

How to Scale a Growing Business

INSIGHTS FROM A SALESFORCE STARTUP





“We operated by the phrase, ‘Planning to Win.’”

STEVE LOUGHLIN
Co-founder, SalesforceIQ

Introduction

In 2011, RelateIQ was a brand new software startup with just a few employees working from the kitchen of one of the cofounders. In 2013, the business officially launched from a commercial basement space. In 2014 Salesforce purchased the fast-growing company, and today we have thousands of customers as SalesforceIQ.

The reason the company was able to grow so quickly and effectively is because knowing how to scale effectively was top of mind for our founders from the very beginning. They meticulously planned for scalable growth from day one and mindfully revised that plan on a continual basis.

The principles that guided their planning aren't specific to any particular industry or company size – instead they focused on fundamentals that apply equally to any growing business. In this e-book, SalesforceIQ's leaders share their top advice for scaling successfully.

What Is Scalability?

Scalability is the ability to take on growth and opportunity while maintaining peak performance. It means you can effectively adapt all your resources to meet the changing demands of your customers, partners, and employees as you grow.

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Chapter 1: Creating the Foundation for Growth

Plan to Win

Winning doesn't happen by accident. You need leaders who can envision success, create a plan to achieve it, and then rally a team around that plan. To make your company's vision tangible to the people who need to execute it, we suggest building your plan on the three T's – Truth, Tradition, and Teamwork.

Truth Keeps You Grounded When Your Business Takes Off

You may know your “company truth” as your mission statement, key success factors, founder's philosophy, or something else. What you call it isn't important – what matters is that every employee knows and shares the goals and core values that will drive your company forward and serve as the benchmarks of your success.

Truths can vary widely from company to company, but every business should prioritise value to customers over everything else. Putting customers first helps to keep your growth at the

ideal rate – even if that means slowing things down to ensure products or services always meet the standards of the company vision.

Tradition Preserves Your Company Culture

A great way to bring a company's truths to life is to intentionally turn them into traditions that become part of the company culture. For example, if customer value, innovation, and community service are a company's top priorities – then customer service awards, innovation labs, or community outreach projects might become meaningful traditions.

Traditions make it easier for all team members to understand what the company's mission is, and to feel like they're an important part of it. Traditions are a fun way to engage and inspire new employees. And as a company grows, the traditions established early on serve as an anchor to the original culture that made the company special.

PRIORITY #1:

Create Value for Customers

Here are 5 questions to keep you on track:

1. Is there demand for this product, and is the pain point real?
2. Do customers love our product?
3. How are customers using the product?
4. How much value are we creating for our customers?
5. Are we scaling appropriately to meet demand – and do we have a team to sell this?

“My #1 piece of advice is to always look back to your business priorities and make sure your budgeting decisions and quarterly goals align.”

JEN PAAU
Sr. Director of Operations, SalesforceIQ





Teamwork Makes Change Easier

A growing company is a dynamic company, so roles and responsibilities are bound to change along the way. For some employees, as their work volume increases, the scope of their responsibilities may have to contract.

Emphasising the importance of teamwork over individual accomplishments helps people feel secure and valued even as their roles change. Everyone in the company should know well in advance what the plan for winning is. And that plan should include what the organisation and job roles will look like as the company grows.

Equally important is having great team members who stay motivated and inspired by team success even as individual roles and responsibilities evolve along the way. Our next chapter will help you build that team.



“The advantage to growing past the startup phase is that even though your responsibilities will be specialised, your impact will grow.”

ARTHUR JOSEPHSEN

Director of Employee Success & Recruiting, SalesforceIQ

Chapter 2: Building a Great Team

As your company grows, many things will change, including the type of talent you need and how hands-on company leaders can be in the hiring process. To continually find the best employees, companies should plan to adjust their hiring strategy along the way. We call this the “50 vs. 150” approach.

Start With Generalists

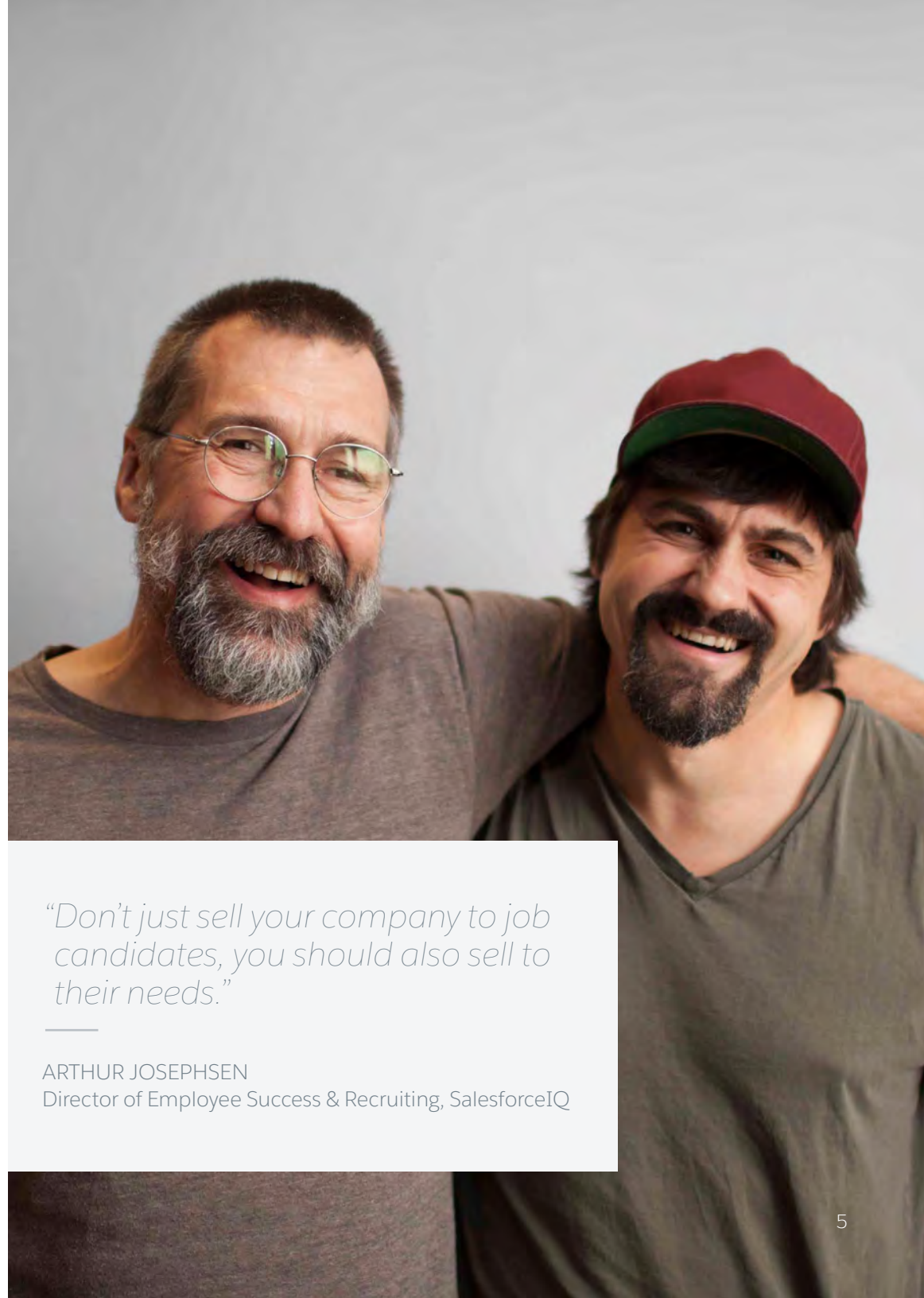
The first 50 employees in a company usually include many “generalists” who are comfortable wearing multiple hats, covering a variety of responsibilities, and adapting rapidly to changing needs. At this stage the most successful recruiting is based on the assumption that talent knows talent.

A small, gifted team recognises qualities similar to their own and hires talented individuals who are a good fit for the existing group. At this point you’re judging candidates based on their ability to scale the best qualities you already have, and leadership often weighs in on every hire.

Add Specialists As You Grow

As your team grows from 50 to 150 employees or more, you can no longer rely on the team’s collective gut to choose the best candidates. It’s time to hire specialists to fill in your company’s blind spots, and their expertise will fall outside the general sphere of knowledge of your existing team.

At this stage recruiting becomes more complex, and a scientific approach can help evaluate candidates effectively. Recruiters should create and test different interview questions to see which ones are best for finding employees who thrive in your company. Recruiters should also regularly seek feedback from hiring managers and other team members to see if new employees are a good fit. Getting as much data as possible on every hiring decision lets you iterate and improve your hiring process as the team continues to scale.



“Don’t just sell your company to job candidates, you should also sell to their needs.”

—
ARTHUR JOSEPHSEN
Director of Employee Success & Recruiting, SalesforceIQ



“People want jobs with creative authority. Empower them to leave an indelible mark on your company.”

ARTHUR JOSEPHSEN
Director of Employee Success & Recruiting, SalesforceIQ

PRIORITY #2:

Build a Winning Team

Here's how to find and keep awesome employees:

1. Discover what people really want.

Have an open conversation with candidates to find out what they really want and need. Flexibility can win over the top candidates, but you'll only know if you ask.

2. Work quickly.

When you find the right person, make an offer fast. You'll make them feel wanted. And you'll avoid the frustration of losing a great talent because you moved too slowly.

3. Treat people well.

Every job candidate is also a potential brand advocate. Leave everyone with a positive impression of your company even if you don't extend an offer.

4. Win with culture.

When a company makes the employee experience a top priority, that company becomes more attractive to candidates with multiple job offers.

5. Give people creative authority.

People want to work on market-changing products and services. Let candidates know they're encouraged to take creative authority and prove their vision.

Chapter 3: Growing Your Demand

Demand generation is a notoriously tough gig in a growing company. Budget for demand gen is usually bare bones until somebody proves it actually works. But how do you make it work without budget?

The key is to spend your dollars selectively and systematically from the very start. To do that, you have to understand your customer.

Know Your Customers

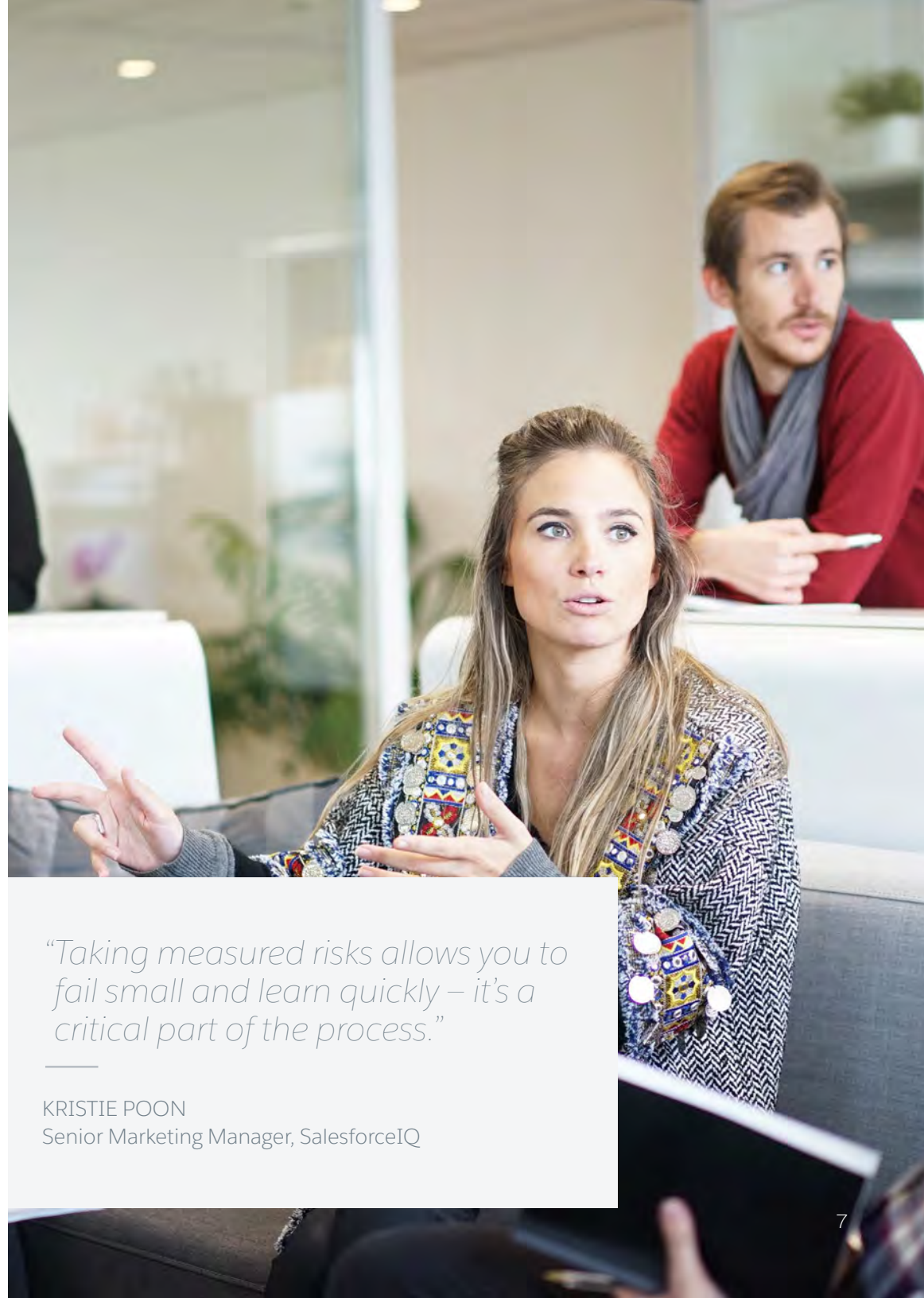
When we say know your customer, we mean really know your customer. To be most cost effective, you want to make sure all your marketing dollars are laser focused at your intended audience and nowhere else.

Start by determining where your audience lives online and offline, so you can target them there. Do they regularly search for product information on Google? Are they active on Facebook, Twitter, LinkedIn, or some other social network? Do they usually shop online or in a store? Wherever they are when they're ready to buy, you need to be there, too.

Prioritise Where to Spend Budget

Once you know where to find your audience, the next step is to determine which channel is the best environment to capture their interest. Keep in mind that where they're most numerous or active isn't necessarily the best choice for demand gen.

In the beginning, the smart approach is to run a lot of small tests across channels rather than place one big bet that may or may not pay off. This hedging strategy makes it more likely that some of your investments reap a return – and you also gain a much deeper understanding of your audience. By experimenting, you can start to learn things like where the best leads come from, where customers are active during different stages of the buying journey, and how much you need to spend for a good lead.



“Taking measured risks allows you to fail small and learn quickly – it’s a critical part of the process.”

KRISTIE POON
Senior Marketing Manager, SalesforceIQ

PRIORITY #3:

Grow Demand on a Tight Budget

Here are 5 steps to get maximum impact from a minimal budget:

1. Identify the online and offline channels where your audience “lives.”

Are they searching on Google, shopping at Amazon, networking at live events? You need to know where they are before you can grab their attention.

2. Start with small tests to see where your budget gets the best results.

Don't put all your eggs in one basket with one or two big bets. Instead, spread your investment around so you can learn what works best.

3. Measure results weekly so you can continually adjust for optimal ROI.

Reporting at a regular cadence allows you to quickly understand what is or isn't working so you can immediately shift your budget without wasting time or opportunity.

4. Minimise low-quality leads by fine-tuning your targeting over time.

Low-quality marketing leads waste everybody's time. Find out where they're coming from and weed them out by narrowing your targeting parameters.

5. Take advantage of free opportunities like product reviews and byline articles.

Online media sites are constantly searching for quality content. Offer them smart, relevant content directed at your audience, and everybody wins.

Measure, Measure, Measure

The only way to gauge success is to measure. And the only way to consistently improve results is to measure, adjust, and measure again. Setting a regular cadence for reporting provides a clear view of the business and allows for quick adjustments like shifting the budget or implementing new tests.

Start by setting the goals you want to measure – and plan on re-assessing those goals as you learn what drives your success. A growing company might begin by measuring for the greatest number of leads generated or lowest cost per acquisition. As their demand gen matures and becomes more sophisticated, they might want to look more closely at revenue generated or overall ROI for particular channels.

Chapter 4: Empowering Your Sales Team

Companies with the most enthusiastic and productive sales teams are the companies that never stop thinking ahead. Their leaders envision what the business will look like in six months or a year and proactively put the right sales tools and training in place now. This shows sales reps that they're valued as an integral part of the company's growth and they rise to the occasion.

Here are three rules that will make your sales reps feel confident, supported, and excited about their part in growing your company:

Rethink the Sales Role

Business models are evolving all around us, unlocking opportunity in places most of us never imagined. There's no reason the sales model should be any different. Many businesses are already finding new customers by expanding their sales methods beyond traditional phone calls and emails. Encourage your sales reps to be creative and think of new opportunities to bring in business.

Let Your Sellers Sell

In a growing company almost everybody wears multiple hats, even sales reps. But it's important to free up your Account Executives (AEs) so they can be as productive as possible doing what they do best – closing sales. Consider using Sales Development Reps (SDRs) to qualify leads and move them through the pipeline until they're ready for the AEs to close. Your AEs will close more deals faster, and SDRs will get excellent training for more advanced positions.



PRIORITY #4:

Empower Your Sales Team

Here's how to keep your sales team excited about the future:

1. Rethink the sales role.

Encourage sales reps to get creative and think outside the traditional sales channels like phone and email. Play to the strengths of your reps and your business.

2. Let your top sellers focus on closing deals.

Top sellers get frustrated when they don't have time to close deals. Free up your closers by using SDRs to qualify leads and move them through the pipeline.

3. Give your sales team forward-thinking tools and training.

Look ahead six months or a year and prepare your sales team now. With their eyes always on the future, they'll stay excited about their role growing the company.

4. Measure the right metrics.

Metrics like number of calls made or emails sent are detrimental when you want sales teams to think outside the box. Focus on quality of activities over quantity.

5. Prepare the team for change.

In a growing sales team, change is inevitable. Try to involve the team in driving the change so it's transparent, exciting, and empowering.

Take Advantage of Technology

Another way you can save AEs, and your entire sales team, enormous amounts of time is by using intelligent technology to automate and improve your most tedious processes. The right customer relationship management (CRM) software can cut hours of busywork per person per week by automatically capturing and organising data, prioritising tasks, simplifying collaboration and sharing, and allowing sales teams to work efficiently from mobile devices.



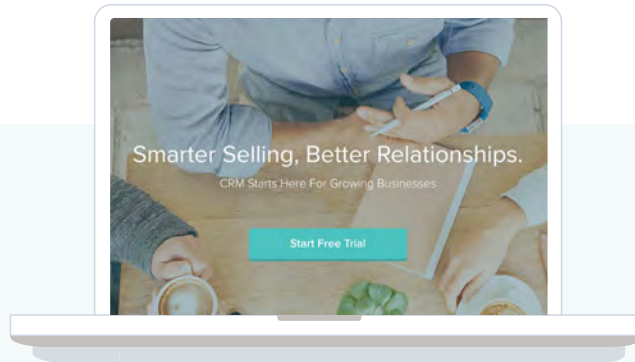
“Help your sales team spend their time doing what they do best – sell. The right technology can save them hours.”

JANE ALEXANDER
SDR Manager, SalesforceIQ

Get Started Today

Growth is a journey, and Salesforce has smart solutions for every step along the way.

If you're a fast-growing businesses looking to manage your customer relationships for the first time, you can start with SalesforceIQ CRM. This out-of-the-box intelligent CRM solution can be set up in minutes to start managing your sales process today. Simply connect your email and start leveraging data-driven insights to deepen your customer relationships and accelerate deals through the pipeline.



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