

# HOW A CRM SOLUTION HELPS SMALL BUSINESSES

PART OF THE CRM SUCCESS SERIES

## *Introduction*

# LEARNING ABOUT CRM

Technology has changed the game for small businesses. Where department size was once an advantage, it can now be a hindrance. Where large, established infrastructures used to mean stability, they can now mean reduced agility and flexibility. For decades, being “the little guy” has been a disadvantage, but not anymore.

The right technology can turn an SMB from a niche player in an industry to a major threat to established enterprise players. Organizing, supporting, and enabling a small business with a customer relationship management (CRM) solution like Salesforce can help that SMB punch well above its weight and harness the selling power previously reserved for big business.

This e-book will take a look at the specifics of what a CRM solution can do for your small business, including:

- How it helps you get to know your customers
- How it enables you communicate at a massive scale
- How it can increase your company’s productivity
- How it can give your company big business power

Let’s take a look at how a CRM solution can help your small business.

## Table of Contents

- 03** Get To Know Your Customers
- 06** Communicate At A Massive Scale
- 09** Increase Productivity
- 11** Big Business Power
- 13** Conclusion


## Chapter 1

# GET TO KNOW YOUR CUSTOMERS

The expectations of sales leads have never been higher. With more data available than ever before, your leads expect you to know exactly who they are and tailor your sales pitch to their specific needs and pain points. Generic sales pitches or manipulative sales tactics no longer cut it and only serve to drive leads away. Today's sales reps really need to know their leads, and a CRM solution like Salesforce can help.

## Contact Management

CRM lets you do much better than a name, address, and phone number. It allows you to gain insights from conversations on social media like Facebook, LinkedIn, Twitter, and YouTube, giving you the complete picture. The tool even monitors customer interactions, internal account discussions, and account histories in one place. So if a customer calls, any employee with access can catch up on relevant details in no time.



Today's sales reps really need to know their leads, and a CRM solution like Salesforce can help.

## Smarter Data

In an age of immediate solutions and readily available information, customers expect you to understand their business needs better than they do. This means you need data that doesn't just cover the basics, but provides actionable intelligence that can be accessed anywhere, at any time. Data.com is the sales tool of choice for getting the data you need on every account, enabling you to find the right prospects, make the right pitch, and to close the sale. Data.com Duplicate Management will immediately improve the quality of your Salesforce data and the accuracy of your selling with real-time duplicate alerts in the Salesforce1 mobile app and Salesforce desktop.

## Task & Event Monitoring

If a customer makes a request, whether it be for a quote or a phone call, a CRM solution gives you the power to automatically assign the task to another staff member, while leaving specifics on the account. This means everyone working with that customer knows exactly what is going on at all times. Business owners can also monitor their own calls, meetings, and deadlines so they don't miss any opportunities.



Customers expect you to understand their business needs better than they do.





“Trunk Club runs on Salesforce.  
It just works. Smoothly.”

-Brian Spaly, CEO, Trunk Club

## Customer Spotlight: Trunk Club

Trunk Club is looking to disrupt an industry, and to do that they needed technology that would allow them to scale their business effortlessly. From the one-to-one interactions that customers have with their stylists to the real-time response of their customer service agents, Salesforce was the perfect solution to scale the service and personal touch that Trunk Club customers love.

[Watch the film >](#)

**TRUNK CLUB**  
MEN'S OUTFITTERS

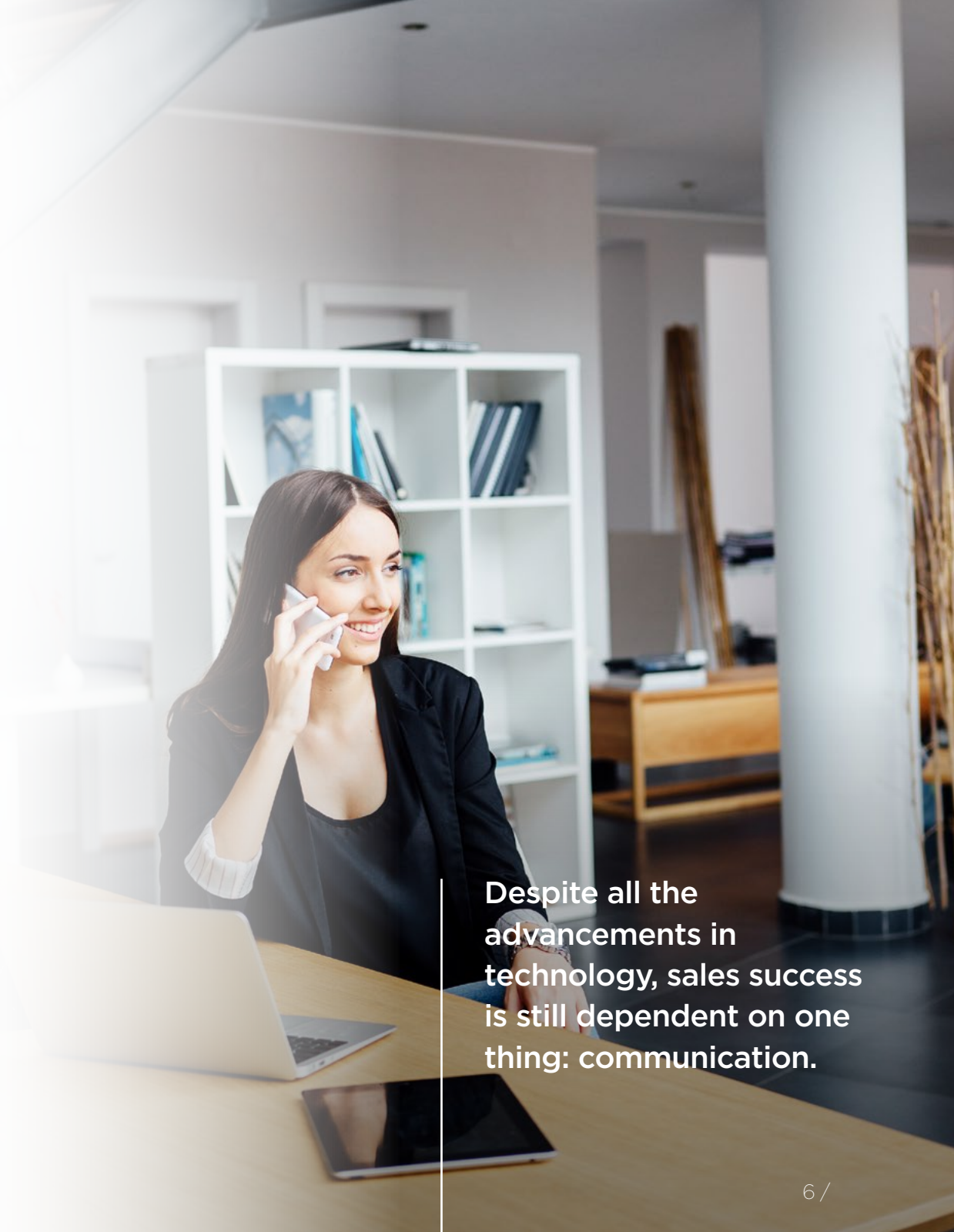
## Chapter 2

# COMMUNICATE AT A MASSIVE SCALE

Despite all the advancements in technology, sales success is still dependent on one thing: communication. However, with more channels and customer touchpoints than ever before, sales professionals need to have the right tools to communicate at the scale required to be successful. Sales reps must be able to respond to dozens, if not hundreds, of emails each day, keep up with emerging channels like social media, and nurture leads that aren't yet ready to buy. While this is no easy task, a CRM solution like Salesforce makes it easy.

## Email Integration

Email is one of the most powerful communication tools available today and continues to be the workhorse of nearly every sales organization. A CRM solution can integrate directly with email clients like Outlook and Gmail, so sales reps don't need to interrupt their workflow to send or read email. They can also easily track any email

A woman with long dark hair, wearing a black blazer over a black top, is sitting at a wooden desk in a modern office. She is smiling and talking on a white mobile phone. In front of her is a silver laptop and a tablet. The background shows a white bookshelf with books, a wooden desk, and a large white pillar.

**Despite all the advancements in technology, sales success is still dependent on one thing: communication.**

conversation with any customer, and share those emails with the right employees.

## Email Templates

To reach customers in a memorable way, emails must be consistent and compelling. CRM email features allow members of your sales and marketing teams to create email templates on an as needed basis, so you can target customers in a more personalized way and even get follow-up reminders.

## Social Media Monitoring

By integrating with social media platforms like Facebook, Twitter, and LinkedIn, sales professionals can also get a more detailed picture of who their sales leads are and what interests them. Information posted on social media can give insight into the struggles and pain points of

a particular lead and prove invaluable when tailoring a sales pitch.

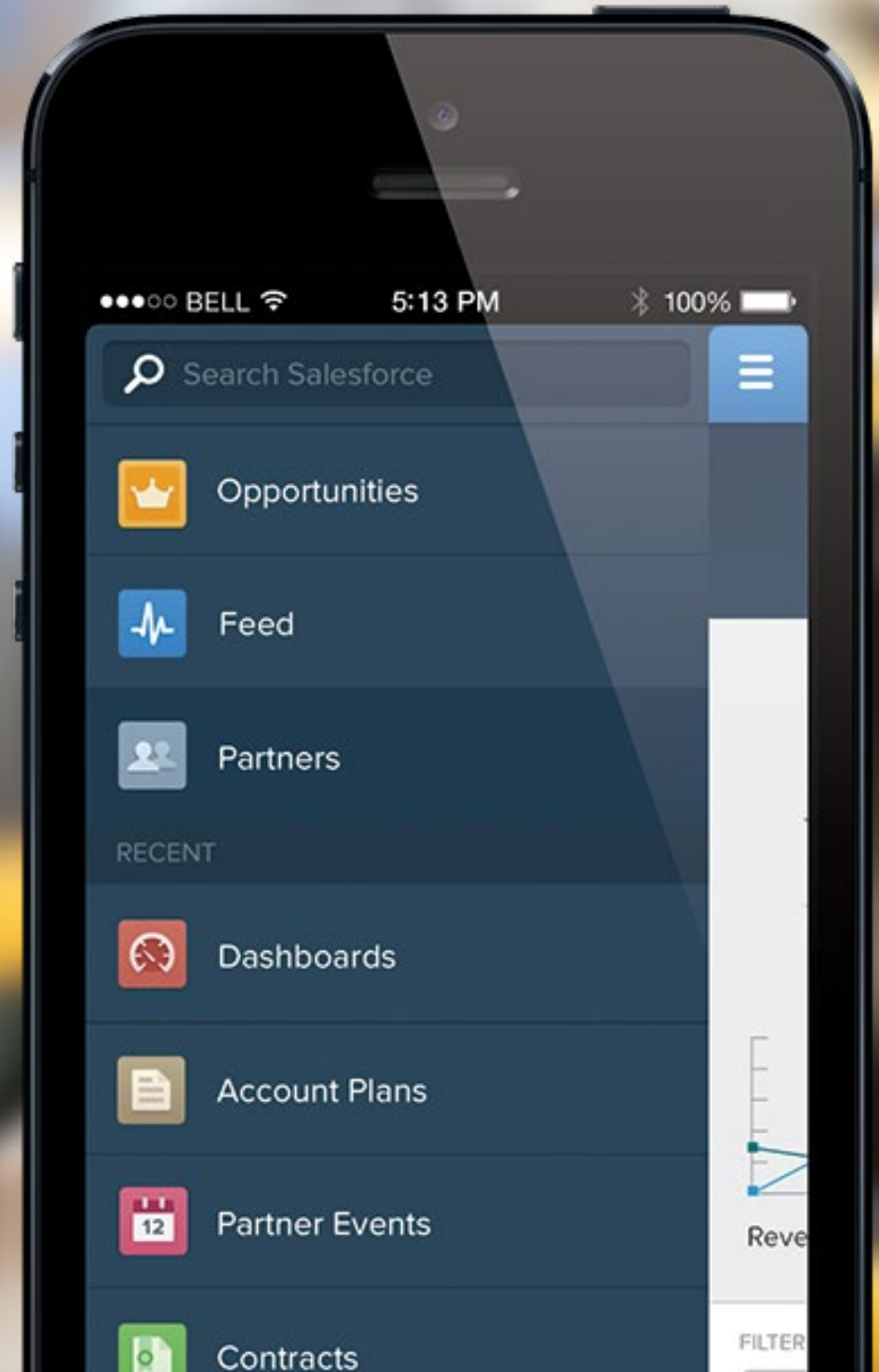
## Lead Nurturing

With easy-to-build lead nurturing campaigns, you can also give each of your salespeople the ability to run their own micro-campaigns to engage and nurture their leads on the fly, improving response time, increasing personalization, and enhancing the capabilities of your sales team. Designed to send information only after a certain time period passes or a particular action is taken, lead nurturing campaigns can allow a sales rep to educate leads at a nearly infinite scale.



# Take an interactive guided tour.

Learn how a sales manager and sales rep use Salesforce to manage their day. This interactive tour guides you through the different capabilities of Salesforce. Experience the world's #1 CRM app today.





## Chapter 3

# INCREASE PRODUCTIVITY

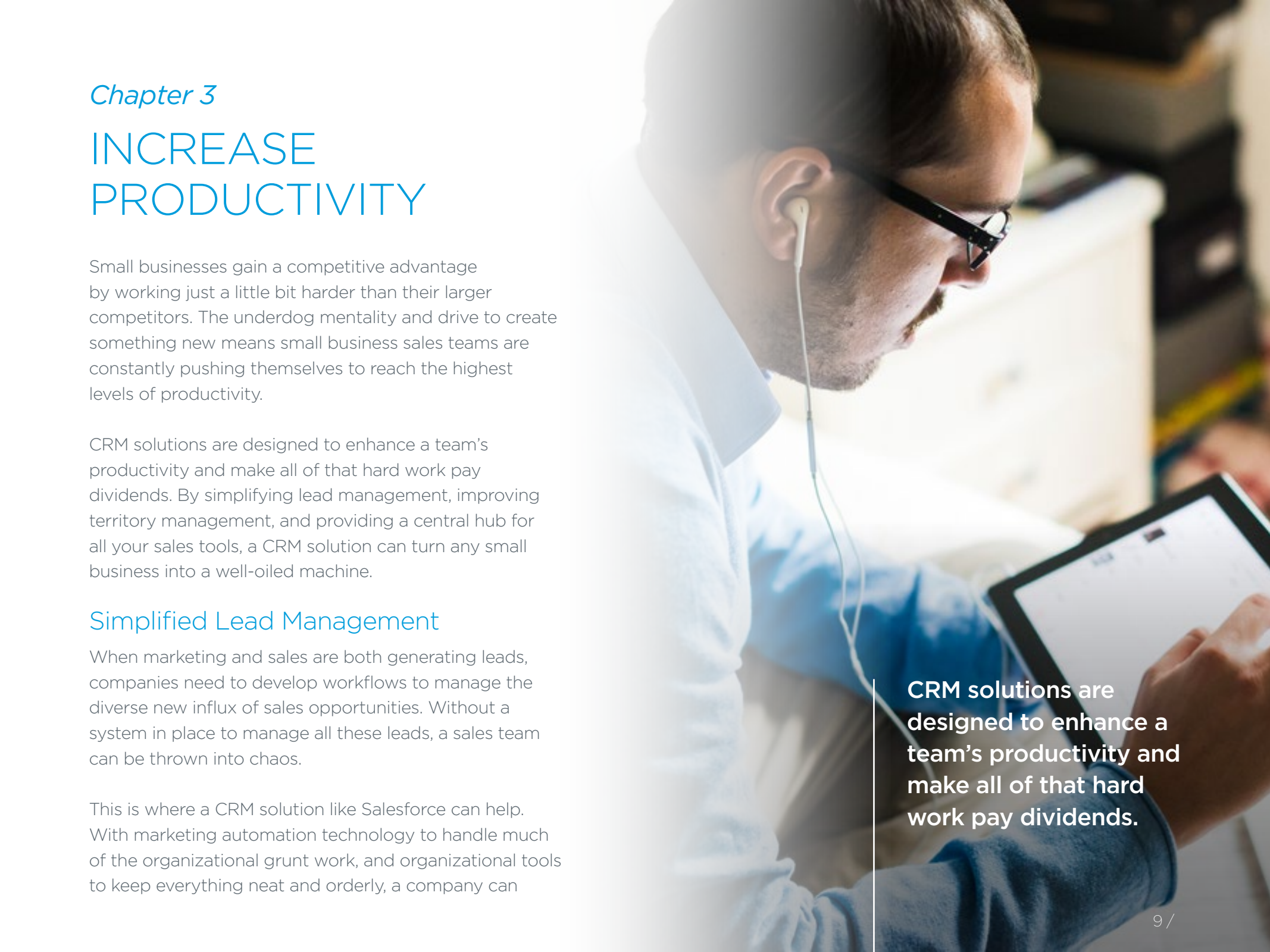
Small businesses gain a competitive advantage by working just a little bit harder than their larger competitors. The underdog mentality and drive to create something new means small business sales teams are constantly pushing themselves to reach the highest levels of productivity.

CRM solutions are designed to enhance a team's productivity and make all of that hard work pay dividends. By simplifying lead management, improving territory management, and providing a central hub for all your sales tools, a CRM solution can turn any small business into a well-oiled machine.

## Simplified Lead Management

When marketing and sales are both generating leads, companies need to develop workflows to manage the diverse new influx of sales opportunities. Without a system in place to manage all these leads, a sales team can be thrown into chaos.

This is where a CRM solution like Salesforce can help. With marketing automation technology to handle much of the organizational grunt work, and organizational tools to keep everything neat and orderly, a company can

A man with glasses and earbuds is looking at a tablet device. The background is blurred, showing what appears to be an office or retail environment.

**CRM solutions are designed to enhance a team's productivity and make all of that hard work pay dividends.**

harness its inflow of leads to start driving business results.

Before a lead even makes it to a salesperson, marketing automation tools like Pardot can automatically take care of most of the administrative work. Leads can be automatically scored and graded by how well they fit your ideal lead profile. Bad leads can be added to lead-nurturing journeys, while good leads can be routed to the appropriate salesperson based on location, industry, or business type.

## Territory Management

Despite being commonplace across most companies and industries, territory models are notoriously hard to set up, execute, and maintain. CRM solutions like Salesforce are changing that with territory management systems. Sales teams no longer need to involve the IT department to create territory models or struggle with the ambiguity of assigning and working clients.

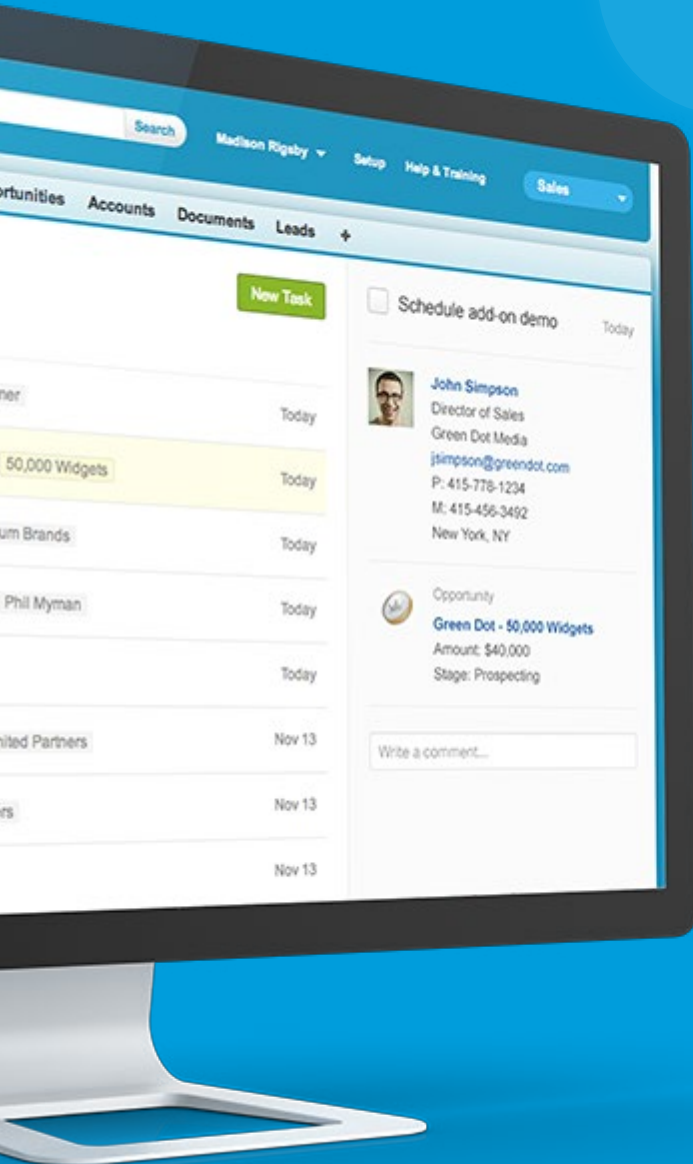
Involving IT in the setup process of territory models effectively excludes the teams that will actually make the most use of the models. Salesforce allows sales teams to set up their own system

with no involvement from IT. Sales teams can now optimize their sales coverage on the fly, in a matter of minutes, not months. A more flexible model means more accurate forecasting, less ambiguity, and greater responsiveness to issues.

## All Tools in One Place

There is no shortage of tools for sales reps to use these days. New products are springing up around common pain points every day. But all of these solutions can fracture our attention and silo our data in a way that can be both time-consuming and ineffective — especially at small and growing businesses, where time is precious.

CRM solutions serve as a central hub for all of your essential tools and data. Everything you need to win a deal, onboard a new client, and report on your performance is all accessible in one interface. The Salesforce AppExchange also allows you to integrate your must-have third party tools as well, reducing the time you spend switching among different tools and making your data more accessible and easier to understand.



## Chapter 4


# BIG BUSINESS POWER

Many small businesses run into the same obstacle at some point in their lifetime: They have a great product or service, but they don't know how to grow their business to the next level. How do you increase revenue and win rates? How do you grow your pipeline while keeping costs under control?

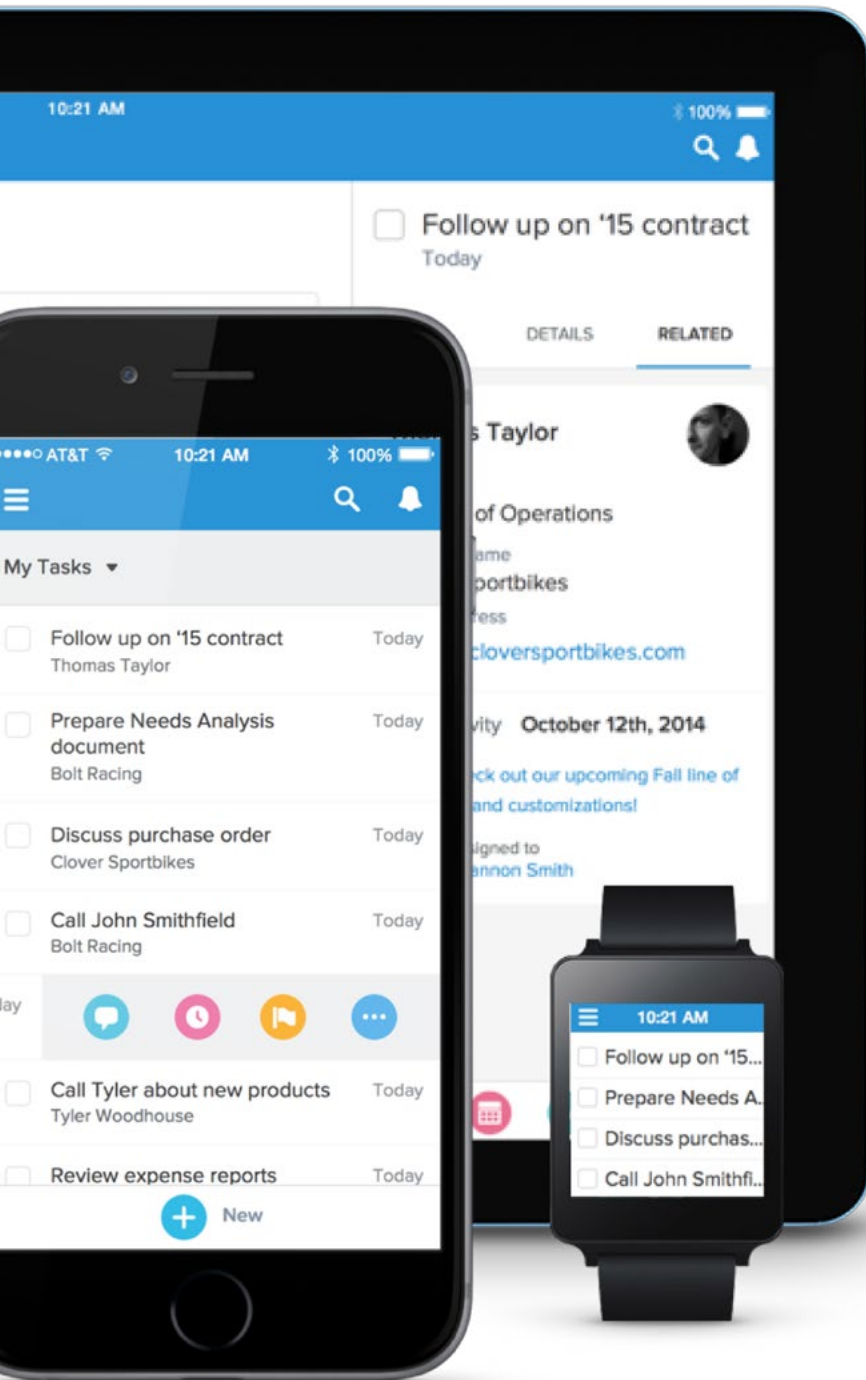
CRM solutions can help jumpstart business growth. CRMs streamline operations, allowing you to increase your win rates, grow your pipeline, and decrease your costs.

### Increase Your Win Rates

In nearly every industry, there is more competition than ever before. This means it's harder than ever to win a competitive deal. Closing a deal comes down to who is better organized, better prepared, and better informed. A CRM solution aligns your processes so you can sell with the poise and efficiency of a Fortune 500 company.



**Many small businesses run into the same obstacle at some point in their lifetime: They have a great product or service, but they don't know how to grow their business**



CRM solutions were designed to make closing a deal as easy as possible. Leads are automatically routed as they come in, complete with contact information, account activity, and relevant company information. Salesforce users immediately have an arsenal of information to start moving a lead to close. Comprehensive performance metrics make understanding what's working (and what's not) easier than ever. In addition, the Salesforce1 Mobile App makes it possible to sell from anywhere, allowing salespeople to be ultra-responsive. Every aspect of Salesforce has been designed to help users win deals.

## Grow Your Pipeline

Keeping track of leads on a spreadsheet just doesn't cut it anymore. Companies can no longer afford to have their pipeline be a mystery. You need to know exactly how many leads are in your

pipeline, and exactly where they are in the sales cycle to accurately assess performance and forecast out your quarters. Salesforce allows you to organize all of your leads, get an accurate view of your pipeline, and better forecast your deals.

## Decrease Your Costs

Bootstrapping and staying lean allow small businesses to maintain a competitive advantage over larger players. Salesforce helps keep hardware and personnel expenses low, improves support while shortening down times, and decreases the risk and difficulty of scaling up your sales organization.



## *Conclusion*

# Punch Above Your Weight

It's a brave new world for small businesses. Agility and flexibility have become major business assets, allowing SMBs to thrive against even the biggest competitors. Salesforce helps push this advantage even further.

Grow your business by increasing close rates and improving pipeline. Enhance productivity with collaboration and customization. Drive innovation and scale quickly with industry leading products. SMBs already have an advantage over larger competitors. With Salesforce, the possibilities are endless.

# SALES SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

If you want to grow your sales and establish a transparent sales process, you need an easy-to-use Customer Relationship Management system. Salesforce allows you to store customer and prospect contact information, accounts, leads, and sales opportunities in one central location.

**32%** Improvement in win rate.

**40%** Increased sales productivity.

**32%** Increase in sales revenue.



The information provided in this e-book is strictly for the convenience of our customers and is for general informational purposes only. Publication by salesforce.com does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links or other items contained within this e-book. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the e-book. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor or professional engineer to get specific advice that applies to your specific situation.

© 2014 Salesforce.com. All rights reserved.

# RESOURCES YOU MIGHT ALSO LIKE:



How A CRM Helps Your Business Grow



How A Mobile CRM Makes You More Successful



Deciding Which CRM Solution Is Right For You



THE CUSTOMER SUCCESS PLATFORM