4 Steps to

Transforming Your Sales Process

salesforce

What's Inside

Today's biggest business trends revolve around helping companies provide exceptional customer experiences. These include big data insights that reveal and predict customer needs, integrated platforms that enable end-to-end personalization, and artificial intelligence (AI) solutions that automate and scale tasks that used to be painfully manual and time-consuming.

The same forces are changing the way sales teams operate, too. Today, winning in sales means giving your customers a frictionless buying experience from start to finish. Because if you don't, someone else will.

In the pages ahead, we'll take a look at:
- Why selling in the age of the customer is different
- How to connect with your customers in a whole new way
- What leading companies are doing to transform sales

Read on to discover how your sales team can sell faster, smarter, and the way they want to with the world's #1 CRM.

86% of buyers will pay more for a better customer experience.
"Second Annual State of Sales," Salesforce Research

Blaze your Trail to more sales at Trailhead.
Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails you'll be up and running in no time.

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Selling in the Age of the Customer

Today, we're in what we call the Age of the Customer. What does that mean, exactly? It means customer expectations have changed, thanks to the Amazons and Ubers of the world. Buyers in both the B2C and B2B worlds are demanding more; they want a personalized and frictionless buying experience that is fast, smart, connected, and available anywhere.

Let's take a closer look at the type of elevated buying experience that today's customers expect:

Fast: For decades, buying a car has been a cultural trope for frustration: a complex process full of confusing features, payment options, and price haggling. Now, companies such as Tesla let you learn about, configure, and even buy the most technologically advanced car in the world with a few taps on an iPad. Buying a car can be that fast and simple.

Smart: Now that smartphones are basically extensions of our own bodies, consumers regularly use them to make purchasing easy. Home Depot has an app that shows you exactly where the items on your shopping list are located in the store, and maps out the quickest way to find them. The same app delivers consumer behavior intel (like which items are most frequently bought together) to Home Depot and its vendors to help optimize floor layouts and the overall shopping experience. Win-win.

Connected: Amazon has already trained consumers to buy any product under the sun from the same site – and get it delivered to their doorstep the next day. With Amazon Dash, it's taken it up a notch. Dash buttons connect directly to Amazon's e-commerce engine and can be placed anywhere in your home, allowing you to reorder your favorite detergent and other household products the moment the need arises with a single touch of a button.

Anywhere: Mobile devices have ushered in a new age of localized, personalized, on-the-go service experiences. Consider this as the new norm: With OpenTable for instance, you can check availability and instantly make reservations at top restaurants in the current city you're in, right from your mobile device.

Engage Customers Consistently Across the Entire Buyer Journey

These are just a few examples of the types of experiences that customers expect today. Anyone who's ever bought anything can tell you that the best buying experiences are smooth and consistent from start to finish, without any nasty surprises (faulty product!) or frustrating disconnects (misleading claims!). That's what you want to deliver to your customers: a seamless, personalized buying experience that makes them want to come back for more.

In order to do that, you need a sales process that connects every customer touchpoint (from website downloads, to social comments, to emails, phone calls, and meetings). That requires giving all employees easy access to one complete view of your customer: surfacing clear insights derived from the information that's captured each time a customer interacts with you, across all channels and all stages of the buyer journey.

Key contacts

Channel preferences

Customer communications

Social engagement

Past purchases

Online interactions

Internal account discussions

Activity history

Industry developments

Today's Sales Challenges

It might sound simple, but keeping up with every customer in this fast-paced world of ever-evolving technology is no easy feat. It's especially tricky if your sales, service, and marketing processes aren't fully integrated.

In fact, we hear again and again from the companies we talk to that disconnected sales processes are the no. 1 challenge that keeps them from effectively engaging their customers. Some organizations talk about how their amazing marketing campaigns fill the pipeline with qualified leads, but things break down when the sales team can't access the right lead information to bring that sale over the finish line. Other companies tell horror stories of week-long delays in the quoting and proposal stages, which result in stalled sales and lower order volumes.

If the systems you use to manage sales, service, and marketing are not seamlessly connected on one platform, critical customer data is getting lost in the shuffle. The result? Disjointed and confusing experiences for your customer as they interact with different people throughout the buying journey.
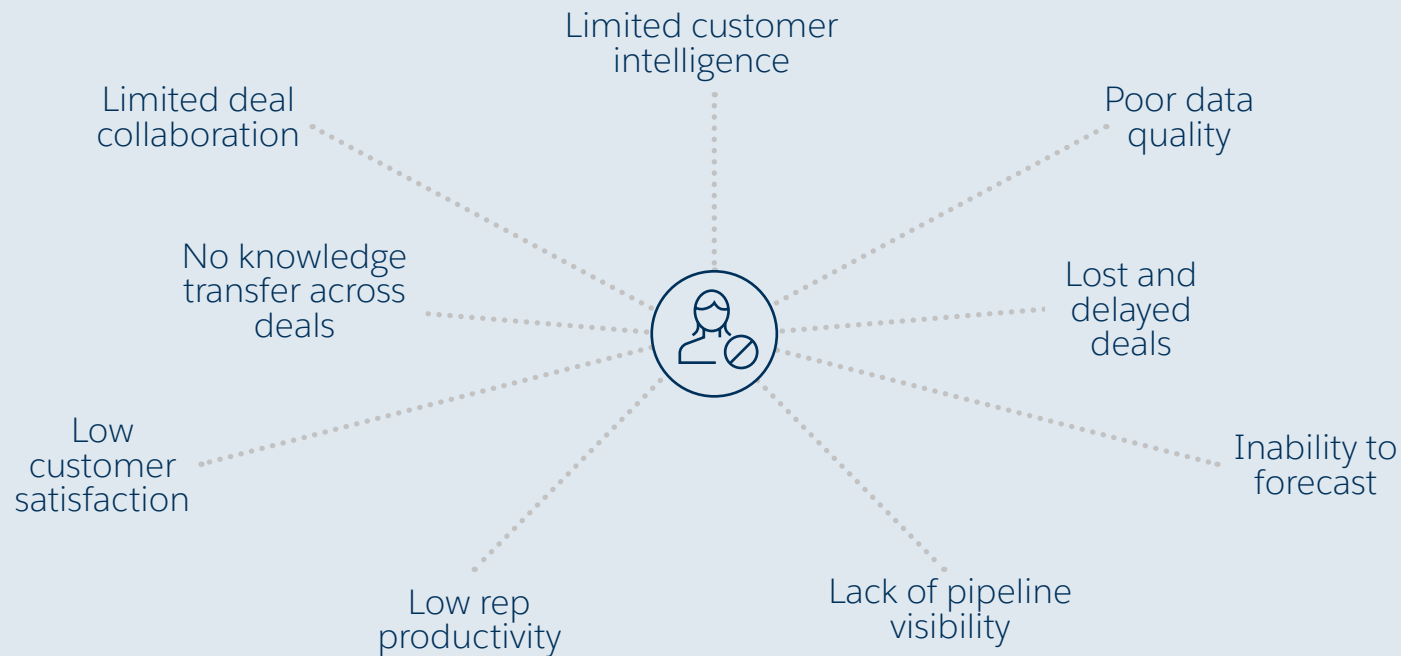
Sales

Service

Marketing

"In fact, we hear again and again from the companies we talk to that disconnected sales processes are the no. 1 challenge that keeps them from effectively engaging their customers."

Disconnected Sales = Inefficient Sales

And disconnected sales processes don't just impact the customer experience. Your sales team suffers, too. They experience lower productivity, frustration from deals that are delayed or lost due to inadequate knowledge transfers, and confusion when poor data quality makes it impossible to get accurate forecasts or clear visibility into the pipeline.

Challenges of a Disconnected Sales Process

Limited customer intelligence

Limited deal collaboration

Poor data quality

No knowledge transfer across deals

Lost and delayed deals

Low customer satisfaction

Inability to forecast

Low rep productivity

Lack of pipeline visibility

So the question is: How can you connect your sales process to deliver an amazing customer experience at every stage of the buying journey?

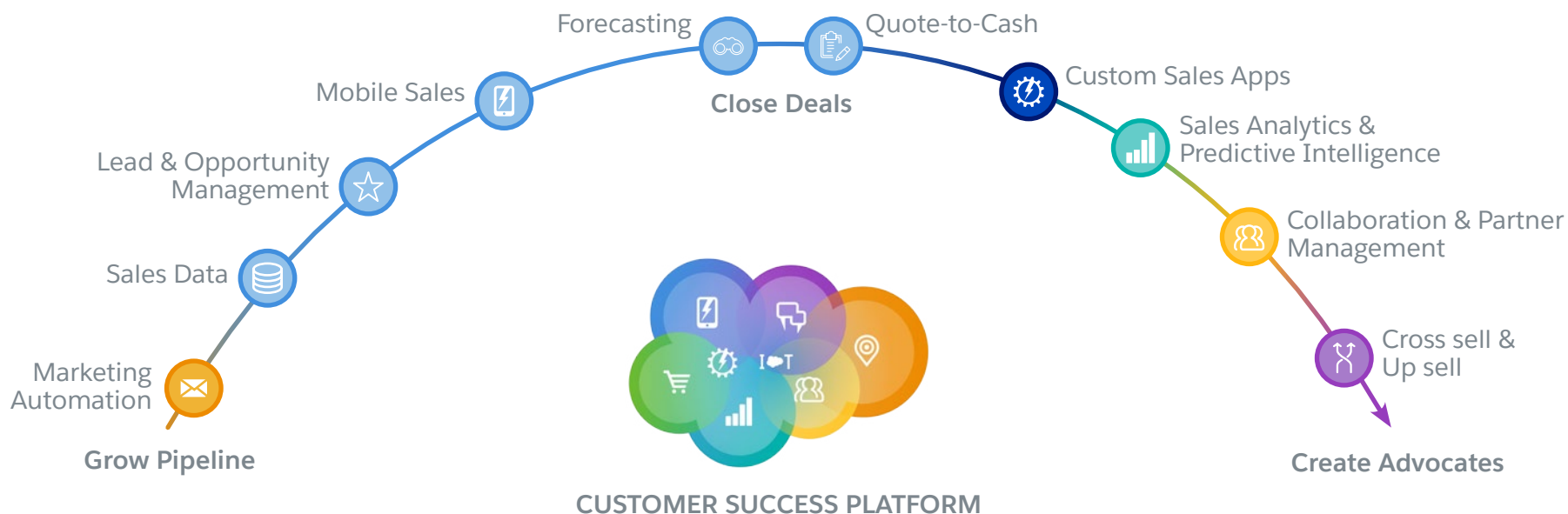**CHAPTER 2**

Connect With Your Customers in a Whole New Way

The answer is simple: Use a single, integrated CRM platform that allows you to manage the entire buyer journey, from capturing a lead, to closing a deal, and following up with top-notch service. Salesforce for Sales provides the world's #1 CRM platform that lets your team sell faster, smarter, and the way they want.

With Salesforce for Sales, your teams can:

- Track prospects and customers through the sales cycle

- Engage customers at the right time with built-in marketing automation and collaboration tools

- Get visibility into sales forecasts and team performance

- Customize workflows, reports, and dashboards

- Identify the best upsell and cross sell opportunities

- Use intelligence and productivity tools at each stage

## Deliver a Connected Experience Across the Entire Buyer Journey

Forecasting

Quote-to-Cash

Close Deals

Custom Sales Apps

Mobile Sales

Sales Analytics & Predictive Intelligence

Lead & Opportunity Management

Collaboration & Partner Management

Sales Data

Cross sell & Up sell

Marketing Automation

Grow Pipeline

Create Advocates

CUSTOMER SUCCESS PLATFORM

CHAPTER 3

Transforming Your Sales

We all know from experience that transforming your entire sales process isn't done with just a snap of a finger. It takes more (sometimes a lot more) than that. So how exactly do you make the jump from a disconnected, inefficient sales process to an integrated system that lets you deliver that cohesive, end-to-end buyer experience that today's customers demand?

It is possible. And, thanks to new technologies, it's now easier and more accessible than ever for companies of all sizes and industries to up their selling game.

At Salesforce, we have the opportunity to work with some of the world's best sales teams. We've seen first-hand how they're laying the foundation for lasting sales success. Here's what we've learned from them.
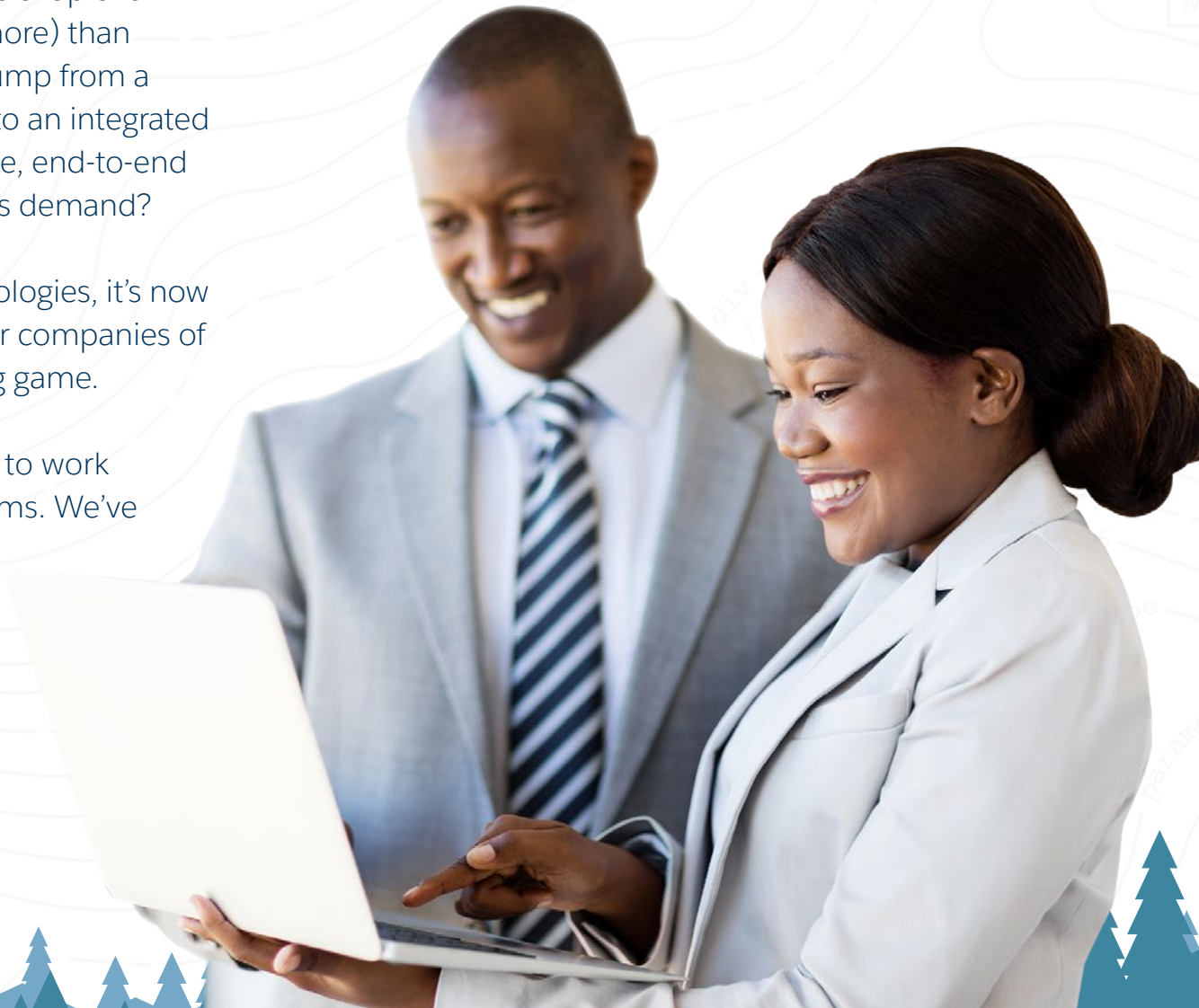
TRANSFORMATION 1

Use Automation and Analytics to Close Deals Faster and Maximize Revenue

Built-in automation and analytics lets sales team:

- Reduce manual data entry

- Organize info in one central location for easy access

- Quickly surface the hottest leads

- Easily identify upsell and cross-sell opportunities

- Instantly deliver personalized quotes and contracts

MITSUBISHI ELECTRIC

COOLING & HEATING

Boosting Efficiency and Increasing Sales

Mitsubishi Electric's Cooling & Heating Division provides high efficiency climate control systems across the globe, serving as the hub for an international network of distributors, contractors, and design-engineering firms all committed to building brand loyalty and delivering exceptional customer service.

However, they were struggling with a decentralized sales process that relied on an inconsistent mix of spreadsheets, price books, emails, and voicemails to collect information and generate quotes. The lack of visibility into pipeline caused inventory gaps and unpredictable revenues, and the slow quoting process limited sales rep productivity and made it nearly impossible to pursue urgent bid projects.

Building the Foundation for Success

Mitsubishi partnered with Salesforce to bring all of its divergent product information, partner certification, quoting, and lead registration processes onto a single, online CRM platform that provides automated documentation and quoting tools, centralized collaboration, and anywhere, anytime access to product and pricing information. Instead of operating in blind silos, Mitsubishi's internal reps and distributors can see leads in the pipeline, collaborate to convert them into opportunities, and generate accurate, up-to-the-minute quotes in minutes. This is important in an industry where timeliness can make or break a deal.

Within six months Mitsubishi had:

Decreased sales cycle length by **1,000%**

Reduced quote approval time from two days to **two hours**

Reduced partner certification and accreditation management time by **80%**

Increased documentation and approval of proposals by **30%**

Improved sales pipeline visibility, closed inventory gaps, and made revenues more predictable

"By making everything online and easy to use for our distributors and sales team, we're able to respond to projects faster and win more."

– **Christopher Osment,** Director of IT

Checklist for Driving Operational Excellence

☐ Centralize lead, opportunity, and account management into one online platform

☐ Automate data entry and quoting processes

☐ Offer flexible reports and dashboards for real-time product, prospect, pipeline, and revenue insights

☐ Provide anytime, anywhere collaboration tools and deal guidance

DISCOVER HOW ›

TRANSFORMATION 2

Connect Sales and Marketing to Accelerate Pipeline Growth

Integrating sales with marketing automation and pipeline intelligence lets teams:

- Quickly prepare for any call with holistic customer insights

- Automate the nurture process

- Add prospects to marketing approved drip campaigns for higher lead conversion

- Predict future sales and identify gaps in the pipeline
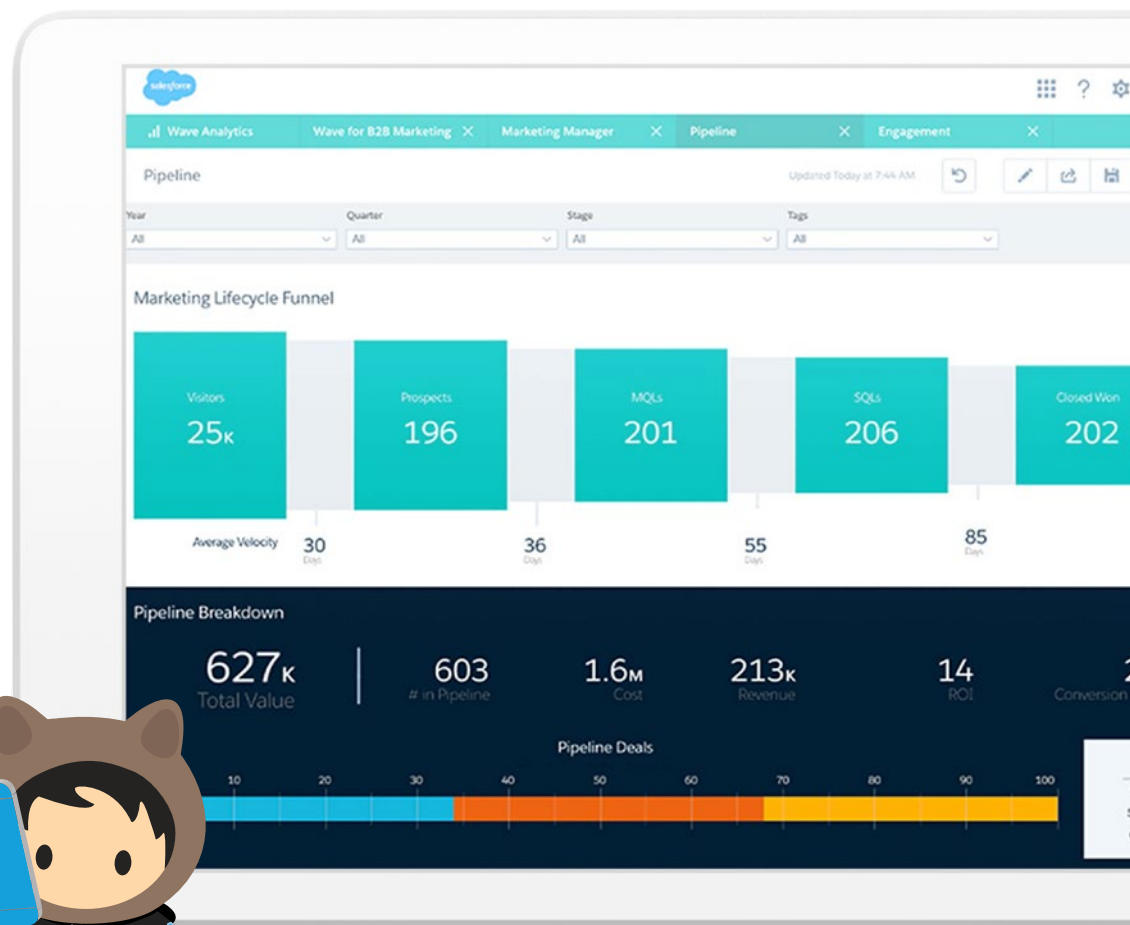
GEORGE STREET

Expanding Markets and Doubling Revenue

George Street is a Chicago-based wedding photography and videography service that connects couples across the country with local photographers and videographers in their network.

Though it had dreams of expanding into new markets, the company kept coming up against some big roadblocks. Namely, because it was using many different systems to track leads, appointments, orders, payments, and customer communications, its data entry and reporting were in shambles. Company leaders didn't have the ability to accurately forecast revenue, and it took days to simply calculate total sales. The company knew if it wanted to grow, big changes were needed.

Building the Foundation for Success

George Street transitioned all its marketing, sales, and customer service operations onto the Salesforce for Sales CRM platform, allowing employees to track – and report out in real time – lead generation and conversion. It's now leveraging marketing automation to run and optimize nurture campaigns, and using automated workflow rules to route leads from the inside sales team to local outside sales consultants – plus match leads with the photographer or videographer that best fits their style. In addition, George Street now manages and tracks all customer service activities on the same platform.

Since making the transition, George Street has:

Generated **384%** more leads and **181%** more appointments

Reduced sales consultant prep time from 30 minutes to **5 minutes**

Increased close rate by **33%**

Grown sales by **459%**

Shortened service case response time from 3 days to under **24 hours**

"We wouldn't be in half the markets that we are in without Salesforce"
– Michelle Mantel, President

Checklist for Unifying Sales and Marketing

☐ Integrate marketing automation, campaign reporting, and lead tracking onto one platform

☐ Automate workflows and partner management processes

☐ Provide lead scoring to prioritize follow-up

☐ Offer anywhere, anytime campaign and conversion reporting for accurate forecasting

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TRANSFORMATION 3

Empower Sales Reps to Sell Faster

Integrated productivity and collaboration tools let sales teams:

- Access and enter data anywhere, from any device

- Sync their email and calendar with the CRM to reduce data entry

- Easily build apps to boost workflow efficiency and automate tasks

- Access customized reports and dashboards to quickly get actionable insights

![accenture — High performance. Delivered.]
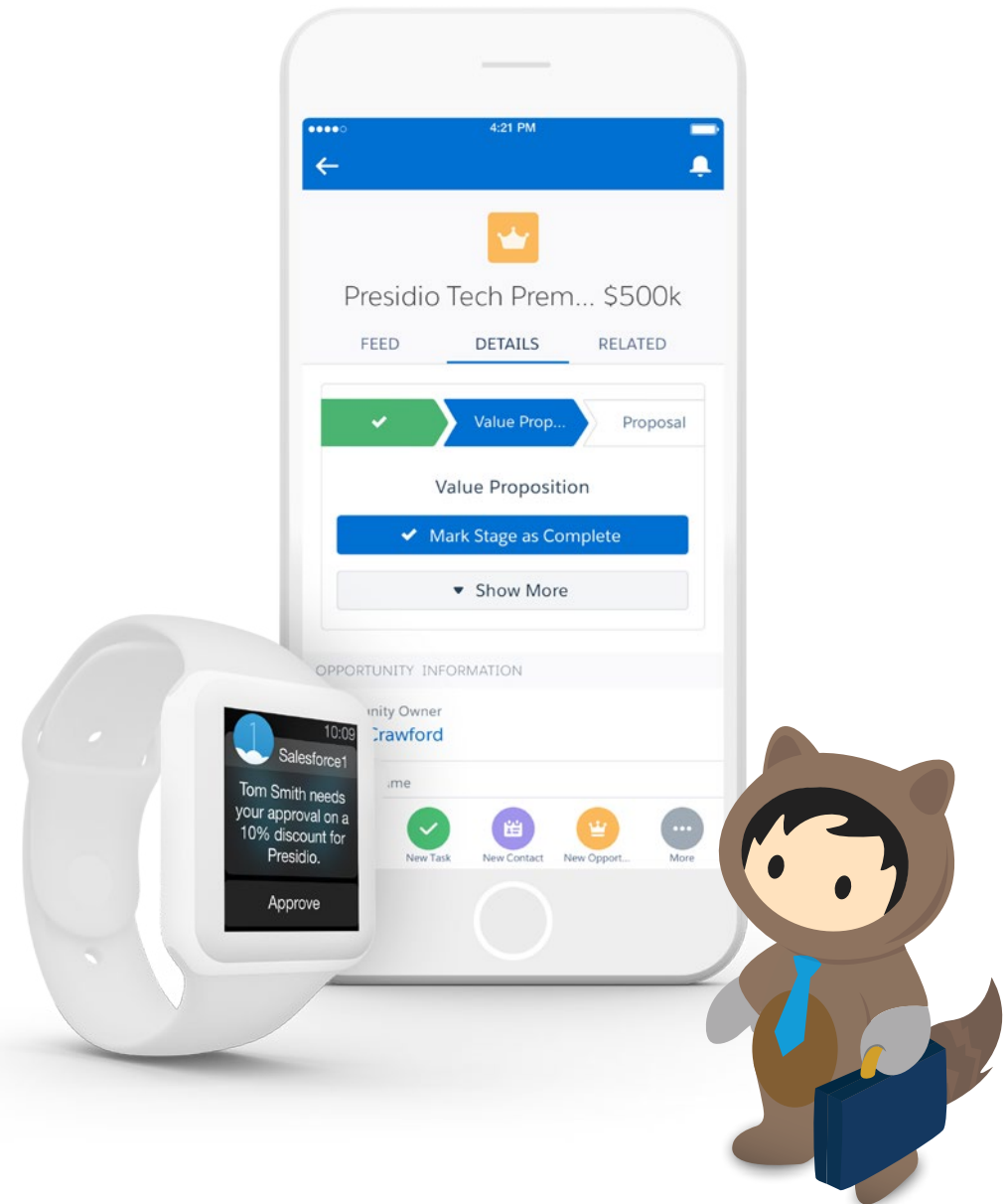
Streamlining the Sales Process for Maximum Efficiency

Accenture is one of the largest consulting firms in the world, serving clients in more than 200 cities and 120 countries. Due to the scale and the breadth of its services and offerings, Accenture's business processes are highly complex.

Yet the company was managing their sales was rudimentary and sorely out of date. Sales meetings and business decisions were still run off of spreadsheets. Despite having customer-facing employees spread out all over the world, they didn't have any sort of centralized system for communicating or recording customer interactions. Delays in the sales cycle were the norm, and sales velocity was limited.

Building the Foundation for Success

Accenture adopted the Salesforce for Sales CRM to manage its entire end-to-end sales process for its five distinct business lines on one single platform, complete with built-in collaboration and productivity tools. The company customized a world-class sales enablement tool: a one-stop-shop that gives 25,000 employees and 6,500 client account teams across 50 countries the ability to track deals, log calls, check dashboards, access client information, and collaborate on projects. All in real time, on any device, from wherever in the world they may find their client work taking them.

The results? Accenture was able to:

Digitize their entire end-to-end sales process in under **5 months**

Unify geographically diverse teams with a single point of record for all customer interactions

Streamline the sales cycle to reduce delays

Integrate sales, service, and marketing processes

"Salesforce is driving all sales enablement at Accenture"
– Andrew Wilson, CIO

Checklist for Accelerating Deals Through Your Pipeline

☐ Create one shared point of record for all customer interactions

☐ Integrate configuration, pricing, and quoting tools to accelerate the closing process

☐ Offer branded and streamlined proposal creation

☐ Provide real-time mobile access

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TRANSFORMATION 4

Engage Customers with a Complete, Customizable CRM

Offering one customizable view across sales, service, and marketing lets sales teams:

- Identify and solve gaps in the sales process

- Use B2B marketing automation to surface the hottest leads, faster

- Deliver personalized quotes and contracts quickly

- Build self-service and partner communities to generate more upsell and cross-sell opportunities

- Optimize the entire customer lifecycle

Schneider Electric
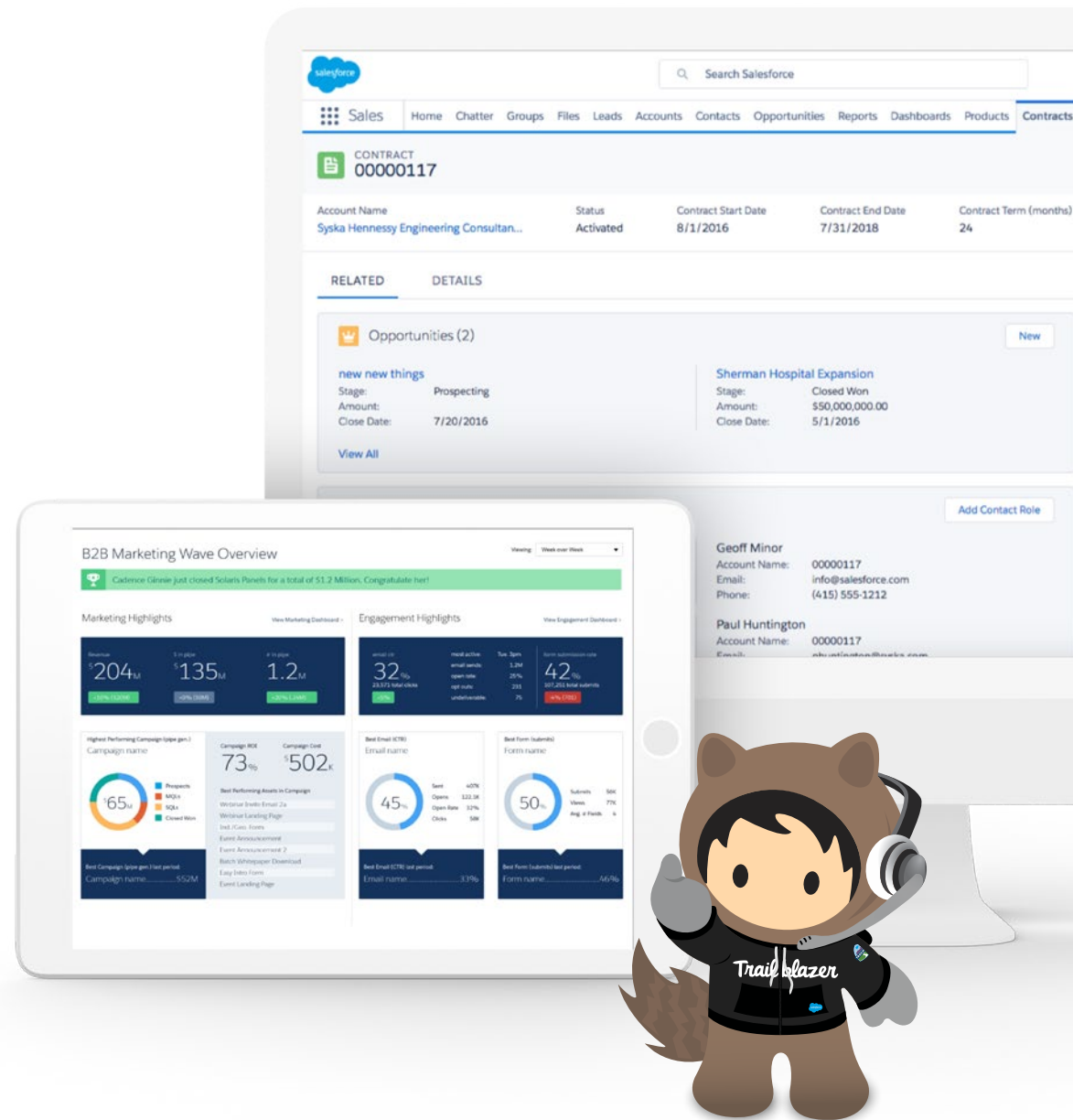
Creating One Conversation with the Customer

Schneider Electric is a global manufacturer of energy management and automation equipment, providing power to almost half of the world's buildings. As you can imagine, its selling and service model is complicated, made even more so by decades of rapid growth and acquisitions that resulted in a disparate array of business systems that weren't integrated.

With thousands of partners, service agents, and employees interacting with customers across the globe, Schneider Electric found it was having difficulty providing a consistent customer experience. Instead of one cohesive customer conversation, customers were having a repetitive and disjointed experience with the company as they interacted with people on different teams.

Building the Foundation for Success

To solve this, Schneider Electric kicked off an initiative called One Schneider – creating one seamless, unified customer experience. To do this, it partnered with Salesforce and adopted the world's #1 CRM platform to align and centralize its various processes and systems, connect an increasingly mobile workforce, and provide one customizable view across sales, service, and marketing.

Schneider Electric was able to:

Unite 43,000 users, 400,000 partners, 4,000 service agents, and over 20,000 salespeople on one shared platform

Increase efficiencies: now only 4,000 service agents solve **10 million cases** each year

Dramatically improve customer satisfaction

Provide one complete view of the customer and one place for collaboration, accessible from any device

Boost solution selling, which grew from 10% to over **40%** of revenues

"Salesforce has completely transformed the way we manage our customer base. We now have one version of the truth to rally the company behind."
– Chris Leong, CMO

Checklist for Selling Smarter with a Complete View of Your Customer

☐ Provide a shared 360-degree view of your customer on one mobile-accessible platform

☐ Offer built-in predictive analytics and account insights to spot trends and anticipate needs

☐ Maximize productivity with intuitive case management and self-service communities

☐ Streamline cross-sell, up-sell, and account management for increased adoption

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Build a Foundation to Drive Long-Term Sales Success

The Age of the Customer is officially here. To succeed, companies have to provide customers with a seamless, personalized buying experience from start to finish. And to do that, you need to empower your sales team to connect with your customers in a whole new way.

Transform how your sales team works with Salesforce for Sales, the world's #1 CRM. Grow your accounts. Find new customers. Customize workflows and dashboards. Accelerate productivity. Make insightful decisions. Close more deals, faster – from anywhere.

See Salesforce for Sales in Action

WATCH DEMO >

Get empowered with sales solutions built for productivity.

Want to sell smarter, faster, and the way you want to? Salesforce helps reps optimize their efforts and win every deal with productivity and collaboration tools that maximize time spent selling – from anywhere and on any device. Discover the cloud-based tools that will give your sales team the power to close deals like never before.

Sales Cloud Einstein

salesforce inbox
Salesforce Inbox

Sales Cloud Lightning

Salesforce1 Mobile App for Sales

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7 Sales Skills That CAN Be Taught

By Dan Ross, SR AVP, Commerical Sales, Salesforce
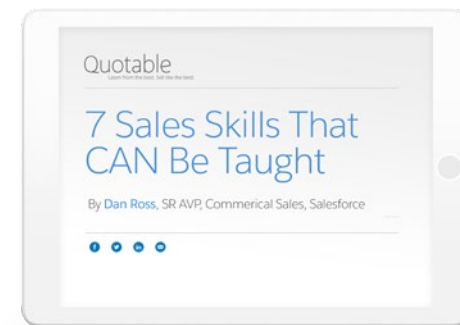
"Sales is a process. To be great you need to master each step, otherwise your efforts will not lead to results."

The 7 Sales Skills That CAN Be Taught, by Dan Ross, Sr. AVP, Commercial Sales, Salesforce

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY