salesforceIQ

salesforce

SMARTER SELLING FOR SMALL BUSINESS

Automate, Prioritise, and Integrate Your Sales Process

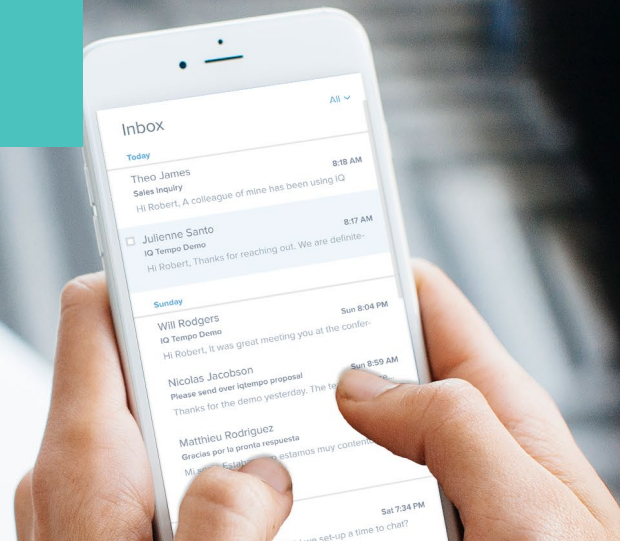# YOUR CUSTOMER DATA IS TELLING A STORY

There's an incredible trend happening today: Companies and their customers are creating more data than ever before – and all that data tells a story. Together, information from your email, calendar, and phone calls create a unified narrative for each customer, including the insights you need to close smarter deals, faster.

But small businesses don't have time to connect the dots

The typical sales rep spends 28 hours in email every week working to uncover new opportunities. Unfortunately, the predictive stories they're looking for usually get lost in the noise of constant communication.

Time spent digging through email for golden nuggets of insight is time lost with customers – and when that time isn't productive, it can mean the difference between a missed quota or a record quarter. This inbox inefficiency isn't the fault of your sales team. Sales reps looking for data-driven opportunities definitely have the right idea. What they don't have are the right tools to find and analyse the stories that will help them sell smarter.

*The typical sales rep spends **28 hours** in email every week.*

Inbox   All ∨

Today

Theo James   8:18 AM
Sales Inquiry
Hi Robert, A colleague of mine has been using IQ

☐ Julienne Santo   8:17 AM
IQ Tempo Demo
Hi Robert, Thanks for reaching out. We are definite-

Sunday

Will Rodgers   Sun 8:04 PM
IQ Tempo Demo
Hi Robert, It was great meeting you at the confer-

Nicolas Jacobson   Sun 8:59 AM
Please send over iqtempo proposal
Thanks for the demo yesterday. The te

Matthieu Rodriguez
Gracias por la pronta respuesta
Mu   Eataba   estamos muy conten

                                                     Sat 7:34 PM
         uld we set-up a time to chat?

TABLE OF CONTENTS

"Many salespeople spend as little as 20% of their time actually selling. Imagine how effective you could be if you doubled, tripled, or even quadrupled that percentage."

LAURA STACK
President & CEO
The Productivity Pro, Inc.

SELLING SHOULD BE EASIER

The goal of every small business is to grow bigger, but smaller size does have some advantages. For one, greater agility means smaller companies can usually adopt new strategies, processes, and tools with minimal work or planning.

Even so, implementing a CRM solution often makes a small sales team nervous. That's because traditional CRM requires a time-intensive setup and training process along with new workflows that complicate the existing selling process. Not so with SalesforceIQ. Our next-generation CRM solution makes selling easier than ever with intuitive processes and no setup required.

Easy CRM Setup

To get started with SalesforceIQ, you just connect your email. That's it.

The first time you log in, you won't be greeted by an empty database waiting to be manually filled with accounts and activities. SalesforceIQ uses its direct connection to your inbox to automatically and intelligently import your contacts and activities, so you hit the ground running.

And there's no need for a dedicated admin or implementation partner, because SalesforceIQ makes your CRM as agile and efficient as you are. Want to import additional information from spreadsheets or other CRM systems? It only takes minutes. Need to personalise SalesforceIQ with customised statuses or fields to match your unique sales process? You can do it yourself with just a few clicks.
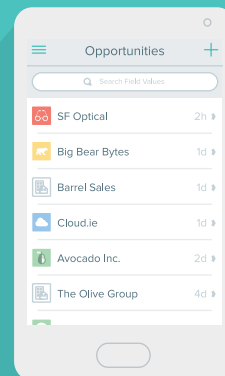
Sell From Anywhere

Modern sales reps don't work exclusively from their desks, and some are never there at all. But customers still expect them to be highly responsive. That means all reps have to be constantly connected, and their tools have to be fully functional on smartphones, tablets, and other mobile devices.

SalesforceIQ was designed from the ground up with this modern sales rep in mind. Mobile apps for iOS and Android put all the functionality of your inbox and CRM right at your fingertips. And enhanced productivity features allow you to access CRM data straight from your inbox. Whether today's office is at your desk or on the go, you can use your smart email and scheduling tools to close deals from anywhere on any device.

≡ Opportunities +

🔍 Search Field Values

SF Optical	2h ⟩
Big Bear Bytes	1d ⟩
Barrel Sales	1d ⟩
Cloud.ie	1d ⟩
Avocado Inc.	2d ⟩
The Olive Group	4d ⟩

Customers expect sales reps to be highly responsive... **whenever and wherever**.

YOUR TOOLS SHOULD BE PROACTIVE

Until now, most CRM tools have been reactive. Sales reps had to manually enter all their activities and customer information – then they and their sales managers tried to glean insights and plan next steps based on the accumulated data. The next generation of CRM works the other way around. SalesforceIQ uses automation and predictive intelligence to change your CRM from a reactive system to a proactive game changer. It does the work. You reap the benefits.

No More Manual Entry

Having complete customer data is a clear advantage for any team, but entering account information and recording sales activities is a monotonous, time-consuming task that's prone to error. Sometimes that makes a small business feel like CRM creates more work than value.

SalesforceIQ eliminates the most time-intensive manual data entry so reps can focus on what matters most: selling, and growing the business. SalesforceIQ logs all emails, smartphone calls (via mobile apps), and calendar meetings – and even crawls the web to automatically populate public information on companies and social profiles for every contact. Reps eliminate hours of busy work, which gives them more time to spend with customers.

> "We can completely eliminate all of those manual processes. It's an incredible time saver."
>
> **KEATON SWETT**
> Co-founder & President
> MindSumo
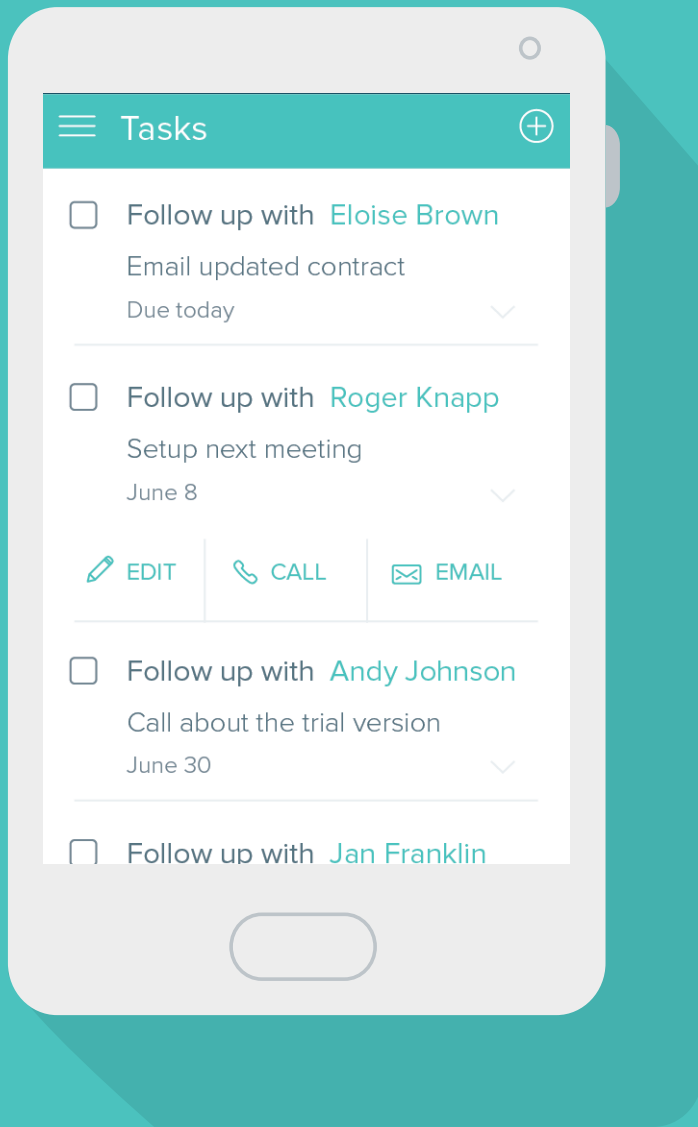
Intelligent Suggestions

SalesforceIQ uses machine learning to continually analyse all the data it collects and provide intelligent suggestions on the best next steps for every account and opportunity. Sales reps no longer have to rely on their own analysis or go to a sales manager to decide their next move. SalesforceIQ automatically plans, prioritises, and keeps you constantly on task.

SalesforceIQ also makes sure nothing falls through the cracks. Did a prospect ask a question or request a quote? With SalesforceIQ, sales reps can take action without going back through their inbox. The system parses the text of customer emails and automatically makes suggestions if the rep forgets to follow up. Imagine this intelligent logic applied to all of your communications – it's like having a personal assistant on call around the clock.

Tasks

☐ Follow up with **Eloise Brown**

Email updated contract

Due today

☐ Follow up with **Roger Knapp**

Setup next meeting

June 8

✎ EDIT   📞 CALL   ✉ EMAIL

☐ Follow up with **Andy Johnson**

Call about the trial version

June 30

☐ Follow up with **Jan Franklin**

You should respond to **Eloise Brown** at **SF Optical**

👁 View Email

"Let me know your thoughts on the contract...

Create Task

CRM SHOULD BE SMARTER

CRM that proactively gathers, organises, and analyses information is a huge step forward from CRM solutions of the past. But SalesforceIQ didn't stop there. It also takes you from the relationship management of yesterday to the Relationship Intelligence of tomorrow.

Intelligence Fields

Traditional CRM limits the amount of information you can see for a given account. It lets you view the company name, account owner, and deal status, but not much else. So how do you use all the other valuable data created at every customer touch point? Enter SalesforceIQ's intelligence fields.

SalesforceIQ automatically gathers, organises, and analyses communication data from your entire sales team and shares the resulting insights via Intelligence Fields.

Smarter Email

SalesforceIQ doesn't simply take old-school CRM and make it better – it also extends CRM to your inbox to make both tools more efficient and useful together. The SalesforceIQ mobile app and Chrome extension combine the best parts of your CRM and your email to make one incredibly intelligent productivity tool.
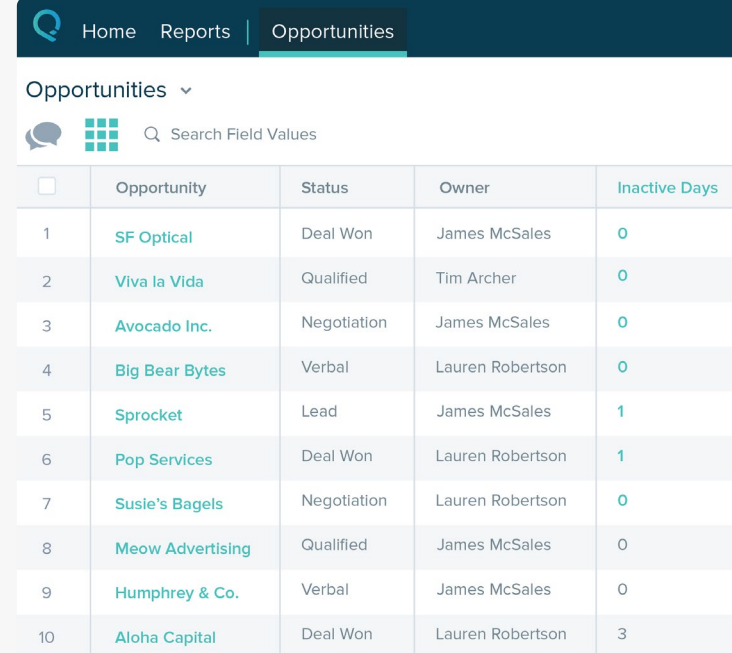
Do you frequently receive similar emails or inquiries? SalesforceIQ allows you to create message templates or text shortcuts so you can respond instantly with a simple click or a tap of your finger. Need to attach that file you just reviewed? SalesforceIQ makes it

Want to know how long an account has been inactive? **No problem.**

*What about the date of your last communication?* **Yup, SalesforceIQ will show you that, too.**

	Home	Reports	Opportunities

Opportunities ⌄

🔍 Search Field Values

	Opportunity	Status	Owner	Inactive Days
1	SF Optical	Deal Won	James McSales	0
2	Viva la Vida	Qualified	Tim Archer	0
3	Avocado Inc.	Negotiation	James McSales	0
4	Big Bear Bytes	Verbal	Lauren Robertson	0
5	Sprocket	Lead	James McSales	1
6	Pop Services	Deal Won	Lauren Robertson	1
7	Susie's Bagels	Negotiation	Lauren Robertson	0
8	Meow Advertising	Qualified	James McSales	0
9	Humphrey & Co.	Verbal	James McSales	0
10	Aloha Capital	Deal Won	Lauren Robertson	3
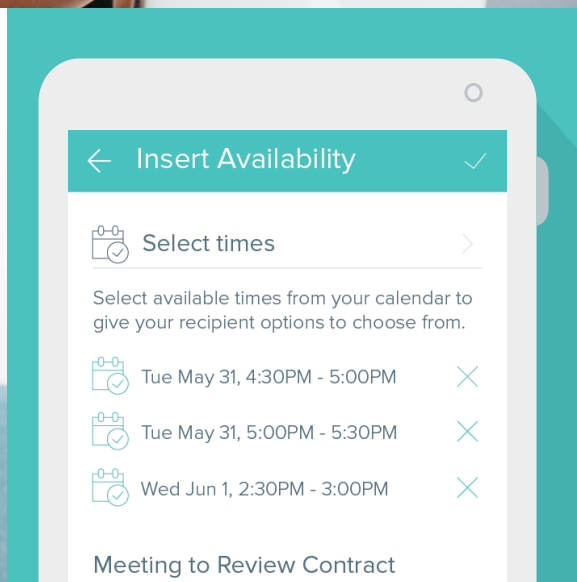
easy to access files from your recent sent / received emails or from your favourite cloud-storage service.

SalesforceIQ also makes it easier to take action on an email using Smart Send features. Easily enable read receipts on an email and you'll know the moment a customer opens it. You can also set reminders to follow up if a recipient hasn't responded to your email after a set period of time.

Smarter Calendar

Now that your CRM and email are in sync, it only makes sense that SalesforceIQ connects your calendar for the trifecta of sales efficiency. SalesforceIQ not only pulls information from your calendar into your CRM, it also integrates your calendar into your emails to simplify scheduling.

If you want to set up a meeting with a customer, just select your preferred dates and times and SalesforceIQ will list those calendar slots in an email. When your recipient clicks their preference, the meeting will automatically be scheduled on your calendar and the recipient receives an official invite.

Better yet, SalesforceIQ makes your meeting emails dynamic, so recipients see only the calendar slots that are still available. If you send an email suggesting three times and one of them gets booked by someone else, the email automatically updates to show only the two remaining time slots. Now, you can send meeting invites at scale without fear of being double booked. There's no confusion and no hassle.

← Insert Availability ✓

Select times

Select available times from your calendar to give your recipient options to choose from.

Tue May 31, 4:30PM - 5:00PM ✕

Tue May 31, 5:00PM - 5:30PM ✕

Wed Jun 1, 2:30PM - 3:00PM ✕

Meeting to Review Contract

GET STARTED TODAY

The business world has transformed dramatically in the last few years, and your small business needs a CRM solution that's evolved with the changes. Your CRM should be able to process the massive amount of data generated by every customer interaction – and it should help your sales team use that data to be more informed and productive at every step of the sales cycle.

SalesforceIQ connects CRM, email, and calendar in one highly productive sales tool so modern sales reps can sell smarter and faster from anywhere.

*Get started in minutes with a free trial of **SalesforceIQ** for small business.*

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