

The Salesforce logo, a blue cloud shape, is positioned in the top right corner of the image. It contains the word "salesforce" in white lowercase letters.

salesforce

sales cloud

The background of the entire image is an aerial view of a city skyline, likely New York City, during sunset. The sky is filled with soft, golden light and scattered clouds. The city is densely packed with skyscrapers of various heights and architectural styles. The lighting creates a warm, golden glow across the scene, with some buildings appearing in silhouette against the bright sky. The overall mood is one of urban energy and growth.

# HOW A CRM HELPS YOUR BUSINESS GROW

## *Introduction*

# BEYOND THE HANDSHAKE

You've likely heard the saying, "Business begins with a handshake"

It sounds so simple. But once a customer relationship is established, the challenge is to maintain it. And that's easier said than done, especially considering that as a business grows, its operations become more complex.

Smart business owners understand that growth means it's time to choose a technology solution that is affordable, boosts productivity, and helps them keep up with customers. One option is a customer relationship management system (CRM).

A CRM can help every customer communication feel personal, no matter how big or busy your business gets. And the right customer relationship management system will help you build and scale your business, while easing growing pains.

Read on to learn more about CRM for small business, the types of CRM systems available, and how a CRM can help you build a bigger and better company.

## Table of Contents

- 03** What Is A CRM System?
- 06** The Traditional Types Of CRM
- 09** How A CRM Helps Growth
- 12** Conclusion

## Chapter 1

# WHAT IS A CRM SYSTEM?

A CRM system allows businesses to manage customer relationships, including the data and information associated with them. With CRM, you can store customer and prospect contact information, accounts, leads and sales opportunities in one central location.

Deals go much faster when your employees can get instant information on potential sales deals, marketing campaigns, and account updates. CRMs are especially helpful in the enterprise, where diverse products and large teams add complexity to customer relations. The virtual paper trail of a CRM system holds everyone involved accountable, even the customer.

If you're in marketing, a CRM solution allows you to organize your marketing campaigns and assets in one place. This makes it easy to run multiple campaigns simultaneously and segment your audience for maximum relevance. With one central hub for marketing campaigns and lead records, your marketing



**CRMs are especially helpful in the enterprise, where diverse products and large teams add complexity to customer relations.**

team will also have unprecedented visibility into how their campaigns are performing and driving revenue for the business.

If you're in sales, a CRM solution allows you to access and organize information about your prospects in great detail and at a massive scale. You will also have visibility into the most recent activities on an account, ensuring your communication with sales leads is always up to date and relevant. With so much information on each prospect and their position in the sales cycle, your sales team will also have

A CRM solution allows you to access and organize information about your prospects in great detail.

a complete view of their sales funnel for the first time. This means a greater understanding of how to move leads to close and more accurate sales forecasting.

If you're in customer service, a CRM solution allows you to provide 360-degree service to each customer. A CRM solution provides one cohesive view of the customer. Service agents will have access to complete case histories, detailed account information, and even the preferred method of communication. All this information makes it easier for your agents to provide tailored, personal service that will turn customers into advocates for your company.

## One central dashboard for your business.

The right CRM system handles multiple tasks and serves as a central dashboard for:

- Sales
- Marketing
- Customer service and support
- Finding and sharing critical information fast
- Tracking customer responses
- Assigning tasks to employees

Customer Spotlight:

## Zero Motorcycles

Zero Motorcycles, the world's leading manufacturer and retailer of electric motorcycles, is out to disrupt the motorcycle industry. When they looked for ways to streamline their business processes and communication, they found Salesforce was the all-in-one platform they needed to increase efficiency and maintain their rapid growth.

[Watch the film >](#)

“All the information I need to operate on a day-to-day basis is at my fingertips.”

—Mike Cunningham, Director of US Sales, Zero Motorcycles

## Chapter 2

# THE TRADITIONAL TYPES OF CRM

When choosing a CRM system, there are two different options to consider: on-premise systems or on-demand/subscription systems (also known as cloud-based). While the cloud is ubiquitous in today's technological environment, Salesforce pioneered the concept way back in 1999. Cloud computing upended the traditional on-premise model, dramatically cutting costs and reducing risk.

In the 15 years since, Salesforce has perfected data center operations and helped the cloud computing industry grow to its current massive size and scale. With its cloud-based product, Salesforce is able to dramatically decrease costs by requiring no hardware, providing better support, making it far easier to scale, and getting customers up and running 70% faster than on-premise competitors.

### On-Premise CRM Systems

On-premise solutions are remarkably expensive to set up and continue to eat

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## The rise of cloud-based solutions:

The demand is for subscription CRM systems in the cloud:

# 94%

- 94 percent of enterprise organizations surveyed are running applications or experimenting with infrastructure-as-a-service.

# 87%

- 87 percent of enterprise organizations are using public cloud.

- <http://www.rightscale.com/blog/cloud-industry-insights/cloud-computing-trends-2014-state-cloud-survey>

through your budget as you add additional IT headcount and incur maintenance costs. If you want to scale your operation in the future, the the hardware costs will mount even higher.

When it comes to sales and technology, any downtime at all can mean major lost revenue. When something goes wrong with an on-premise solution, it can take hours to get a technician onsite and even longer to get the problem resolved. The modern sales organization simply doesn't have that kind of time.

For an organization running an on-premise CRM solution, scaling the business up or down requires a substantial investment, and therefore substantial risk. Scaling up requires adding additional hardware and staff and can take months to fully implement.

### On-Demand/Subscription CRM Systems

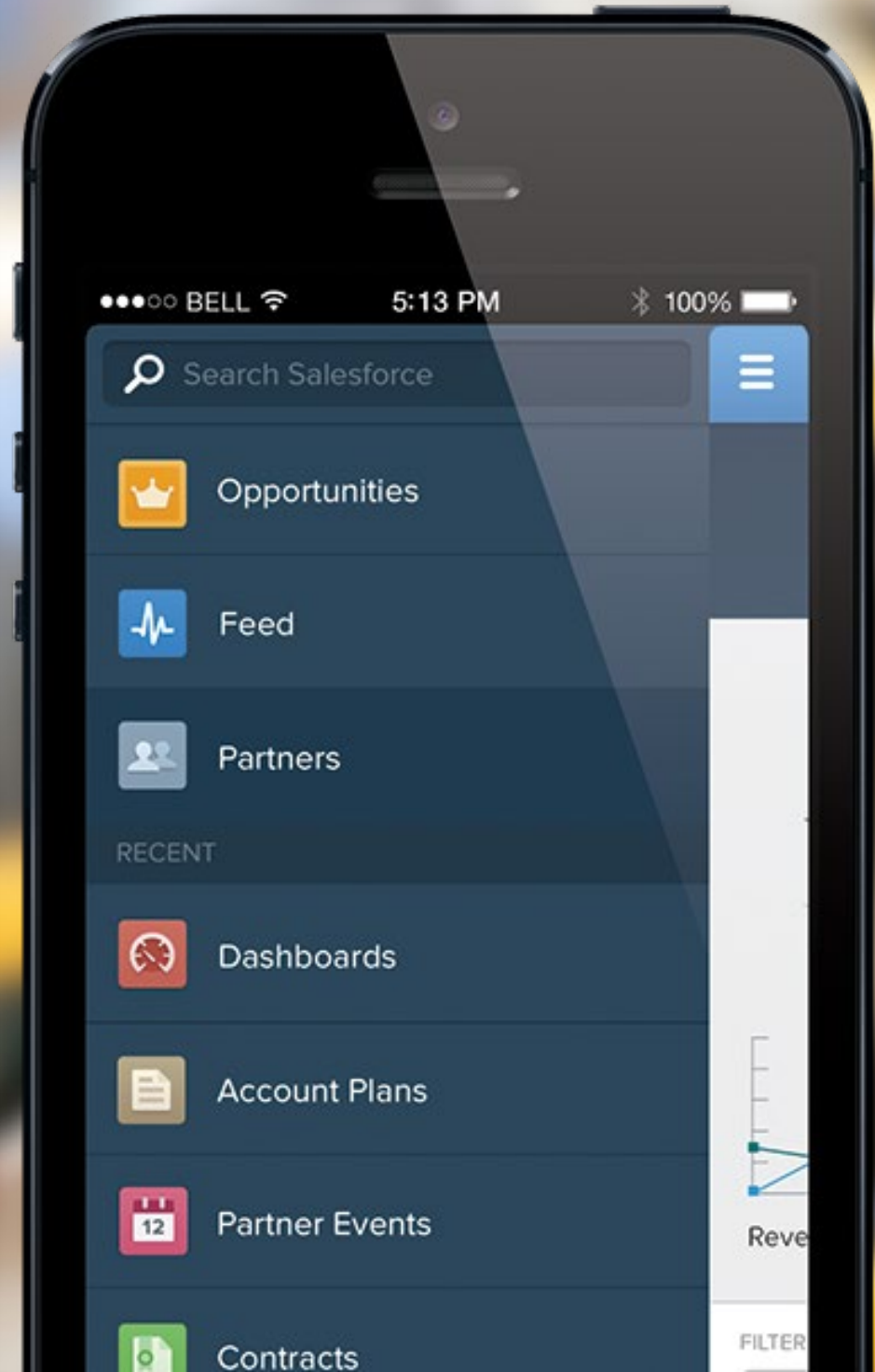
By delivering a cloud-based solution, run entirely from a secure data center, Salesforce requires none of the upfront cost of its on-premise competitors. There is no hardware to be installed and no additional IT hires to be made. An entire company can be set up and pushed live with minimal cost and effort to the customer.

With Salesforce, maintenance happens automatically. If issues arise, a support technician investigates the problem in a matter of minutes, not days. This means less downtime, no expensive maintenance costs, and more time spent selling.

On top of that, Salesforce lets you add more users and additional functionality with a few mouse clicks. No extra hardware, no extra risk. If you need to scale back down or restructure your organization in the future, Salesforce painlessly changes with you.

# 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

# HOW A CRM HELPS GROWTH

### Increases Revenue

Sales teams are faced with a problem: According to a recent study by CSO Insights, salespeople spend only 25-30% of their time selling. The rest is spent on administrative work like qualifying leads, forecasting, routing leads, and researching.

Salesforce is designed to enhance a sales organization's ability to sell, eliminating these daily distractions and allowing sales teams to do what they do best.

By increasing win rates, strengthening pipeline, improving the 360-degree view of a customer, and providing agility and technology the modern sales team needs, Salesforce creates a 20% average revenue increase for customers who switch from competitors. Let's see why Salesforce delivers such amazing results.

### Increase Win Rates

For sales professionals, success is determined by one metric: how much business they



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bring in. However, with more competition than ever before and easier access to relevant information and research among consumers, closing a deal is harder than it has ever been. Salespeople need to be at the top of their game to beat out the competition and win a deal.

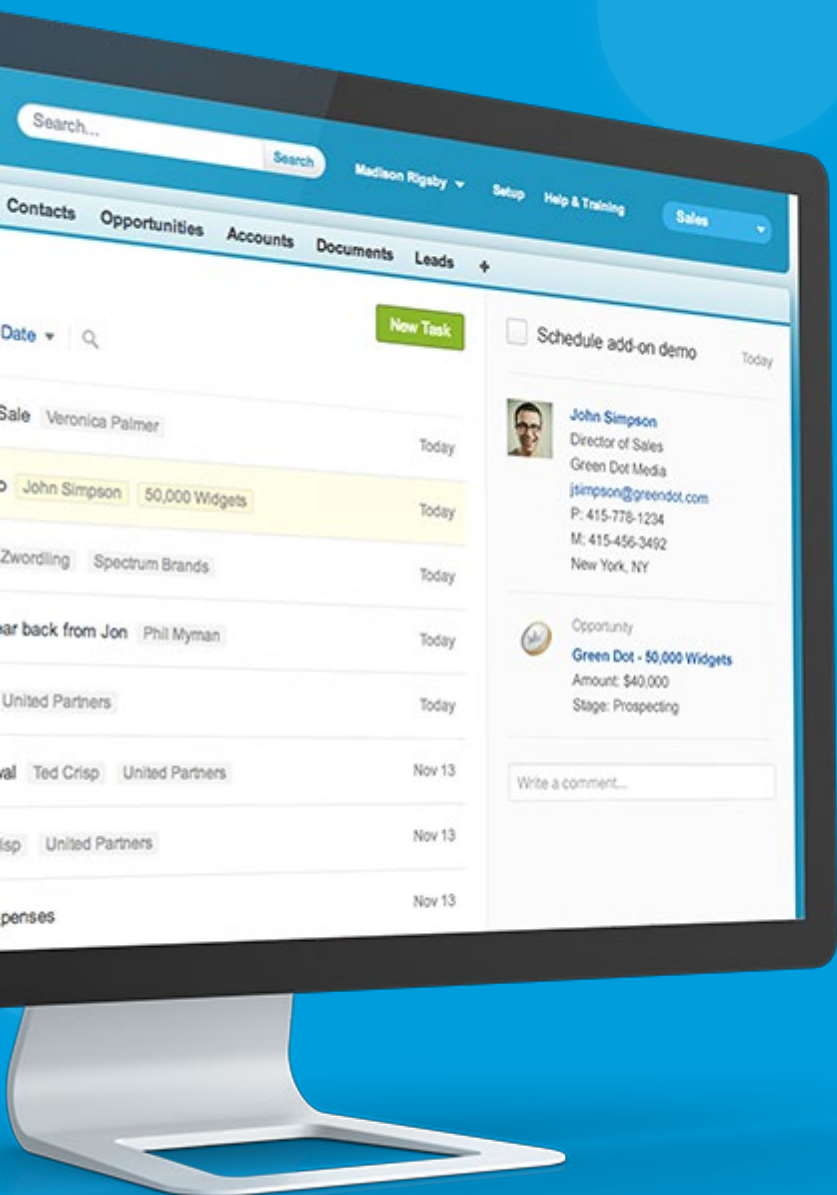
Salesforce was designed to counter this challenge and make closing a deal as easy as possible. Leads are automatically routed as they come in, complete with contact information, account activity, and relevant company information. Salesforce users immediately have an arsenal of information to start moving a

lead to close. Comprehensive performance metrics make understanding what is working and what is 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.

### Improve 360° View of a Customer

For the average salesperson, researching a lead can be a tedious process. Determining their last account activity, understanding their industry and company, gleaning their interests and concerns from





social media — the entire process takes up a vast majority of the time a rep spends on a particular account.

Salesforce takes all of this information and puts it in one place. A prospect's contact information is right next to critical details about his or her company. The prospect's recent activity on your website is recorded and curated right next to his or her qualification score and grade. All of your tasks and engagement history are easily accessible, making the research process faster and more effective.

And it's not just about making life easier for your sales team. Increasingly, prospects and customers expect high-touch, personalized interactions. Salesforce helps you exceed those expectations by giving reps the information they need, when they need it.

## Increase Agility

Technology has dramatically changed the sales game. Where sales used to see a shift in tactics or strategy unfold over the course of decades, technology has forced sales organizations to adopt a new tactic or tool in a matter of days. For customers using entrenched, unwieldy on-premise systems, this level of agility is impossible.

Born cloud, Salesforce is amazingly agile and incredibly flexible to fit the needs of its users. Tools from Salesforce's robust product line can be added in minutes. Additional users can be added with a few keystrokes. Need new features and functionality? Salesforce offers three feature-rich updates each year, not just bug fixes. Salesforce puts you on the cutting edge and makes sure you stay there.



## *Conclusion*

# Building a Solid Foundation

Great customer relationships are the bedrock of a thriving business and the key to your success.

Manage those relationships better and your earning potential should skyrocket. With the right CRM, business owners can spend time building deeper relationships instead of worrying about how valuable information might slip through the cracks.

No matter what your business, industry, or company size is, customer relationship management is the foundation for success.

# 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.



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