



Full Circle
INSIGHTS®

Build vs Buy?

**The True Costs of an
In-House Salesforce Solution
for Sales and Marketing Analytics**

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Turbocharging Your Salesforce Data for Performance

Your company is finding challenges in connecting the dots in your CRM. Salesforce is already a central part of your sales team's business process, and now your company needs to gain insights on its lead lifecycle, funnel metrics, and marketing effectiveness. But the problem is in the data, specifically in automated lead tracking and attributing revenue to campaigns. With Apex code, developers can stretch the Salesforce platform and customize it, so it's tempting to solve your marketing and performance data problem by building an application. However, building your own application in-house to solve your company's problem is much too costly in terms of financial expense, labor, and time-to-value. In this eBook, we summarize what it would take to build funnel metrics and campaign attribution capabilities into Salesforce and hopefully you'll see that there are more efficient and effective ways to accomplish your goal of obtaining accurate, comprehensive business analytics.

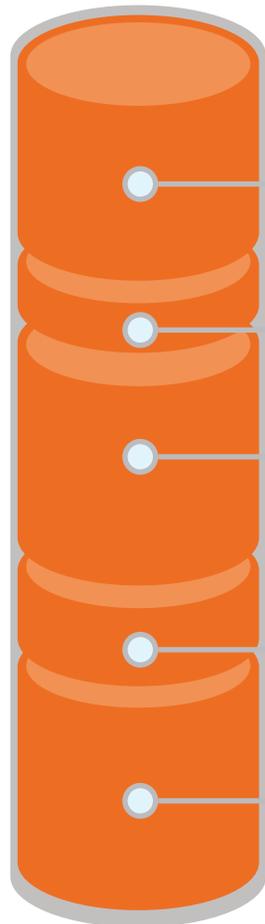


The Requirements

Let's define the application and break down the key features you'd want to build.

Application Desired

An application that utilizes business data to measure and report **sales and marketing performance**



KEY FEATURES NEEDED

Funnel tracking

Measuring sales & marketing efforts together

Attribution

Process integration

Fixed development features

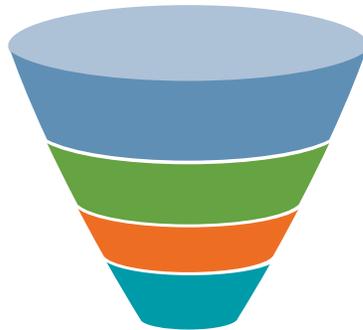
Building In-House: Dollars and Hours

This eBook breaks down the cost* of developing your own in-house sales and marketing performance analytics solution inside Salesforce. We break this down into features required, but in a later section, we'll slice the pie a different way: the software development process and the cost of each step required. You'll see that either way you slice it, there are many components to building in-house that each cost money, labor, and time.

*Assuming a conservative \$150 per hour for labor and 20 hours spent per week on the project. These figures worsen depending on the use of outside consulting, limitations to weekly hours dedicated to this project, etc.

Funnel Tracking

Funnel tracking is key to following a single lead's progression in Salesforce, over time and through specific stages. The point is to understand where leads are, where they came from, and how long they've spent at different points. So, the solution needs to be able to accurately track current and historical outcomes.



- Funnel stage definitions
- Lead source
- Lead progression timestamping
- Funnel exit and re-entry

Your company will define each stage as it fits with your sales cycle, and the funnel tracking module needs to incorporate the concept of funnel stages and the triggers that designate where a lead is in the funnel. Consider that the lead lifecycle is often not linear and a single person may be set to nurture, or disqualified multiple times before eventually closing. Consider the cross-object functionality needed to report across leads, contacts, and opportunities in a single report. So this adds a level of complexity to the way you need to store your funnel data.



FUNNEL TRACKING

15 WEEKS
\$45,000

Integrating Sales and Marketing Measurement

Your company wants to connect lead activity to sales and marketing engagements all throughout the funnel. So, the proposed solution should measure and report key metrics including sourcing, volume, velocity and conversion across both sales outbound efforts as well as marketing.



Attribution

To measure revenue attributed to campaigns (marketing and otherwise), the application needs to be able to associate a single source (marketing or sales) with each engagement/opportunity, as well as consider if that source should be based on the First Touch, Last Touch, or a "Tipping Point" response.

The solution should support reporting across all touches that influenced a deal, and with that, your company needs to define what is "influential" within the CRM. Consider the implications of changing those rules, and if those changes require code changes (we'll have a section just to describe maintenance costs later).



Process Integration

Your application needs to work with your existing lead record workflows and Salesforce processes. They include score changes, status changes (for Lead, Contact, Opportunity records), integrating the engagement record object (Full Circle Insights uses the Campaign Member object), triggering assignments, triggering notifications, and various bits and pieces that tend to be forgotten.



Fixed Development Components

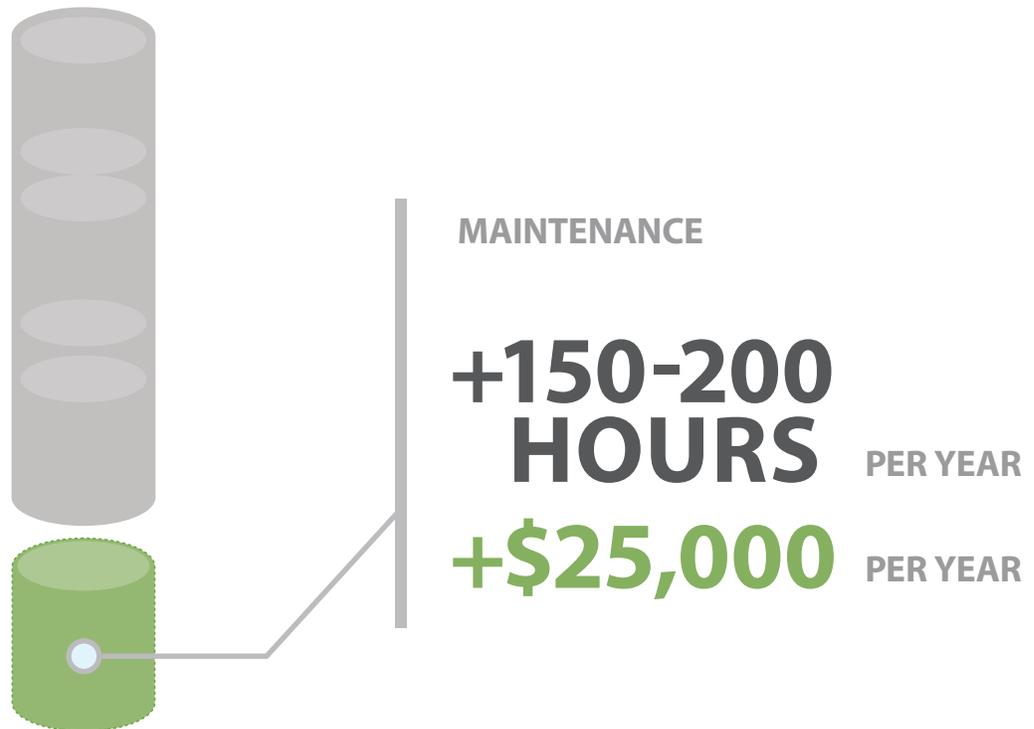
Finally, there's a laundry list of items that need to be addressed in developing a system of workflows inside of Salesforce. We list a few, but the key takeaway is that there are a myriad of infrastructure considerations under the hood to keep in mind.

- Configurability and having UI for internal users to make changes to fields and settings
- Merge / conversion / deletion handling
- DML lock errors
- Support for repeat responses to a campaign
- Overriding other Salesforce behaviors to support real-world lead engagement scenarios



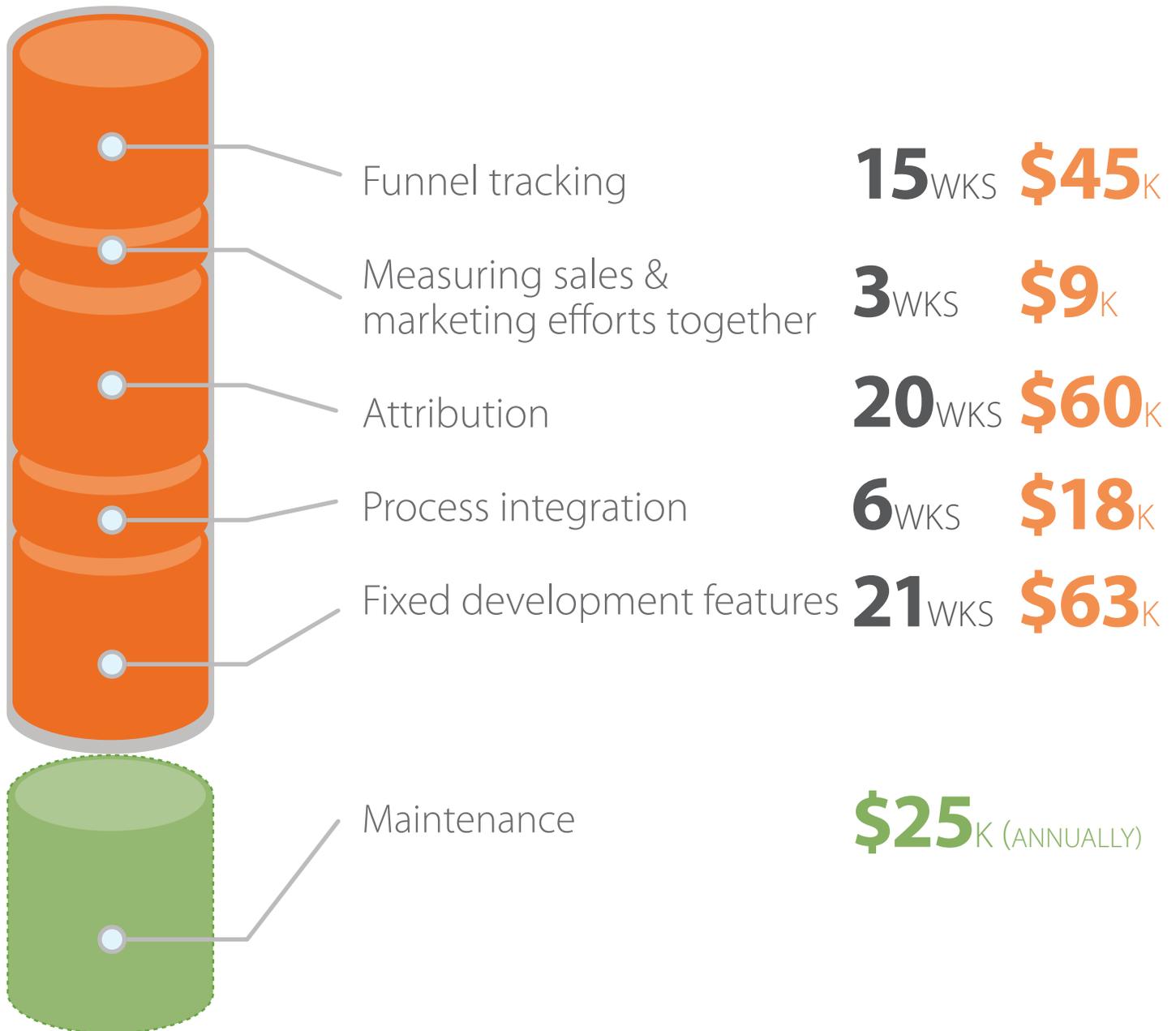
The Ever-Underestimated Maintenance Cost

Even after the creation and implementation of the application, somebody has to maintain it. Maintenance can be defined as a process to cope with newly discovered problems with the application, external updates, or new features desired. While not as large in scale as initial development, these factors potentially add another iteration of Requirements, Designing, Developing, and QA to ensure that your custom-built application works the way you want it to.



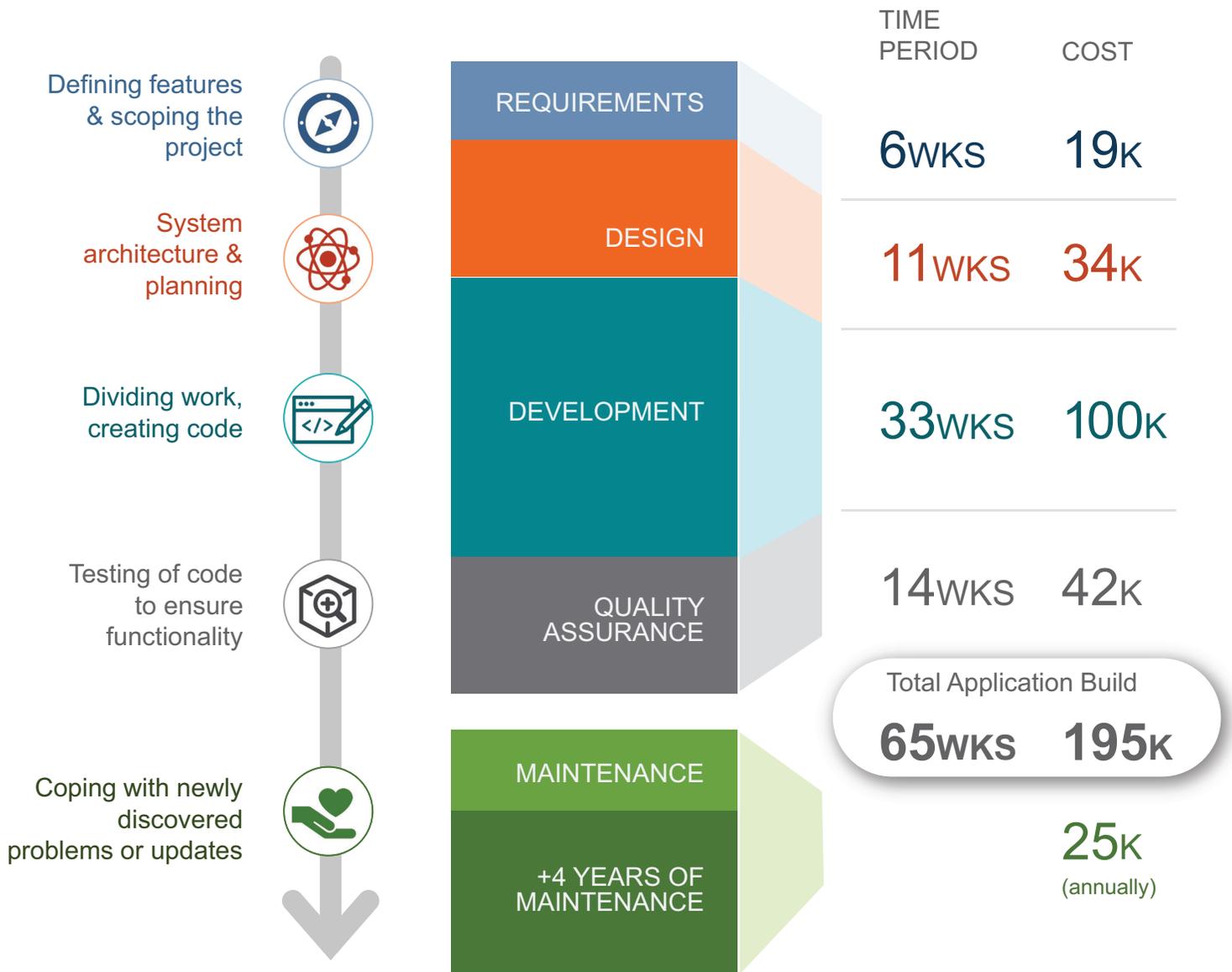
The Final Bill

Summing the above yields a total of 65 weeks and \$195,000, not including maintenance. This depends on components chosen, but regardless you should see that costs and time can easily build up.



Total Cost by Development Categories

Alternatively, we can categorize the above costs into the standard process of software development as per below.



Other Speed Bumps and Considerations

While it is tempting to try to “whip up” an in-house solution, the above should illustrate what it truly takes to build the components of marketing analytics you might want. That’s not taking into account other potential considerations and obstacles.

What if costs balloon? Or if there are delays?

What happens if an update to your integrated platforms (Salesforce, marketing automation, etc.) breaks part of your software?

What if the engineers who own this software leave your company? Do you have faith in the documentation to maintain continuity?

Bottom Line: Magnitude of Cost and Time to Value

The investment of money and time are significant. Knowing that, the real question may actually be: can you afford the opportunity cost? Taking 65 weeks is equivalent to a delay of about 16 months. Can you afford to be distracted for a year and a half, while your competitors are hitting the market at full-speed? So, next time your finance department claims that you need to build the software because the company can’t afford to buy, counter by saying that you can’t afford to build.

TOTAL TIME

65WKS

TOTAL COST

\$195k

**DELAY IN “TIME TO VALUE” OF
12-18 MONTHS!**



*“Software purchased off the shelf cuts the cost and time to at least half, not including the maintenance required that eats **another 10% of the cost annually** (or after five years, more than half of the building cost!)”*

Dan Appleman, Author of *Advanced Apex Programming for Salesforce.com*

About Full Circle Insights

Full Circle Insights delivers marketing and sales performance measurement solutions and lead management technology for driving revenue. Our cloud-based products provide actionable intelligence to optimize a company's marketing mix and drive more revenue. The company built its products 100% on the Salesforce App Cloud and are compatible with the leading marketing automation solutions.

Founded by former Salesforce executives and implementation veterans, CRM product managers, and marketing automation specialists, the Full Circle Insights industry pioneers and thought leaders know what it takes to run a successful marketing organization. The team is passionate about giving marketers the answers they need to uncover a marketing campaign's impact to the business, plan with confidence, and grow revenue.

Learn more at www.fullcircleinsights.com.

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