Fast Start

Bring the full power of Sales Cloud to your inbox.

Learn how to use Salesforce Inbox to streamline tasks like creating CRM records, scheduling meetings, and answering emails.This Accelerator gives you tips on integrating email with Sales Cloud, improving sales forecasting, and increasing adoption. We'll help you create a plan to set up Salesforce Inbox so your team can start identifying opportunities, connecting with customers, and selling smarter than ever.

What it can do for you.

- Increased Sales Rep productivity by integrating email with Sales Cloud.
- Improve adoption by showing Sales Reps how easy it is to log from email
- Improve sales visibility and forecasting because of improved data quality

How It Works

A Certified Specialist will guide you through the process via three calls totaling 3.5 hours over 2 weeks.

Discovery
- Review Salesforce Inbox administration guide
- Review customer configuration, permissions, use-cases

Analysis
- Recommend and then agree upon roles for integration between Sales Cloud and email account
- Troubleshoot configuration, permissions and credentials
- Sales use-case product demo for best practices
- Summarize discovery, learnings and best practices - customized by role

Outcomes
- Agreed-upon roles and requirements
- Sample templates for Sales managers
- Customized best-practices and recommendations

ADDITIONAL INFORMATION

Premier or Signature
Time you will spend on this Accelerator: 3.5 hours

GOAL
Achieve Faster ROI, Gain Business Insights

INTENDED USER
- Organizations with a distributed Sales organization and the desire to better measure the activity of Sales Reps
- Organizations seeking to migrate off of legacy email connectors.

PREREQUISITES
- Must have Premier or Signature Success Plan.
- Sales Cloud and Salesforce Inbox licenses required
- Compatible email server/client (Exchange 2013 or 2016 Server, Office365, or Gmail email server)
- Salesforce Administrator available to perform configuration tasks. Admin must have Exchange credentials and ability to assign licenses.
- Sales leader to provide context for desired activity views and best practices adoption

Note: Does not cover custom code or actions. Custom migrations for legacy users of RelateIQ is outside the scope of this accelerator

To schedule your 1-on-1 Accelerator, visit our Help Portal, or contact your account executive or success team today!

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