

THE UNFAIR **ADVANTAGE** GUIDE.

salesforce

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Everything you need to know to get started with **CRM**.

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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.”

-Mavenlink

”

The secret is out.

Unfair advantages for all

We work in a world that is constantly changing, we are connected to each other like never before and an explosion of devices offers us new ways of doing things. What do you focus on first?

We know if you engage and connect deeply with your customers you get incredible success. But you need a way do to it.

The secret is out

Being customer driven requires all parts of your company to work smarter than before and to go as fast as the world around you. Is your whole company connected to your customers?

With Salesforce.com the secret formula is simple. Our platform manages all of your critical customer information so that you can see it all in one place. Sales, service, marketing, your applications and reporting all together. Simple.

And it's easy to start. From one application you can view contacts, manage tasks, track performance, follow up email, automate marketing, you name it. In fact with the right customer relationship management (CRM) app you'll increase efficiency, increase marketing ROI, close more deals, boost sales and improve customer satisfaction.

So is it time for your company to invest in CRM?

Signs you need an unfair advantage.

Businesses typically begin with a basic relationship of seller to customer – simple. In this early stage it might be OK to maintain a spreadsheet or jot down notes about customers and orders. But as you grow this basic approach can hold you back from moving fast.

Here are some warning signs that it's time to trade in old ways and start really connecting with your customers.

1. There's no single source for information

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

2. There's little or no visibility

Not only do you lack visibility into how your customers are connecting with employees, you also lack insight into what your salespeople are doing. This makes it difficult to help them be successful –and keep them accountable.



Does your business need a CRM?

Not sure if your business is ready for a CRM? If you check any of the following boxes, a CRM could dramatically improve your business performance.

- There's no single source for information
- There's little or no visibility
- Reports are tedious and painful
- You are losing data
- It's hard to stay in touch on the go
- Every customer is treated the same
- You lack a plan to scale fast

3. Reports are tedious and painful

Generating reports and analytics of your sales team's monthly progress against their quota would be ideal. But creating reports manually is cumbersome, often resulting in no tracking at all.

4. You are losing data

It's hard for you to schedule follow-ups with customers and prospects. Great meetings happen on the road, but the sales teams don't always transfer their notes and important details get lost, especially if an employee leaves the company.

5. It's hard to stay in touch on the go

Your sales reps are out in the field, meeting prospects and discovering valuable info. But all this new data gets stored on handwritten notes or in files on personal computers, instead of being shared with the team.

6. Every customer is treated the same

You don't target prospects based on their value to the business. Rather, you are sending the same types of offers and messages to customers and prospects in very different stages of the buying process, as well as in different industries or geographies.

7. You lack a plan to scale fast

What if your business grew from 20 to 200 this year? Are you confident that your current processes will scale? If you know that you are going to grow, are you worried about keeping productivity up while scaling up?

If any of these apply to you or your team, don't despair. These are exactly the issues that a CRM system can address. Next up, let's take a look at how a CRM makes your business more productive.

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 truly is 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.

The more effectively and efficiently you use your time, the better results to your bottom line. Small businesses grow faster by getting better at providing a steady flow of new prospects, increasing time spent selling, and arming their sales reps with the info they need to close deals more quickly. That is where a CRM application comes in.

Pipeline

Finding time to bring in a steady flow of new customers can be quite the challenge for a small business sales team. This is often caused by issues such as:

- Inability to route leads to the appropriate sales rep
- Lack of information on potential clients
- Inadequate knowledge about a prospect before calling
- Poor visibility and forecasting of future pipeline

A CRM app allows sales reps to store the data on prospects so the information's ready at each interaction. Plus, it quickly provides metrics related to visibility and forecasting.

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Selling Time

Obviously, representatives need time to sell. Some of the time traps faced by salespeople are hard to overcome, but others can be easily fixed:

- Communication is a big challenge for a sales team on the go, but surprisingly few teams leverage smartphones and tablets as part of their regular workflow. Making the switch to mobile can eliminate downtime and increase communication.
- Automation of repetitive tasks gives salespeople more time to concentrate on closing.
- Providing one channel for reps to share information and connect eliminates endless email loops and phone tag.

The right CRM system syncs with mobile devices anywhere, anytime via the cloud, so the entire team is on the same page and has the most current information at their fingertips.

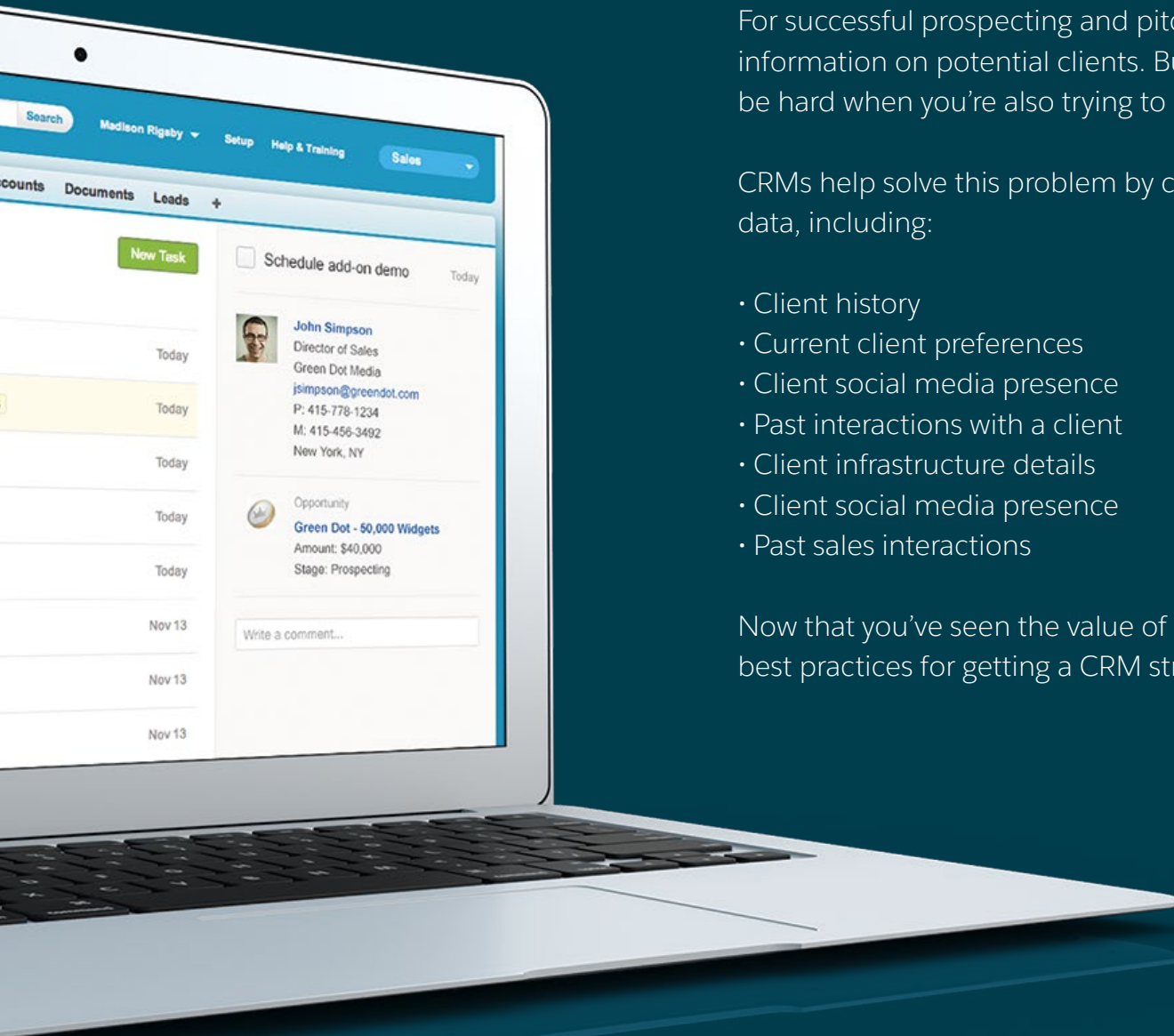
Better Intelligence

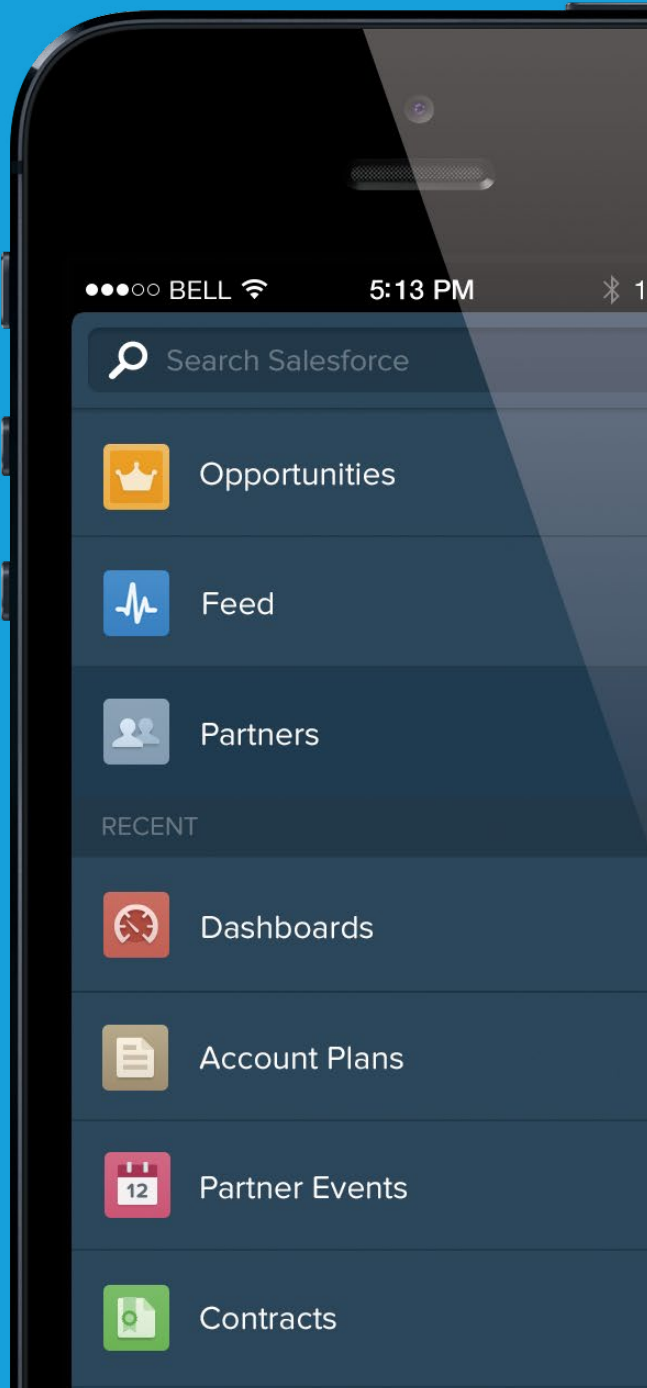
For successful prospecting and pitching, you must gather vital information on potential clients. But finding time to do that can be hard when you're also trying to make your month.

CRMs help solve this problem by collecting valuable customer data, including:

- Client history
- Current client preferences
- Client social media presence
- Past interactions with a client
- Client infrastructure details
- Client social media presence
- Past sales interactions

Now that you've seen the value of a CRM system, let's investigate best practices for getting a CRM strategy in place.





Don't forget to think mobile

The Mobile Sales Team

As you consider CRM solutions, it's important to consider that the modern sales team is no longer confined to their desks for 8 hours a day. They are always on, always connected, and incredibly mobile. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity, and fits into your sales team's existing workflows.

Mobile CRM Tools

When considering CRM tools, you'll notice that a rare few have functional mobile components. Make sure the technology you are considering does not just add mobile functionality as an afterthought. Solutions like Salesforce1 were built mobile-first with a team's productivity in mind. Designed with apps and features that streamline the sales process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your business, and one that revolutionizes it.

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from a business perspective.

How to craft a CRM Strategy.

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from a business perspective. Here are seven basic steps to build a winning plan:

1. Define Your Vision

Some people dismiss vision statements as a waste of time, but successful sales leaders know the value of having a clear, repeatable, action-oriented vision that your team can rally around. Your vision can be many things, from becoming market leader for sales in your region, to redefining customer

service within your industry. Make it both aspirational enough to have an impact, and clear enough that the entire organization can understand it.

2. Define Your Strategy

Strategy is what makes your vision achievable. Say you want to be market leader for sales. Do you do this by competing on price, or by offering different products, or by emphasizing your great after-sales service?

Building your CRM strategy.

Set yourself up for success by building a comprehensive CRM strategy. Take the following steps to hit the ground running.

- Define Your Vision
- Define Your Strategy
- Define Your Business Objectives
- Get Your Team On Board
- Identify the Metrics
- Prioritise Your Initiatives
- Define Your Roadmap

3. Define Your Business Objectives

Business objectives are where vision and strategy get translated into the day-to-day work. A common mistake when implementing a new CRM system is to replicate in it all the old business objectives and processes, complete with their inefficiencies. Instead, view your implementation as an opportunity to review and optimize how you work.

4. Get Your Team On Board

Executive sponsorship is vital for your CRM vision, strategy and business objectives, and for a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

5. Identify the Metrics

“You can’t manage what you can’t measure” is an adage attributed to many business thinkers. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organization, from sales reps and managers, to the executive team.

6. Prioritize Your Initiatives

You’re not going to get everything done at once, so decide what’s most important to deliver first. Training is often the priority, so everyone is ready to use the new CRM system as soon as it is available.

7. Define Your Roadmap

You shouldn’t look at building an effective CRM system as a “big bang” event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you go live is equally important. Plan beyond launch day and consider what other capabilities you need to deliver for the business.

Now that your CRM system and strategy are in place, it’s time to see the best ways to measure and maximize the technology.

Customer Spotlight:

Herman Miller.

When global furniture manufacturer Herman Miller was looking for a tool to help them grow and modernize their business processes, they turned to Salesforce to help them do it. With new insights into their sales cycle, enhanced mobile functionality, and cross-company collaboration, Salesforce now allows Herman Miller to understand their customers like never before.

[Watch the film ›](#)

“Salesforce helps us understand our customer base more effectively than we ever otherwise could.”

-Curt Pullen, President, Herman Miller

Does it really help?

The average percentage improvements cited by our customers* speak for themselves increasing:

- Sales by 32%
- Sales productivity by 40%
- Lead conversion by 39%
- Customer Satisfaction by 40%
- Marketing Return on Investment by 40%

A fair go and then some.

Here are several best practices to remember when working to maximize your ROI, from CRM Search's Karen D. Schwartz:

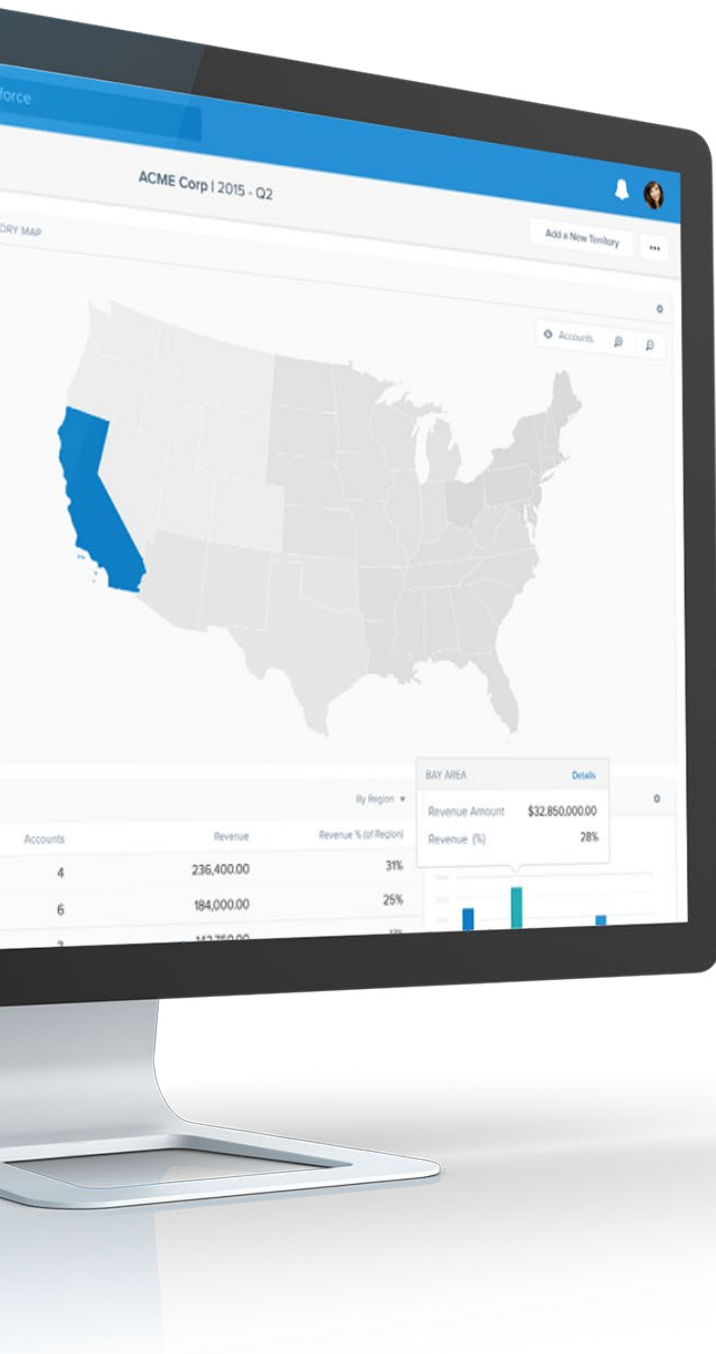
Why choose a Cloud based CRM Solution

Choosing a cloud based solution means you can be up and running fast. No mucking around with servers, software or versions. With a cloud solution you don't have any ongoing capital expenses and we roll out 3 upgrades every year for you. No hassles. And its safe. We have unmatched security at every level. Trust is our number 1 priority.

Integrate with Applications that Provide Value

Take advantage of the new business and social applications that are out there, and integrate them with your CRM system. These include marketing automation and accounting software, plus key social tools, which allow your company to follow people, information, and groups on social networks, and capture real-time data.

*Source: Salesforce Customer Relationship Survey conducted March 2014 - May 2014, by an independent third-party, Confirmat Inc., on 4,100+ customers randomly selected. Response sizes per question vary.



Allow for Mobile Integration

Make everything accessible on mobile devices for your salespeople so they can work on the road – things like reviewing correspondence, managing contacts, and accounts. The integration should also ideally work with back-office systems, social networks, and web conferencing.

And so you are fully covered, here are some practices to avoid when working to maximize your CRM ROI, from CRM Buyer's Christopher Bucholtz:

Infighting Between Sales & Marketing

CRM data is valuable when used to qualify leads for the sales department and to show which marketing campaigns lead to closed sales. But these insights can be missed if sales and marketing don't work together. Before you do anything else, get both departments in a room to map out common goals, and to discuss how to use the data.

Generating Reports for the Sake of It

The right CRM application can present data in an almost effortless preformatted report. But this analysis will do you no good if it is ignored. Take the time to not only read the reports, but to understand and act on them when needed.

Building “Relationships” with Customers

CRMs are an excellent tool to connect with your customers and build relationships that grow over time. But don't just assume that everything is fine and well. Be aware that customers evolve and change, and your business may need to change with them.

Conclusion.

Any great company should focus on their customer first and align their business to deliver. A CRM platform like Salesforce.com can help you start small, but let's you advance as fast as you need to. Imagine connecting apps, data and devices to build a customer experience second to none. It's possible and currently over 50% of data transactions on Salesforce.com are between connected apps. Meaning our customer's businesses are smarter today than they have ever been.

As your company expands connections of all types become more sophisticated and collaboration between teams becomes vitally important. A CRM solution can become the nerve centre to these interactions between colleagues, teams, departments, partners and customers.

Within the next 5 years over 75 Billion devices will be connected. You'll need a customer platform that helps you maintain an unfair advantage.



Sales solutions that will make your business more productive.

If you want to grow your sales and establish a transparent sales process, you need an easy-to-use Customer Relationship Management system. Salesforce allows you to store customer and prospect contact information, accounts, leads, and sales opportunities in one central location.

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[GET STARTED](#)



26%
improved
win rate



36%
increased
sales productivity



28%
increase
in sales

salesforce

Source: Salesforce.com Customer Relationship Survey conducted March 2013, by an independent third-party, Confirmat Inc., on 5,200+ customers randomly selected.



THE CUSTOMER SUCCESS PLATFORM
SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS



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