

Fast Path to Growth

# Customer Relationship Management 101

meet with sales team



follow up w/ potential customers



salesforce

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On average, customers using Salesforce have seen 38% faster decision making, a 25% increase in revenue, and a 35% jump in customer satisfaction.



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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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## INTRODUCTION

If your business is still growing, you might not think you're ready for customer relationship management (CRM) technology. Larger enterprises use CRM to manage and analyze customer interactions with the goal of building stronger relationships, improving customer retention, and driving growth. But you may feel it's overkill for your company's limited day-to-day needs. Or maybe you're afraid it's simply too expensive.

In reality, though, if your company relies on spreadsheets, email, or old-fashioned Rolodexes to track and manage customer conversations and follow-ups, then you're already using a relationship management solution.



**The real question is:** Does your current solution make the best use of your time and resources to grow your business?



Keep in mind, smart relationship management isn't just for salespeople. Whether you're in sales, customer service, business development, recruiting, PR, or any other line of business, relationship management tools give you a better way to manage the external interactions and relationships that drive success.

## What Is CRM?

Customer relationship management (CRM) refers to the strategies and technology companies use to organize, manage, and analyze their critical customer information. A CRM system lets you store customer and prospect contact information, accounts, leads and sales opportunities in one central location, helping your team move through the process of winning deals with greater efficiency and rigor. Savvy business owners of every size and industry have discovered that CRM is a powerful business tool that will truly help them grow.

[Learn More About CRM](#)

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## 5 WAYS CRM HELPS YOU GROW YOUR BUSINESS

Because relationships are the key to your company's growth, it only makes sense to manage them as efficiently and effectively as possible. Here are 5 ways relationship management technology helps you grow your business bigger and faster than ever.



# 1

## Blaze a trail to more sustainable relationships

The health of your company depends on the health of your customers, so it pays to help them succeed. Develop a deep understanding of a customer's business—beginning with a complete view of their history with your company—and you'll develop a strong relationship built on trust and mutual success.



*46% of sales leaders say deeper customer relationships are a key objective for sustaining success.*

Salesforce, First Annual State of Sales

# 2

## Reduce the cost of sales

New customers are a key ingredient of continued growth, but they're not easy—or cheap—to come by. The good news is you can offset new customer acquisition costs through sales to your existing customer base. Gain greater visibility into the upsell, cross-sell, and renewal opportunities in your customer portfolio—and you'll see repeatable sales move faster and smoother thanks to the trust you've already earned.



*The probability of selling to a new prospect is 5%–20%. The probability of selling to an existing customer is 60%–70%*

Marketing Metrics

# 3

## Increase sales productivity

Adopting smart technology frees your teams from process-heavy tasks and gives them more time to connect with customers. Manual tasks like hunting for contact information or entering data can be automated or eliminated from customer-related processes. The time gained will be put to better—and more profitable—use by talking to new customers and strengthening relationships with existing ones.



*52% of high-performing salespeople identified themselves as power users who take full advantage of their companies' CRM technology.*

Harvard Business Review

4

## Gear up for better customer experiences

The best product is only as good as the service that comes with it. Drop the ball after a sale and you're wasting the time and effort that went into winning a valuable customer. When your entire team has immediate access to a customer's complete history, everyone can provide personalized solutions or connections to the right resources. The results are smoother interactions that build trust and encourage repeat business.



*55% of consumers would pay more for a better customer experience.*

Defaqto Research

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## Get on the path to improved customer retention

Visibility across all your relationships can help your teams proactively address at-risk accounts and present customers with opportunities at just the right moments. With transparency into a customer histories, you can provide more satisfying purchase and service experiences that keep them coming back for more. Invest your time wisely now, and strong customer will pay dividends for years to come.



*A 5% reduction in your customer defection rate can increase profits 25%–85%.*

Harvard Business Review

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Because relationships are the key to your company's growth, it only makes sense to manage them as efficiently and effectively as possible.





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## 7 UNMISTAKABLE SIGNS YOU NEED CRM NOW

Still not sure if you're ready for CRM?  
We understand a CRM initiative can be  
intimidating—but it doesn't have to be.

For starters, use our simple 7-step test to see  
if you should be using CRM today. If one or  
more of these situations apply to you, then  
guess what? The right CRM could make your  
job a whole lot easier.





# 1

## You have no single source for information

Does your company have customer and order information in more than one location? If you have customer details in spreadsheets (or notes stuck to computers), then your sales team—and everyone else who interacts with your customers—is at a disadvantage. They lack a single view of every customer's contact info, orders, and interactions.

# 2

## You have little or no visibility into customers

Do you lack visibility into how your customers are connecting with employees? Then you also lack insight into what your salespeople are doing. If you're not sure what the sales team is doing, it's harder to help them be successful—and keep them accountable.

# 3

## Reports are tedious and painful

Do you and your team go through the cumbersome process of creating reports manually? If so, your tracking capability can probably be described as “slim to none.” Ideally, you should be generating reports and analytics of your sales team's monthly progress against their quotas.



4

## You're losing data

Is it hard for you to schedule follow-ups with customers and prospects because you're not sure what you're following up on? If your customer interactions aren't being tracked, important details get lost—especially if an employee leaves your company.

5

## It's hard to stay in touch on the go

When your sales reps are out in the field meeting prospects and discovering valuable information, does the rest of your company ever get to see it? Data stored in handwritten notes and on personal computers is an untapped goldmine.

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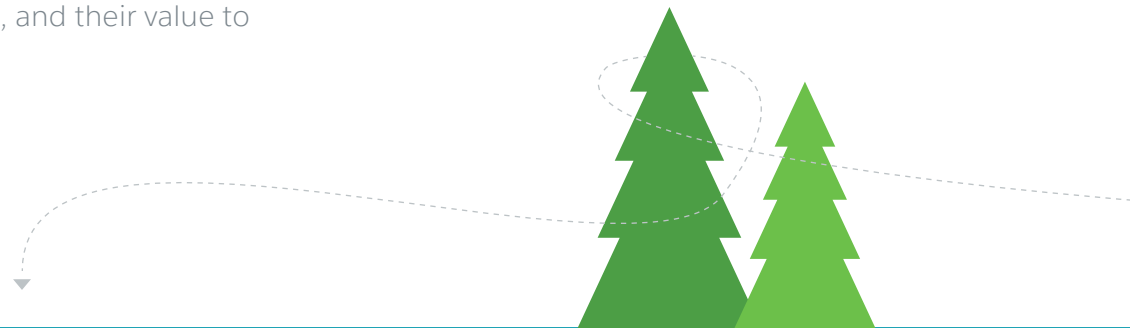
## Every customer is treated the same

Are you sending the same types of offers and messages to all your customers and prospects? If so, you're missing tons of opportunities. To make the most of every interaction, you want the ability to target prospects based on their industry, geography, stage of the buying process, and their value to your business.

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## You lack a plan to scale fast

What if your company grew from 20 to 200 employees this year? Are you confident your business could scale as quickly as the demand? Don't let your own processes be the obstacle to hard-earned success.



**Trailhead: The Fun Way to Learn Salesforce**

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## WHAT SHOULD I LOOK FOR IN A CRM SOLUTION?

Most of today's customers are well-informed, fast-moving, and impatient. And with more information—and more options—at their fingertips daily, they're going to be even tougher to please tomorrow. How do you keep up? You'll need a CRM built to create relationships that last.

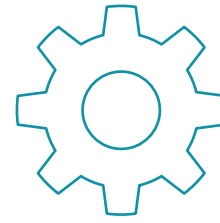




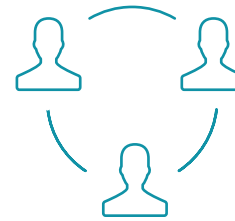
Businesses using smarter technology to support their customer relationships grow faster, adapt with agility, and compete at higher levels. How do they do it? By choosing a relationship management solution that is:

**Automated** – Repetitive tasks are the enemy of growing businesses. Automation saves your teams from manual processes and improves productivity. Time saved through technology is more time to connect with your customers.

**Collaborative** – To create a great customer experience, everyone who interacts with your customers should be working together from the same up-to-date information at all times. Sharing data is essential to growth; it helps your team run efficiently and provide the kind of experience today's customers expect.



automation



collaboration

**Intelligent** – Intelligent data is all about seeing the most meaningful information in a way that’s both actionable and productive. A smart tool feels like it’s another team member helping you work more efficiently.

**Cloud-based** – By running your business in the cloud, you can access your data and customer information anytime from anywhere. And since it doesn’t require server maintenance or upgrades like on-premise CRMs, you can save money and easily scale your technology to keep up with business growth.



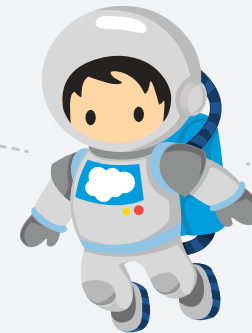
intelligence



cloud-based

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## YOUR PARTNER IN GROWTH: SALESFORCE

Salesforce helps you find customers, win their business, and keep them happy so you can grow faster than ever. With Salesforce's out-of-the-box solutions, small businesses can easily implement cutting-edge technology and connect everything they use to run their businesses.

\*Average percentage improvements reported by Salesforce customers.  
(Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.)

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

**38%**  
faster  
decision  
making



**25%**  
increase  
in revenue



**55%**  
jump in  
customer  
satisfaction

**GET STARTED**