

Positioning FileMaker

...when your prospect is also considering [Salesforce.com](https://www.salesforce.com)

[AKA The Platform Smackdown]



Introduction: Sara Severson

- Technical Project Lead
- Eight years with Soliant
- Eight years prior as FileMaker user, then in-house developer
- Certified FileMaker 9-13 developer
- Force.com certified developer since 2009
- Certified Salesforce administrator since 2011

Agenda



- Choosing platforms, generally
- Salesforce: major player in CRM
- What are its strengths?
- Where is FileMaker better?
- The case for integration

- Bonus: What you may hear in the sales cycle (hype vs. skinny)

Choosing platforms, generally

Sales premise: Choosing platforms

- We know what we love about FileMaker
- Trusted advisor: know what's best for your client
- You'll do better with good info

What is Salesforce?

Salesforce: CRM & platform

- CRM for Sales, Service (think call center), Non-profits
- Not a sales tool specifically
- Somewhat modifiable via declarative interface
- Cloud-based
- Force.com is the dev platform
 - ◆ Object-oriented programming
 - ◆ Fully customizable
 - ◆ Customizations can be pricey

Demo



What are its strengths?

Salesforce can be an easy fit...

- If the client's requirements match the CRM offerings
- For help desks (Service cloud)
- For distributed operations
 - ◆ Easy access for all users
 - ◆ Localization via language settings
- If requirements are met by an affordable App Exchange app
- For small nonprofits (10 free licenses)

Case study: Distributed franchise

- Multiple locations across East Coast
- Heavy customer interaction (SFDC Communities)
- Access via any mobile device (franchisees and customers)
- Ease of launching a new franchisee

What is FileMaker better at?

FileMaker is the best recommendation...

- For custom development beyond the CRM
- For a quicker development cycle
- If the UI needs to be other than the SFDC default
- When the cost of SFDC licensing isn't counterbalanced by a match with the prebuilt features
- If the client needs flexibility in their mobile app's UI
- For offline sync

FileMaker win: Custom development, quicker cycle

- FileMaker dev vs. OOP in multi-tenant environment
- Faster initial development
- Easier future modifications
- Case study: Internet security firm

Case study: Internet Security Firm

- System needed to:
 - ◆ Process approval workflow
 - ◆ Manage product rebates by vendor
 - ◆ Tally sales as a result of rebates
 - ◆ Manage budgets
 - ◆ Show ROI by vendor
 - ◆ Incorporate 2 external data feeds
 - ◆ Manage marketing activities and results
- 20-user workgroup
- Part of 20,000-employee firm
- Single IT department (extraordinary bottleneck)

Case study: Internet Security Firm

- Pros for Salesforce:
 - ◆ The rest of the firm was on Salesforce
 - ◆ Only approved platform
- Pros for FileMaker:
 - ◆ Faster development lifecycle
 - ◆ Easier to support
 - ◆ Entirely custom solution: no CRM overlap
 - ◆ No data overlap with the enterprise solution
- *FileMaker would have been better entirely.*
- *Salesforce required.*
- *Our support still required.*

FileMaker win: UI

- SFDC UI generally uncustomizable
- UX is a chronic complaint
- Custom code (\$\$)

Standard Salesforce layout. Without visualforce pages, systems will have this look and feel.

The screenshot displays the Salesforce 14 user interface. At the top, there is a blue header with the Salesforce logo, a search bar, and a 'Conferences' dropdown menu. Below the header is a navigation bar with tabs for Home, Chatter, Leads, Organizations (selected), Contacts, Opportunities, Event Management, and Conference Agenda. The main content area shows the profile for 'Soliant Consulting Inc', including a 'Show Feed' button and a list of links: Back to List: Field Updates, Contacts (4), Former Employees (1), Open Activities (1), Activity History (15+), Client/Contact Notes (1), Opportunities (1), and Publication Sponsorships (0). A table titled 'Opportunities' is visible, with columns for Action, Opportunity Name, Type, Stage, Amount, and Close Date. Below the table is a detailed view of the selected opportunity, showing fields such as Needs TLC, Opportunity Rank, Organization Name, Organization Listing Name Preference, AKA Name, Parent Organization, Billing Address, Continent/Region, and Ownership.

Action	Opportunity Name	Type	Stage	Amount	Close Date
Edit Del	Soliant Consulting Inc - 6/5/2013	Publication Sponsorship	Value Proposition	\$795.00	6/18/2013

Needs TLC

Opportunity Rank: 3

Organization Name: [Soliant Consulting Inc \[View Hierarchy\]](#)

Organization Listing Name Preference: Soliant consulting

AKA Name: Soliant

Parent Organization:

Billing Address: 14 N. Peoria Street, Ste 2H
Chicago, IL 60607
United States

Continent/Region: North America

Ownership: Private

Main Email: tholmes@soliantconsulting.com

A/P e-mail address:

Phone: +1(650) 340-1779

Fax:

Website: <http://www.soliantconsulting.com>

Ok For Public

FileMaker win: Cost (even with CRM match)

- Custom development on SFDC = \$\$
- CRM licensing = \$\$
- Salesforce Pricing:
 - ◆ Per user, per month, varies by feature set
 - ◆ 50-person user group, Enterprise Sales Cloud level:
 - \$6,250/month
 - \$75,000 annually
- Exception: nonprofit

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 - ~~\$6,250/month~~ \$7,500/month
 - ~~\$75,000 annually~~ \$90,000 annually
- Exception: nonprofit

Case study: Lead leaving SFDC

- Not using most of the features
- Lots of work to input data, not getting it out again
- Heavily relational sales cycle not helped by salesforce
- High cost

Draw: Mobile

- FileMaker Go competitive
- Minor limitations on SFDC
 - ◆ UI is set
 - ◆ Offline sync not supported
- SFDC native layouts automatically translated to cross-platform mobile UI

Demo: SF1



The Case for Integration

Different Breeds of Cat

- Overlap of fortes is slight
- Use the strengths of each
- Expensive to replicate a custom FM solution in SFDC

Integration Cases

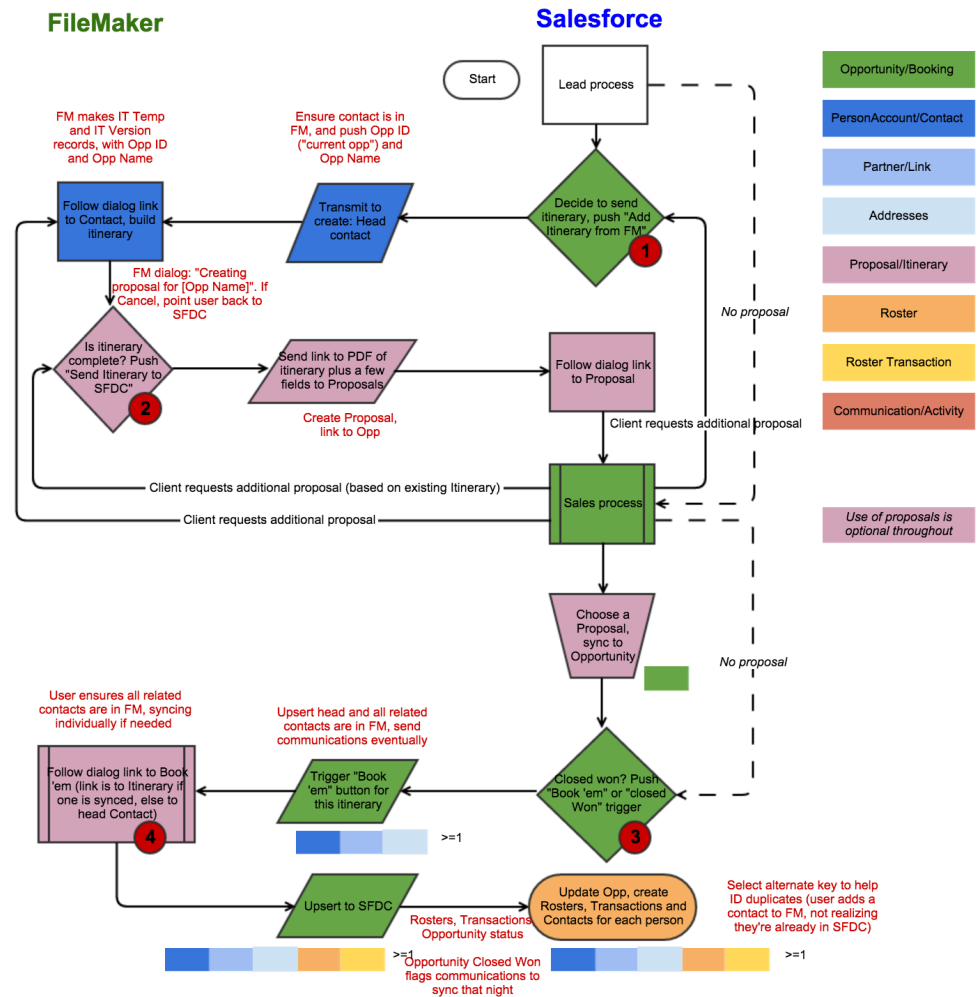
- Sales CRM + Fulfillment:
 - ◆ Sales team wants to use the CRM
 - ◆ Remaining business has complex FileMaker solution to support fulfillment
 - ◆ Unrealistic to transfer all FM functionality to Salesforce
- Acquisitions:
 - ◆ Org using SFDC purchased org using FM
 - ◆ FileMaker solution was comprehensive
 - ◆ Only sales data needed on SFDC

Integration Options

- SFDC REST API
- SFDC SOAP API
- SFDC streaming API
- Create/expose custom web service
- 360 Works' MirrorSync beta

Case Study: Safari co.

- Thorough foundation
- Complex integration
- Sales/fulfillment split
- Mirrorsync implementation in progress



Sales vs. Massive Marketing Engine

What we hear from leads

- IT supports it
- Sales team is asking for it (including new sales hires)
- Start-up: turnkey system
- Start-up: Investors are asking for it (Bay area)
- General momentum

What your leads may have heard

- Wave Analytics
 - ◆ Like Business Objects
 - ◆ Starts ~\$40K on top of existing fees
- Salesforce IQ
 - ◆ “Smart” mail integration, cueing off text of emails
- Lightning
 - ◆ Updated responsive UI
- Thunder (Internet of Things)
 - ◆ Big data

Recap

Recap: FileMaker is the best fit...

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- If the client wants offline sync

- ...and integration works, and often suits

Questions / Discussion

Thank You

