5 Ways to

GET MORE VALUE FROM SALES CLOUD

salesforce sales cloud

Introduction

As a Sales Cloud customer, you're already supercharging your organization's sales. You know and appreciate how Sales Cloud gives you both a high-level view of your sales business and the ability to drill into specific areas of rep productivity, pipeline, lead conversion, and more.

But what if you could get even more out of the world's #1 CRM? What if you could automate every manual process in your sales cycle? What if you could create customizations that map to your team's unique needs? What if you could connect Sales Cloud to other business applications and develop and test new innovations without risk?

The reality is Sales Cloud customers are already doing all this, and more. By creating workflows, automating processes, customizing, developing and integrating, our customers see some impressive results. From a 44% increase in sales productivity, to a 45% increase in pipeline and deals closing 38% faster, it's no wonder the average customer sees a 37% increase in their revenue. In this e-book, we'll explain five ways you can get the maximum value out of Sales Cloud – making your sales organization much more effective.

Customize

Sales Cloud is a powerful tool right out of the box; however, our customers see the most success when they personalize Sales Cloud to sell exactly the way they want. Companies that customize their CRM to meet their unique needs see a competitive advantage because their technology and tools are better aligned to their processes, making everything run more smoothly. To bring this advantage to our customers, Sales Cloud offers enhanced customization so you can develop the custom apps, profiles, and page layouts that are perfect for how you do business.
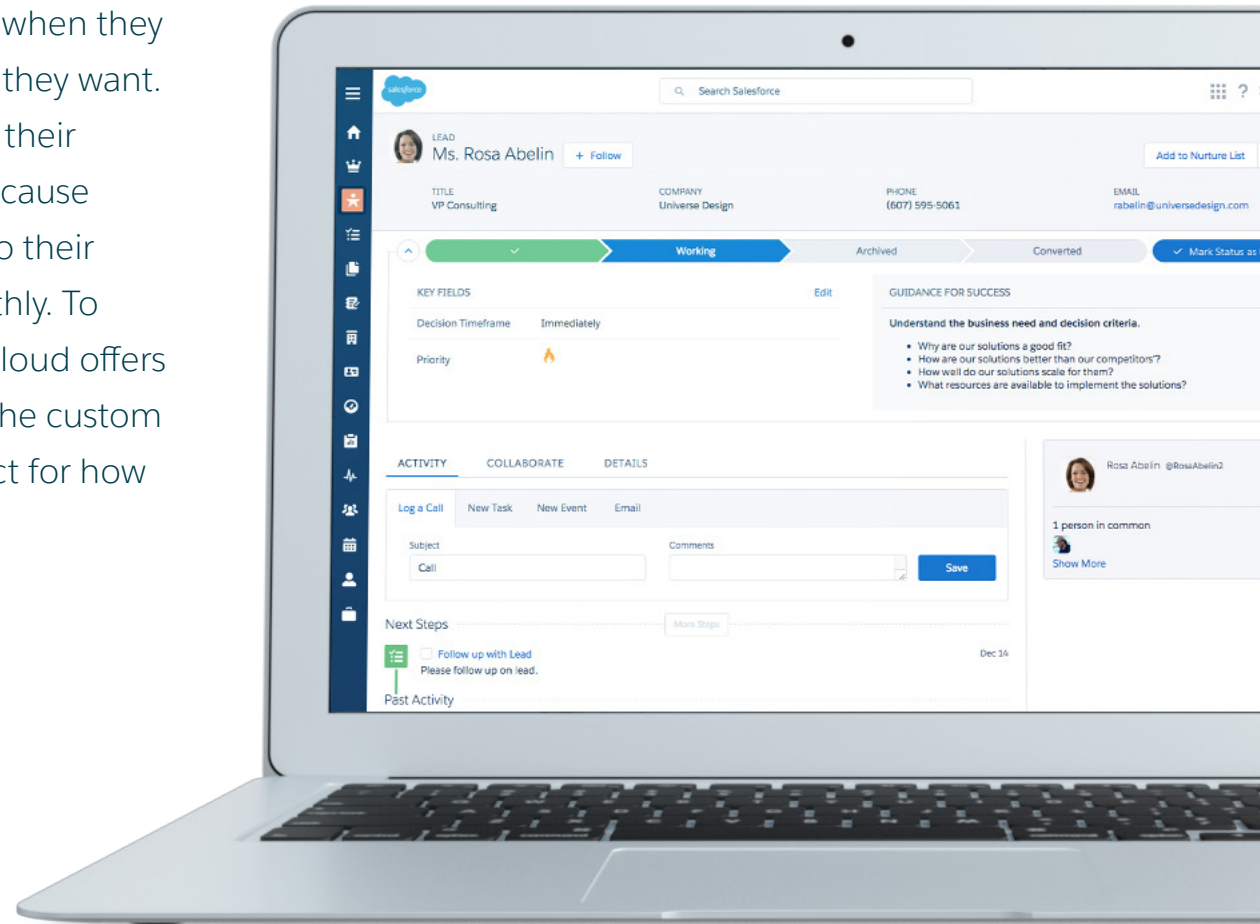
Create specific processes and display particular data for different teams with record types and fields. Precisely define permissions to better manage security requirements. And create custom objects and apps that work for you. For example, if you're a real estate company, you could create a custom object for homes. Or maybe your growing business wants to build a custom deal support request app so reps can always get the help they need to close deals. With Sales Cloud, it's possible to make as many custom tabs, apps and objects as you need to get the job done. There's virtually no limit to the ways you can tailor Sales Cloud to meet your company's needs.

"Tech for tech's sake doesn't help you win deals. Tech that makes you faster, smarter, more effective, more efficient – that's the tech you need."

Matt Heinz
President, Heinz Marketing Inc.
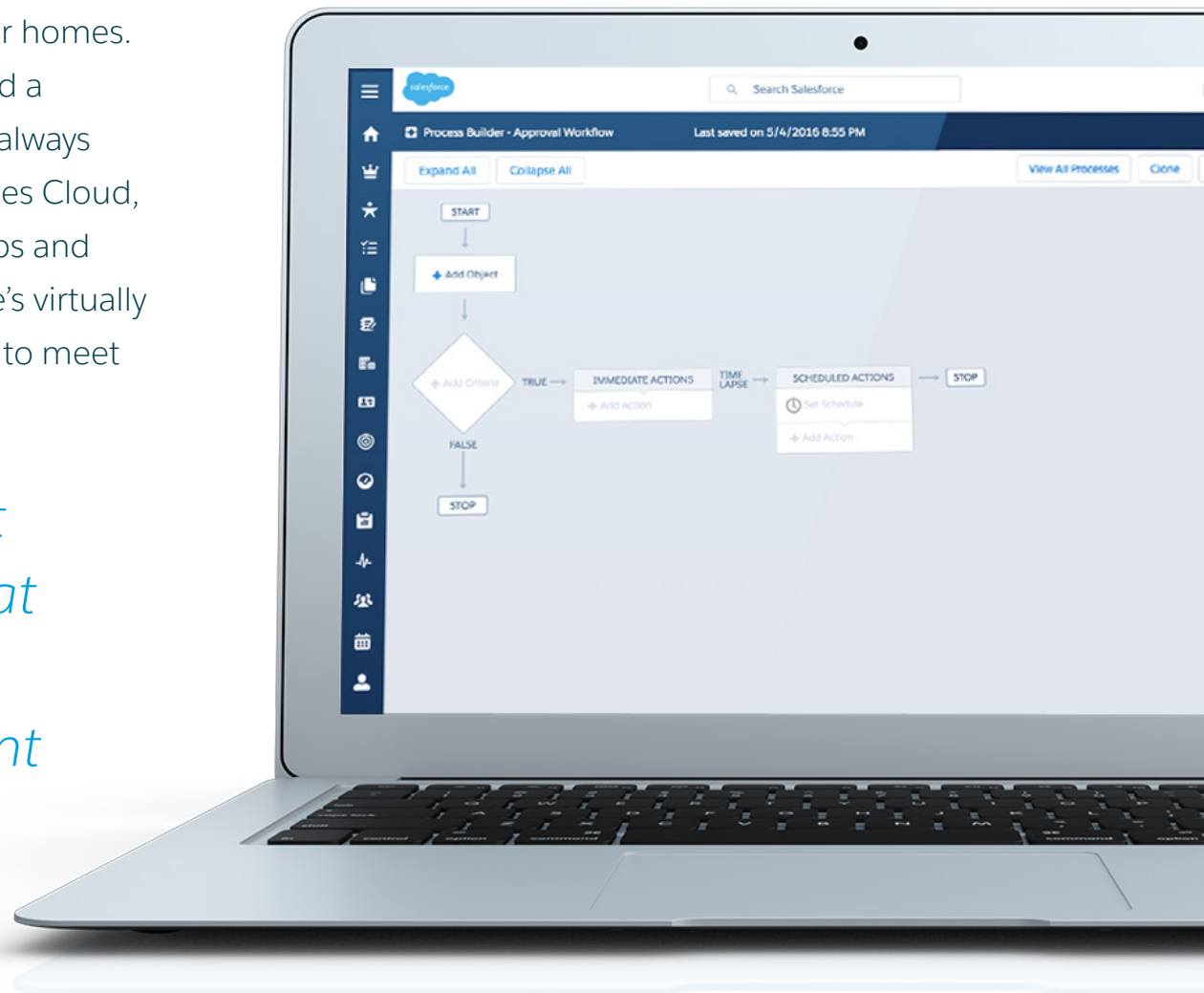
Automate

Many businesses just getting started with Sales Cloud complete a lot of tasks manually. Considering that 68% of a sales rep's time is spent not selling, doesn't it make sense to automate more and spend less time clicking? With Sales Cloud, you can automate thousands of tasks and business processes, including pricing approvals, travel reports, record updates, and more. With automation, you and your team can get back to what really matters: selling.

Help your reps take the right actions at the right time with workflows and approval automation in Sales Cloud. Design business processes with drag-and-drop simplicity, real-time approvals from within Chatter feeds, automated price approvals and escalations, and much more. Automation is the key to getting the most out of Sales Cloud because you'll simplify everyday processes while keeping deals in motion.

Sales Cloud customers report an average 44% increase in sales productivity.

Customer Spotlight:
Enterprise Bank & Trust

In 1988, Enterprise Bank & Trust, a St. Louis-based bank and wealth management firm (NASDAQ: EFSC), was founded on the principle that deep and enduring client relationships drive success. In 2011, Enterprise Bank & Trust made a targeted FDIC acquisition that increased deposit accounts by 450%.

The significant increase in deposit clients posed an opportunity for the bank to expand consumer banking, but added significant complexity to the tasks of managing resources and internal information and communication about its growing client base. Cross-selling to the new clients was near to impossible because the existing, home-grown CRM system was not designed for cross-channel referrals and not all associates were using the system. There was no effective way to track cross-sell activity except through actual results.

In 2012, Enterprise Bank & Trust contracted with

74% *of global sales leaders are using or piloting/ planning to use sales analytics in the next 12–18 months.*

State of Sales

Bluewolf, a global business consulting firm, to identify a solution to move the Company toward a more focused, cohesive and unified sales process. Bluewolf concluded that Salesforce was critical to the growth and success of the sales culture. Within 6 months, the Sales Cloud was rolled out to every associate – from tellers to the CEO.

Almost immediately, management was able to track the internal referrals between channels. An account team structure and new sales processes were implemented which has translated into increased cross-selling opportunities and profits. Cross-channel sales meetings are conducted using a single Salesforce dashboard where all team members are able to see the status of opportunities and assist with getting them over the finish line. As a result, Relationship Managers are utilizing their "product partners" to help sell products rather than trying to sell all products on their own. Salesforce has been instrumental with building a framework for the Enterprise Bank & Trust team to be better informed, communicate more effectively, and help fulfill the Company's mission: To guide clients to a lifetime of financial success.

Connect

Every time a sales rep opens her laptop to start the workday, how many applications do you think she opens? Five? Ten? She is probably digging through her email to find the context for an upcoming customer meeting in her calendar. She is also probably trying to access an ancient ERP to see the order status for that same customer. Sales professionals have to use dozens of digital tools to get their jobs done, and data can be stored in multiple places, making it that much more difficult to serve their customers. Start doing more with Sales Cloud by connecting it with other applications, so reps need only access one system to see the complete picture of their customers.

We make it easy to connect Salesforce to other apps through application program interfaces (APIs). Our APIs are simple, powerful, and secure – so it's hassle-free to connect to your other business apps with existing integration methods. We also have an ecosystem of partners that have built apps with out-of-the-box Salesforce connectivity. That means you get a single view of your customer across applications to start every day with a strong understanding of sales across your business.

High-performing sales teams use nearly 3x more sales tech than underperforming teams.

State of Sales

Connecting Sales Cloud to Microsoft

One example of connecting Salesforce with another business application is Sales Cloud's integration with Microsoft. Salesforce and Microsoft's joint integration seamlessly combines the vast resources of the top CRM and productivity app, allowing you to work with more efficiency, intelligence, and collaboration. Your company may rely on both Microsoft and Salesforce to get the job done, so we've made it easy to seamlessly use Salesforce data and create Salesforce records in Microsoft apps like Outlook and Office 365. No more cutting and pasting! It's 100% in the cloud, and it's the latest milestone in our strategic partnership with Microsoft.

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Develop

Since sales teams – and your business – rely on Sales Cloud for day-to-day operations, you want to test any changes in a workflow or new customization before putting them into production. Testing ensures there's no disruption for those using Sales Cloud to do their jobs. Rather than testing in the main production org, sandboxes are a great solution.

Sandboxes are copies of an org in a separate environment, where you can develop, test, and play around with new ideas without compromising the data and applications in the main org. By providing a safe testing ground, sandboxes help you roll out greater innovation to your team faster.

Sales Cloud offers different sandboxes designed to give your admins, developers, and programmers exactly what they need. Empower your team to innovate and test without the risk – get them started with sandboxes.

89% of apps launching in the next 12-18 months will be created with a mobile-first mindset.

State of IT
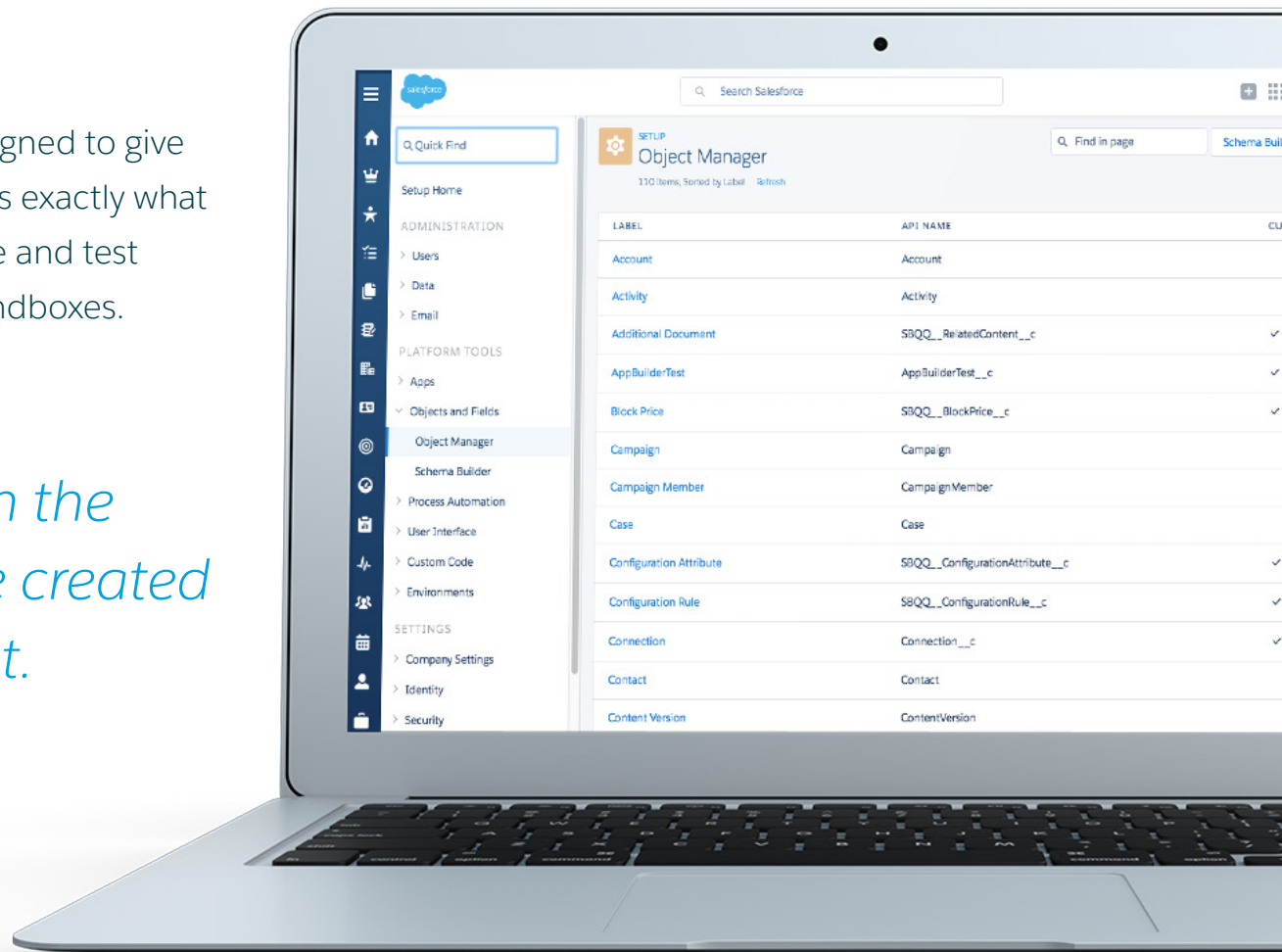
Customer Spotlight:
Thinking Capital

GROWTH BEGINS WITH ONE SMART STEP FORWARD.

Because the world changes so quickly, keeping the status quo actually leads to stagnation. Progressing with the flow of business begins with the realization that there's always a better way. When it's followed up with the commitment to go down that new path, growth truly happens. And that's when your company begins to lead.

Thinking Capital's customer relationship processes were stuck in the last century. All of their work documents were written on paper, they had no IT staff, and they couldn't afford to build and maintain a server. Because nothing was automated, employees were busy completing tasks that took them away from truly helping their customers.

They recognized the need to roll out a new CRM model that would help them better streamline their business processes. Before Salesforce, their employees would have to send multiple emails

Supercharge Sales with Analytics

Looking for the next level of insight? Sales Wave Analytics is an end-to-end analytics app that brings the power of Wave Analytics to Sales Cloud, on any device. Now every sales manager can quickly gain pipeline visibility, track team performance, and uncover opportunities to grow the business. Sales moves fast, so Wave Analytics is designed to launch in minutes, not months. Flip a switch and watch your sales team explore, share, and succeed.

LEARN MORE

to schedule site visits to these small businesses and then manually assess the risk. If this process were automated, their efficiency and productivity would be turbocharged.

BECOMING MORE EFFICIENT BY LEAPS AND BOUNDS.

Thinking Capital decided to move forward with Sales Cloud during their CRM implementation. They have since seen a 35% year-to-year growth, propelling them into a new world of efficiency and customer service. They've shifted away from paper charts and calculators to determine which small businesses qualified for credit. This decreases their risk for bad debt. So now, when a new merchant application is submitted, site visits and sales rep notifications are taken care of automatically and rapidly. This information is also stored in an internal database that is easily accessible for employees to reference.

Also, the implementation of the dashboard allows employees to manage their own day. They are notified with real-time updates on relevant information and coaching tips by their managers when necessary. Also, employees are now able to collaborate and communicate easily from their mobile devices using Chatter. This has improved their productivity by 20%.

Salesforce has enabled Thinking Capital to shift their customer service experience online. This new process has helped them and their customers dramatically grow their businesses.

Get Help

Looking to make the most of the investment you have made in Sales Cloud? Premier+ Success is our gold standard of help. All Sales Cloud customers get our Standard Success Plan, but Premier+ is for those who want an extra advantage. Customers with Premier+ Success get access to experts, training, resources and admin services, resulting in some impressive benefits:
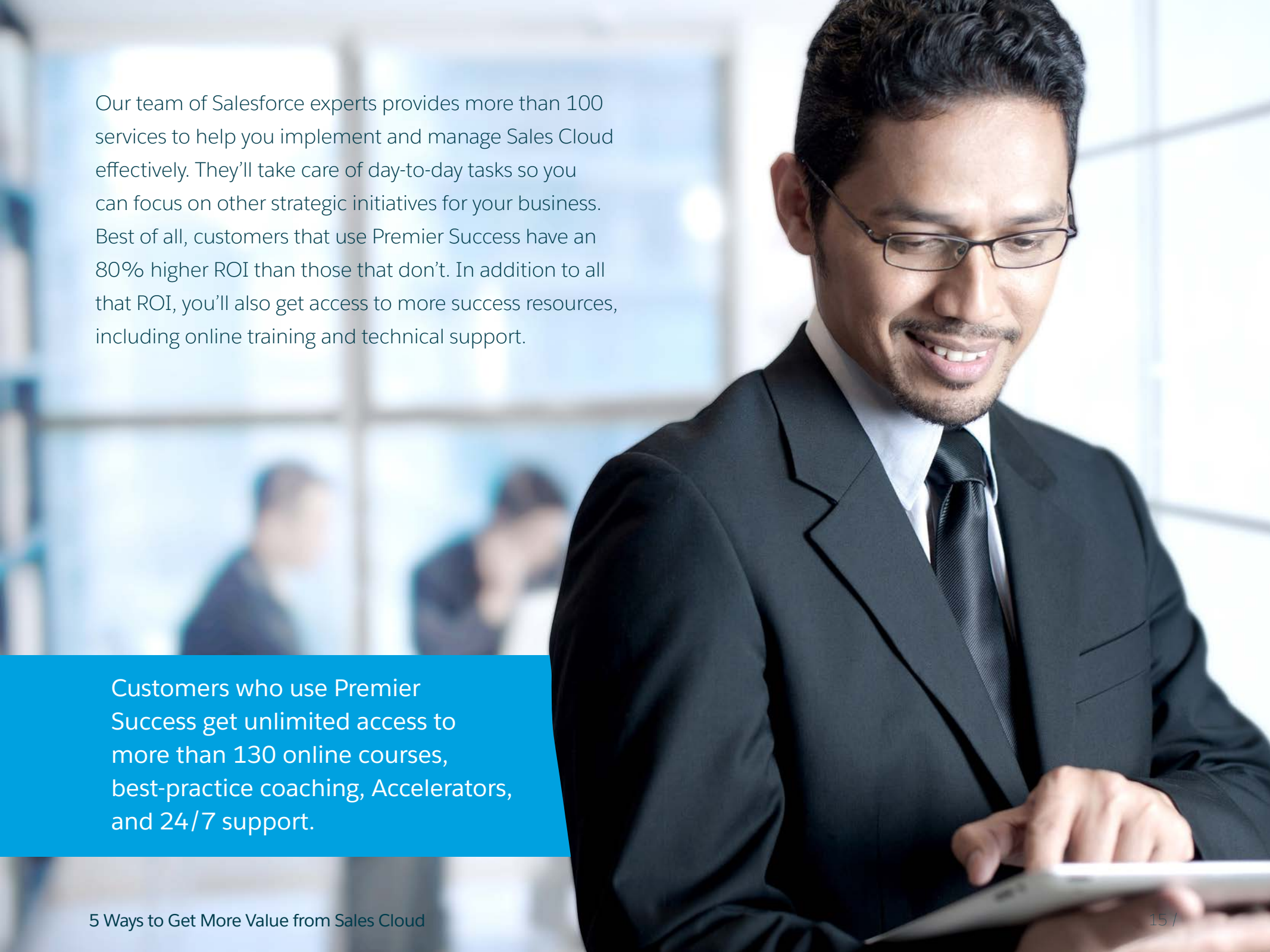
52%
increase in user
adoption

64%
faster
configuration

77%
faster
deployment

138%
more
automation

Our team of Salesforce experts provides more than 100 services to help you implement and manage Sales Cloud effectively. They'll take care of day-to-day tasks so you can focus on other strategic initiatives for your business. Best of all, customers that use Premier Success have an 80% higher ROI than those that don't. In addition to all that ROI, you'll also get access to more success resources, including online training and technical support.
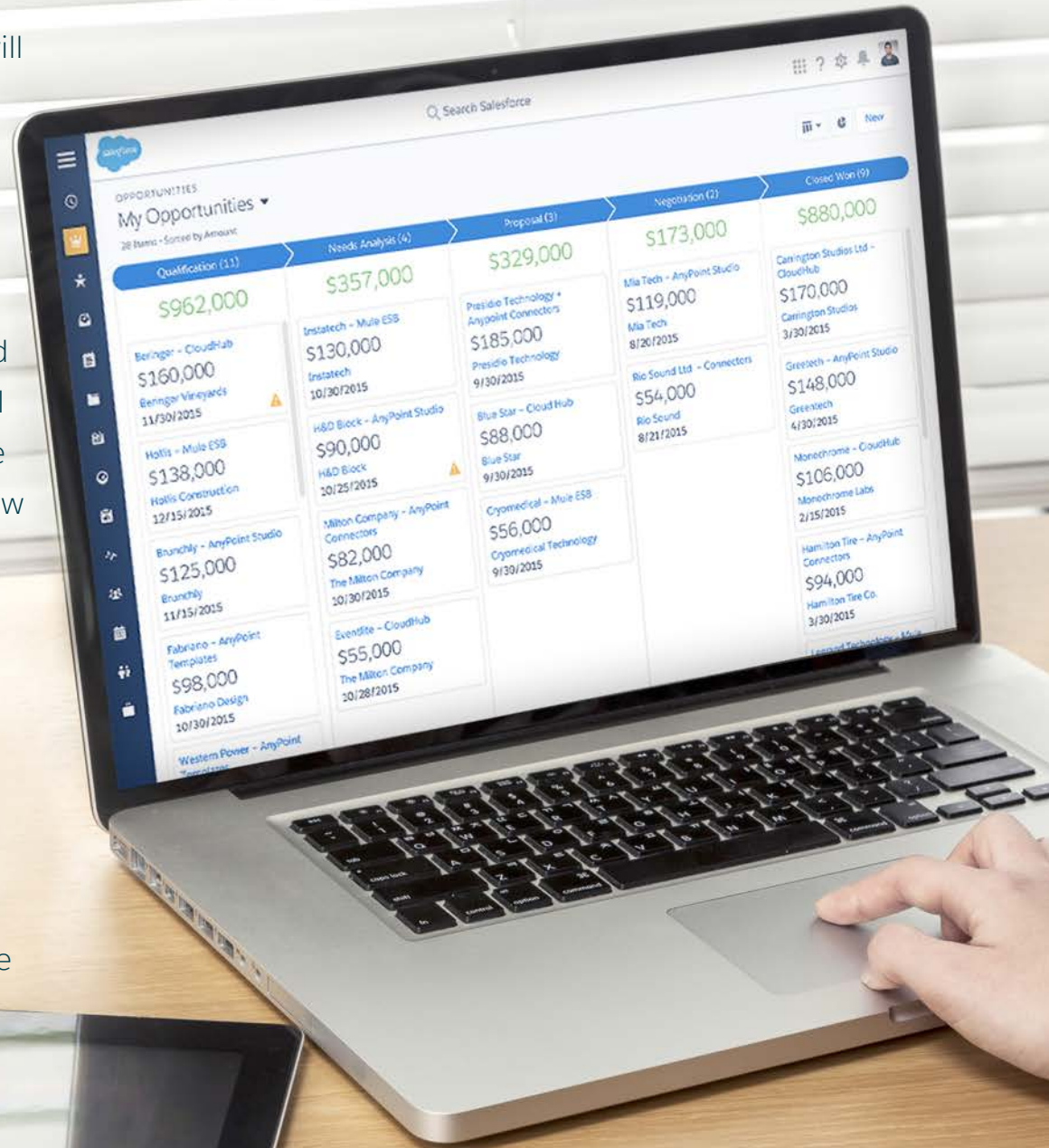
Customers who use Premier Success get unlimited access to more than 130 online courses, best-practice coaching, Accelerators, and 24/7 support.

Conclusion

These five ways to get more value from Sales Cloud will rev up your sales results fast. On average, customers see a 37% increase in revenue with Sales Cloud.

What's even better is that, when you layer these different strategies, they become even more powerful. For example, customizing, automating, and connecting are all highly effective, but sandboxes will let you test more with each. And you may want some guidance along the way as you implement all that new functionality, so Premier Success might be just what you need.

With Sales Cloud, you can always build upon your current success by implementing new features. Everything works together seamlessly in our trusted cloud, so you and your team can focus on selling. You'll never outgrow Sales Cloud, and the more you learn, the more you'll discover new ways to maximize your sales team's effectiveness.

Resources You May Also Like:

Selling With Salesforce: How 8 Successful Companies Do It

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5 SECRETS of the Most Productive Salespeople

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY