

A woman with voluminous curly hair, wearing a pink sleeveless top with white polka dots, stands with her arms crossed in a bright, rustic-style shop. The shop has bicycles hanging on the wall and various plants on a wooden counter in the foreground. The text is overlaid on teal-colored rectangular boxes.

The Entrepreneur's

Guide to Finding

the Right CRM

salesforce small business

# Introduction

You're probably reading this e-book because you want to know what CRM is all about – and how it helps small businesses grow.

CRM stands for customer relationship management, but you could have learned that much in a quick Google search. We're guessing you want to know why and how small and growing companies are using CRM technology to grow their businesses and connect with customers.

Sure, CRM lets you store and manage prospect and customer information in one central location, including contact info, accounts, leads, and sales opportunities, but CRM isn't just a fancy contact list. It's how a company uses its CRM solution to connect to customers that makes it one of the most valuable, game-changing pieces of business technology available.

In this e-book, you'll learn the nuts and bolts of how CRM works, how to apply CRM's capabilities to make a company more efficient, why small businesses need CRM, and where to go for more information.

# Table of Contents

- 03** Chapter 1  
What Is CRM?
- 07** Chapter 2  
How CRM Boosts Your Sales
- 10** Chapter 3  
A Big Help for Small Businesses
- 13** Chapter 4  
Resource Library
- 14** Conclusion



## chapter 1

# What Is CRM?



At this point, you already know what CRM stands for. (Skipped the intro? *It's customer relationship management.*) But those three little letters can mean a wave of change that will revolutionize your business and help you grow like never before.

At the heart of a good CRM solution is something called “sales force automation,” which might sound a little intimidating, but it's not. At the most basic level, CRM means putting account and contact information in a central and accessible place so you accelerate and streamline the sales process. For instance, instead of being mired down in yellow sticky note reminders or buried in spreadsheets and Google Docs, you can move leads through your sales department quickly and easily, as a team. And CRM isn't just for leads – you can also store and automate processes for contacts, opportunities, customers, and so on.

The best CRM applications help you manage all of your critical customer information in one central location. Without leaving the app, you can view contact info, follow up via email or social media, manage tasks, and track your performance, among other benefits. Implementing the right CRM can increase sales efficiency by helping you close more deals, boost sales, and improve forecast accuracy.

The best CRM systems give you a quick way to score and route leads, track opportunities and activities, and gain visibility into deal stages and business health for both prospects and customers. And it's literally a record of your business' ongoing relationship with those contacts, whether they're customers, prospects, or partners.

The details of that record can contain everything from call logs and notes, deal conversations, and quotes, to shared files that are relevant to the customer's needs, and more. You can also keep information about customer service tickets and custom data fields, such as shipments or product licenses. So now anyone with access to these records can speak to customers with confidence. Additionally, you can set up your CRM to create daily to-do lists, schedule call alerts, and trigger emails.

CRM, of course, isn't just for sales. A complete CRM solution keeps track of the entire customer lifecycle, from tracking the performance of your marketing campaigns to monitoring the productivity of your customer service agents. It helps you build a community of engaged customers and partners and opens the door to brand-new applications designed to meet your unique business needs.

The best CRM systems are built to integrate with your other systems of record, too – so you don't have to give up the email service or HR solution your employees are already accustomed to using. They're built to work on any device, from tablet to smart phone to smartwatch, and they offer visually compelling, customizable reports and dashboards that enable you to optimize performance in real time.



## Checklist:

Here are a few key points to consider when considering which CRM system is best for you:

- Is it a cloud or on-premise CRM system?**  
*Cloud systems are generally faster, more cost-effective, and easier to set up and customize.*
- Is it optimized for any device?**  
*Your employees and customers are more mobile than ever. The best CRM systems have mobile capabilities baked in.*
- Does it go beyond simple data storage to deliver insights?**  
*A CRM system should make it easy to see how sales deals are moving through the funnel or where service case resolution is stalling – and easy to act on that information – via visual, customizable reports and dashboards.*
- Does it scale with you?**  
*Your CRM system should be more than a sales solution; it should be built on an open, scalable platform that lets you build customizations and leverage partnerships to fit your growing needs.*

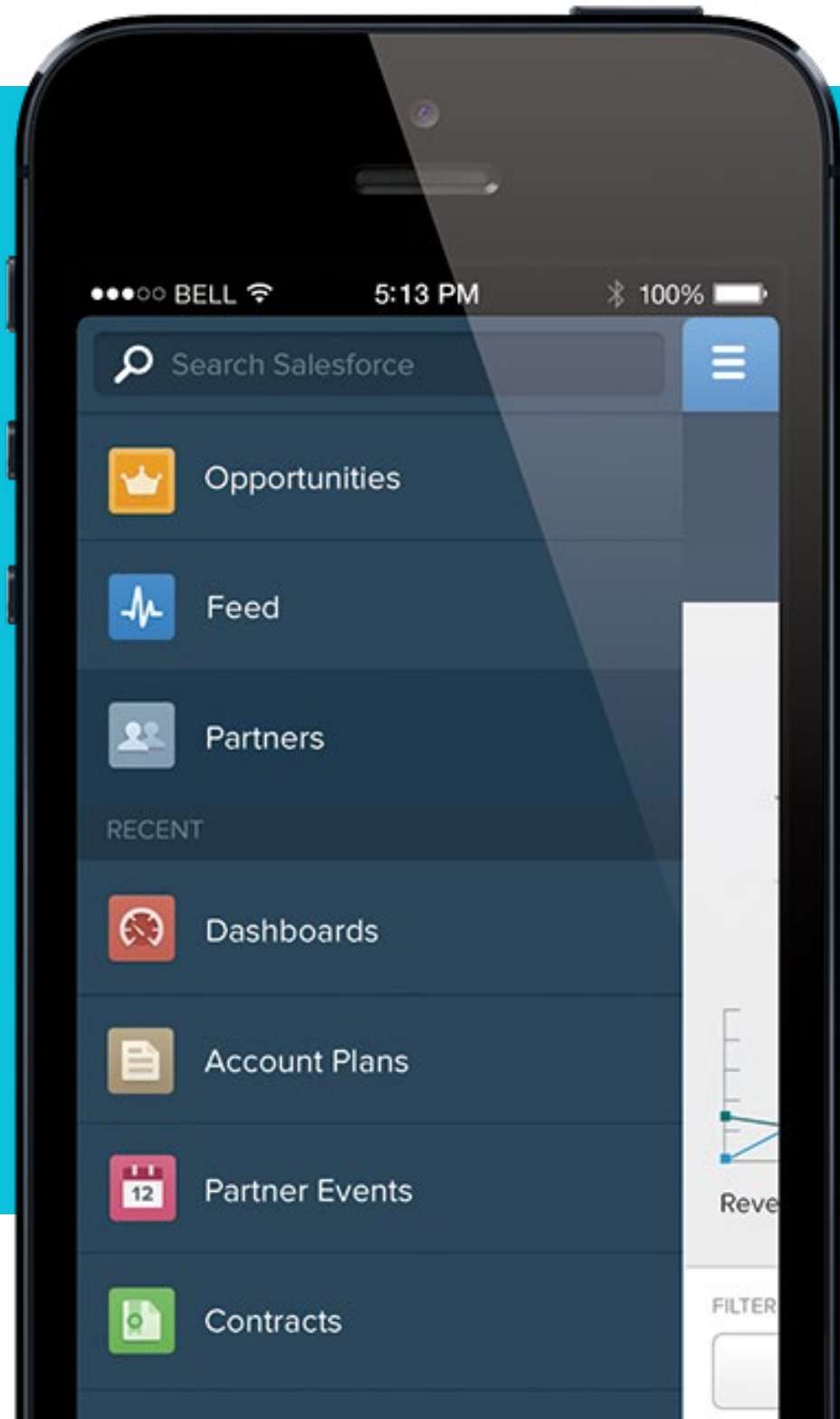
# Your CRM Should Be Mobile-First

## The Mobile Sales Team

As you consider CRM solutions, it's important to consider that the modern sales team is no longer confined to their desks for 8 hours a day. They are always on, always connected, and incredibly mobile. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity, and fits into your sales team's existing workflows.

## Mobile CRM Tools

When considering CRM solutions, you'll notice that a rare few have functional mobile components. Make sure the technology you are considering does not just add mobile functionality as an afterthought. The Salesforce1 Mobile App — available to all Salesforce customers — was built mobile-first with a team's productivity in mind. Designed with apps and features that streamline the sales process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your business and one that revolutionizes it.







*“As a customer company, we run our entire business in Salesforce, and can’t imagine how we would have skyrocketed to such heights without it!”*

Ryan McWhirter  
Director of Product

**365**  
retailmarkets

[Read more >](#)

365 Retail Markets succeeds at every step with Salesforce.

365 Retail Markets was founded in 2008 with the ambitious goal of revolutionizing the vending industry. In the seven years since, the company has proceeded to do just that with innovative solutions and an eye toward the future.

A photograph of three business professionals in a modern office setting. A man in a white shirt and dark suit is shaking hands with another man in a grey suit. A woman in a grey blazer stands between them, smiling and holding a tablet. The background shows large windows and office equipment.

## chapter 2

# How CRM Boosts Your Sales

Now that you know what a CRM does, let's apply that information to see the possibilities for how the right CRM can help your business.

Businesses typically begin with a basic relationship of seller-to-customer – simple. In such an early stage, it might be fine to just maintain an Excel spreadsheet or jot down notes about customers and incoming orders. But as your business grows, this sort of record-keeping can't do what you need anymore, and you'll want to become more efficient.

As the old adage goes: "There aren't enough hours in the day." This is especially true in the sales world, where time truly is money. The more efficiently salespeople use their time, the better the results to your bottom line. Businesses grow faster by keeping a steady flow of new prospects, increasing time spent selling, and arming their sales reps with all the information they need to close deals. That is where a CRM application comes in handy.

## Keeping the Pipeline Flush

Finding time to bring in a steady flow of new customers is a challenge for any sales team. This is often caused by some of the following issues:

- Inability to route leads to the appropriate sales rep
- Inadequate knowledge about a prospect before calling
- Poor visibility and forecasting of future pipeline

The best CRM systems allow sales reps to store the data on prospects so the information's ready at each interaction. Plus, it quickly provides metrics related to visibility and forecasting.

## Sell, Sell, Sell

Obviously, representatives need time to sell. Often, sales reps face time traps that are hard to overcome, but this can easily be fixed:

- Communication is a big challenge for a sales team on the go, but surprisingly few teams leverage smartphones and tablets as part of their regular workflow. Making the switch to mobile can eliminate downtime and increase communication.
- Automation of repetitive tasks gives salespeople more time to concentrate on closing deals.

- Providing one channel for reps to share information and connect with each other and product experts eliminates endless email loops and phone tag.
- The right CRM system integrates with mobile devices anywhere, anytime via the cloud, so the entire team is on the same page and has the most current information at its fingertips.

## Keeps You in the Know

For successful prospecting and pitching, you must gather vital information on potential clients. But finding time to do that can be hard when you're also trying to make your month. CRM systems help solve this problem by collecting valuable customer data on your behalf, including:

- Client history
- Current client preferences
- Client social media presence
- Past interactions with a client
- Client infrastructure details
- Client social media presence
- Past sales interactions

These efficiencies ring true for businesses of any size. But how can CRM be useful for small businesses, specifically? Check out the next chapter.

## Checklist:

Does your CRM solution play well with others?

### Email

*Your CRM system should integrate seamlessly with whatever email provider or distribution system you're currently using – whether that's Gmail, Outlook, MailChimp or Silverpop.*

### Google

*Your CRM system should also integrate with Google's suite of cloud apps: Drive, Contacts, Calendar, and more.*

### Cloud services

*The best CRM systems also integrate seamlessly with popular cloud storage providers such as Box and Dropbox; popular note-taking apps like Evernote; and e-sign services like DocuSign.*

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## Ready to learn more?

Your road warriors are core to your sales business. [Here's how a CRM can make them even more productive >](#)



*“The day we shifted everything to Salesforce was the day we became significantly more efficient and productive as a company.”*

Nick Sorensen  
Senior Director, Healthcare Operations

**PROSPER**<sup>P</sup>

[Read more >](#)

Prosper Healthcare Lending succeeds at every step with Salesforce.

Prosper Healthcare Lending is an online financing platform for elective healthcare procedures. As its co-founder, Nick Sorensen has seen the platform evolve as his team continues to iterate. One key advantage of using Salesforce has been a DocuSign e-signature integration that has decreased the time required to get a signed contract by 54%.

## chapter 3

# Big Help for Small Businesses

When first starting out, many entrepreneurs and small businesses wonder whether they actually need CRM. The good news is that technology has changed the game for small businesses. Where small department size once hindered, it now helps. Small, newly established infrastructures used to mean less stability, but now they offer more agility and flexibility.

The right technology can turn your growing business from a niche player to a major threat to established enterprise companies. Organizing, supporting, and enabling your new company with a CRM solution can help you harness the selling power previously reserved only for big business.

The bottom line: If you have customers, you can benefit from CRM. Even if your customer base is small, no one can keep every interaction – ones that have happened, or need to happen – memorized and organized. It's a powerful business tool that streamlines processes, gives valuable business insights, and virtually connects employees at your company so they can collaborate as a team, in real time. That's something every business could use.

Every business runs differently, and your small business has unique processes and ideas of success. This means a good CRM solution should be easily customizable and have an information hierarchy that puts what's important to you front and center. The best CRMs feature drag-and-drop customization capabilities, and then deliver regular upgrades automatically that won't break those customizations – with little or no need for IT involvement.



There's no shortage of CRM options, but only one continues to make more businesses successful than any other. Salesforce customers, on average, report 27% growth and a 42% boost in customer satisfaction.

Salesforce was designed to make closing a deal as easy as possible for small businesses. 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 an open lead through to a closed opportunity. Comprehensive performance metrics and user-friendly reports and dashboards enable you to act on key insights in real time. 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.

So that's CRM for entrepreneurs. Have more questions? We thought so. That's why we wrote the next chapter, which is a library of other resources for more of your CRM and sales questions.

## Checklist:

Is Salesforce the right CRM for you?

- Born cloud**  
*Salesforce is the world's leading enterprise cloud platform. Our fully customizable, complete CRM solution can have you up and running in a matter of days, not months.*
- Mobile-first**  
*Salesforce was built with the mobile user in mind. The powerful Salesforce1 Mobile App, available to every Salesforce customer, lets you work from anywhere, on any device.*
- Complete CRM**  
*Salesforce is more than just sales automation: it's a complete Customer Success Platform, with scalable solutions for sales, service, marketing, community, analytics, and apps. If you're looking to grow, you'll need a solution that can scale across your business.*
- Customizable platform**  
*Salesforce is built on a scalable, customizable platform. That means you can adapt our CRM to fit your needs as you grow. Our open ecosystem of partners and independent software vendors also lets you leverage a wealth of existing tools.*



*“Knowing how and when to reach out to a prospect during their lifecycle is crucial to establishing a relationship.”*

Billy Cripe  
CMO



**FIELD NATION**

[Read more >](#)

Field Nation succeeds at every step with Salesforce.

Field Nation runs a free platform for connecting businesses with local freelance expertise. By using Salesforce as their single source of truth, they've built a business around obsessing over their customers.

## Chapter 5

# Resource Library

You may have more questions now about CRM, the Sales Cloud (that's our complete cloud for effective selling), and Salesforce. Check out these resources to learn more.

### E-books



5 Productivity Tips Every Small Business Should Know



4 Ways Your Sales Team Can Help Build Your Brand



Your Complete CRM Handbook



Simplifying the Modern Sales Cycle

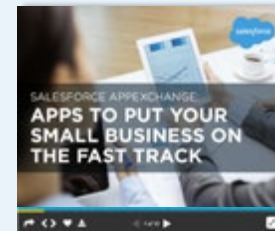


How a CRM Helps Your Business Grow

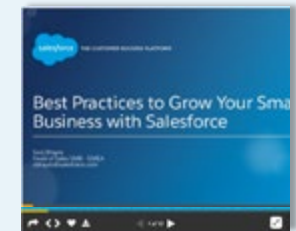


Small Business, Big Impact

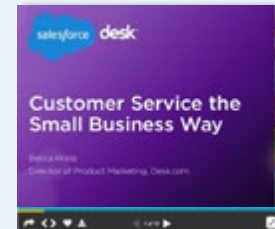
### SlideShares



Apps to Put Your Small Business on the Fast Track



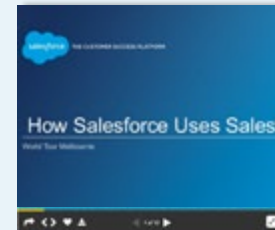
Best Practices to Grow Your Small Business with Salesforce



Customer Service the Small Business Way



Small Businesses Using Salesforce to Grow and Succeed



Run Your Business Better Using Salesforce



How to Set Up Your Small Business Social Profiles



# Conclusion

Congratulations, you're now a CRM expert! Consider this our guarantee that you know a whole lot more about CRM than you did before. (Although if you're [wanting a real certification in Salesforce](#), we have one of those, too!)

At its simplest, CRM is a way to store customer information and better communicate with them. At its best, the right CRM can propel your business to greater heights of efficiency and growth than you ever thought possible. Consider using a CRM as the foundation for your continued success.

## How Much Do You Know About CRM?

**Take Our Quiz Now** *(Answers on next page)*

Are these statements true or false?

1. CRM stands for centralized revenue management
2. CRM works best for medium-sized businesses.
3. CRM is the same as sales force automation.
4. CRM systems help keep track of client preferences.
5. All CRM systems are cloud-based.
6. CRM is mainly for sales teams, but other departments can take advantage of it as well.
7. You can access your CRM data from any device, at any time.







## Answers

- 1. False.** CRM stands for *customer relationship management*.
- 2. False!** CRM can be an invaluable tool for businesses of any size.
- 3. False.** While many CRM systems do help automate your sales force, with a complete CRM like Salesforce, that's only the beginning. A complete CRM system helps you manage customer relationships across every aspect of your business, from customer service to marketing and beyond.
- 4. True.** It also collects client history, client social media presence, past client interactions, client infrastructure and account details, and past sales interactions.
- 5. False.** CRM systems can be either cloud-based (like Salesforce) or on-premise – stored on local servers. Cloud-based CRM systems are generally more cost-effective and customizable.
- 6. False.** CRM is great for sales, but complete CRM systems are just as great for customer service, marketing, communities, analytics, and apps. [Click here](#) to learn more about Salesforce's complete Customer Success Platform.
- 7. True – if you have Salesforce!** The Salesforce1 Mobile App enables you to access your CRM data from anywhere, at any time. Before choosing a CRM, make sure it's mobile-first.

# MOVE YOUR BUSINESS FORWARD, FASTER.

For decades, being “the little guy” has been a disadvantage, but not anymore. Salesforce can help jumpstart business growth. Salesforce streamlines operations, allowing you to increase your win rates, grow your pipeline, and decrease your costs.

[Learn more ›](#)

**32%** Improvement in win rate.

**40%** Increased sales productivity.

**32%** Increase in sales revenue.



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**THE CUSTOMER SUCCESS PLATFORM**  
SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS