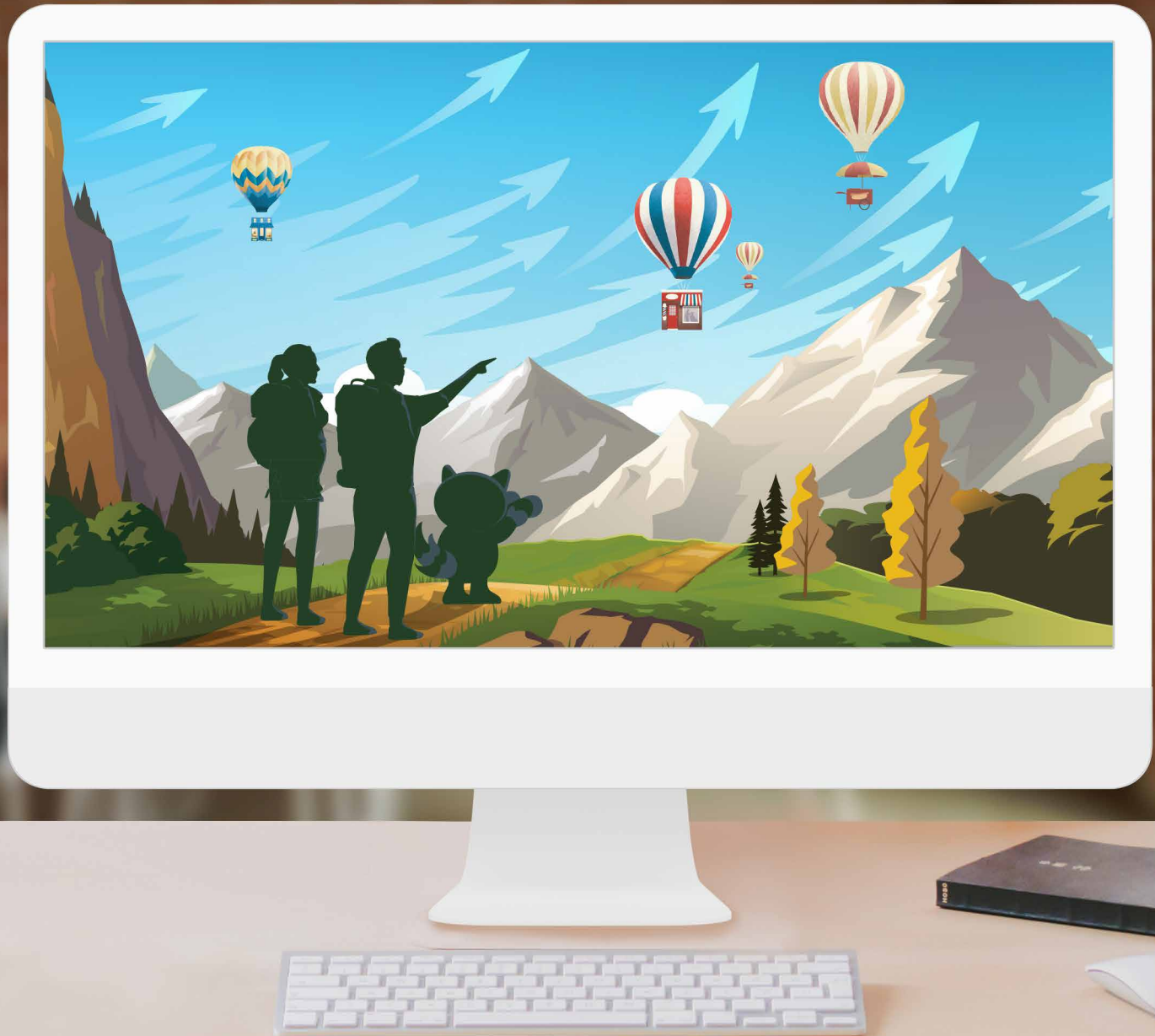


GETTING TO KNOW

SALESFORCE ESSENTIALS

The small business trailblazer's guide to getting started with Salesforce CRM



salesforce

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Meet Astro and Friends.

As you may have noticed, the style of this e-book is inspired by the great outdoors and U.S. national parks. Why? Because they express a feeling of fun, adventure, and exploration – and Salesforce is all about empowering people to blaze their own trails and be part of something greater. Pretty cool, huh? If you want to know more, check out [Trailhead](#), the fun way to learn about Salesforce. Get started today.



Introduction



Learn why Salesforce is the
#1 CRM for growing businesses.

[ACCESS THE GUIDE >](#)



Learn why a complete CRM is
essential for growth.

[HIT THE TRAIL >](#)

WHY DO SMALL BUSINESSES CHOOSE SALESFORCE?

Welcome, small businesses. You are the passionate Trailblazers that fuel innovation and drive our economy. As a small company, you may have less time and fewer resources than your bigger competitors, but you still find a way to compete with them. The new edition of Sales Cloud, called Essentials, was created with you in mind. Whether you're using spreadsheets and sticky notes to manage your business or have already embarked on your [customer relationship management \(CRM\) journey](#), this e-book will explain how Salesforce can help your business grow.

Salesforce was founded in an apartment in San Francisco with one goal in mind – to help our customers succeed. Our products can help you find more customers, win their business, and keep them happy. We make it easy to

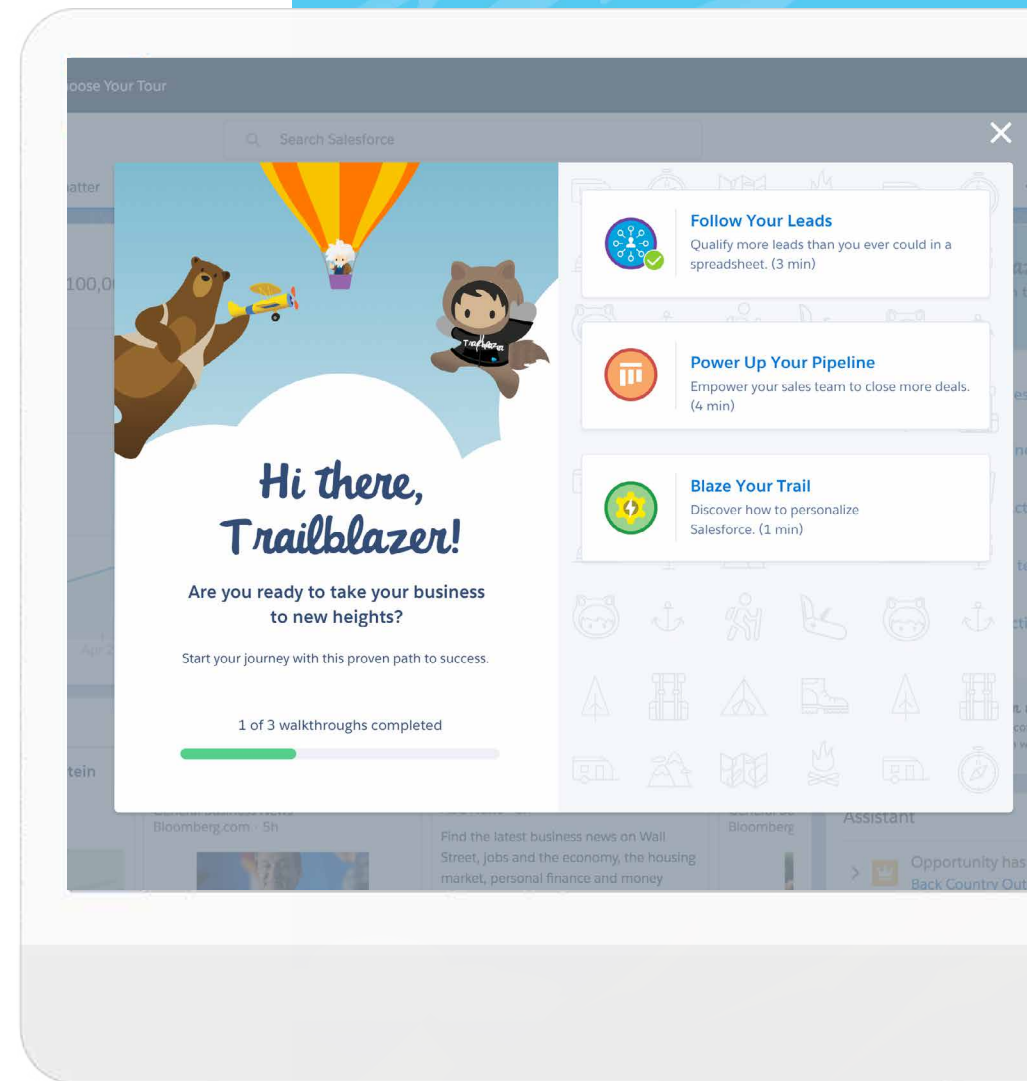
connect all of the tools you need to run your business. Our products grow with you, so you never have to worry about scalability. And now you can get more out of your data through built-in intelligence that provides predictions and insights. Today, our customers range from small startups to some of the largest enterprises, and we are [recognized by industry analysts](#) as the market leader for [customer relationship management technology](#).

Not only does customer success form the basis of our business model; it underscores a culture of constant innovation throughout our company. As your business grows, we'll continue to work with you to deliver value. We are dedicated not only to leading the CRM industry but to defining the future of business across all industries.

What is Essentials?

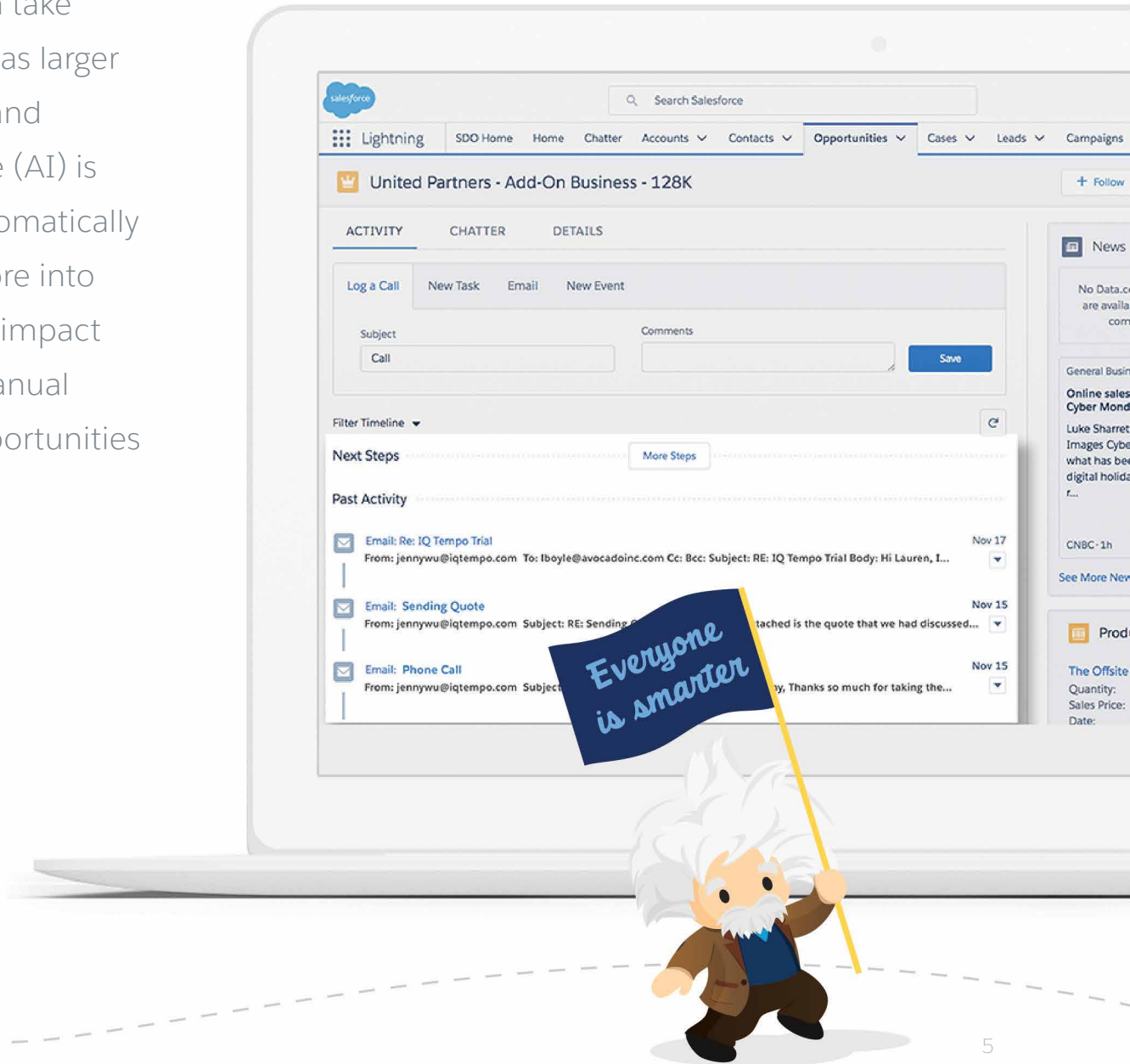
The latest edition of Sales Cloud is called Essentials, and it includes the must-have CRM features for small and growing businesses. Like other Sales Cloud editions, it's built on the [Salesforce Customer Success Platform](#), so it's secure and scalable, and easy to customize and upgrade as you grow.

You can start using Salesforce Essentials instantly. Setup is simple, and in-app guided tutorials will show you how to use it. Recommended setup steps help you map out your sales path, import your business contacts, and collaborate with your teammates. And when you're ready to learn more, guided learning paths on [Trailhead](#) – the fun and easy way to learn Salesforce – can help you blaze your trail to success.



CHAPTER 1: WHAT IS ESSENTIALS?

With Essentials, small businesses can take advantage of the same technologies as larger companies. Now you can sell faster and smarter because artificial intelligence (AI) is built in. [Einstein Activity Capture](#) automatically logs emails, calendar events, and more into Salesforce, so you can focus on high-impact activities. With less time spent on manual entry, you can focus on the sales opportunities that grow your business.



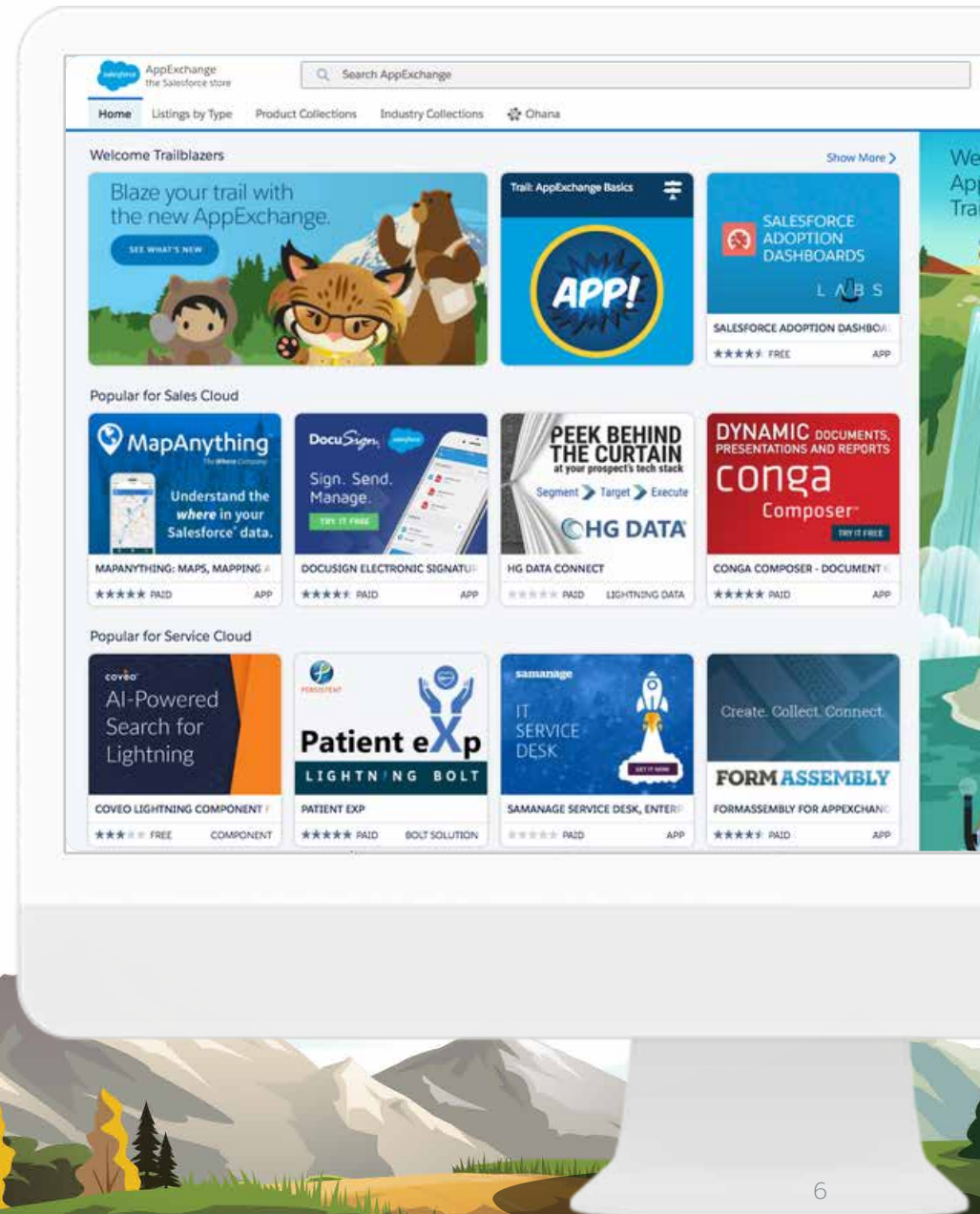
CHAPTER 1: WHAT IS ESSENTIALS?

Keeping up with growth can be challenging for a small business. But Essentials makes it easy to scale as you grow because you can instantly connect and share data among all the tools you need to power up your business. You can quickly add the apps you need to scale your business through the world's largest app ecosystem, [AppExchange](#). We've teamed with leading small business-focused partners to bring value right out of the box with automatic integration for the tools that help you grow.



See Essentials in action.

[WATCH DEMO >](#)



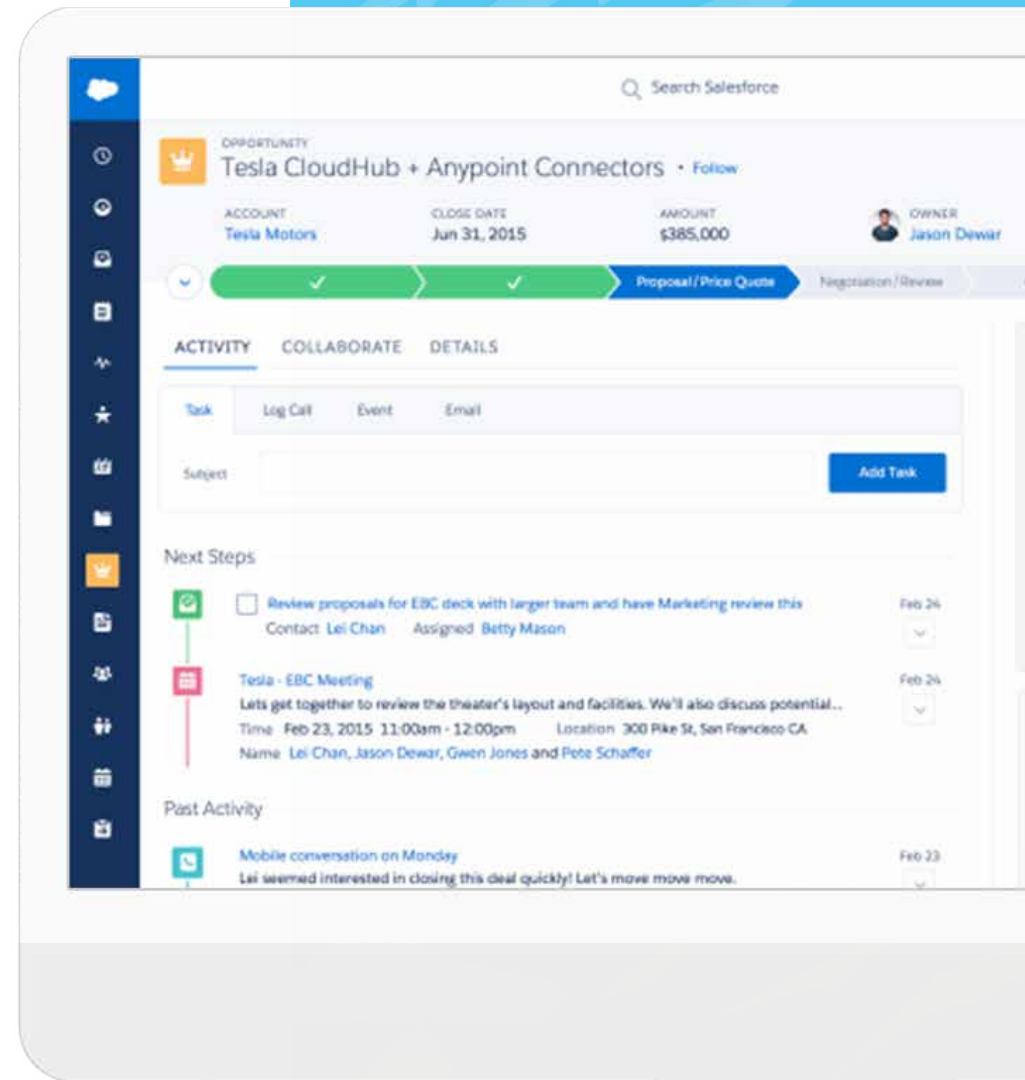
How does Salesforce help my business grow?

Salesforce CRM collects all your customer and prospect information – across websites, email, phone calls, social media, and many more sources and channels. It organizes everything to give you a complete record of both individuals and companies, so you better understand your relationships over time.



Learn 6 ways CRM helps grow business by downloading our free online guide.

[ACCESS THE GUIDE >](#)



A 360-degree view of your customers and prospects can help you:

Track your full sales cycle.

Salesforce allows you to set up your sales workflow so that you can track every step of your sales cycle from open opportunity to close. With customer information and interactions automatically logged, you and your team will know the latest status and next steps with that prospect or customer so you'll never drop the ball. With full visibility into the customer relationship, you'll know what's needed to close deals fast.

Identify and prioritize new leads.

With Salesforce, sales can identify the hottest leads and focus on the best opportunities. Marketing can spot prospects that need more nurturing and prime them to become quality leads. With complete, accurate, easy-to-access information about clients and prospects, both sales and marketing can be more successful.

Increase referrals and business from existing customers.

When you understand your customers better, it's easier to see cross-selling and upselling opportunities and win new business from them. Salesforce also gives you the tools to help your customers every step of the way and keep them happy with better service – from email to web to social media. And happy customers are likely to become repeat customers.

Personalize for better customer experiences.

Sixty-six percent of consumers and 72% of business buyers are likely to switch brands if they're treated like numbers instead of individuals.* So understanding your customers' challenges, goals, and needs is important if you want to maintain a strong relationship. Salesforce provides context to every interaction so you can reach out with the right message to the right person at the right time, and on the right channel – across sales, service, and marketing.

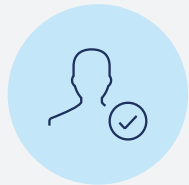


With full visibility into the customer relationship, you'll know what's needed to close deals fast.

*Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.



Average Percentage Improvements Reported by Salesforce Customers:*



+30%

Lead Conversion



+30%

Sales



+35%

Sales Productivity



+35%

Customer Satisfaction



Find out which Salesforce solutions can help your business grow by talking to a growth expert.

CONTACT US: 1-800-667-6389



+38%

Faster
Decision-Making



+25%

Revenue

* Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.



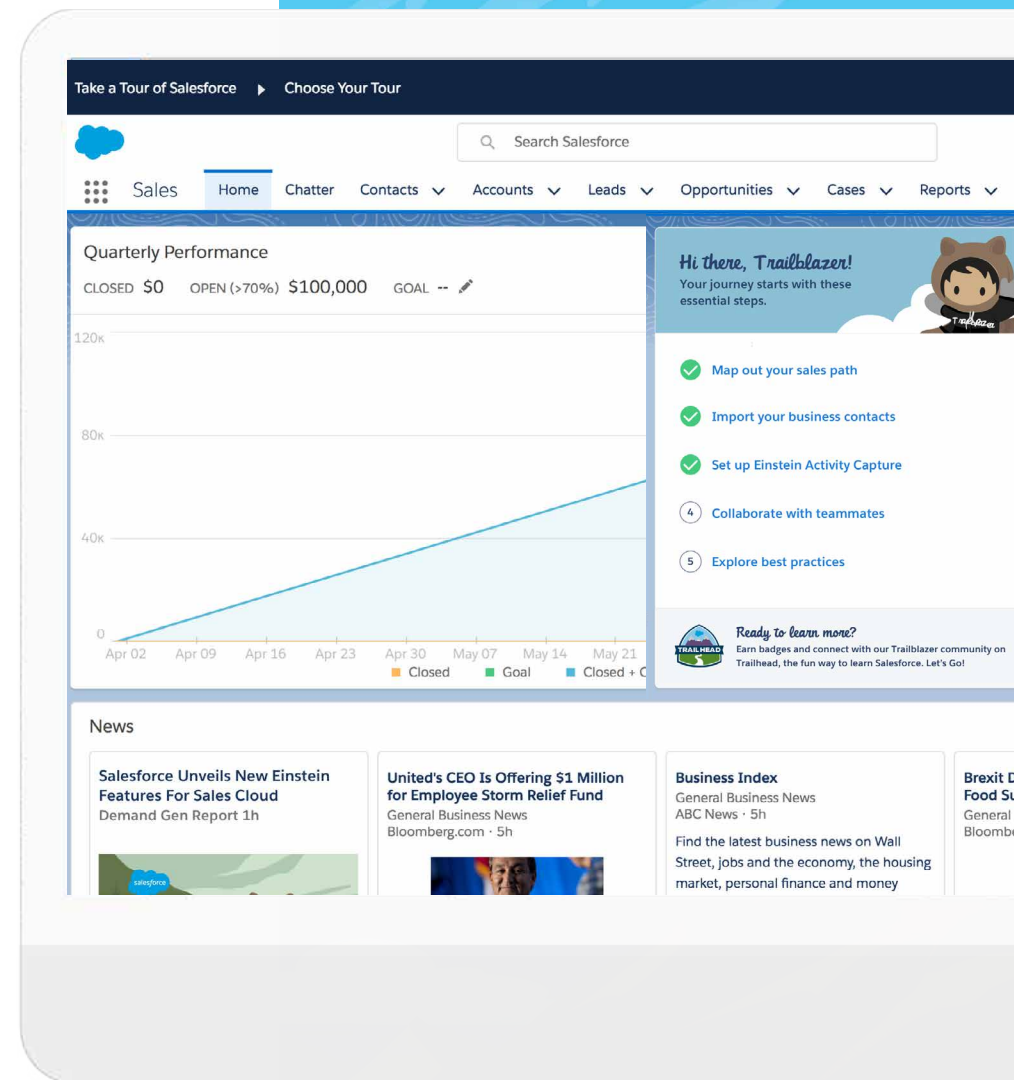
Is Essentials right for my business?

Salesforce has CRM solutions for companies of all sizes. We understand that small and midsize businesses have unique challenges, which is why we created Essentials. You can get set up and get all the benefits of CRM in no time, while knowing your technology investments will scale as your business grows.



What should I look for in a CRM system ?

[ACCESS THE FREE GUIDE >](#)



Essentials is designed to:

Start instantly.

Small and growing businesses pressed for time and resources need to get started fast. Salesforce makes it easy and fun to get going with [Trailhead](#). After a simple sign-up, you'll be instantly launched into Salesforce. Our interface, called [Lightning](#), is easy and intuitive for users to navigate. Helpful guides, in-app product tips, and a setup assistant will help you and your team quickly customize Essentials to your business.

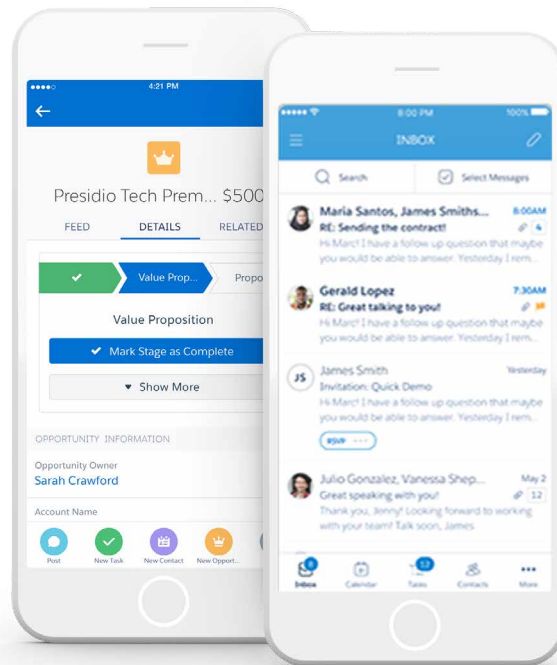
Sell more.

Intelligence is built into Essentials, so you can sell smarter and faster. Einstein Activity Capture syncs Salesforce with your email to gather all activities and customer communications so your team doesn't lose time to manual data entry. And because sales doesn't always happen at the desk, the [Salesforce app](#) and [Salesforce Inbox](#) are designed to help you do business anywhere, anytime.

Scale as you grow.

Scale as you grow. Because Salesforce is built for companies of all sizes, you'll never outgrow your CRM. It comes with the marketing and customer service tools you need to understand and

help your customers every step of the way. And you can further extend the power of Salesforce by integrating with AppExchange apps built specifically for small businesses like yours.



“
Because Salesforce is built for companies of all sizes, you'll never outgrow your CRM.”

Is my business a fit for Essentials?

Salesforce offers solutions for businesses of all sizes and industries. Use this handy checklist to see if the Essentials edition is right for your company. Check out Essentials edition if you:

- ✓ Want to get started with Salesforce
- ✓ Want to automate your sales workflow
- ✓ Have five salespeople or less
- ✓ Don't need to customize extensively to fit your business
- ✓ Have a tight budget



Get started with the basics of Salesforce.
[HIT THE TRAIL >](#)



How do I get started with Essentials?

Getting started with Essentials is simple – all you need is your email to get started.



Start a free trial of Essentials.

[SIGN UP >](#)

1

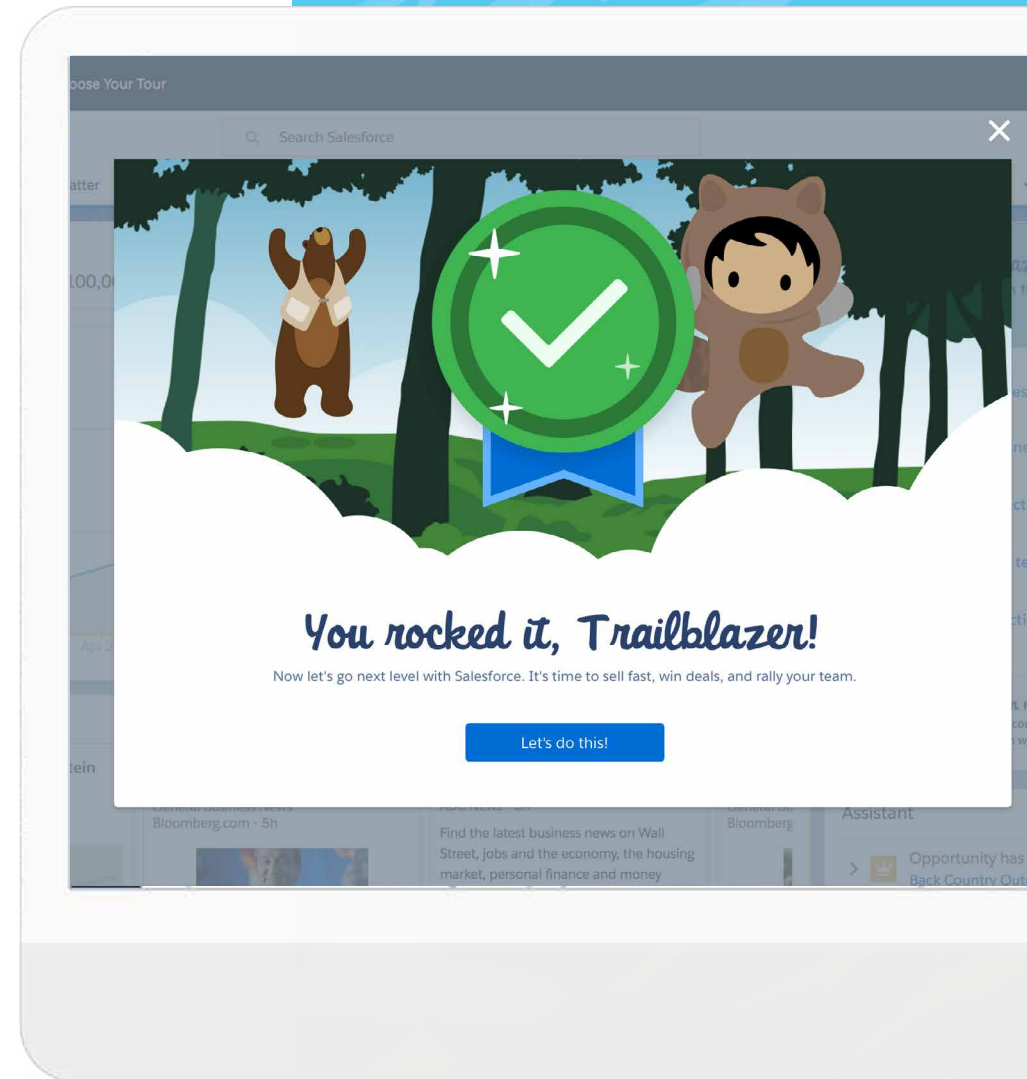
Begin by entering your name and email.

After you submit, your business's Salesforce instance is automatically created. You'll be greeted with your first walk-through, showing how to get set up.

2

Follow the Trailhead-guided walk-throughs.

Dive right into your new Salesforce instance with the Trailhead-guided walk-throughs to help you learn how to set up Salesforce for your business.



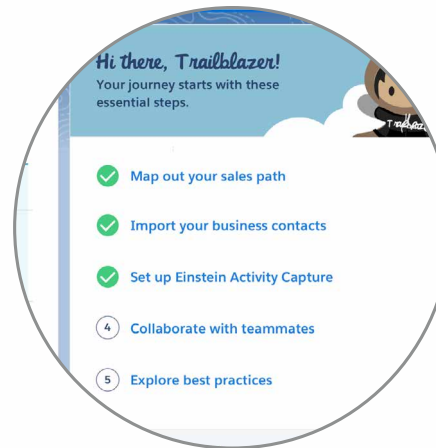
CHAPTER 4: HOW DO I GET STARTED WITH ESSENTIALS?



3

Learn how to use Salesforce to manage your customer relationships.

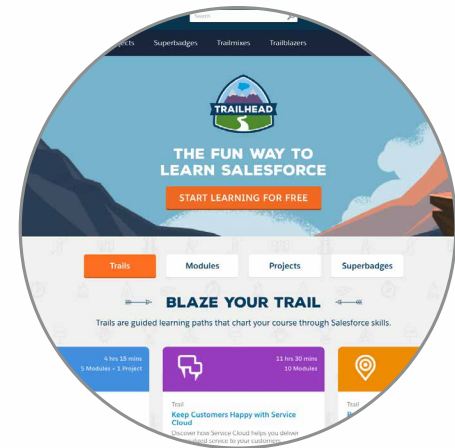
Each walk-through is designed to help you and your team quickly learn how to use Salesforce to manage your customer relationships. Helpful tips on each screen explain what to do and cover definitions so that anyone working within Salesforce can understand what each term means and is on the same page and path to growth.



4

Customize Salesforce for your team.

The Setup Assistant will guide you on the right path to customizing Salesforce and maximizing user productivity.



5

Continue your journey with Trailhead.

And when you've mastered all the in-app walk-throughs, continue your Salesforce learning journey with Trailhead to maximize your Salesforce investment for your growth.

What are my next steps with Salesforce?

Salesforce helps customers find success. On average, customers using Salesforce see 38% faster decision-making, a 25% increase in revenue, and a 35% jump in customer satisfaction.* To find your success with the new Essentials edition, follow these steps and get ready to take your business to new heights with Salesforce:

- ✓ Get a deeper understanding of how you can grow faster with [Salesforce CRM with Trailhead](#), the fun and easy way to learn about Salesforce.
- ✓ [Craft your CRM strategy](#) to make the most of your Salesforce investment.
- ✓ Sign up for a free trial of [Salesforce Essentials](#) and experience the #1 CRM for yourself.
- ✓ Visit [Salesforce.com/SMB](#) for CRM solutions and tools that can help you grow your business.
- ✓ Get inspired by reading [how other high-growth businesses are finding success](#) with Salesforce.
- ✓ [Contact us](#) to find out how Salesforce can help you find, win, and keep more customers – and support your continued growth.



+38%
Faster Decision-Making



+25%
Increase in Revenue



+35%
Jump in Customer Satisfaction



Get started with the basics of Salesforce.
FREE TRIAL

**Average percentage improvements reported by Salesforce customers. (Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.)*

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