

Informatica Salesforce Guides

Guiding Salesforce Users to Work Accurately
and Efficiently With Integrated Access to Data

Why Salesforce Guides?

Greater Salesforce Efficiency

Do your Salespeople spend too much time “hunting and pecking” their way through Salesforce? Informatica Salesforce Guides provide easy-to-use wizards that allow every salesperson to follow an efficient process regardless of experience or expertise. Salespeople can spend more time selling and less time on administration.

Real-Time Access to Data

Are your Salesforce users frustrated at having to swivel to other applications to get access to the data they need to help their clients or prospects more effectively? Informatica Salesforce Guides provide you access to data wherever it is and presents it in the context of the user. This leverages Informatica’s built-in API-based integrations.

Improved Customer Support

Are your customers frustrated when kept on hold or asked to repeat the same information over and over? Informatica Salesforce Guides process wizards enforce consistency, predictability, and quality of support activities performed by any customer service agent.

Unlocking the Value of Your Salesforce Investment

Companies motivated by the promise of higher productivity, lower costs, and rapid implementation are aggressively adopting Salesforce to enable customer service, sales, and marketing functions. However, many struggle to achieve the full potential of the software because their users forget to record critical information or make errors trying. The dozens of tabs and hundreds of custom fields that make Salesforce powerful also make it too time-consuming to use, too confusing to navigate, and a fertile ground for user error. As a result, many Salesforce implementations suffer from inaccurate reports, poor user adoption, and low return on investment.

Let Salesforce Users Take Control

Custom coding is one option to make Salesforce easier to use, but it requires developers and a significant amount of time. Another option might be to use custom triggers, visual force pages, and validation rules, but, again, these require technical skills and time. In desperation, many companies turn to third-party consultancies that typically provide the right answers but come at a cost that not everyone can afford. The ideal solution is to let Salesforce power users among your Sales Effectiveness, Sales/Service Operations teams, and Salesforce Center of Excellence customize the interface and define processes to enhance how the business works.

Informatica Salesforce Guides

Luckily such a solution exists: Informatica® Salesforce Guides. Informatica Salesforce Guides is a process automation tool for Salesforce that allows users to easily adapt the application and automate repetitive tasks, without the need for APEX programming. With Informatica Salesforce Guides, Salesforce users create custom wizards that quickly and efficiently guide any other Salesforce user through a set of tasks and activities. This ensures that processes are completed correctly, consistently, and in the right order. Adding Salesforce Guides to Salesforce delivers greater user efficiency, better customer service, and accurate business reporting.

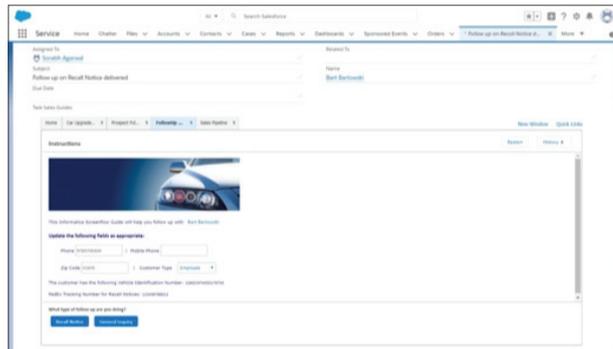
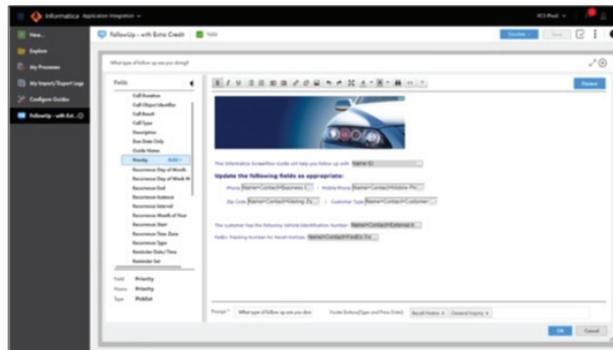


How Does Informatica Salesforce Guides Work?

The power of Salesforce Guides lies in its unique design environment—a do-it-yourself tool that is highly visual and intuitive, allowing business users to create, modify, and implement wizards on their own.

Access to data wherever it resides is a breeze with Informatica’s built-in, API-based integration. There is no need for complicated and expensive integration projects to provide contextual data within the Salesforce experience.

And you use the same design environment to create wizards that are desktop-enabled or optimized for mobile delivery.



Deliver an Optimized Mobile Experience

- Easy to Use – Leverages touch-screen input and voice-to-text capabilities.
- Mobile Application Design Environment – Optimized for mobile delivery with pre-installed themes.
- Supports Virtually any Device – Drive mobile and social collaboration into any Salesforce environment with support for iPad®, iPhone®, Android™, and Chatter™.

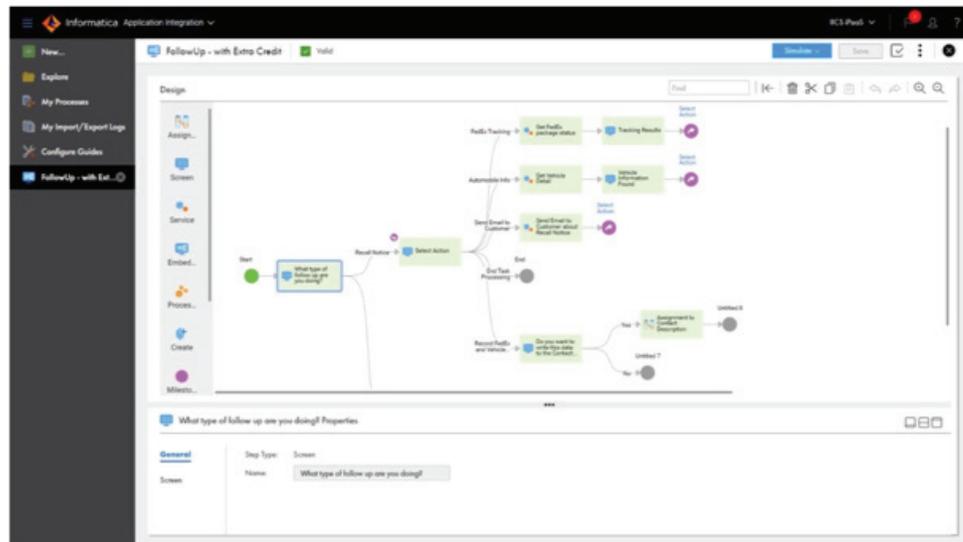


“The benefits we’ve achieved are outstanding. We’ve seen a 20% increase in agent productivity, reduced our customer call waiting times to virtually zero, and reduced the time it takes to create new accounts by 85%. What used to be a 10-minute process is now just a minute and a half.”

— Jonathan Adlerstein,
CIO, Plymouth Rock Energy

Powerful Process Automation Features

- Visual Wizard Designer — Easily create and modify custom application wizards with an intuitive, web-based tool that requires no APEX coding or formal programming skills.



- Supports Standard and Custom Objects — Works with any standard or custom objects, fields, and picklists that are defined in the Sales, Service, or Marketing clouds.
- Clean and Natural Salesforce Integration — Easily manipulate Salesforce data with clean and natural integration. No need to replace existing workflows, approvals, triggers, or existing APEX classes.
- Sample Wizards — Get up and running in minutes using sample guides that provide lead nurturing, sales qualification, call scripting, and much more.
- One-Click Publish — It only takes a single click to share process automation wizards with an entire sales, service, or marketing team.
- Interactive Data at its Source — No need for complicated and expensive integration projects to deliver the data you need to your users.

About Informatica

Digital transformation changes expectations: better service, faster delivery, with less cost. Businesses must transform to stay relevant and data holds the answers.

As the world's leader in Enterprise Cloud Data Management, we're prepared to help you intelligently lead—in any sector, category, or niche. Informatica provides you with the foresight to become more agile, realize new growth opportunities, or create new inventions. With 100% focus on everything data, we offer the versatility needed to succeed.

We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption.

Who Uses Salesforce Guides?

Customer Service Departments

Use Salesforce Guides to design and deploy wizards that standardize support procedures, streamline repetitive actions, and implement best practices for problem resolution. Support agents quickly create cases, assign tasks, log issues, and send follow-on emails, all from a single user interface. As a result, Salesforce Guides wizards reduce time-to-resolution, increase call throughput, and improve customer satisfaction.

Sales Departments

Use Salesforce Guides to automate repetitive actions, optimize sales processes, and boost sales team productivity. Salespeople with a smartphone or internet browser assign tasks, create contacts, log notes, and update opportunities with easy-to-use wizards. Also, they design and deploy custom wizards to replicate time-saving sales procedures for call-scripting, sales meeting preparation, account planning, and opportunity progression.

Marketing Departments

Use Salesforce Guides to increase the effectiveness of campaigns by designing and deploying wizards that enrich leads by appending missing data. Marketers follow a step-by-step guide that iterates through a prospect list to ensure that all lead information is accurately and consistently collected.



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