SALESFORCE ESSENTIALS

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THE BOTTOM LINE

Salesforce announced the availability of Sales Cloud Essentials and Service Cloud Essentials, versions of Sales Cloud and Service Cloud specifically designed for small and medium-sized businesses (SMBs). A streamlined user interface and Trailhead-driven setup wizards drive rapid time to adoption and value, and a lower price point make it more competitive as a subscription service for SMBs. Nucleus estimates the streamlined, automated deployment will make it more accessible for SMBs by cutting deployment time by more than 50 percent without the need for specialized resources.

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THE ANNOUNCEMENT

On March 13, Salesforce announced Sales Cloud Essentials and Service Cloud Essentials, tailored for the needs and budgets of small businesses. Key points of the announcement include:

- Trailhead-driven setup guides automate the configuration and setup processes based on standard sales and service processes and best practices.

- Einstein Activity Capture automates the process of manual data entry for sales and service representatives to increase productivity while driving greater and more complete data capture.

- Reliance on the Salesforce Lightning framework means Essentials have an easily customizable drag-and-drop interface for users, and responsive, mobile-friendly access through the Salesforce Mobile App.

- An easy migration path from Salesforce Essentials to standard Service Cloud and Sales Cloud means small customers can deploy quickly today and grow over time, taking advantage of the full capabilities of Sales Cloud and Service Cloud with minimal disruption.

Essentials is designed for the small business audience, with a per-user subscription list price of $25 per user per month for up to 10 users (five for each product). Essentials users have access to both Sales Cloud Essentials and Service Cloud Essentials capabilities and features.

WHY IT MATTERS

In its original days, Salesforce was largely an SMB product that teams set up on their own without IT or specialized resources – but a lot has changed in the past 15 years or so. As Salesforce has continued to add to the functional capabilities of its clouds, they have by nature become more complex – and more expensive. Essentials provides a more accessible price point for small customers.

However, more importantly, the Trailhead-driven wizards accelerate deployment time by more than 50 percent (based on Nucleus's initial tests of the solutions) without the need for Salesforce experience, outside consultants, or an in-depth knowledge of customer relationship management (CRM) best practices – making deployment much more accessible as well.

Providing both sales and service users with crossover functionality makes a lot of sense for the small business. In growing organizations where employees may wear many hats, enabling both sales and service to support each other and see the same data streamlines customer communications and reduces data silos.

Although there are many solutions at an SMB price point on the market for sales and service, many users of those solutions find that as they grow they often have to upgrade to more enterprise-scale CRM products. Users of Salesforce Essentials have the ability to upgrade to the full version of Sales Cloud and Service Cloud as they grow or their needs change without the disruption of changing applications or vendors. It's also important to point outthat some of the latest innovations of Salesforce – such as Lightning, the Mobile App, and Einstein Activity Capture – are included as part of Essentials. Although Essentials may be scaled-down versions of Salesforce in terms of some functionality, the key usability (read: productivity) features available in the enterprise solutions are in Essentials as well.

One perceived downside to the release of Essentials is that Salesforce will be retiring its Desk.com and SalesforceIQ solutions (primarily for SMBs) in the near future. However, migration tools and offers and the compelling additional features (as well as a better long-term growth path) should make the move less painful for existing Desk and SalesforceIQ customers.

CONCLUSION

As Salesforce has expanded its functionality and capabilities, it has also necessarily increased in complexity and price, putting it out of the reach of many small businesses. Although the Essentials price point puts it in reach of SMBs, what's more important is time to effective deployment and adoption – a challenge with any CRM product, no matter the market or price point. With guided setup and easy no-code customization, Essentials brings enterprise-grade CRM capabilities to the SMB.