

Selling With
Salesforce: How

8

Successful
Companies
Do It



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INTRODUCTION

If you're in sales, you know technology is a major help in moving your deals through the pipeline. You probably also know that Salesforce has a wealth of technology to help you do just that. But let's be honest – Salesforce has a lot of products, and we add more features and update existing products every year. With so many options, you might not know exactly how to tap into the power of Salesforce to address your business size and sales needs.

That's why we created this e-book: to show you eight real-life stories of companies using Salesforce to sell smarter. These stories cover varied industries, from financial services (check out Enterprise Bank & Trust), to everyone's favorite industry: pizza (see Papa Murphy's story).

In each of these stories, we call out which Salesforce products the company is using so you can draw comparisons to your own business and decide what's best for you. It's all in the name of selling more, which every rep can agree is the ultimate goal. Let's dive in, starting with a bit more background on our sales solutions.

A white laptop keyboard is visible in the top left corner, with keys like 'caps lock', 'shift', 'control', and 'option' visible. A smartphone is in the bottom left corner, displaying a mobile app interface with various notifications and icons. The background is a light-colored wooden surface.

SELLING WITH SALESFORCE

Back in 1999 when we pioneered cloud computing, Salesforce could best be described as a customer relationship management (CRM) tool. That's still the heart of who we are – although the Salesforce family has grown along the way. Today, sales reps can customize Salesforce for their exact goals and sales cycle needs, whether they use Sales Cloud, Data.com, Pardot, or a combined solution.

Meet Sales Cloud

Sales Cloud is the world's #1 CRM solution. With Sales Cloud, you can grow your accounts faster, find new customers faster, and close deals faster – from anywhere. At the most basic level, Sales Cloud puts account and contact information in a central and accessible place, so you accelerate and streamline the sales process. The more data you give Sales Cloud, the more you'll:

- **Close more deals.** Sales Cloud tracks all customer interactions and info in one place, so you can more quickly push deals along.
- **Get more leads.** Nurture leads until they're sales-ready, then automatically route them to the right reps.
- **Accelerate productivity.** Any rep, from the field to the office, can be more productive when sales data is centralized and processes are automated through Sales Cloud.

Meet Data.com

Want to know your customers and prospects better? Get to know Data.com. No matter the size of your company, all sales reps share one common need: a pipeline filled with high-quality leads. Here's how Data.com helps you get there:

- **Find new customers faster.** Data.com Prospector shows you decision-makers through accurate and complete B2B contacts and company profiles.
- **Give salespeople the right data.** Do you know the number one reason for CRM failure? It's bad data. Data.com automatically transforms incomplete, inaccurate, and outdated information into actionable, money-making data.

- **Gain insight about your customers.** See cross-sell and upsell potential through account linkages, learn more about your current customers, and get a holistic picture of account penetration by customer.

Meet Pardot

Pardot is where sales and marketing come together to drive success like never before. In a nutshell, Pardot drives sales with intelligent B2B marketing. Here's what that means for your business:

- **Generate high-quality leads.** Fill the sales funnel with high-quality leads by easily creating landing pages and forms, running highly targeted email campaigns, and personalizing every buyer's experience.
- **Streamline lead management.** Goodbye, manual labor. Hello, autopilot. Pardot automates common sales and marketing tasks like lead qualification and nurturing, so you can free up sales to bring in new business.
- **Keep your pipeline fully stocked.** Everyone from sales to marketing is happier when the pipeline is filled with the right leads. Pardot shows both teams what's working, so everyone can repeat their success.

When you combine these three tools, you can craft your perfect blend of Salesforce that helps you achieve your unique sales goals. Next, learn how eight companies are using their own Salesforce solutions in every stage of the sales cycle – from territory planning to boosting sales with channel partners – to become bona fide selling machines.



DOCUSIGN REALIGNS ITS SALES TERRITORIES

DocuSign, Inc. (DocuSign®) is changing how business gets done by empowering anyone to transact anything, anytime, anywhere, on any device with trust and confidence. The company's eSignature and Digital Transaction Management (DTM) technology delivers value to nearly every individual professional, every small business and every global organization across every industry – as well as every business department within those companies. That's a massive addressable market.

As DocuSign expanded operations from North America to serve its growing customer base of more than 100,000 companies and more than 50 million users in 188 countries, the Sales Operations team realized it needed to redefine and align its sales territories to position Sales professionals for continued success.

However, the company didn't have much structure to its data, which made it challenging to really understand that addressable market and, according to Senior Business Analyst Kristin Lucas, "presented all kinds of challenges for our sales team and made it difficult to plan sales activities. As the sales team at DocuSign grew, we knew that we had to take action to ensure that the data in our system would scale with our business. And so we started to look for solutions that would allow us to do this globally."

With Salesforce and Data.com, DocuSign was able to make sense of its data, including adding 200,000 accounts to Salesforce that had previously been missing from its total addressable market. With a deeper knowledge of its customers, including the hierarchy of each organization, DocuSign was able to realign sales territories and assign the right customers to the right teams.

Now, says Lucas, "we have a very sophisticated segmentation model for our territories." Using both industry and geographical information supplied by Data.com, DocuSign has created more than 30 segments for its teams. Using Salesforce and Data.com, the prospect of serving a near limitless addressable market isn't quite as daunting for industry leader DocuSign.



DocuSign
imported over
+200,000
accounts from
Data.com that were
previously missing
from its total
addressable market.



“Our sales reps have confidence in the territories assigned to them and know that they have the complete and accurate information they need to close business.”

– KRISTIN LUCAS, SR. BUSINESS ANALYST
DOCUSIGN



CENVEO IDENTIFIES CROSS-SELL OPPORTUNITIES

As a world leader in the management and distribution of custom print, labels, and envelopes, Cenveo delivers full-service, creative business solutions to its customers.

As a result of multiple acquisitions made over the last 10 years, Cenveo was divided into three unique divisions with diverse sales cultures and datasets. As a result, it struggled with siloed data and wasn't collaborating or cross-selling products and services – which was hurting the business. Cenveo began looking at solutions that would bring the sales teams together and decided on Salesforce.

Cenveo first introduced Salesforce to a division of 55 users. "We saw benefits immediately," said Kathy Coates, vice president of platform sales technology. "Prior to utilizing a CRM, we had multiple reps calling on the same customer representing each of our divisions. With the implementation of Salesforce, we developed as a strategic sales team, we merged divisions and took down the 'walls' between our reps," she said.

"We originally planned to roll out Sales Cloud over 3 – 5 years. We've had it three years and 98% of the company is already using it," Coates continued.

Having a single platform was eye-opening to the organization. "We look at our customer program in a totally different way," explained Coates. Now the entire team cross-sells solutions, and Cenveo has more visibility into the sales pipeline.

Cenveo was also able to set up custom objects and workflows to customize its usage of Sales Cloud and improve forecasting and estimating capabilities. "Sitting on our earnings call, there hasn't been one time in the last three calls that Salesforce hasn't been brought up. We have used Salesforce to completely reculture our company," said Coates.



With Salesforce,
Cenveo has completely
recultured its company –

98%
of which is now using
Salesforce.



“We look at our customer program in a totally different way. As a result, we’ve remodeled our sales team. Instead of selling print from one division and envelopes from another, now the entire team sells solutions.”

– KATHY COATES, VP, PLATFORM SALES TECHNOLOGY
CENVEO



XIRRUS NURTURES PROSPECTS

Xirrus is a leading provider of high-performance wireless networks that function under the most demanding circumstances, supported by superior coverage and security. The sales and marketing teams at Xirrus wanted to improve the customer path to purchase and transform lead nurturing processes.

“Everyone has Wi-Fi. For us, it is all about finding the needle in the haystack. Who is ready to upgrade or swap their wireless solution, and when does that moment take place,” said Carrie Krinock, Senior Director of Corporate Marketing.

Before bringing on Salesforce Pardot, the Xirrus team couldn’t initiate conversations with prospects at the right time in the sales cycle. Campaigns were difficult to launch, and the sales team had no access to insights gathered during buying conversations.

Now, after implementing Pardot, the marketing team has easily and quickly created five strong nurture programs speaking to key Xirrus buying personas. When Xirrus added Pardot scoring and grading to the mix, it had a perfect storm.

By better monitoring nurture programs, Xirrus has removed critical barriers in the buying process and automated the qualification process.

“It’s a seamless and automatic process. Beyond the efficiency of the automation, the sales team can also leverage Pardot to gain prospect insight,” said Krinock.

The company is experiencing its most significant revenue growth spurt in large part due to an updated marketing and sales process. In the last year alone, it saw a 20% growth year over year in overall company revenue.

For Xirrus, it’s all about finding and re-creating campaigns that are as high-performing as its Wi-Fi. Xirrus is able to do this with Salesforce.

With Pardot,
Xirrus saw a
record-breaking

+20%
YoY revenue growth
in 2015 – with



420,000
emails sent and



12,000
page conversions in
that year alone.



“Pardot is critical to our marketing and sales teams. We simply cannot be competitive without our partnership with Salesforce.”

– CARRIE KRINOCK
SENIOR DIRECTOR OF CORPORATE MARKETING
XIRRUS



PAYCOR RAISES SALES PRODUCTIVITY

Paycor provides small and midsize companies with cloud-based onboarding, HR, payroll, and timekeeping software, delivering service to more than 30,000 organizations.

Before using Salesforce, Paycor used three different systems to store prospect and client data. But there was one big problem: these three systems didn't communicate with each other. Sales professionals entered their activity in the evening, if at all, and used Excel spreadsheets to manually record monthly sales.

"Our old CRM system was not user-friendly. If we needed to add new fields, or import data, or create a complex report, we had to go to IT and request their help," said Brian Vass, vice president of sales and marketing technology.

Paycor knew that to successfully scale its business, real-time information and a single source of sales truth was critical. So Paycor switched to Salesforce.

"Today with Salesforce – wow, what a change," said Scott Rudy, chief sales officer. Vass agreed: "We have thousands of reports and over 100 dashboards to measure everything from sales,

service, accounting, and product marketing – all powered through the Sales and Service Clouds."

Paycor also combined Data.com with Sales Cloud for even more powerful selling. "When we hire a sales professional for a new territory, we use Data.com to identify prospect accounts and contacts to populate that territory so the seller isn't starting from scratch," said Vass. Paycor has configured Data.com Clean to run every evening to flag field value differences and append their Salesforce records with enhanced data.

"As a result of our work with Salesforce, we're seeing an increase in overall sales productivity, which we define as revenue per salesperson. So on average, we're finding our sales professionals are generating more revenue per person today than before using Salesforce," said Vass. "It's a win for our sales professionals and for Paycor's entire business."



Paycor is generating
more revenue
per salesperson with
Salesforce.



“Today with Salesforce – wow, what a change.”

– SCOTT RUDY
CHIEF SALES AND MARKETING OFFICER
PAYCOR



ENTERPRISE BANK & TRUST AUTOMATES SALES

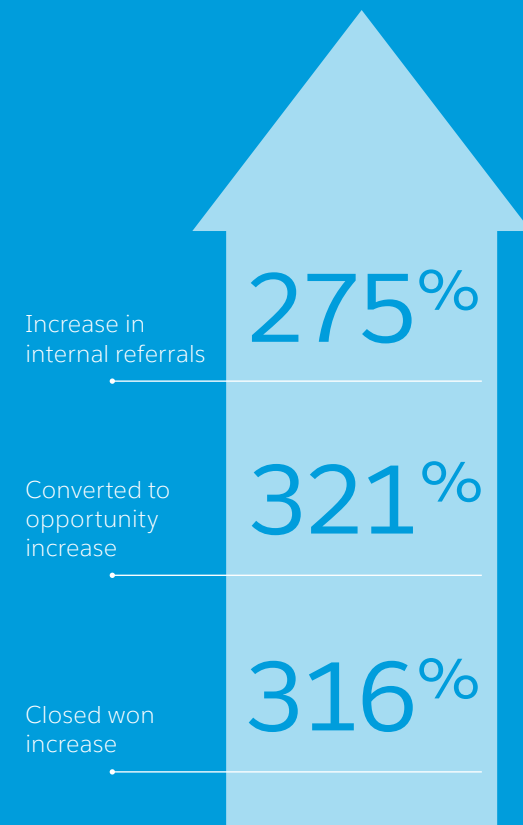
In 1988, Enterprise Bank & Trust, a St. Louis-based bank and wealth management firm, was founded on the principle that deep and enduring client relationships drive success. In 2011, Enterprise Bank & Trust made a targeted FDIC acquisition that increased deposit accounts by 450%.

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 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 six months, 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.



Jul 22 – Dec 31, 2013 vs. Jan – Dec 2014



“Using Salesforce, we hoped to significantly improve our cross-sell ratio, streamline sales processes, and provide a 360-degree view of our clients. It’s working.”

– DEBORAH N. BARSTOW, SVP
ENTERPRISE BANK & TRUST



ENCYCLOPAEDIA BRITANNICA INCREASES PROFITS AND RENEWALS

Encyclopaedia Britannica is a global educational publisher with products that promote knowledge and learning. Today, Encyclopaedia Britannica is fully digital and updated daily; it's online, in e-books, and even on mobile devices.

But the iconic publisher's had to find new ways to sell for the digital world. As print's dominance in reference publishing declined, Encyclopaedia Britannica's print sales dropped 97% over six years from 1990-1996. The company was prepared, having gone online in 1994, one of the first publishers to do so. But this meant an entirely new way of doing business. "Our culture changed from a company selling print books door to door and to schools and libraries, to becoming a technology company," said Michael Ross, senior vice president, Britannica Digital Learning US and EMEA.

The company embraced the move to digital as a chance to drive more revenue by selling lower-cost products in much higher volumes – "Swapping print dollars for digital pennies," Ross called it. However, selling to a vastly larger customer base exposed the limits of Encyclopaedia Britannica's homegrown CRM system.

A big benefit of going all-digital is that Encyclopaedia Britannica now gains deeper insight into how customers use its products. "Online products let us be more intimate with customers. We communicate more frequently and respond to them better," Ross said. As evidence, Director of Marketing and Sales Support Rick Booms cites Encyclopaedia Britannica's subscription renewal rates that top 95%.

To keep that rate climbing, the company adopted Pardot in mid-2015 to help with onboarding and renewals. Ross said his teams will also use Pardot to get away from "batch and blast" emails, in favor of buyer's journeys that help them better understand what their customers are really interested in.

Overall, profit margins have increased 8% since Salesforce adoption. Year-over-year profits in Ross' group grew twice as fast, to 17% over the same time period. "I guarantee we couldn't have done that without Salesforce," he said.

Encyclopaedia
Britannica's Digital
Learning Group
**increased
year-over-year
profits 17%.**





“We saw year-over-year profits of 17%.
I guarantee we couldn’t have done that
without Salesforce.”

– MICHAEL ROSS, SVP
BRITANNICA DIGITAL LEARNING US & EMEA



Love at 425°

PAPA MURPHY'S BOOSTS SALES WITH CHANNEL PARTNERS

Fresh pizza brand Papa Murphy's is one of the country's fastest-growing franchises and the leading take-and-bake chain in the U.S. For a franchising business like Papa Murphy's, the ability to open new stores simply and seamlessly is key to growth.

"It takes a village to open a store," said Jenni Doyle, director of information and technical services. From technology partners, to designers, to project managers, every team member must stay in sync throughout the process.

But with new franchise owners, field teams, and partners across the country using individual spreadsheets to track tasks, there was no transparency in that process – and when new steps were added, the home office had to contact every team member about the changes. "You're not going to have consistency if you have 17 groups using 17 different spreadsheets," said Doyle. Knowing that this wasn't scalable, Papa Murphy's brought on Salesforce to coordinate every step.

Using Sales Cloud, Papa Murphy's began tracking the full lifecycle of franchise leads – a critical step in adding more stores. With its out-of-the-box mobility

and ease of integration with third-party tools, Sales Cloud clicked perfectly with Papa Murphy's needs.

Next, Papa Murphy's added Community Cloud to bring franchisees and operations teams together on private group pages to coordinate every step of a store launch, from location scouting to opening day.

Papa Murphy's combined Salesforce solution enables full, 360-degree transparency, so everyone can see what tasks are assigned to them. "When we introduce new steps into the process, we no longer have to hunt down those 17 spreadsheets," said Doyle. "With just a few clicks or swipes, we can update one template, and everyone is aware of their new tasks."

The end result: a simplified, more efficient process for franchise owners and Papa Murphy's.



With **Salesforce**,
Papa Murphy's turned
15 spreadsheets into a
single template.



Chicken Bacon
Artichoke delite

FREE
DOUGH
MADE



"Our franchise process begins and ends in Salesforce."

— JENNI DOYLE
DIRECTOR OF INFORMATION AND TECHNICAL SERVICES
PAPA MURPHY'S



ROSETTA STONE KNOWS ITS CUSTOMERS

Rosetta Stone has long been the go-to source for individuals, businesses, and schools looking to address critical language and communication challenges. With millions of learners to serve and more being added every day, Rosetta Stone relies on Salesforce to know who its customers are today and who they might be tomorrow.

As today's consumers blend their business and personal lives, Rosetta Stone needs to look at its customers holistically to really understand them. Analyzing sales and business data together in Salesforce helps Rosetta Stone see the whole picture. But outdated and incorrect customer data wouldn't make for a very useful roadmap, so the company also uses Data.com to help enrich its data, get rid of duplicates, and set the foundation for incoming information to be clean and consistent.

Having a consistent view of its customers both stateside and internationally, Rosetta Stone can better understand who and where its customer base is. From there, it can properly segment territories so account teams are working the

right accounts, not spinning their wheels. This also allows Rosetta Stone to identify growth opportunities and make decisions based on a solid understanding of its customers. "We can take that data and determine what our next region will be for sales efforts or presence," said Jim Gentile, senior manager of CRM systems.

With a complete, consistent view of current customers and the infrastructure to keep that view crystal clear, Rosetta Stone can see market trends, better anticipate future demands of its customers, and strategize accordingly.



71%

of businesses want to grow internationally and need to provide employees with language learning to do so.



“What once took hours can now be done in moments with Data.com.”

– JIM GENTILE, SR. MANAGER, CRM SYSTEMS
ROSETTA STONE

CONCLUSION

As these eight examples have proven, there's a lot Salesforce can do to revolutionize your sales process, save your sales reps time, and ultimately put many more dollars in your pipeline.

You might start with Sales Cloud to move your sales business from spreadsheets to the cloud, use Data.com to keep records clean and actionable, and implement Pardot to connect sales and marketing teams. And you may want to add other Salesforce products and features as your needs change. But ultimately, it's all about what moves the needle in your business and helps you grow.

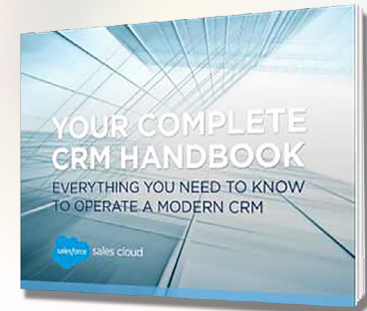
Check out salesforce.com to take advantage of the complete Customer Success Platform, or keep learning by reading more real business examples like the ones in this e-book.



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Salesforce Data.com

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THE CUSTOMER SUCCESS PLATFORM

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