

Small Business

Growth Kit

salesforce

Tips and tools from the experts to chart
your path to growth

WITH EXCLUSIVE POPUP

Partner Offers



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Welcome to the Small Business Growth Kit

Astro and friends will be your guides as we share the insights, tools and tips to help you on your trail to business growth.

Introduction

The trail to growth can be quite twisty-turny. But there are three things you can think about to make the trek easier: your plan, your preparation, and the tools and solutions you'll need to bring your vision to life. This kit offers guidance in all three areas. So whether you're just starting to define your destination, or you're already on your way, you'll find some helpful insights here.

Charting your path to growth

Growing your business is an uphill climb – especially without a clear understanding of where you want to go. So how do you map out your path?

As a market leader in sales tools and insights, Salesforce has experienced tremendous growth. But that growth is a product of more than what we do and sell. It comes from a plan defined by our V2MOM process. V2MOM stands for vision, values, methods, obstacles, and measures, and those words represent the five most important questions you can ask yourself as you strive to grow:

Vision: What do you want?

Values: What's important about it?

Methods: How do you get it?

Obstacles: What might stand in the way of getting it?

Metrics: How will you know when you have it?



Vision



Values



Methods



Obstacles



Metrics

Chart your path in 4 steps:



Map your V2MOM



Socialize it and get buy in from your team.



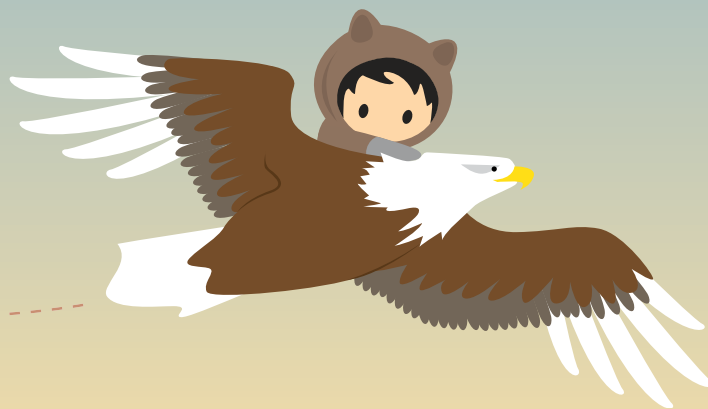
Have each team create its own, and then each employee.



Revisit throughout the year to evaluate progress.

But there's more to the process than answering the questions. The transformative power of the process lies in sharing your answers with your team and asking your team to answer the questions, too, in the context of your answers. (*For instance, if your vision is X, their vision should complement X.*)

Then as they use their answers to perform the same process with their own teams (and so on), everyone in the company becomes aligned. That alignment is not only the key to growth, but the key to achieving just about anything.



“While a company is growing fast, there’s nothing more important than constant communication and complete alignment.”

– **Marc Benioff**
Chairman & CEO, [salesforce.com](https://www.salesforce.com)



Preparing for your journey

A successful sales expedition requires an effective pitch.

But a good pitch is not simply about what you have to offer. It's a framework for give and take – an adaptive model driven by the changing needs of your buyers and the challenges you can help them meet. With that in mind, here are a few tips to get your pitch on track.

1. Do your due diligence

82% of sales people are not aligned with the needs of their buyers. Set yourself apart by doing your research. Knowing your prospect's company, industry, and competitors allows you to ask the right questions and tailor your message to their specific challenges.

2. Talk to the right person

All the research and customer information in the world won't help you if you aren't in touch with the person who can approve the purchase. Leveraging sales intelligence tools or social media resources like LinkedIn can help you identify the best contacts to pursue.



3. Prepare for objections

As you're reviewing your pitch, be sure it can accommodate potential sales objections. The most common objections fall into four buckets:

Budget: "We just don't have the budget."

Authority: "I need to consult with X."

Need: "I'm happy with my current solution."

Time: "We're too busy right now."

Be prepared to discuss each objection, ideally framing it in terms of how that objection reveals a need for your product or service. (ie: *If your product can save the customer money, that's a great counter to the lack of budget objection.*)

4. Think on your feet

Once your pitch is polished, don't cling to the script. Talk less and listen more, sharing only what appeals most to the customer. Pitches with real potential feel less like a business presentation and more like a healthy conversation about business needs.

5. Always end with agreed next steps

Every sales pitch should end with a call to action that makes sense. Even if the customer isn't ready to complete the sale yet, be sure to keep the prospect on the journey and move forward with a follow-up meeting or a trial period.



Evaluating and optimizing your tools

Many small business owners have no structured system for tracking their sales prospects and customer information.

Of those that do, most rely on outdated tools, such as email (44%) and spreadsheets (41%). But fast-growing companies do things differently. While they owe their growth to everything from product innovation to improved internal processes to innovative apps, one of the things that makes the biggest difference is a CRM, which stands for “Customer Relationship Management.”

Companies adding a CRM system have increased sales by as much as 29% and revenues by as much as 41%. While the results are extraordinary, there’s no magic in how it works.

CRM simply puts all of your critical customer information in one place and allows you to view contact info, follow up via email or social media, manage tasks, track performance, and more – all within a single application. In short, finding the right CRM can translate to closing more deals, boosting sales, and improving forecast accuracy.

35%
of small business owners say that not having enough time in the day keeps them up at night.

Salesforce can help you reach your next peak, with smart sales and service automation that gives you back the time you’ve been losing.



Is it time for you to invest in CRM?

We've found six leading indicators that can help you answer that question, based on cases in which CRM has had the greatest impact.

1. There's no single source for information

You store your customer and order information in more than one location, such as a spreadsheet or notes stuck to your computer. This puts your sales team at a disadvantage. They lack a single view of every customer's contact info, orders, and interactions.

4. Sales notes aren't automatically shared

You lack a shared, mobile-friendly system in which all sales people keep their notes. This means reps on the road can't share notes immediately and may forget to do so when they get home. That slows the flow of information and increases the likelihood it will be lost – especially if an employee leaves the company.

2. There's little or no visibility

You have no system that lets you see what your salespeople are doing or how your customers are connecting with employees. This makes it difficult to help your sales team succeed – and keep them accountable.

5. Every customer is treated the same

You're not able to distinguish which offers and messages are going to which targets. So the same information is going to customers and prospects in very different stages of the buying process, as well as in different industries or geographies. That means your messages are not resonating with specific needs.

3. You create reports manually or not at all

You're not using an automated resource to produce reports and/or analytics that map your sales team's monthly progress against its quota. Because doing this by hand is tedious and painful, you're likely not doing it as much as you should, if you're doing it at all. This deprives you of invaluable insights.

6. You lack a plan to scale fast

You're not confident your current processes will accommodate that growth you're striving to achieve. So you may not be able to keep productivity high while scaling up.

How CRM improves productivity

You probably know the old saying, “there never seem to be enough hours in the day.” This is especially true in the sales world, where time is truly money. According to a study by Mavenlink, two out of five small business owners rank time as their most valuable asset, and a quarter of those would pay \$500 for just one extra hour in the day.

Unfortunately, you can’t buy more time. But you can use it more effectively and efficiently – with CRM. A CRM system optimizes your sales process, which means more time to generate new prospects. A CRM system arms your sales reps with the info they need when they need it, which means it takes less time to close sales. A CRM system allows you to sell smarter and better, which means you grow your business faster.

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– Mavenlink

See how it worked for Pendo

Todd Olson and his team at Pendo have built a business around how digital products can help companies learn from their customers, and create better products in the future. Backed by a Series A round of financing closed in late 2015, the company is growing quickly.

Pendo is CEO & Co-Founder Todd Olson's third startup. So when he founded the Raleigh-based company in October of 2013, Olson was already familiar with some of the challenges commonly faced when getting a new venture off the ground – and in growing while maintaining mission focus. For Pendo to successfully land and expand clients, Olson needs his teams not only to avoid losing time to “noise” that could be outsourced, but also to work across departments to find ways to offer customers more value. Already familiar

with Salesforce dating back to 2001, Olson knew the platform could help his company's efforts on both counts. So Pendo started using Sales Cloud from the company's earliest days.

Salesforce is more than Pendo's system of record for the sale process. “If it's not in Salesforce, it didn't happen. That's one of the rules at the company,” Olson said. “I don't care what a rep tells me about how great his call was. If he's not sharing it with the rest of the team, he's not contributing to help the company move forward.” Sales Cloud helps Pendo's small but growing sales team manage the complex process of prospecting into enterprise technology companies. A Sales Cloud feature called Sales Path helps formalize the company's sales methodology by giving notes to sales reps at each stage of the opportunities process. “Salesforce helps even the best salespeople be more successful,” said Olson.

Pendo also adopted Desk.com for customer support and Pardot for marketing automation, moving on from older systems. Running the entire business on Salesforce allows everyone

at Pendo to work more efficiently and to know where each customer is in every part of the sales and support cycles. “Our sales force has tripled in two months, and with Salesforce, we've been able to maintain our speed to value,” said Olson.



[Watch the Pendo story video to learn more](#)



Salesforce helps even the best salespeople be more successful.

– TODD OLSON

Co-Founder & CEO, Pendo

Exclusive partner offers

As your business strikes out for new frontiers, Salesforce products and services can help. But there are other products and services you'll need and we want to help there too. So we've built a network of partners who can deliver in those areas, in extraordinary ways. Take a moment to learn about them and the special offers they've made available.



G2 Crowd, the world's leading business solution review platform, leverages more than 175,000 user reviews to bring transparency to business technology research. G2 Crowd's mission is to provide the insights business professionals need to gain confidence in their buying decisions and become more successful in their jobs.

[Make a more informed buying decision](#)



RelationEdge helps companies implement Salesforce – providing a custom engineered solution that will allow you to better market, sell and service your customers. Then we provide ongoing services and support, evolving the platform to meet changing business needs and ensuring you continue to get the most value from your investment over time.

[Schedule a Business Process Review](#)



Sage Live is a powerful cloud business management solution that lets you connect and seamlessly integrate critical business functions such as CRM and Accounting with one cloud solution by harnessing the power of Salesforce and the ecosystem of 3000+ connected business apps.

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With **Chase for Business**, you'll receive guidance from a team of professionals who specialize in helping improve cash flow, offering solutions for taking and making payments, and providing financing options.

We help clients manage their finances so they can focus on what they do best: building their business.

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RingCentral, Inc. is a leading Salesforce Appexchange Partner and global provider of cloud unified communications and collaboration solutions. Empowering today's mobile and distributed workforces to be connected anywhere and on any device through voice, video, messaging, collaboration, conferencing, online meetings, contact center, and fax. RingCentral is a leader in the 2016 Gartner Magic Quadrant for UCaaS Worldwide for the second consecutive year.

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The **Small Business Development Center (SBDC)** is currently the largest management assistance program serving the business sector in the United States. The SBDC conducts research, counsels and trains business people in managing, financing and operating small businesses, providing comprehensive information services and access to experts in a variety of fields.

[Learn More](#)



Dallas Office of Economic Development is a full service economic development program leading the City of Dallas' business & real estate development efforts, supporting existing & prospective Dallas businesses and development & redevelopment in the City.

[Learn More](#)



The Dallas Entrepreneur Center (The DEC) is a coworking space and 501c3 non-profit created to help entrepreneurs start, build, and grow companies through education, mentorship, and community. Use the links below to schedule a tour of the facility and connect to learn more about The DEC's programs and initiatives for women and minority entrepreneurs.

[Learn More](#)

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Score is a nonprofit association that provides free business mentoring, tool, templates & tips and free or inexpensive workshops – locally or via webinars. The Dallas Chapter of SCORE has a variety of 20-30 local workshops that cover business start-up and formation, marketing/social media, accounting and more. 65 SCORE mentors stand ready to volunteer their time.

[Learn More](#)



The **Dallas Regional Chamber** serves as the voice of business and the champion of economic development and growth in the Dallas Region. We work to strengthen our business community by advocating for pro-growth public policies, improving our educational system, attracting talented workers from around the world, and enhancing the quality of life for all.

[Learn More](#)

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

salesforce

Your partner in growth

Salesforce helps you find customers, win their business, and keep them happy so you can grow faster than ever. With Salesforce's out-of-the-box solutions, small businesses can easily implement cutting-edge technology and connect everything they use to run their businesses. On average, customers using Salesforce have seen a 38% faster decision making, a 25% increase in revenue, and a 35% jump in customer satisfaction.

To learn more about how Salesforce can help your business, visit: salesforce.com/smb
To see how easy it is to learn Salesforce, join your guide, Astro at: trailhead.salesforce.com

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