




# CUSTOMER RELATIONSHIP MANAGEMENT *THE CASE OF SALESFORCE*

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*This document has been produced by RisiAlbania. Risi is a youth employment project of the Swiss Agency for Development and Cooperation SDC, implemented by Helvetas and Partners Albania for Change and Development. The views and conclusions contained here do not necessarily reflect neither those of the Swiss Government nor the Swiss Agency for Development and Cooperation SDC.*

# CUSTOMER RELATIONSHIP MANAGEMENT

## *THE CASE OF SALESFORCE*

### **GUIDANCE**

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Helvetas and Partners Albania for Change and Development are implementing the RisiAlbania youth employment project, supported by Swiss Agency for Development and Cooperation (SDC).

RisiAlbania supports the creation of quality jobs in the local IT sector. The project has supported the **growth of e-commerce** in Albania by assisting businesses in adopting digital payment solutions and enhancing their online presence. To enhance competitiveness and access to higher-value markets, RisiAlbania has facilitated the **certification** of local companies with international standards such as ISO 27001 (Information Security Management) and ISO 27701 (Privacy Information Management). Recognising the potential of the **business processing outsourcing (BPO) sector**, the project has worked to position Albania as a value-added destination for outsourcing services.

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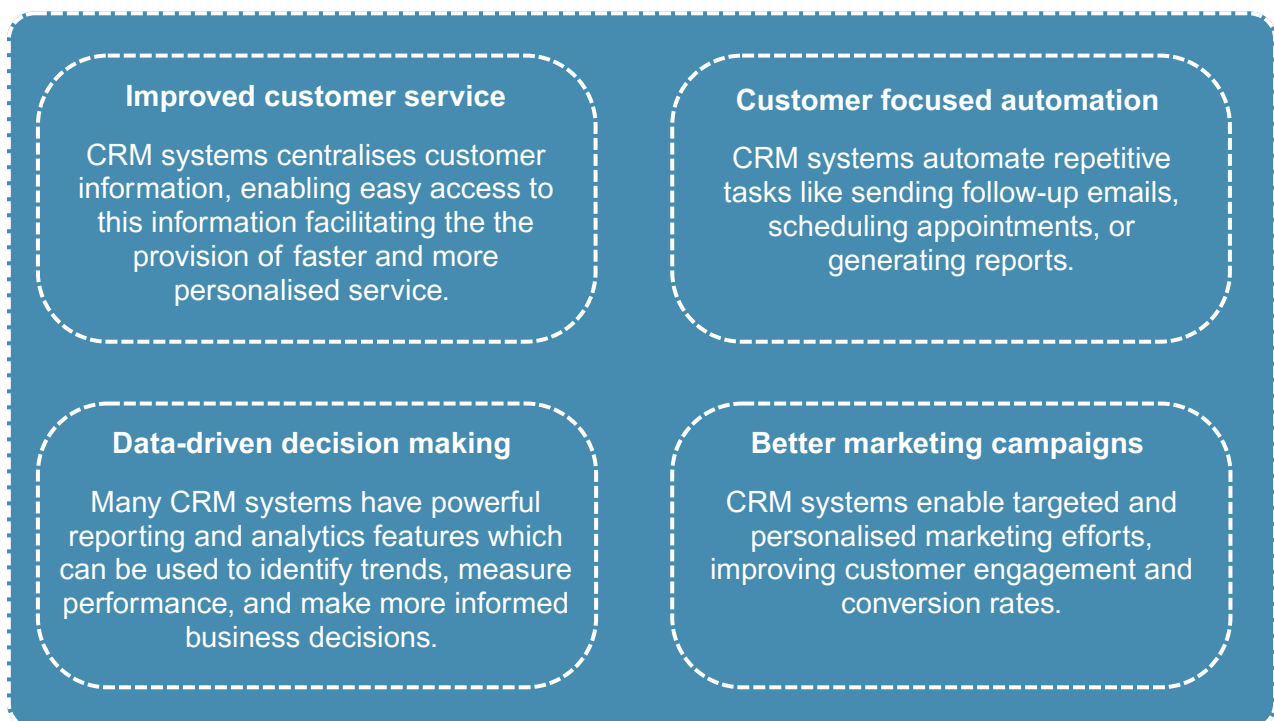


# PART 1 - THE BASICS

## What is a Customer Relationship Management (CRM) system?

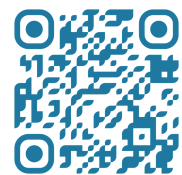
A CRM system is a tool, typically a piece of software such as the Salesforce cloud-based solution highlighted below, that helps businesses manage and improve their interactions with current and potential customers. In essence, a CRM system is a digital assistant that allows a business to keep track of all customer information, interactions, and activities in one place.

A CRM system allows businesses to learn more about their customers and how to better cater to their needs, thus retaining customers and driving sales growth. The key benefits of a CRM system include:



## What is Salesforce CRM?

Salesforce is one of the leading CRM solutions globally, offering a range of cloud-based tools and features to help businesses improve their customer relationships, sales processes, and overall operational efficiency. Salesforce is the owner of other business solutions providers such as Slack, Tableau, MuleSoft, and Heroku, and they complement each other by enhancing Salesforce's ecosystem across collaboration, data, integration, and app development. Some of the key features and functionality of Salesforce are highlighted below.





salesforce

# Features and Functionality of



**Sales Automation:** Automates sales tasks such as lead management, opportunity tracking and forecasting.

**Contact Management:** Provides a 360-degree view at consumer details interactions, and history.

**Pipeline Management:** Helps in tracking sales pipelines and stages of deals to improve sales effectiveness.

**Customer Support:** Manages customer service operations, including case tracking and issue resolution.

**Knowledge Base:** Allows creation and management of a knowledge base for customer self- service.

**Omni-Channel Support:** Integrates various support channels (email, phone, chat, social media) enabling improved customer service.

**Campaign Management:** Manages and automates marketing campaigns across multiple channels.

**Email Marketing:** Designs and sends targeted email campaigns.

**Customer Journey:** Creates personalized customer journeys based on behavior and preferences.

**Data Visualization:** Provides dashboards and reports for visualizing business data.

**AI Insights:** Uses artificial intelligence to generate predictive insights and recommendations.

**Data Integration:** Integrates data from multiple sources for comprehensive analytics.

**Campaign Management:** Manages and automates marketing campaigns across multiple channels.

**Email Marketing:** Designs and sends targeted email campaigns.

**Customer Journey:** Creates personalized customer journeys based on behavior and preferences.

## PART 2 - MAKING IT HAPPEN

### How do I know if I need a CRM system like Salesforce?

Determining whether you need a CRM system like Salesforce depends on several factors related to your business operations, customer management needs, and growth objectives. Some of key indicators or business issues that suggest you might benefit from implementing a CRM system are highlighted below.



#### BUSINESS ISSUE

1

##### **Disorganised customer information**

Customer data is scattered across different platforms, spreadsheets, documents and emails, making it difficult to track and manage.

2

##### **Inefficient sales processes**

Sales team struggles with managing customer leads, tracking opportunities, and closing deals efficiently.

3

##### **Poor customer service**

Customers face long wait times for support, and sales and customer support teams lack access to customer history and information.

4

##### **Inconsistent marketing efforts**

Marketing campaigns are not targeted or personalised, leading to low customer engagement and conversion rates

5

##### **Difficulty in tracking performance**

Limited or unreliable data to report against key performance metrics, making it hard to assess the effectiveness of sales, marketing, and customer service efforts.



#### CRM SOLUTION

1

Centralises all customer information, providing a **single source for all customer data**.

2

**Automates and streamlines sales processes** (e.g. sending follow-up emails, scheduling appointments etc.) helping sales teams prioritise leads, track progress, and close deals faster.

3

Provides a **comprehensive view of each customer's history**, enabling sales and customer support teams to resolve issues quickly and effectively.

4

Helps **segment your current and target customer base**, personalise marketing efforts, and track the performance of campaigns..

5

Offers robust **analytics and reporting tools**, providing real-time insights into business performance and helping with data-driven decision-making.

# Who can I work with in Albania to integrate Salesforce CRM into my business?

## LDA DIGITAL SOLUTIONS

LDA Digital Solutions is a Salesforce Consulting Partner firm based in Tirana, founded in 2022 by Marilo Meta, a Salesforce MVP and Trailblazer Community Leader. LDA specialises in helping local SMEs adopt Salesforce CRM solutions. With a mission to drive digital transformation, LDA empowers businesses to improve their sales, service, and marketing strategies, enabling them to become more competitive and responsive to customer needs. LDA is also a proud member of the Pledge 1% Initiative, dedicating 1% of its time, product, and profit to creating a positive social impact in the communities it serves.

In 2019, Marilo Meta began building the Salesforce ecosystem in Albania, starting the Trailblazer Community in Tirana to address a gap in accessible CRM technology for local businesses. SMEs in the region struggled with fragmented customer data, inefficient sales processes, and limited technological resources to scale effectively. Recognising Salesforce as the ideal platform to overcome these challenges, Marilo introduced it as a powerful tool to centralize data, streamline operations, and foster growth.

With the founding of LDA Digital Solutions in 2022, the goal was to expand the reach of Salesforce solutions and help businesses adopt CRM technology that could transform their customer relationships, automate processes, and provide actionable insights for data-driven decisions. The inclusion of the Pledge 1% Initiative further reinforced LDA Digital Solutions' mission to lead with purpose, contributing to youth empowerment, nonprofit support, and community-driven initiatives.

## THE IMPACT OF SALESFORCE

Since adopting Salesforce, LDA Digital Solutions has helped numerous businesses in Albania and beyond achieve improved business results:

- 1 Improved Customer Insights:**  
By leveraging Salesforce Sales Cloud and Service Cloud, clients gained a unified 360-degree view of their customers, enabling them to personalize interactions and build stronger relationships.
- 2 Improved Customer Insights:**  
Increased Efficiency: Salesforce's automation tools reduced manual effort in sales and marketing processes, cutting administrative time by up to 40% for some clients.
- 3 Enhanced Decision-Making:**  
Powerful analytics and dashboards gave leaders real-time visibility into KPIs, allowing for smarter, faster decisions.

## 4 Community Engagement:

The **Pledge 1% Initiative** has enabled LDA Digital Solutions to support nonprofits, host youth development programs, and contribute to *Albania Dreamin'*, a pioneering Salesforce community event that has been organized annually since 2020. These efforts showcase Albania as a growing hub for Salesforce innovation and inspire others to drive positive change.

## 5 Global Exposure:

The success of *Albania Dreamin'*, featuring international speakers and experts, has elevated the Salesforce ecosystem in the Balkans, bridging the gap between local talent and global opportunities.

## IKONS

Since 2016, IKONS has been delivering top-tier IT services to System Integrators across Europe through a team of highly skilled professionals. Our mission is to empower our partners by expanding their reach, enhancing their capabilities, and driving business growth through expert IT solutions. Specializing in B2B collaborations, our team includes Software Developers, Business Analysts, Quality Assurance Specialists, IT Recruiters, Business Development Experts, Management Consultants, and Marketing Professionals.

We offer comprehensive IT solutions, including software design, development, implementation, and remote or outsourced IT services. Our expertise spans SAP technologies, Java, Business Intelligence, web application development, cloud & mobile technologies, .NET, and more.

With a diverse portfolio and experience working with international clients, IKONS has established a sustainable hiring and training approach through a dedicated training center in collaboration with local universities.

## THE IMPACT OF SALESFORCE

- Manual work is reduced and errors are minimized
- Collaboration between sales, marketing, and support teams improved
- It is ensured data security with role-based access and encryption, helping business to comply with required standards of GDPR and info security
- Real-time analytics and reporting dashboards







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