

A photograph of two men in an office setting. The man on the left is wearing a red and blue plaid shirt and white pants, with his hands on his hips. The man on the right is wearing a light blue button-down shirt, pink pants, and glasses, and is pointing at a whiteboard. The whiteboard has several yellow sticky notes and a piece of paper on it. The background is a bright, modern office with large windows.

# 5 Productivity Tips

## Every Small Business

## Needs to Know

salesforce

small business

# Introduction

Running a growing business can be exhilarating. The opportunities for growth and change are endless; the ability to adapt quickly to new circumstances is unlike anything an enterprise company can do; and the team is often tight-knit, united around a common push for success.

But life at a small business can be stressful, too. Every minute counts, and days often seem filled with obstacles. You worry about acquiring and retaining customers, building a brand, developing products, and managing your resources. It's a huge responsibility. Wouldn't it be nice if things just worked, and you could focus on growing the business instead of putting out fires?

With the right technology, you can save time, while generating more leads and improving the relationships between your customers and your company. We'll show you how a few simple tips can create a domino effect of productivity across your entire company.

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## TIP #1

# Get The Right Tools

Technology has transformed the way we do business. Today, we have more data, clearer insights, and better productivity tools at our fingertips than ever before. But as any smartphone owner knows, the very same data and devices that enable us to be more informed and productive can also be agents of procrastination, distracting us from the rising volume of work we're expected to accomplish.

At small businesses, efficiency is a high-stakes game. Every minute matters, as does every dollar. Technology must be reliable, effective, and user-friendly. And as your business grows, the technology you choose must be able to grow and scale with you.

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### Why Small Businesses Need CRM

In the early stages of any business, managing prospects, customers, and service cases is easy: your client base is small, and your team can focus on just a few individuals. But as you grow, you might start to notice your leads going cold, your customers begin to abandon you, or your teams duplicating efforts and stepping on each other's toes.

These are signs your business is in need of a customer relationship management (CRM) system.

✓ Quick Tip:

When you delegate a task, always give a due date and a relative priority, in relation to the things already on the task list.

– Laura Stack Author, speaker, productivity expert

[See more tips >](#)

**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

[Learn more about CRM >](#)

To some small businesses, customer relationship management (CRM) can sound like something complex and unattainable – something only huge companies can afford to implement – but it doesn't have to be that way. On the most fundamental level, CRM systems keep you organised and efficient by helping you keep track of every sales lead, service case, and marketing campaign you touch. But today's CRM systems are so much more than just an organisational tool. The right CRM delivers intelligent insights designed to maximise your team's productivity and effectiveness. Instead of just knowing where leads are in your pipeline, for example, the right CRM will trigger your sales team to communicate with those leads at the right time to ensure they stay warm.

And that's just the beginning. Rather than a database to store all your sales data, think of a CRM system as the universal source of truth that connects all your different business apps, from social networks like LinkedIn, to email systems like Gmail and Outlook, to productivity apps like Evernote and Dropbox.

Imagine how much more productive you'd be if you knew that everything you needed, from sales performance data to marketing activities to accounting and customer service, was all in one place? It's a game-changer.

## Moving to the Cloud

There are, of course, a wide range of choices when it comes to selecting the CRM that's right for you. Small businesses need CRM systems that are fast, reliable, secure, and cost-effective – and will scale as the business continues to grow. When it comes to CRM systems, businesses generally have two main options: on-premise and on-demand, also known as cloud-based.



### On-premises CRM

Housed at the location of the business that uses it, on-premises solutions require the up-front purchase of servers or data centre equipment and the installation of CRM software and middleware by IT staff. It also requires IT for ongoing maintenance and updates. In some cases, you may even need to build the software yourself.

### CRM in the cloud

Cloud-based CRM solutions provide world-class solutions through any browser or mobile device and are instantly scalable, requiring no on-site IT staff. Essentially, CRM in the cloud allows you to pull up a login page through a browser like Chrome, Internet Explorer, Safari, or Firefox. You simply log in with a user name and password, and your CRM is right there. Even better, the mobile functionality of cloud CRM solutions has cut the tethers for reps and managers on the go.

This is why cloud CRM systems are ideal for small businesses: they're more cost-effective, require less of an investment in hardware and IT resources, and can scale and change quickly as the business grows.

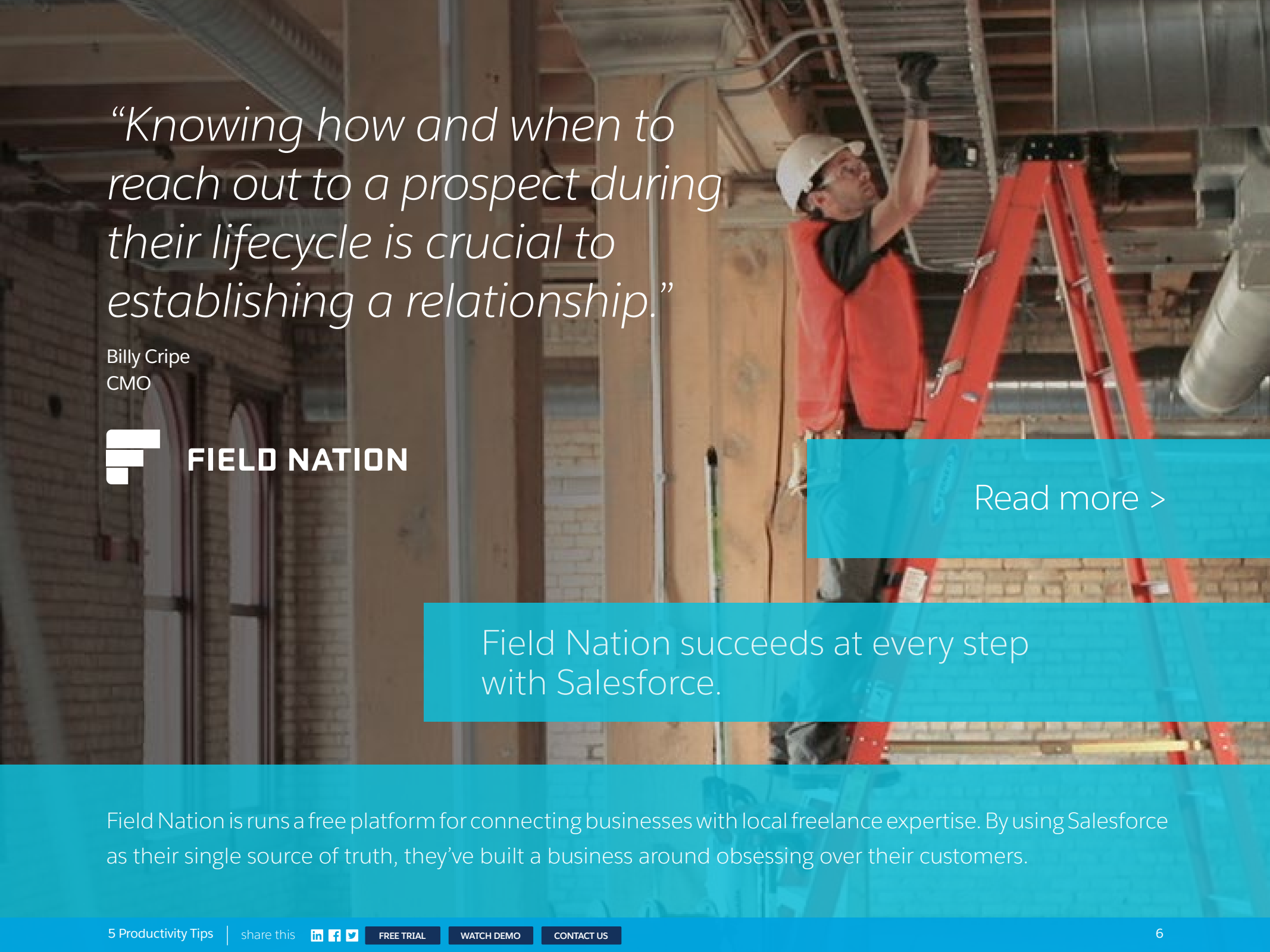
## Quick Summary:

How will a cloud-based CRM make my small business more productive?

- ⊕ It's the "glue" that keeps all of your data in one place
- ⊕ It saves you time during setup and updates
- ⊕ It saves you money in IT and infrastructure costs

## Ready to learn more?

Wondering which CRM is for you? Check out our free e-book, [How to Decide Which CRM Is Right for You.](#)



*“Knowing how and when to reach out to a prospect during their lifecycle is crucial to establishing a relationship.”*

Billy Cripe  
CMO



**FIELD NATION**

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Field Nation succeeds at every step with Salesforce.

Field Nation is runs a free platform for connecting businesses with local freelance expertise. By using Salesforce as their single source of truth, they've built a business around obsessing over their customers.



## TIP #2

# Connect All Your Data

A key question to ask when choosing any technology – and especially a CRM system – is whether it integrates with other tools, both cloud and non-cloud. If you want your CRM to be the central hub for your business data, it has to be able to play well with the other tools you use.

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### Pulling Off the Band-Aids

When a company is in its early days, keeping track of all the key business information – from sales leads to customer service cases to marketing campaign performance – is relatively easy: there just aren't that many employees, customers, or systems yet. Yet as your company grows, workflows become more complex, and the sheer volume of data associated with running the business quickly becomes unmanageable. This is when many small businesses adopt quick fixes – some digital, some analog, from spreadsheets to organise a list of sales contacts to sticky notes for urgent to-do's; to storage and communication apps.

Sometimes, these solutions are attractive because they're what we know. The problem is that no Band-Aid solution can do everything you need. A spreadsheet might keep track of your sales leads, but it won't notify you when a lead is going cold. A sticky note might remind you to do something today, but it can't talk to the invoices you've stored in your file-sharing app or the meeting notes you've logged in your smartphone. Although it can feel like you don't have the time, money, or expertise to pull off the Band-Aids and adopt a holistic new system, that's exactly what small businesses must do in order to keep growing.

✓ Quick Tip:

When you delegate a task, always give a due date and a relative priority, in relation to the things already on the task list.

—Dave Kurlan, Founder & CEO, Objective Management Group, Inc.

[See more tips >](#)



## Connecting the Dots

It's normal to have more than one system to house all of your different business data and processes. It just means that your central foundation – your CRM system – should be able to play well with others. At Salesforce, we've made integration a top priority to ensure that small businesses can adopt and use our CRM system easily, in coordination with whatever systems (cloud or non-cloud) they're already using.

### Email

You use your CRM to manage customers; you use email to talk to them. Now, you can merge these two functions. Email apps can automatically pull contact information into Salesforce to create new leads, record email events and interactions, and view Salesforce information in email carriers. Salesforce lets you integrate with all of the world's most popular email providers and email deployment services, including Gmail, Outlook, Mac Mail, MailChimp and Silverpop.

### Google

Salesforce integrates effortlessly with Google's suite of cloud apps. Sync your Contacts and Calendar, enable Google Drive to share and collaborate on files, and track AdWords results with your leads.

### Microsoft

All of the Microsoft Office and Office 365 products that you already use integrate easily with Salesforce, including Sharepoint. In March 2015, we announced the Salesforce App for Outlook, which enables you to view Salesforce contacts, leads, accounts, opportunities, cases and users in context of email – seamlessly inside of Outlook.

### Other cloud services

In addition to Google Drive, Salesforce also integrates with Box and Dropbox for your storage needs. Evernote is there to create custom account notes and capture all of your images, and DocuSign

integration ensures that approvals and sign-offs go smoothly even when you're on the go.

You can find many more partner apps and tools in the AppExchange, designed to increase your productivity so you can focus on your customer needs.

### Quick Summary:

Why should you choose a CRM that integrates with other systems?

- ⊕ It helps you build a single source of truth for all your important business information
- ⊕ It allows you to be more flexible with the other systems you choose
- ⊕ It saves you time by eliminating the need to transfer data and files from one system to another

### Ready to learn more?

Learn how a CRM can help your business grow. [Click Here.](#)

*“The day we shifted everything to Salesforce was the day we became significantly more efficient and productive as a company.”*

Nick Sorensen  
Senior Director, Healthcare Operations

**PROSPER**<sup>P</sup>

[Read more >](#)

Prosper Healthcare Lending succeeds at every step with Salesforce.

Prosper Healthcare Lending is an online financing platform for elective healthcare procedures. As its co-founder, Nick Sorensen has seen the platform evolve as his team continues to iterate. One key advantage of using Salesforce has been a DocuSign e-signature integration that has decreased the time required to get a signed contract by 54%.



## TIP #3

# Work Smarter

Going cloud is only the first step. Productivity isn't just about having the right systems in place and interconnected – it's also about using them effectively. Only once you've integrated your existing data and systems of record into your CRM will you truly begin to leverage the power of the cloud.

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### Streamline Processes

Workflow can be defined as a process to complete a set of tasks. Task 1 leads to Task 2, which leads to Task 3, and so on. Automation happens when you're able to apply simple triggers to each task based on set criteria and actions. If you're using a CRM, you can trigger multiple successions of "If X, Then Y" scenarios:

- If Lead attends event, then mark Lead History as 'Attended'
- If Lead attends webinar, then change Lead Owner from Marketing to Sales
- If Sales receives new Lead, then add reminder to Outlook to call in 5 days.

By setting up a few workflow rules, a CRM can track a lead's interaction with your company, transfer ownership from

✓ Quick Tip:

When you switch tasks over and over before completing one, you constantly interrupt your own focus, again and again. Single-tasking keeps you on point and gets the job done.

– Laura Stack Author, speaker, productivity expert

[See more tips >](#)



Marketing to Sales, and set up a contact reminder. Your lead attending a webinar triggered the workflow in this scenario, and you didn't have to do anything at all since the CRM did all the heavy lifting. The beauty of automation is its efficiency. For small businesses, the time saved translates into valuable hours that can be allocated to more important tasks.

Integration and automation go hand in hand: the more systems you integrate with your CRM, the richer your opportunities for automation. For example, Outlook users can now see Salesforce information within their emails. The integration automatically lets you know if a contact's email address is not in the CRM and will prompt you to add it.

### Communicate More Effectively

When you're first starting a business, it's easier to deliver highly personalised communications, sales strategies, and customer service. But as your business grows, keeping things personal becomes a challenge. You're juggling a million new

responsibilities – and on top of that, the number of prospects and customers you're dealing with just keeps growing. Sure, growth is good, but transitioning to sales, marketing, or customer service automation can feel scary. Will your prospects and customers notice that things are different? Will you lose that personal touch?

Not if you choose the right CRM system. Email templates that automatically import your prospect's name, for instance, and automated tasks tailored to each account help you keep your interactions personal without requiring a huge investment of time. With CRM, you can limit the amount of time your sales team spends composing emails, searching through inboxes for contact information, and making to-do lists. Research shows that in general, people prefer to have a seamless customer-service experience than to be amazed. With a little help from a CRM system like Salesforce, your business can work smarter, while providing the personal touch your customers will remember.



Ever dropped the ball on communication when a lead was transferred to a new owner, or experienced a bottleneck when trying to get feedback on a marketing plan? With a cloud-based CRM on your side, these communications can all be automated. Leads can be transferred automatically, with the new owner alerted by a simple notification, and multiple stakeholders can collaborate simultaneously on a file. Every interaction is trackable – which means detailed records that can help get a sales rep up to speed in her new territory and eliminate the loss of institutional knowledge if a team member changes roles.

## Quick Summary:


How does automation make small businesses more productive?

- ⊕ It saves you money by helping you allocate person-hours to value-adding functions
- ⊕ It saves you time by taking care of smaller, more menial tasks
- ⊕ It makes everyone's job more fun by freeing up employees for bigger, more ambitious projects

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## Ready to learn more?

We wrote the book on simplifying your sales cycle. [Check it out!](#)



*“As a customer company,  
we run our entire business in  
Salesforce, and can’t imagine  
how we would have skyrocketed  
to such heights without it!”*

Ryan McWhirter  
Director of Product



[Read more >](#)

365 Retail Markets succeeds at every step  
with Salesforce.

365 Retail Markets was founded in 2008 with the ambitious goal of revolutionising the vending industry. In the seven years since, the company has proceeded to do just that with innovative solutions and an eye toward the future.



## TIP #4

# Go Mobile

Today's consumers are mobile. In 2014, the number of mobile devices on Earth surpassed the number of humans; mobile is increasingly essential to doing business, regardless of company size or industry.

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But making the leap from a workforce that uses mobile devices to a truly mobile workforce is no easy feat. Most of your employees probably already have smartphones, and they're probably already using them as productivity tools – checking their bank balance while in line at the car wash, reading the latest industry news on the bus to work, responding to emails while waiting at the doctor's office.

But are they leveraging this same capability when it comes to their day jobs? Are your remote employees or field sales reps able to be every bit as effective as your in-office team members?

✓ Quick Tip:

Incentives are nice, but they're not the ultimate motivator. What is? Having a clear path to success. If you're confident in what you need to do, you're highly motivated to do it.

Jason Jordan, Author, speaker, sales management expert

[See more tips >](#)



As we mentioned in Chapter 2, by centralising information within the cloud, you can do business anywhere in the world, from any device. Becoming mobile opens the door to productivity. Yes, you'll still have all of the temptations and distractions of playing Candy Crush or watching hilarious YouTube videos on your phone, but you'll also be able to update your team on a customer meeting instantly, rather than waiting until you get back to the office.

Your team can then use that information immediately, saving the business crucial time. You are never 'stuck' at an airport, at a hotel, or on a train – you can always get things done.

### Work From Anywhere

Once upon a time, leaving the office for a client meeting meant sacrificing valuable working hours to travel from one office to another. Flying to another city to present to a partner organisation meant even more lost time. Today, transit time is an opportunity.

Imagine using the time spent traveling to a meeting to look up the prospect in Salesforce, where you could see every past interaction between your company and hers. You might learn how many team members report to her and what her key business challenge is. Then, you might review your product pitch deck before meeting with her.

Field sales can download more marketing materials or customer slides to show clients at their office on-demand with a tablet. Customer service agents can start responding to customer inquiries while sitting on a delayed train on their way to work. Inventory managers can track shipments, reorder supplies, and approve new vendors as they make their morning rounds at a warehouse, all from the palm of their hand. The possibilities are limitless.

## Integrate Your Apps

Your CRM data should also integrate with your favourite productivity apps. During a meeting, you can take notes in Evernote, then easily save them in Salesforce. Using Box, you can access files stored in Salesforce, and vice versa. The moment you agree on a deal, you can send her a secure contract via DocuSign – all from the palm of your hand. You can even manage your sales territory and optimise your travel route using MapAnything. With tools like these at your disposal, you can make your workforce truly mobile – and ensure that all your employees are being as productive as possible, no matter where they are.

## Quick Summary:

How does going mobile make you more productive?

- ⊕ It gives you access to a whole suite of productivity apps designed for mobile use
- ⊕ It saves you time by enabling every employee to get work done from anywhere
- ⊕ It takes advantage of the mobile functionality your employees are already using in their personal lives

## Ready to learn more?

Your road warriors are core to your sales business. [Here's how to make them even more productive >](#)



*“We started using Salesforce for tracking because the API allows us to easily pull information and connect to our backend. Now, it’s our main tool for tracking sales and venues.”*

Doktor Gurson  
co-founder and CEO



[Read more >](#)

Doblet succeeds at every step with Salesforce.

Doblet is an on-demand phone charging service at bars, restaurants, hotels, malls, cafés and businesses. To keep track of venues where Doblet could offer its innovative phone chargers, the company started with spreadsheets – but quickly realised it needed a better system.

## TIP #5

# Simplify Reporting



Today's consumers are more than just mobile: they're also increasingly data-driven. Your customers expect to see results, and they'll do the research and crunch the numbers to ensure they're making the most informed decision possible. They expect the same thing in return, in the form of personalised, intelligently crafted customer journeys. So how do you get there?

### Figure Out What You Want

Data is everywhere, and it's easy to come by. With one click, you can turn on web analytics systems that tell you more than you ever wanted to know about how your website or blog is performing. But what actually matters? Before jumping into an ocean of data, sit down with your team and figure out what's most important to you. It might be the length of your sales cycle, the conversion rate of different marketing campaigns, your net promoter score, or any combination of metrics across your organisation's key functions. One approach is to start with a big brainstorm-style list that contains every metric you want; once you've made the list, go through and prioritise each item. At Salesforce, we have a saying: "If everything is important, then nothing is important."

✓ Quick Tip:

It is just as important to disqualify a lead as it is to qualify it. Your time, talent, and attention are your most valuable sales assets, and they must be used wisely.

- Gregg Thaler, Chief Revenue Officer, RingLead

[See more tips >](#)



### Keep It Clean

Your insights are only as good as your data, so keeping your data “clean” should be a key priority for businesses of any size. But with multiple humans whose minds all work differently inputting your data, bad data is bound to happen.

The solution to this is to periodically have your data scrubbed and de-duped, where duplicate records are deleted or merged. Automated data cleanup services can not only clean up your data, but also enhance it with additional insights from providers like Dun & Bradstreet. You can schedule your clean-ups at convenient times and trust that your information is clean and current. This way, your team can spend time on less menial tasks while trusting that all of our data is accurate and secure.

### Automate It

As a small business, you might feel like you’re moving too fast or don’t have enough data points to necessitate always-on tracking and reporting. Don’t believe it! Creating a reporting process from the beginning ensures that you’re constantly improving your business based on actual data rather than intuition or guesswork. Insights are

essential at the beginning, when it's easier for a business to shift its trajectory if things aren't working. A data-centred culture also lays a foundation of data-based decision-making that will endure as you continue to grow.



Sound like a lot of work? CRM systems like Salesforce allow you to automate reports and dashboards so you can monitor your key success metrics with simple, user-friendly visuals. Simply identify the data you want to include in a report, then choose the graphical element you prefer. Dashboards enable you to collect data from multiple reports and sources, then present them all together, in a single view. For example, you might run a report on the status of all leads for a particular lead-prospecting campaign so you can see how long it's taking your sales team to close these new leads.

You might have a separate report that shows the average sales cycle according to company size, and a separate one that tracks the average cycle for each of your sales reps. Pull them all together into a single Salesforce dashboard, and you'll have a complete view of how this marketing campaign is performing against various benchmarks. With Salesforce, all of your dashboards are optimised for mobile and accessible from your mobile device, no matter where you are.

## Quick Summary:

How does simplifying your reporting make you more productive?

- ⊕ It helps you prioritise what's most important to your business
- ⊕ It saves you time previously spent digging around for the right data
- ⊕ It helps you deliver the right insights to the right people at the right time, in user-friendly, accessible formats

## Ready to learn more?

Ready to build some killer dashboards? [Learn how >](#)



*“With Data.com and Salesforce working together, we can quickly understand who our leads are and how we can interact with them.”*

Paul Leary  
President

## BESPOKE COLLECTION

[Read more >](#)

Bespoke Collection succeeds at every step with Salesforce.

Bespoke Collection is a boutique wine producer and lifestyle brand based in Napa Valley. In addition to offering premium wine, they also provide a curated selection of premium wine and art experiences.

## Conclusion

Agility and flexibility are assets in today's business landscape. These are natural strengths of small businesses. When you combine those assets with productivity, there's no reason why a small business couldn't become a major player among enterprise competitors. Success can be found in taking advantage of the available technologies and using them to their full capabilities.

# MOVE YOUR BUSINESS FORWARD, FASTER.

For decades, being “the little guy” has been a disadvantage, but not anymore. Salesforce can help jumpstart business growth. Salesforce streamlines operations, allowing you to increase your win rates, grow your pipeline, and decrease your costs.

**37%** Improvement in win rate.

**44%** Increased sales productivity.

**37%** Increase in sales revenue.



## THE CUSTOMER SUCCESS PLATFORM

SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS

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