

Small Business

# Growth Kit

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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:

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**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.



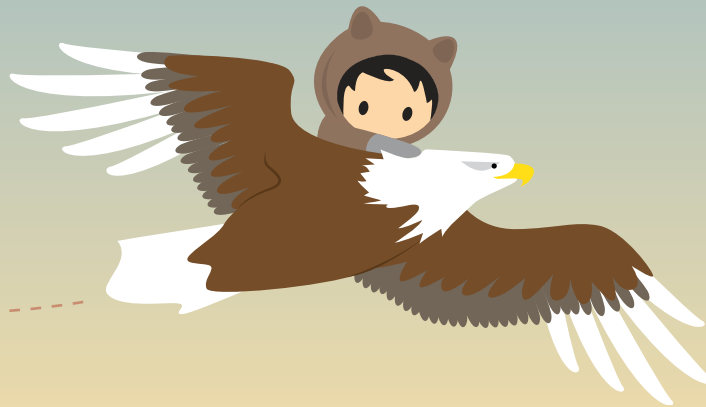
Have each team create its own, and then each employee.



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.



**OpFocus** is a Salesforce consulting company focused on preparing "as a Service" (XaaS) companies for their next level of growth. OpFocus has helped 460+ clients increase revenue, reduce costs, automate processes, and create operational efficiencies.

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**InsightSquared** helps sales operations professionals break the cycle of spreadsheets by equipping them with real-time reporting on virtually all sales KPIs. Hundreds of fast-growing companies rely on our solutions to aid in forecasting accuracy, pipeline management, rep coaching, and data-backed planning and analysis.

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Mayor's Office of  
Economic Development

The **Mayor's Office of Economic Development** aims to promote a healthy environment for business of all types and sizes while fostering economic inclusion and equity. The Small Business Development team is Boston's front door for small businesses, and includes permitting and licensing resources, as well as technical help. We also offer certification for local, women, minority and veteran owned businesses.

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**Boston**

**AMA Boston** is comprised of a diverse group of marketing professionals from across New England who strive to foster innovation and collaboration. Our member-run organization leverages comprehensive knowledge and resources to propel marketers forward in their careers and organizations. Our Chapter is fourth largest in the American Marketing Association.

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The **Mass Small Business Development Center Network** provides free and confidential business advice to existing and prospective small business people. Areas of assistance include: new business formation, business plan development, cash flow analysis, personnel and organizational issues, financing, marketing and sales, and more. We also offer training seminars on a variety of topics, including starting a business, financial planning, legal issues, government procurement, and international trade.

[Learn More Online](#) or Call Our Office at 508-673-9783



**Boston Career Link**, operated by Goodwill, is part of the Massachusetts One-Stop Career Center network connecting workers with employers. Boston Career Link offers universal access to a broad range of career counseling services, career resources, workshops, job fairs, mass hiring events, and special programs to connect job seekers with employers. Job seekers learn about current openings, receive assistance with their job searches, learn job search techniques, and receive instruction on how to apply for a job online. Businesses come to Boston Career Link throughout the year to conduct on-site interviews with qualified, pre-screened job seekers or to participate in job fairs.

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The **Boston Planning & Development Agency (BPDA)** In partnership with communities, the BPDA plans Boston's future while respecting its past. By guiding physical, social, and economic change in Boston's neighborhoods, the BPDA seeks to shape a more prosperous, resilient and vibrant city for all.

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

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# 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](https://salesforce.com/smb)  
To see how easy it is to learn Salesforce, join your guide, Astro at: [trailhead.salesforce.com](https://trailhead.salesforce.com)

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