

Blaze New Deals Faster

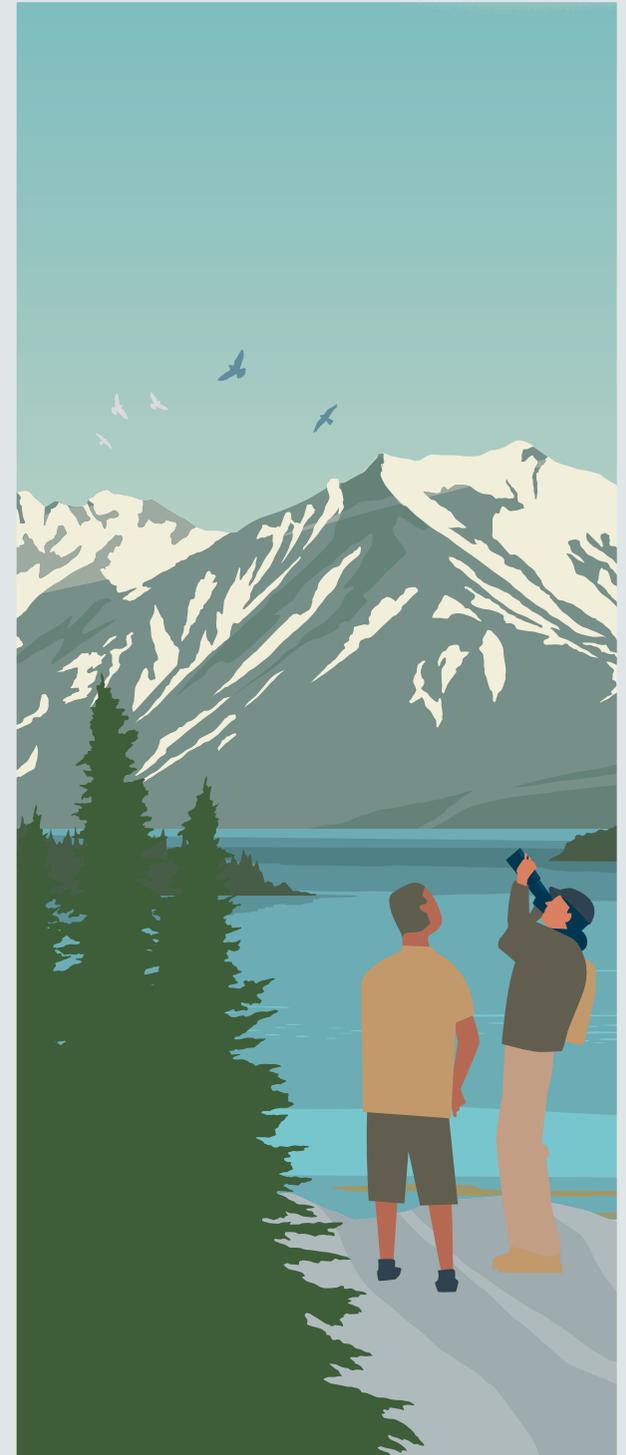
FIND YOUR PRODUCTIVE PEAK WITH SALESFORCE INBOX



salesforce inbox

CONTENTS

- 03** Introduction
- 05** Chapter 1. Win More with One Workspace
- 07** Chapter 2. Make Teamwork Almost Automatic
- 09** Chapter 3. Raise Your Mobile Productivity
- 11** Chapter 4. Work Smarter. Get More From Every Email.



INTRODUCTION

Where the Real Selling Gets Done – Your Inbox

The art of selling has entered a bold new phase. Salespeople now only spent 32% of their time selling – at least in the traditional sense of making phone calls, knocking on doors, and meeting face-to-face with customers.¹

Today, sales cycles are longer, there are more decision makers, and prospects are harder to reach. To get results, sales reps must focus more on gathering data, researching, and communicating with prospects and team members before they ever pitch their product.

If you guessed that most of those interactions are done over email, you're right. The inbox is a great place to blaze a trail to faster sales. In this e-book, sales reps will learn how to take their productivity to new heights, starting right where they spend most of their time – their email.

89%

of sales reps say they've missed sales opportunities because they can't keep up with prospect information.



The Struggle for Productivity

Sales reps often lose valuable time toggling between email and other applications, logging their sales activities into a CRM, and scheduling appointments. This is valuable time that sales reps could use pursuing more opportunities and closing deals.

In a survey by CSO Insights, sales reps indicated they need access to as many as 15 data sources to find crucial information that moves deals forward.² Unfortunately, digging through so many data sources can be overwhelming. In fact, research shows that 82% of sales reps say that it takes too much time to research prospects.³ Additionally, 89% of sales reps say they've missed sales opportunities because they can't keep up with prospect information.⁴

To improve sales productivity, organizations are investing nearly \$20,000 per sales rep on productivity initiatives such as tools and training.⁵ But there's an easier way. Sales reps can boost productivity significantly by simply being more efficient in how they use their email inbox to get work done.



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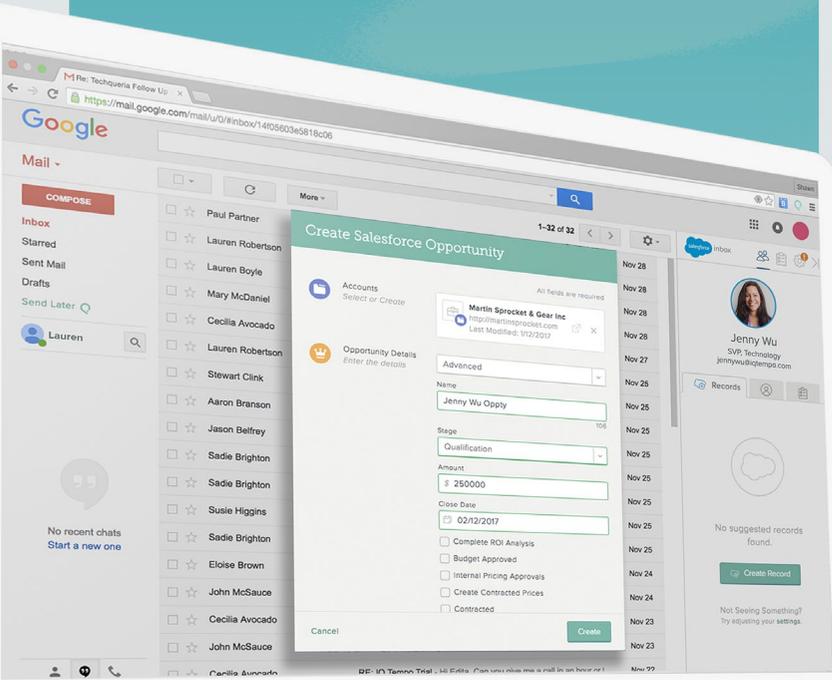
CHAPTER 1

Win More with One Workspace

One of the biggest productivity barriers is toggling back and forth between email and other applications. Not only does it take time to click between apps like calendar, LinkedIn, and your CRM platform, but that's when details get lost or forgotten. Switching between apps can be particularly tough if you're traveling and trying to prep for your next meeting.

But if you don't prep, you're less likely to close the deal. According to research by Forrester, executive-level buyers in the study said that 75% of reps didn't come prepared with knowledge about their business.⁶

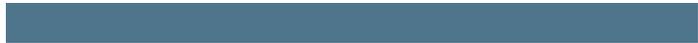
To research prospects faster, Salesforce Inbox gives you seamless access to all your sales tools – CRM, calendar, and social media – right in your email client. With Inbox, you have access to your CRM data, including the ability to quickly create new CRM contacts or access contextual CRM data from your email or calendar, speeding up the entire sales process and improving information for your whole team.



To research prospects faster, Salesforce Inbox gives you seamless access to all your sales tools – CRM, calendar, and social media – right in your email client.

“Is One of the biggest benefits for me opening an opportunity directly in email and seeing the notes right in Gmail, Outlook 365, or on my mobile device,” says Robert Capozzi, Solutions Engineer, Salesforce. “Having this capability turns an hour-and-a-half ordeal into an easy five-minute task.”

For additional customer intelligence, you can also connect to social media sites like LinkedIn. Inbox will generate a sidebar in your email containing LinkedIn information such as the prospect’s role, connections, or personal interests. With this data integrated into their Salesforce Inbox app, sales reps have all the information they need to connect with prospects and customers without leaving email.

57% 
of buyers say reps aren't knowledgeable about their industry.

70% 
of buyers say reps aren't prepared to answer the questions they asked.

75% 
of buyers say reps aren't knowledgeable about their business.

77% 
of buyers say reps don't understand the issues they face or how the company's product could help.⁷



“Having this capability has turned an hour-and-a-half ordeal into an easy five-minute task.”

Robert Capozzi,
Solutions Engineer, Salesforce

CHAPTER 2

Make Teamwork Almost Automatic

As the world goes digital, sales cycles become more complex and draw in more people, on both sides. Pity the lone wolf sales rep, because today's sellers have to be strong team members.

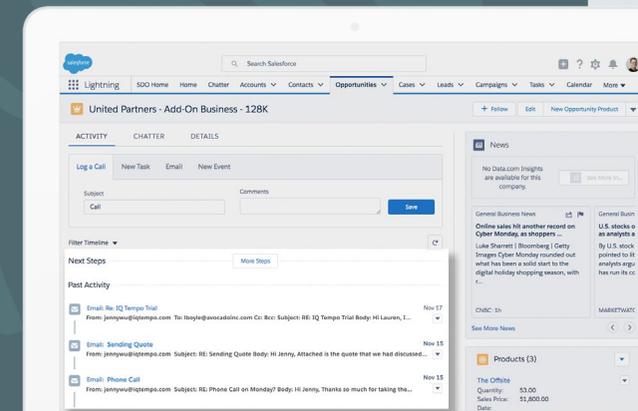
But working collaboratively on a deal is easier said than done. It can prove difficult to share all of the details of an opportunity in real time with a growing cast of people who range from service to sales ops professionals. All too often, sales reps forget to log emails into the CRM system, which grinds collaboration to a halt.

Inbox's Einstein Activity Capture solves this problem by automatically logging all email and calendar events into Salesforce, creating many advantages for reps and people they work with:

- **Allows for closer collaboration among team members.** With important email and meeting details automatically logged in your CRM system, everyone stays in the loop.
- **Provides better pipeline visibility for sales managers.** Clearer views into deals saves managers time previously spent gathering status updates. Better records also allows managers to see where opportunities are in the sales pipeline, and to coach their sales reps as needed to close more deals.

79%

of the opportunity-related data sales reps gather is never updated in the CRM system.⁸



Inbox's Einstein Activity Capture enhances team communication and collaboration by automatically logging all email and calendar events into Salesforce.

- **Improves the accuracy of sales operations' forecasts.** Any forecast is only as good as the information it's based on. With all data automatically logged, sales operations managers can spend less time digging for information and increase everyone's confidence in forecast accuracy.
- **Creates more accurate data.** Everyone can feel more confident that the data is accurate when logging is automated, not left up to a tired account executive to remember what happened at the end of a long day.
- **Eliminates interruptions by team members or managers trying to get status updates.** Research has found that after a simple interruption, it takes an average of 25 minutes to return to the original task.⁹ With a single source of truth that captures all activity automatically, there are fewer interruptions and more time to close deals.

When all activity is automatically captured and logged into Salesforce, collaboration grows easier, faster, and more natural. And it's not just sales reps who benefit – team managers, sales ops, and partners all gain efficiency when the information they need is updated in real time and always at their fingertips.



Twenty-five, the number of minutes it takes to return to the original task after a simple interruption.



“I want to see which opportunities are moved forward in the sales process. This is where the action is, and it tells you most of what you need to know to determine how your salespeople are doing and how to help them.”

Anthony Iannarino,
author of *The Sales Blog*¹⁰

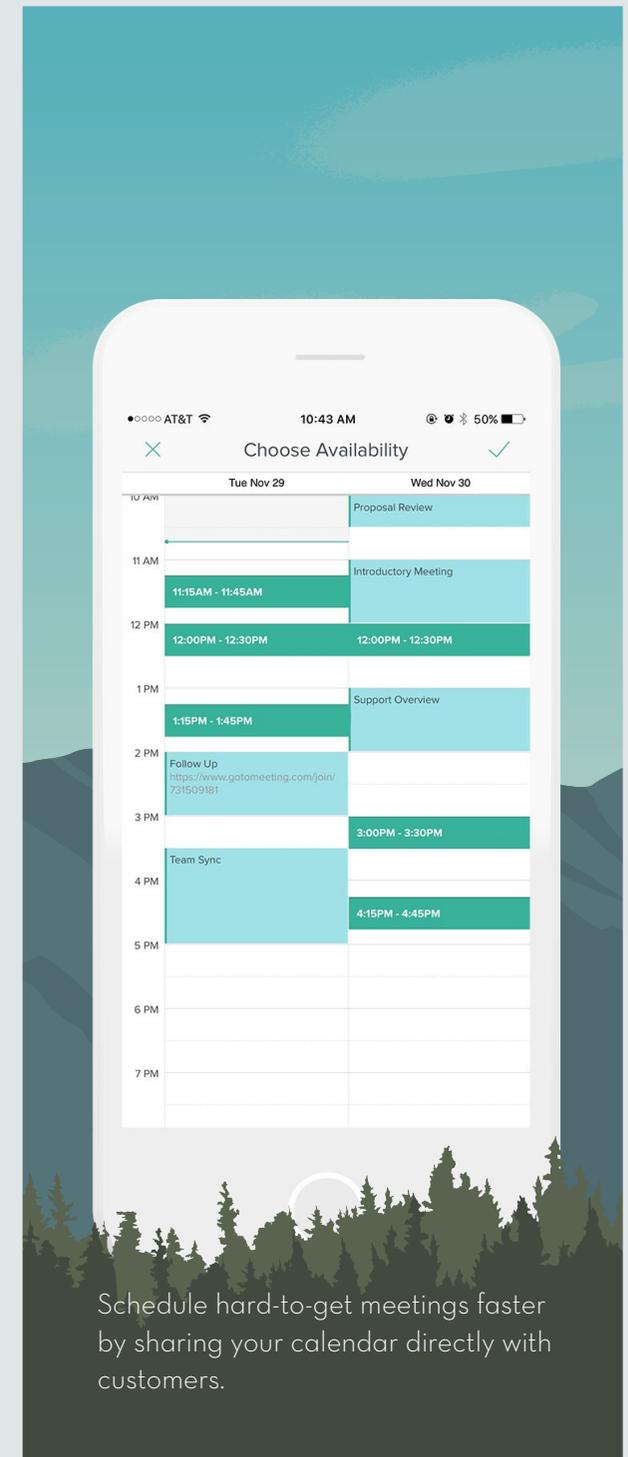
CHAPTER 3

Raise Your Mobile Productivity

Many sales reps spend days away from their desks, running from one customer meeting to the next. They depend heavily on their mobile devices to schedule appointments, communicate with customers, and keep track of their work.

The Inbox mobile app makes it faster and easier to get work done on the go. Mobile app features include:

- **Automatic capture of emails and calendar events** to your CRM system from your mobile device to eliminate the work of logging emails later, or worse – forgetting to do it at all.
- **A streamlined work experience** with access to email, calendar, email, and social media profiles in one app.
- **A sophisticated calendaring application** with smart scheduling to manage meetings without the back and forth. It dynamically updates your availability so you never have to worry about double-booking.
- **Real-time email tracking** with notifications confirming when your recipients open your emails.



Schedule hard-to-get meetings faster by sharing your calendar directly with customers.

Inbox helps you stay on top of your leads, no matter where you are. Conversations with prospects are more effective because you know if they have read your emails or not, and can plan your follow-up accordingly. And, for both you and your customers, Insert Availability saves time and removes the possibility of scheduling two meetings for the same time.



“As an account executive, I spend on average of one week per month traveling. Having to go in retroactively at the end of the day to log whom I met with just wouldn’t happen.”

Brittany Ivanco,
Account Executive, Salesforce

CHAPTER 4

Work Smarter. Get More From Every Email.

Salesforce Inbox works proactively you save time, gain insights, and close deals faster. Inbox boosts efficiency by reading your emails and learning which emails should be tagged to the CRM system and which shouldn't. For example, Inbox will prompt you to save external emails, but not internal ones. It also recommends on next steps you should take, such as emailing a specific client, to help you close deals faster.

With powerful time-saving features incorporated into Inbox, sales reps can skip the busywork and spend more time connecting with customers. The Recommendation feature further boosts efficiency by helping reps prioritize and tackle their most important work first.

Bring Peak Productivity to Your Inbox

The key to reaching your productivity peak is not working harder, but smarter. With Salesforce Inbox, you can get all your work done in one place – your email.



“I’m sending emails out all day. Before Inbox, I just wasn’t saving emails, but now I’m immediately prompted to save them. And the best part is that Inbox is smart enough to know internal emails don’t need to be saved and doesn’t prompt me to do so.”

Josh Geiger,
Engineer, Salesforce



Inbox makes using email a seamless part of selling. It allows sales reps and account executives to be more productive, both on the go and in the office. And the results are powerful, with customers saying they've achieved:

21% faster sales cycles

25% more time spent selling

38% increased CRM adoption¹¹

Blaze your trail to faster selling. Use Inbox to bring email, calendar, and CRM together in one seamless experience that smooths the path for more deals for every rep on your team.

¹ "The State of Sales Productivity Report," *Docurated*, 2016.

² "New Survey Reveals Big Data Is Helping Companies Capture Sales Growth," PR Newswire, Aug. 2, 2012, <http://www.prnewswire.com/news-releases/new-survey-reveals-big-data-is-helping-companies-capture-sales-growth-165125436.html>.

³ Ibid.

⁴ Ibid.

⁵ "The State of Sales Productivity Report," *Docurated*, 2016.

⁶ Mark Lindwall, "Why Don't Buyers Want to Meet with Your Salespeople," *Forrester*, Sept. 29, 2014, http://blogs.forrester.com/mark_lindwall/14-09-29-why_dont_buyers_want_to_meet_with_your_salespeople.

⁷ Ibid.

⁸ Sindi Markette, "What Is Sales Really Doing With Their Time: Infographic," *Esna*, Dec. 4, 2014, <http://web.esna.com/blog/what-is-sales-really-doing-with-their-time-infographic>.

⁹ Bob Sullivan and Hugh Thompson, "Brain, Interrupted," *New York Times*, May 3, 2013, <http://www.nytimes.com/2013/05/05/opinion/sunday/a-focus-on-distraction.html>.

¹⁰ Jesse Davis, "How Top Sales Leaders Track Close Rates," *RingDNA*, Oct. 8, 2014, <http://www.ringdna.com/blog/how-top-sales-leaders-track-close-rates>.

¹¹ Results collected during a Salesforce Inbox Customer Survey in May 2016. Response sizes vary per question.



SALESFORCE INBOX

Streamline your workflow and surface key customer data when you need it most by harnessing the power of Relationship Intelligence to anticipate customer needs and more, right from your email – wherever you go.



CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY



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