

Grow Your Small Business With Salesforce



SELL. SERVICE. MARKET. SUCCEED.



Table of Contents

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- 01 **Introduction**
The Salesforce Advantage
- 02 **Chapter 1**
Make Everyone More Productive
- 03 **Chapter 2**
Generate More Business
- 04 **Chapter 3**
Manage Your Sales Cycle
- 05 **Chapter 4**
Get Even More from Salesforce



Introduction

The Salesforce Advantage

Making your people more productive, getting more leads, and closing more deals are key to the success of any business, large or small. For small businesses, cloud-based technologies such as Salesforce level the playing field. Instead of needing to make huge investments in hardware, software, and staff to manage it all, small businesses can use CRM to manage their businesses efficiently—to jump-start and nurture their growth.

Salesforce is ideal for small businesses that need to make the most of all their assets, including their people, customers, and technologies. It's low-cost because there are no big up-front investments in hardware, software, or getting up and running. It's low-risk because you pay as you go—and as you grow, the application grows with you.

In this e-book, you'll learn about four ways Salesforce can help you grow your business:

1. Make everyone more productive
2. Generate more business
3. Take control of your sales cycle
4. Get even more from CRM



Chapter 1

Make Everyone More Productive

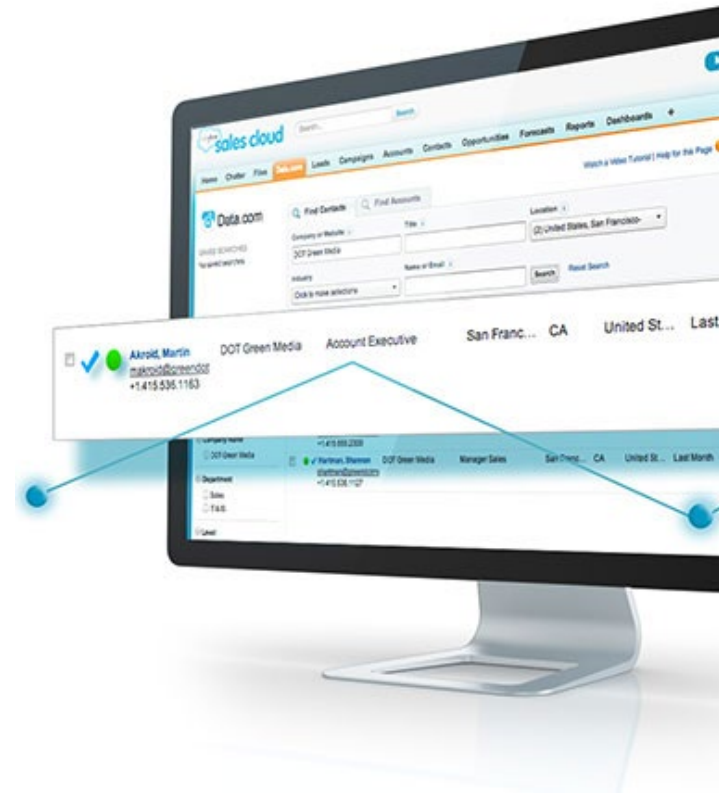
A great way to grow your business is to make everyone at your company more productive. You need to help them work faster and smarter—to enable them to spend less time on busywork so they can spend more time with prospects and customers. And you need to take advantage of any other applications you've already invested in, so that everything works together.

Here are five ways to make people more productive:

1. Customize Salesforce CRM to fit your needs.
2. Centralize information so it's easy to find what you need, when you need it.
3. Stay informed with automatic updates on the people, documents, and deals that matter most.
4. Integrate with other applications so your users don't have to switch applications or miss out on information.
5. Go mobile so your users are never out of touch.

Customize: Make Salesforce work the way you do

One way to make life better for everyone at your company is to make Salesforce really easy to use. Because every business is different, we made



it easy to change how Salesforce looks and works. You can get rid of unneeded fields so nobody is overwhelmed; change the names of tabs so they make sense for your business and your industry; create any extra tabs and fields you may need; and change where information appears on the page. In other words, you don't have to change the way you do business to fit the application. Instead, you can change the application to fit you. And you don't need to hire developers to do it. Anyone can make these changes—with clicks, not code.

Organize: Centralize your information

In many companies, people waste lots of time tracking down information that's stored in email, spreadsheets, documents, notebooks, or even on sticky notes. Of course, sometimes the information they're trying to find was simply lost.

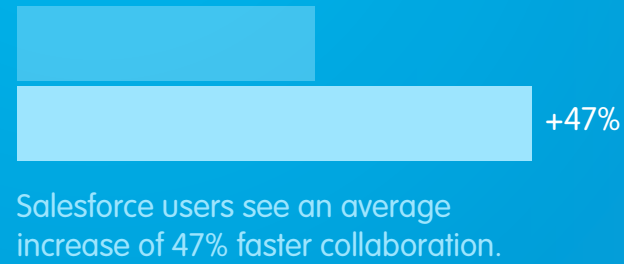
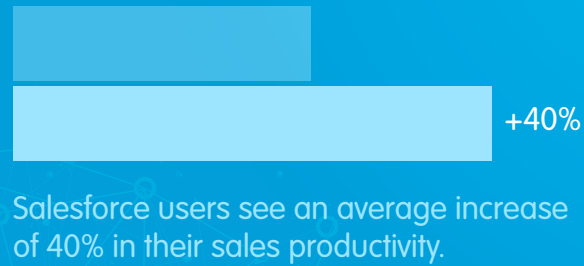
Salesforce CRM puts an end to scattered and misplaced information because it stores all the information about each contact, lead, and account in a centralized location. Instead of having everyone

use a separate system for organizing information, Salesforce integrates everything into your company's knowledge base. As a result, you always see all of the information related to your prospects and customers, created by anyone and everyone. You only need a computer with a browser or your mobile phone to have the information at your fingertips.

Stay Up-to-Date: With Chatter

Chatter, which is available to Salesforce users for free, makes working with people in your company as easy and personal as Facebook. Chatter is different from Facebook because you don't just follow people; you can also track documents, deal status, or anything else in the application that's important to you. For example, use Chatter to find experts, be notified when a price list is updated, when an important deal closes, or for pretty much anything else you can imagine. You'll always be up to date on what matters most to you. Chatter also relies on the underlying security structure of Salesforce CRM, ensuring that all of your information is safe and secure.

Real results from Salesforce customers:



Integrate: Don't switch between applications

Don't let the word "integration" scare you. Salesforce makes it easy to connect to the applications you already rely on, so you can get the big picture and get more done. Chances are you already use Gmail, Outlook, Yahoo!, or another email system. With Salesforce, you don't have to change the way you work with your current email application. Instead, you can simply use it within the Salesforce interface—or embed Salesforce into Outlook. You can also synchronize Salesforce with your Outlook address books and calendar. With email integration, you no longer have to switch applications, and you can easily track each email interaction with your prospects and

customers. That way, you can stay on top of what's going on with your contacts and deals, and decide where you need to spend your time.

Go Mobile: Run Your Business From Your Phone

With the Salesforce1 Mobile App, you have all the functionality of Salesforce in the palm of your hand. You can access your contacts, accounts, opportunities, and other important information from your mobile device. The Salesforce1 Mobile App, which is free for all customers, lets you read and edit your Salesforce CRM information on the go. Now you can take all your CRM data with you and still pack light.

Chapter 2

Generate More Business

Generating new leads is vital to future sales and the survival of a business. Traditionally, marketing efforts to generate leads have been costly, and it's been difficult to track which of these efforts is most effective.

One way to get the most from your marketing dollars is to meet your customers where they are: on the Internet. With Salesforce, you can automatically capture leads when people find your site via search engines and fill out your Web forms. You can then route those leads to your sales team to follow up immediately.

Consumer behavior changes constantly, and so do opportunities for lead generation. That's why it's important to periodically revisit your strategies for capturing leads to take advantage of evolving consumer behavior and technical trends.



Here's how Salesforce can help you get more business, process leads more effectively, and keep getting better at getting leads:

1. Set up reminders
2. Help people find you on the Web
3. Enable small businesses to run like big businesses
4. Capture Web leads automatically

Set up reminders

Often, business is lost for very simple reasons: leads fall through the cracks, someone forgets about a meeting, or a promised follow-up isn't sent. With the reminders feature in Salesforce, you'll never have those problems again. By setting up tasks in Salesforce, you'll be reminded of key meetings, follow-up items, and any important deadlines you need to meet.

Help people find you

The Internet lets small businesses compete with much larger companies by lowering the bar for getting the word out. By using search engine marketing (SEM) to find potential customers, you can target the right people more effectively than ever before. And instead

of bombarding everyone with your message, you can be discovered by those who may already be interested in your product.

Make your small business run like a big business

Salesforce CRM gives you features that only large businesses can typically afford, so you can run your business much more effectively. By automating key tasks, you can do more without having to hire more people.

Check out the following features that help your business look—and perform—like a bigger company:

Email templates – Use email templates to control your branding and messaging and to make sure all communications are consistent and professional. Email templates are great for making key messages from different people or departments consistent—for example, for responding to inquiries, communicating about your product, or promoting regional events.

Real results from Salesforce customers:



Salesforce users see an average increase of 34% in their speed of deal closure.



Salesforce users see an average increase in win rates of 32%.



Lead assignment and auto-response emails – You can generate customized automatic responses, so that prospects immediately hear from you when they contact you. You can also route leads to specific people, whether they’re the most qualified, located in a particular region, or for any other reason. Or you can simply route leads to the first available person.

Capture Web leads automatically

Your website is a valuable marketing tool that informs people about your products or services. You can also turn your site into an automated lead-capture machine. It’s easy to set up—you simply create the

forms to capture visitor information and generate the code that pulls that information into Salesforce.

You can use several Web-to-lead forms to capture different types of information, depending on where the form appears. For example, you may want to collect different information in a “Contact me” form than in an “Event Registration” lead form.

In addition to using the standard Web-to-lead functionality in Salesforce, you can pull in lead information with social media and your blog platform.

Chapter 3

Manage Your Sales Cycle

Do you know what's happening with every deal, at every stage? With Salesforce, everything about every deal and every customer is in one place, so you can see at a glance what's happening with all your deals. That way, you'll always know where you're winning and losing, which deals need help, and when to get ready to celebrate. Here's what you can do to manage your sales cycle:

1. Track your deals in Salesforce, from lead to close
2. Create reports and real-time dashboards to always know where you stand

Track each deal—and get an overview of all deals

With Salesforce, you can monitor all deals in progress to decide where you need to spend time and how to move the deal along. You'll see which deals are most important and which need the most attention.

These capabilities are extremely helpful for just one person managing his or her deals. When several people are involved, however, being able to monitor deals quickly and accurately becomes critical. With Salesforce, you can get



an overview of all deals in progress, see what's happening with the business overall, and even forecast revenues.

In addition to seeing how deals move through the sales funnel, you can track all customer interactions. Every email, every call, and every document is tracked and stored with the customer's contact information. That means you save time because you no longer have to hunt for such information, and it's easy to get up to speed on any particular deal. Over time, you can also evaluate what approaches are most helpful to closing deals.

Create reports and real-time dashboards

Creating reports can be a tedious process; besides, reports show only what happened in the past. Salesforce makes creating those reports easy; no special expertise is required. Because Salesforce runs in the cloud, these reports are updated in real time, so you always have an up-to-the-minute picture of

your business. That way, you're aware of potential problems—and opportunities—right away.

With Salesforce, you're not limited to reports with just rows of numbers; instead, you can create dashboards that turn reporting data into colorful graphs and gauges. Dashboards are great for getting an at-a-glance snapshot of your business. By putting these dashboards on everyone's homepage, you can be sure that critical information is always front and center.

Salesforce comes with lots of standard reports you can use as is or modify as needed, along with ready-made dashboards you can download. You can set up Salesforce to constantly update your dashboards and anyone can create reports in minutes.

Chapter 4

Get even more from Salesforce

Once you're up and running with Salesforce, you'll think of lots of other things you'll want to do. Chances are someone else has thought of them as well—and created apps to do them. To make these apps available, Salesforce created the AppExchange, a one-stop shop for business applications you can easily add to Salesforce.

You won't need developers to help install these apps into your account. Many apps are free; others are available for a fee. You can use these apps to extend or to go far beyond.

On the AppExchange, you'll find hundreds of applications to add functionality such as quoting, professional services automation, HR management, and events management. It's also a great source for instant customizations and free dashboards.





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.

[Learn More](#)

[See Demo](#)

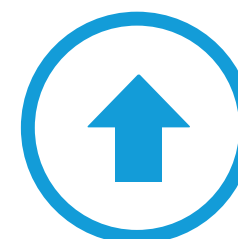
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32%
improved
win rate



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