, there are three browser tabs for cases: '00001029 | Case', '00001031 | Case', and '00001024 | Case'. The main content area is divided into several sections:

- My Open Cases:** A list of 5 items with search and filter options. The list includes cases like 'Broken Solar Panel' and 'Website is down'.
- Case Detail View:** The selected case is 'Design issue with mechanical rotor' (Case Number: 00001024, Status: Working, Priority: Low). It features an 'Actions & Recommendations' panel with options like 'Verify Caller', 'Triage and Repair', and 'Order Replacement'. Below this is the 'Case Details' section showing the case owner 'Sally Seahorse' and status 'Working'.
- Details Feed:** A table of case metadata including Case Owner (Sally Seahorse), Case Number (00001024), Contact Name (Lauren Boyle), Account Name (United Oil & Gas Corp.), Type (Mechanical), Case Reason (Equipment Design), Web Email, Web Name, Date/Time Opened (8/2/2022, 12:15 PM), Product (GC3040), Potential Liability (No), Case Origin (Web), Case Reason (Equipment Design), Engineering Req Number (868314), SLA Violation (No), Created By (Sheri Wanasek), and Last Modified By (Sheri Wanasek).
- Activity Panels:** On the right side, there are panels for 'Open Activities (0)', 'Activity History (0)', 'Case Comments (2)', and 'Attachments (0)'. The 'Case Comments' panel shows two comments from Sheri Wanasek.

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# Use Cases

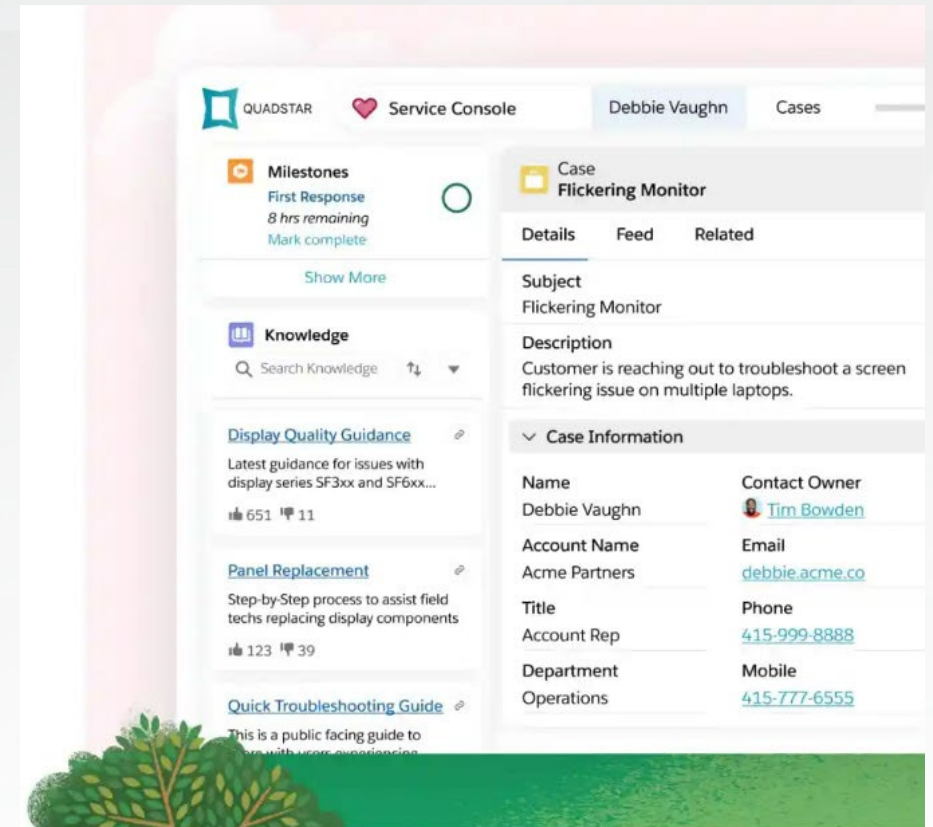
- **Post-Sales Service**
  - Can help improve customer satisfaction after the sale
- **Customer Support**
  - Essential for managing customer inquiries, complaints, & support
- **Service-Level Agreement (SLA) Adherence**
  - Can help you meet service-level agreements by efficiently resolving issues
- **Live Chat & Social Media Support**
  - Integrates with live chat tools & social media platforms
  - Agents can handle real-time inquiries, complaints, & questions across channels
- **Case Resolution**
  - A customer submits a support request via email. Service agents use Service Cloud to create a case, categorize it, & assign it to the appropriate team
  - They communicate with the customer, troubleshoot the issue, & resolve it efficiently
- **Self-Service Portals**
  - Service Cloud enables companies to set up self-service portals for customers
  - Customers can log in, search knowledge articles, find solutions, & even create their own cases if needed



# Service Cloud Key Benefits

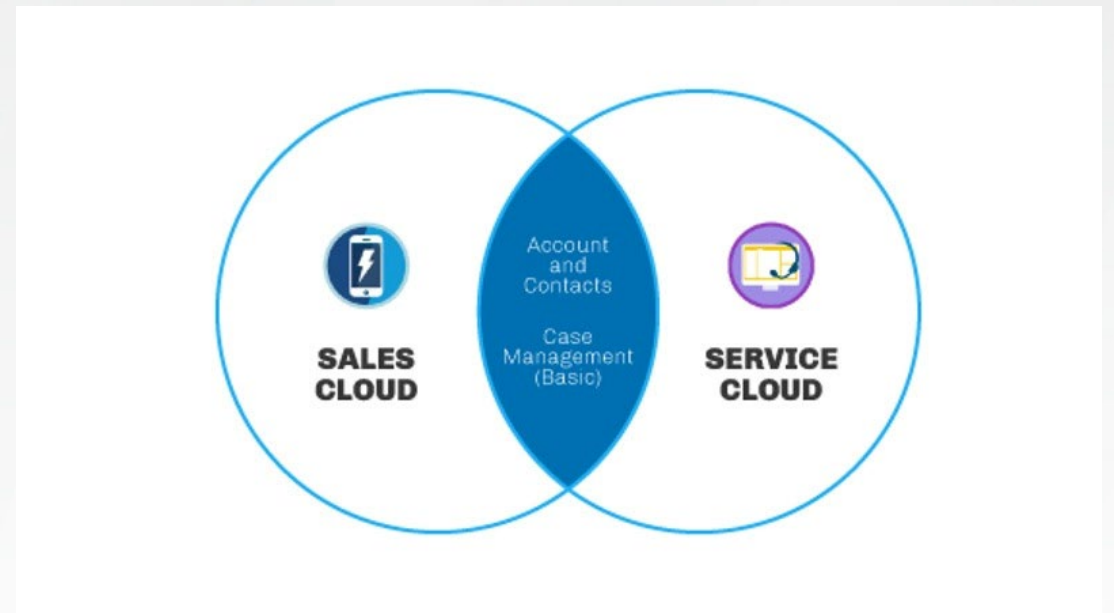
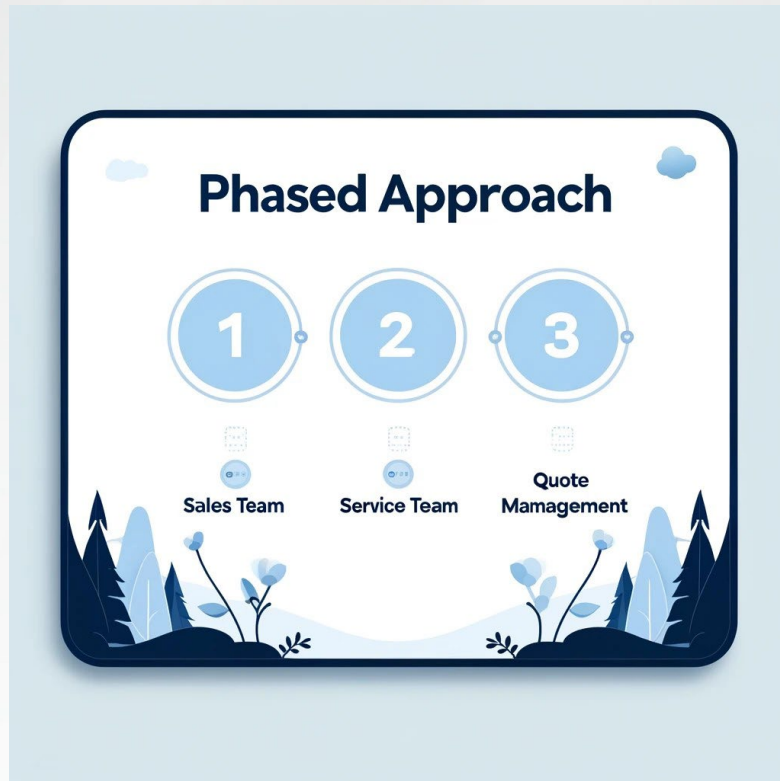


- 360-Degree Customer View
- Robust Case Management
- Multichannel Support
- Unified Service Console
- Integrations
- Analytics & Reporting



# Platform Decision Considerations

- Business Needs
- Integration
- Scalability
- Customization
- User Experience
- Analytics & Reporting
- Support & Training



# Questions?

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# Additional Resources



## Are You Ready to Use CRM & Marketing Automation Together?

Software • October 07, 2022

Discover how using CRM and marketing automation together may benefit your organization.



## How to Choose Your CRM Partner Wisely

Software • November 17, 2022

Get tips on how to choose your CRM partner wisely. A reliable CRM partner can help you deliver successful business outcomes.



## CRM Dashboards: A Modern Fortune-Telling Tool

Software • March 25, 2024

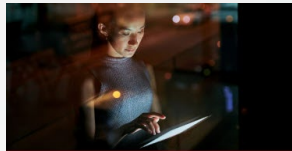
Discover how CRM dashboards can empower you to make informed decisions faster.



## How a Salesforce Customer Self-Service Portal Can Help CX

Software • November 28, 2023

Explore how a Salesforce customer self-service portal can help streamline workflows and enhance the customer experience. Read on for useful insights.



## Salesforce Expands Artificial Intelligence Capabilities

Software • May 19, 2023

Explore the potential benefits of integrating Einstein GPT and Data Cloud with Flow and learn more about Salesforce generative AI capabilities.



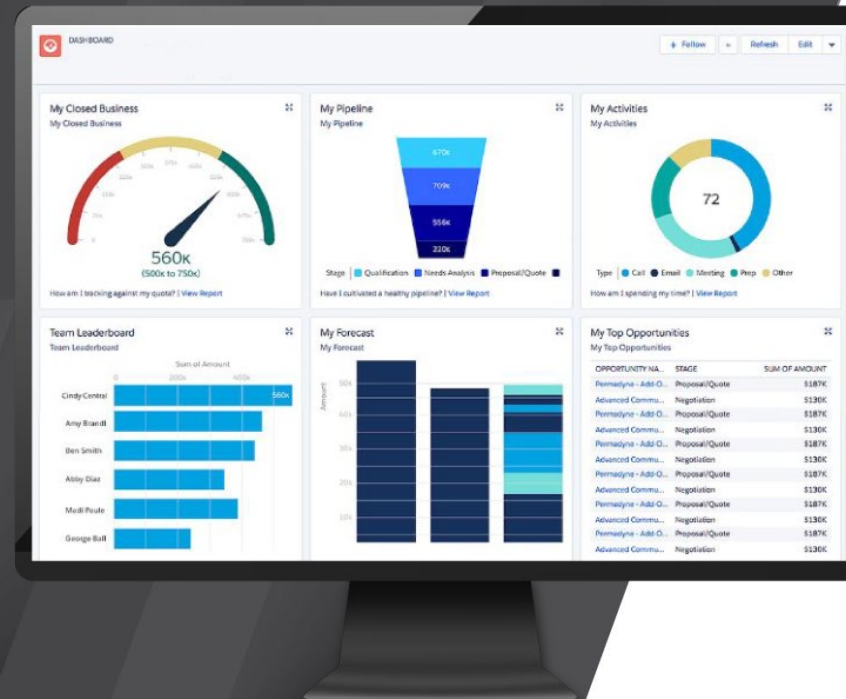
## 10 Tips to Help Improve CRM User Adoption

Software • January 11, 2023

Adopting a CRM system can help your organization create improved business development processes. Read on for tips to help improve CRM user adoption.



# Thank you!



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