

How CRM Helps Small Businesses



SELL. SERVICE. MARKET. SUCCEED.



Hello.

You've just opened one of four books in a series on CRM systems from the #1 CRM solution in the world, Salesforce. 100% cloud, social, and mobile, Salesforce has led the revolution in sales, service, and marketing by helping companies of all sizes connect employees, partners, and customers like never before.

Here's a full list of titles in this series designed to help you get started with a CRM solution that's right for you.

- How a CRM Solution Helps Your Business Grow
- How Social CRM Connects You to Customers
- How CRM Helps Small Businesses
- How to Decide Which CRM Solution is Right For You

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Learning About CRM

Sample CRM Functions:

- Contact Management
- Mobility
- Task & Event Tracking
- Email Integration
- Email Templates
- Mass Emails
- Lead Scoring
- Opportunity Tracking
- Marketing Campaigns
- Real-Time Quotes
- Product Tracking
- Analytics Data
- Social Network Monitoring

A CRM (short for customer relationship management) system simply manages most of your critical customer information so you can see it in one place. Features vary among platforms and some systems are completely customisable.

A few examples of what a CRM solution can do include the ability to view contact info, follow up via email or social media, manage tasks, and track performance, among other benefits. The right CRM integrates with the services you already use, so there's no issues when it comes to your current processes. Just automate and go.

This e-book will take a look at the specifics of what a CRM solution can do for your small business, including:

- How it helps you get to know your customers
- How it manages your email better
- How it maximises your time
- How it gives you big business power

Know your customers better with:

- Contact Management
- Mobility
- Task & Event Monitoring



CRM Helps You Get to Know Your Customers

Whether you and your team are in the office or on the road, the right CRM can save and monitor the full history of your customer interactions. Here's how:

Contact Management

CRM lets you do much better than a name, address, and phone number. It allows you to gain insights from conversations on social media like Facebook, LinkedIn, Twitter, and YouTube, giving you the complete picture. The tool even monitors customer interactions, internal account discussions, and account histories in one place. So if a customer calls, any employee with access can catch up on relevant details in no time.

Mobility

The best CRM systems let you connect via mobile devices,

so employees can access essential information anytime, even on the road. As long as there's cell reception, everyone stays in the loop with real-time updates. In addition, all of the stored data is available at your team's fingertips in offline situations as well.

Task & Event Monitoring

If a customer makes a request, whether it be for a quote or a phone call, a CRM solution gives you the power to automatically assign the task to another staff member, while leaving specifics on the account. This means everyone working with that customer knows exactly what is going on at all times. Business owners can also monitor their own calls, meetings, and deadlines so they don't miss any opportunities.

Take control of your email with:

- Email Integration
- Email Templates
- Mass Emails



CRM Lets You Manage Email Effectively

We've all been there. Facing a mountain of an email inbox. You want to effectively manage what's there and prevent valuable opportunities from slipping through the cracks, but that can be easier said than done. A great CRM system helps you tame the bottomless pit of your inbox. Here's how:

Email Integration

Email is one of the most powerful communication tools available today. CRM can integrate directly with email clients like Outlook, so notifications don't interrupt your workflow. You can also easily track any email conversation with any customer, and share those emails with the right employees.

Email Templates

To reach customers in a memorable way, emails must be consistent and compelling. CRM email features allow members of your sales and marketing teams to create email templates on an as needed basis, so you can target customers in a more personalised way. Some CRMs even let you offer automated follow-up reminders.

Mass Emails

When situations arise where you need to send a targeted marketing campaign to many customer contacts in your system (like a limited time offer), CRM lets you create a templated message. This can then be emailed to everyone at once with a single click.

Get more productive with:

- Marketing Campaign Management
- Lead Scoring
- Opportunity Tracking



CRM Makes the Most of Your Time

What if you could take all the data you have on prospects, determine the ones that are most likely to become customers, and have you and your team put the majority of your energies into opportunities with the biggest payoff? All this and much more is doable using a CRM system.

Here's how:

Marketing Campaign Management

With CRM, you can manage and analyse marketing campaigns across every channel (online ads, social media networks, etc.) from one central location. This means you can see where the best leads are coming from and invest in the areas that produce the best results. No wonder CRM users typically see a 65% jump in marketing campaign effectiveness.

Lead Scoring

CRM "lead scoring" is defined as effectively assigning grades to customers. This practice prioritises leads based on who they are and how they behave. Some leads are ready to make a purchase right away, while some need work. Lead scoring shows you which leads are "hot." By investing more time in these, your sales team will close more deals faster.

Opportunity Tracking

"Opportunity tracking" on a CRM lets you track deals that are almost ready to close. You can see key info about important accounts fast, including your team's work on an account, plus details like how valuable it is, notes on the competition, and what stage the deal is in. The best CRM systems even let you set up automatic notifications for a deal, so you can get live updates and close even faster.

Get big business power with:

- Product Tracking
- Real-Time Quotes
- Analytics Data



CRM Gives You Big Business Power

You might think that services (like product tracking and real-time quotes) and processes (like analytics) are things only big companies with many employees can do. Not so. A CRM solution can give you the power of a large enterprise.

Here's how:

Product Tracking

Track important info about products and inventory for each opportunity in your CRM system. It's easy to note all the details you and your customers might need, such as quantity, price, product codes, inventory, and accounting.

Real-Time Quotes

This CRM feature lets sales representatives send real-time

quotes to customers, using product tracking data that's already in the system. These quotes are automatically generated so they can be shared with the customer in mere minutes. This fast delivery system is a great way to keep customers happy.

Analytics Data

The traditional running of analytics reports is tedious and overwhelming. This isn't the case with CRM. Analytics are processed automatically, giving you a regular, personalised look at your business, so you can easily see where improvements can be made, what's doing well, and what options you have for additional growth.



What CRM Can Do for You

If you want your small business to grow and thrive, it's important to take advantage of the tools and technologies that set you up for success. Implementing a CRM system will give you all of the below, and much more.

Get to know your customers. CRM manages customer info so you and your team are fully informed anywhere at anytime.

Make email do what you want. End the bottomless pit of email. Effortlessly send targeted campaigns and track results.

Maximise your time and close more deals. Guarantee that your efforts are directed towards where the best results are.

Use all the capabilities the big guys have. Track products, give real-time quotes, and generate analytics.

Learn more about CRM solutions from Salesforce at salesforce.com/au.



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.

[Learn More](#)

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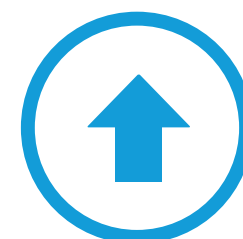
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26%
improved
win rate



36%
increased sales
productivity



28%
increase
in sales



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