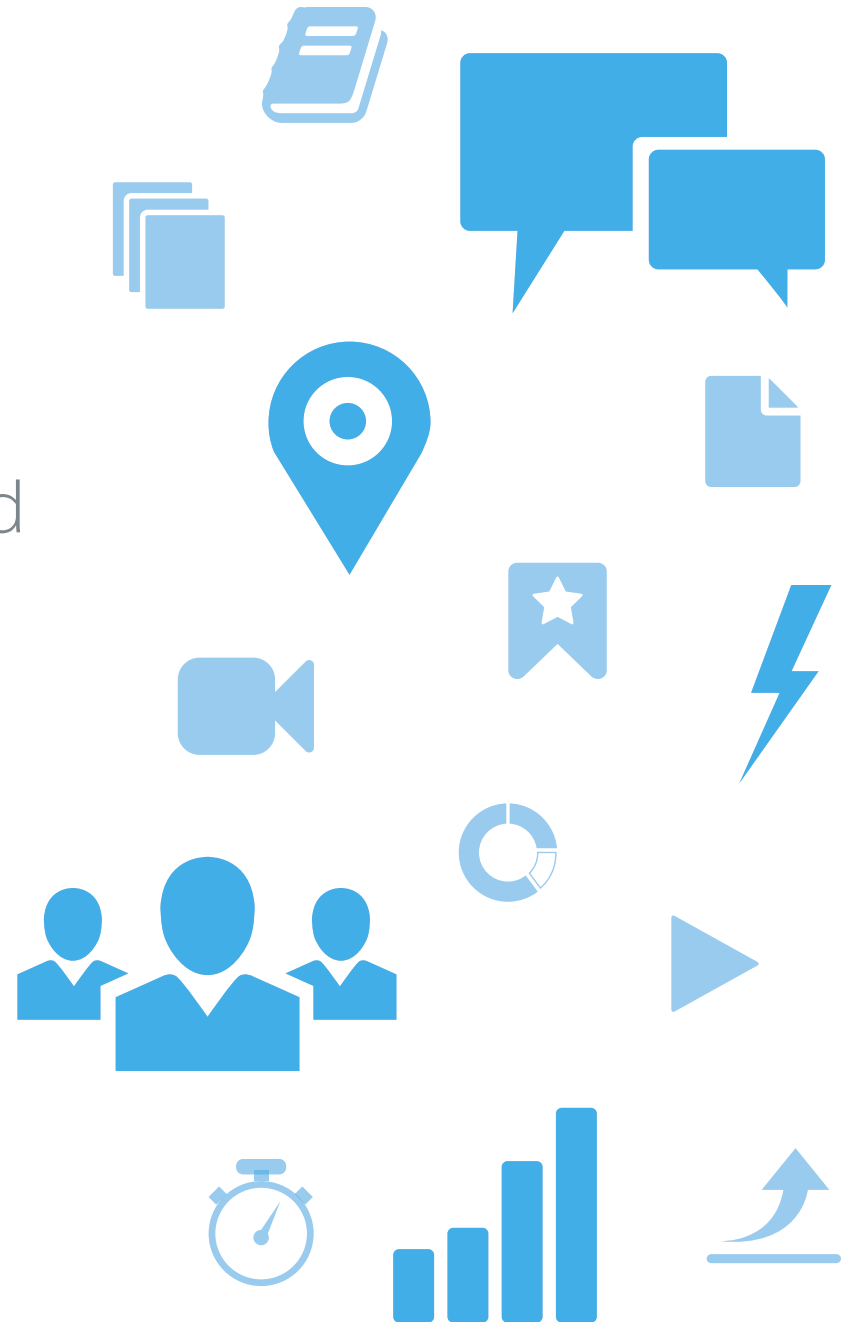


WHY DO I NEED CRM?

Answers to frequently asked
customer relationship
management questions.





INTRODUCTION

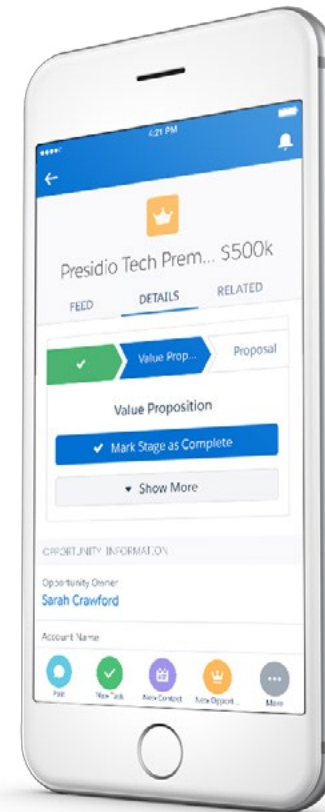
In a [2015 survey](#) conducted by Salesforce, more than half of small business owners said their companies were not using any kind of customer relationship management ([CRM](#)) solution.

Yet, small businesses that have implemented a CRM solution have seen major improvements in sales productivity, customer satisfaction and most importantly, big gains in sales! So, what holds back other small business owners from using a CRM solution?

This e-book takes a look at some frequently asked questions small business owners have about CRM and offers helpful answers.

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Question #1: What Does CRM Do?

Some people believe that sales is an art, where a rep can close a deal with charm and charisma. That might have worked in the past, but modern salespeople have to rely on much more than personality – they need process and analytics to help close big deals.

On the surface, CRM sounds like a digital rolodex that stores your contact's basic information. However, when using a CRM system, the most successful sales reps are not only personable, they also play it smart by following an insight-driven sales process. CRM helps your team move through the process of winning deals with greater efficiency and rigor. It helps your reps get a 360-degree view of the customer, which helps them close deals and build the relationship. Savvy business owners have discovered that a CRM is a powerful business tool that will truly help them grow.



Simplify lead management

Salespeople spend only [one-third](#) of their time selling; they spend the remainder of their time with administrative tasks, such as lead qualifying, chasing down information, researching, and keeping track of details. This is important to note because oftentimes success in sales is determined by how much new business is generated. In fact, driving new business was deemed the top objective by salespeople working for small businesses,

according to [our recent survey](#). Closing deals has gotten tougher as busy sales teams have seen an increase in competition. Without a well-defined workflow to manage incoming sales opportunities, time is wasted. CRM was designed to help businesses overcome this challenge and make closing a deal as easy and quick as possible. Leads are routed as they come in, complete with contact information, account activity, and relevant

company information. Working in tandem with marketing automation tools, the CRM's workflow engine ensures that leads are automatically scored. Leads that aren't ready to purchase can be sent to lead nurturing campaigns, and good leads can be routed to the appropriate sales rep. Comprehensive performance metrics help to better define what is working – and what isn't.



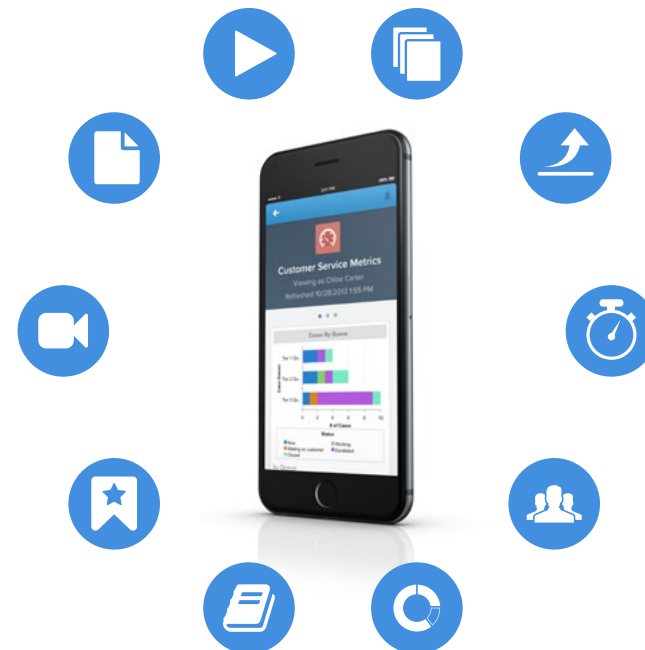
Key Takeaways About CRM:

CRM is not just a glorified database. It's a way to transform your business by:

- Improving sales productivity and speeding up the sales process
- Simplifying the lead management process by defining a clear workflow path for leads.
- Connecting teams with the help of apps, enabling them to work from anywhere at any time.

Keep your team connected

Despite all of the advances in modern technology, sales success remains dependent on one thing: communication. There are hundreds of emails going back and forth, social media channels to monitor, and leads to nurture. A cloud-based CRM app helps your teams stay productive whether they're at their desk or in the field. Sales teams can access all files and update customer records while on the go using mobile apps such as the [Salesforce1 Mobile App](#), allowing teams to be ultra-responsive. Many of those on-the-go solutions include collaboration tools where your employees can work across the organisation on sales opportunities, service cases, and campaigns. Running your business from your smartphone will soon be as commonplace as ordering food using an app.



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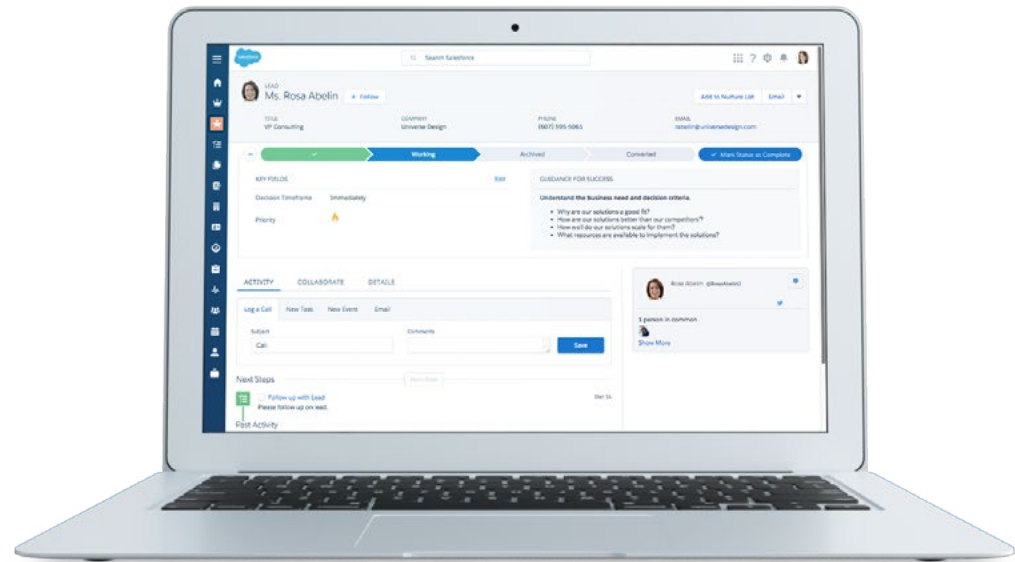
Question #2: Do Only Large Companies Use CRM?

Many small business owners believe that you have to be a large company to truly take advantage of CRM capabilities. After all, a CRM app is a customer relationship manager, so you need to have lots of customers that need to be managed, right? Not entirely. Businesses of any size can benefit hugely from using CRM; it will help them grow pipeline, speed up their sales cycle, and collaborate across teams.



Do more with less

With limited resources and manpower, CRM can enable a team of just a few people to do the work of a much larger group. With more efficiency and the advantage of a repeatable sales process CRM introduces, your company can compete with much larger companies, and even surpass them by being agile and flexible.



“If you find yourself being slow to respond to people, or you’re getting lots of inbound follow-up like ‘Hey, I’ve been waiting to hear back from you,’ then you probably need a CRM.”

Ethan Senturia
CEO of Dealstruck

For businesses of all sizes

All companies, big and small, need to see their pipeline to chart a clear path toward success. To keep a competitive edge, you need to know how many leads you have and what stage of the sales cycle they're in if you want to accurately assess performance and forecast your quarter results. That's where a CRM comes into play—it makes your sales data transparent. With fully customisable reports and dashboards, you're able to see the status of any lead or customer, track pending deals, and get an all-encompassing bird's-eye view of your company's performance with the push of a button. What does this mean for you? Beyond knowing the key contacts, you'll walk into meetings armed with all your communications, current status of deals, campaign interactions, and even social media insights. Having this complete [360-degree view of your customer](#) helps your sales team build deeper relationships and demonstrates to clients that you truly understand their business needs.



Key Takeaways:

- Businesses of all sizes can benefit from using CRM to see the status of their pipeline.
- CRM enables small teams to perform the work of a much larger group.
- CRM helps companies gain a 360-degree view of customers to grow and be successful.

Learn more about how a CRM can help you punch above your weight. Download the free e-book *[Small Business, Big Impact](#)* to see why being “the little guy” can be a big advantage.

3

Question #3: Can I Afford CRM?

Every dollar counts when you're a small business. Sometimes you need the extra cash flow to maintain an edge over competitors, and some months you need it to keep the lights on. Priority-wise, CRM often falls on the "nice-to-have" list instead of the "need-to-have" side. For small businesses, CRM brings together all of the information about your customers and your business in one place to make your team more productive. The right CRM can connect your sales, marketing, customer service, inventory management, and internal reporting all in a single place.



That sounds great, but does the cost of CRM still make this a “nice-to-have”? Well, not if you pick the right solution that has simple pricing and a low risk to implement.

For example, a monthly subscription model means that you only pay for what you need as you need it.

Additionally, cloud-based CRM typically keeps hardware and personnel expenses low while decreasing the investment and infrastructure risks companies face when scaling up their business.



The value of a complete view

Small businesses continue to invest in IT solutions that help them run their business better and track everything about their customers. This helps business owners get a complete view of the health of their business to make quick decisions.

Be smart about your investment. Choose a solution that can easily connect the different parts of your business around your customer – inventory, contracts, sales funnel, account information, everything.

When a business first starts, it's enough to keep track of everything via a spreadsheet. However, keeping track of leads and customers on a spreadsheet just doesn't scale. That's especially true if you're trying to create a meaningful customer journey. And what happens when you start growing and obtaining more customers? Tracking, updating, and qualifying leads on a spreadsheet is very manual and way too time-consuming for your sales reps, who should be spending their time selling, not making spreadsheets.

For every \$1 spent, CRM offers an average return of \$8.71.

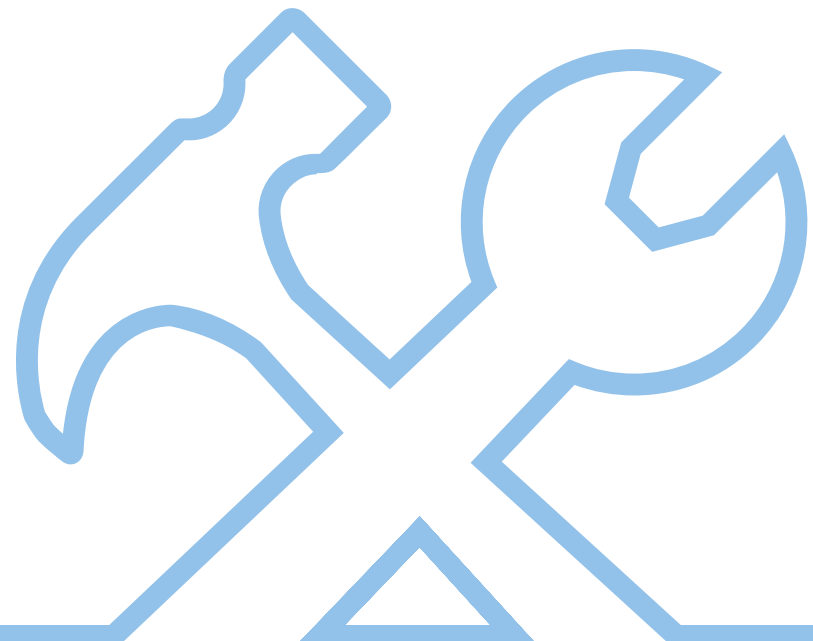
Nucleus Research

Key Takeaways:

- CRM can be customised to fit your business budget and needs
- Cloud-based CRM systems save small businesses money by eliminating on-premise hardware and IT costs.
- CRM scales with you; customise with more features and tools as you grow.

Save time with the cloud

Cloud-based CRM solutions mean there is no hardware to install, so you won't have to hire IT support staff to maintain the system. Look for a solution that is built for you and can scale with your company. This could mean it works out of the box and also offers the ability for customisation down the line. Then, when you're ready to grow, there are no infrastructure build-outs to slow you down: you can just add more users, and you're ready to go with a few clicks of your mouse, while keeping all of your valuable data at your fingertips. There should also be the option to add new functionalities and features that you didn't need when you were just starting out.



4

Question #4: Isn't It Safer to Store Data Myself?

We get it. People have been accustomed to storing their files on their computer hard drives and on-premise servers since the beginning of computing. Storing data in the cloud is a relatively new concept that's only become more prevalent in the past decade. However, most people don't think about security on a daily basis. In today's mobile world, laptops, smartphones, and tablets with important corporate information are toted everywhere – to the office, stuffed into gym bags, left in coffee shops or taxis, and stolen from cars. It happens. And what if an employee leaves your company and takes a device with them?



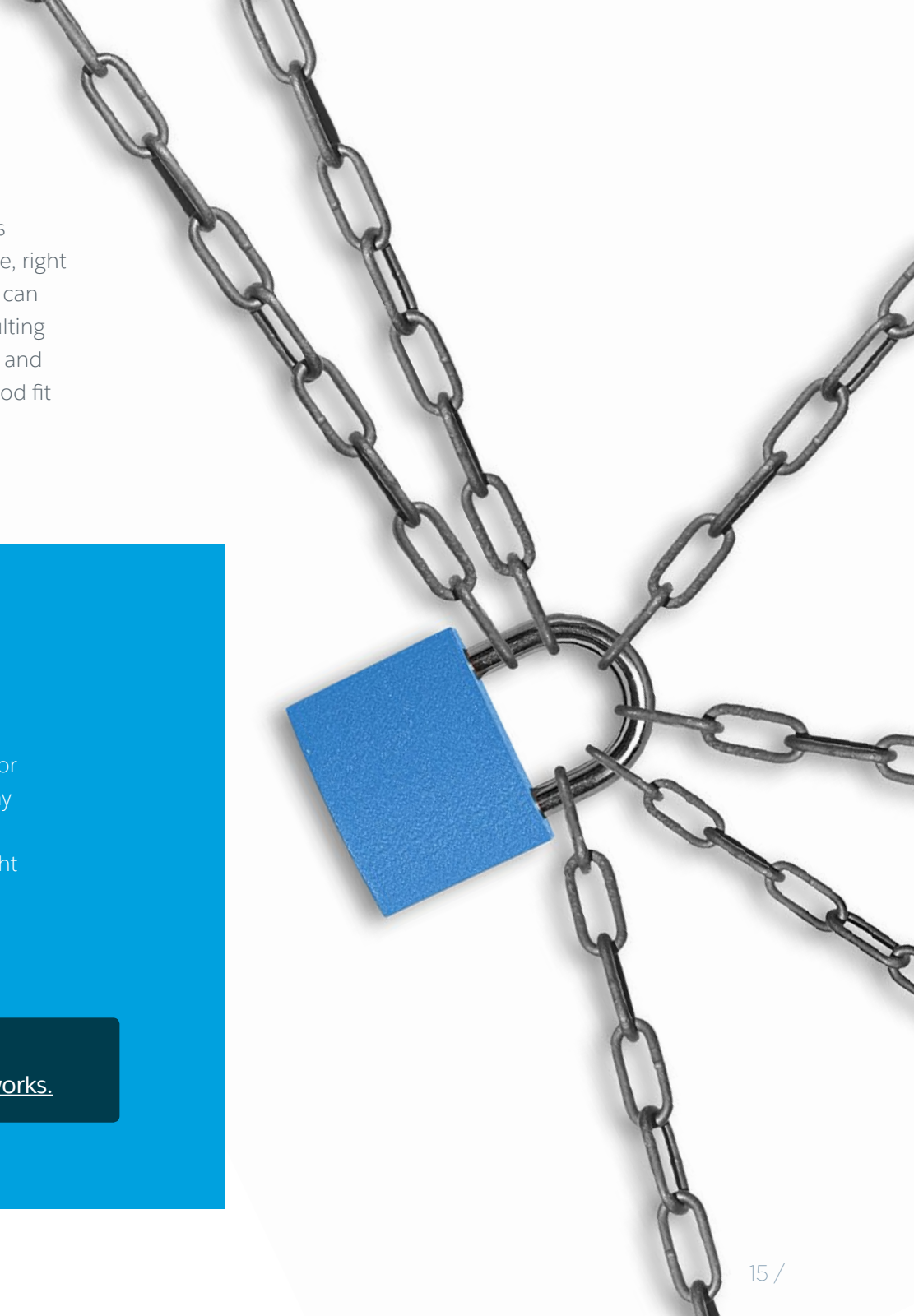
The good news is that when you work in a cloud-based CRM that runs entirely from a secured data center, that important data is always there, right where you left it. When outages occur with an on-premise solution, it can take hours for a technician to arrive on-site and resolve the issue, resulting in tremendous loss of revenue. With the added benefit of its low-cost and high-efficiency updates and services model, cloud-based CRM is a good fit for businesses looking for solutions that won't break the bank.

Key Takeaways:

Why on-premise solutions aren't for everyone:

- People don't think about security on a daily basis. Losing laptops or smartphones containing corporate information puts your company at risk.
- Cloud-based CRM can ensure that all of your important data is right where you left it.

Still mystified by cloud computing?
[Read this article about cloud computing, what it is and how it works.](#)





A sales tool as powerful as you.

Even the best sales people need the right tools to close the deal. Salesforce is the industry leader in customer relationship management and was designed with top sales performers in mind. From the world's most loved CRM features, to cutting edge new functionality that is redefining the industry, Salesforce is focused on one thing: making you successful.

Close more deals, get more leads, gain more insight, and accelerate productivity, with Salesforce Sales Cloud.

[Learn more](#)

45% Increase in sales pipeline.

44% Increased sales productivity.

37% Increase in sales revenue.

Source: Salesforce Customer Relationship Survey conducted May 2015, by an independent third-party, Confront Inc., on 4,600+ customers randomly selected. Response sizes per question vary.

Note: Performance metrics are intended as a guideline based upon historical results from a sample set of customers. Results are dependent upon many different factors that are customer-specific. Therefore, actual results will vary.



Find, win, keep and grow

Understanding CRM solutions and their capabilities is the first step towards achieving big business power. CRM can enhance your company's productivity, help you acquire new customers, and keep all of your data in one convenient place. When you include collaboration features and flexible integration options, CRM enables you to work exactly the way you want to.

Remember, CRM help you:



Find New Prospects.

When used in tandem with marketing automation tools, your business can generate quality leads and track prospect channels.



Win More Deals.

Having a 360-degree view of customers in one convenient place gives you the details to help you score new deals faster and kicks off a repeatable sales process that's customised for each customer.



Keep Your Customers Happy.

Integrate your CRM with smart customer service tools so your support teams can respond quickly on all channels, automate repetitive tasks, and set up self-service sites for customers to help themselves.



Grow Your Business.

Having a flexible CRM can help you through the growing pains right out of the box. No hardware to upgrade and no months spent implementing it. Flexibility also allows businesses to add different functionalities and features as needed.

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