

The Salesforce logo, a blue cloud shape containing the word "salesforce" in white lowercase letters.

salesforce

sales cloud

A group of four business professionals (two men and two women) in business attire are sitting around a small round table in a modern office setting, engaged in a discussion. One man is holding a tablet, and another woman is gesturing while speaking.

HOW SOCIAL CRM CONNECTS YOU TO CUSTOMERS

Hello.

You've just opened one of our 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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Introduction

THE OLD & NEW CRM

CRM (short for customer relationship management) tools have been used by companies to sell, service, and market to their customers for some time. The best of these systems let sales teams store, view, understand, and share customer information from anywhere, anytime in a secure, collaborative way.

The Old CRM Way

Traditional CRM focuses on direct advertising, one-way communication with customers, sales activity, and marketing campaigns that target certain customers in an effort to secure repeat business.

Whether part of a cloud-based or on-premise solution, traditional CRM can be very helpful in organizing information and managing relationships. However, these tools can create a rather impersonal experience, especially if the CRM system relies heavily on automation.

The New CRM Way

The rise of social media is changing the business landscape by offering new channels for finding and connecting to customers in a more personal way. CRM solutions now exist that allow users to take advantage of this brave new world.

With that in mind, this e-book will dive further into the following:

- Defining social CRM
- The benefits of social CRM
- If social CRM is right for you

Let's get started by defining social CRM.



SMB Group research reveals that 65% of small businesses that use social business tools anticipate revenue gains, while only 17% of “nonsocial” small businesses expect revenues to increase.

–Nucleus, The Value of Mobile & Social for CRM, March 2012

Chapter 1

DEFINING SOCIAL CRM

Social CRM is a conversation-driven platform that helps you see who is talking about you online and what they are saying. Businesses use this tool to get closer to customers and to capitalize on the chatter around their brands, products, and services.

Social CRM users can leverage:

- Trending topics in social channels
- Tweets
- Facebook Posts
- Connections
- Engagement

Using social CRM, any business can turn their social network into a customer service touchpoint. Instead of automated systems or call centers, your team interacts directly with customers on social media, where they already spend time.

Next up, a look at the benefits of social CRM.

The value of social media:

Of the 70% of companies using social technologies, **90% report some business benefit** from social technologies. However, up to **\$1.3 trillion worth** of value remains untapped by companies; value that can be unlocked through the use of social technologies.

(McKinsey Global Institute, "The social economy: Unlocking value and productivity through social technologies", July 2012)

As of September 2013, **73% of online adults**

(Pew Internet Social Media Update 2013) use social networking sites.

Chapter 2


BENEFITS OF SOCIAL CRM

With social media, customers share their experiences with millions of people online. This includes feedback about various companies, both positive and negative. It's a powerful tool that creates transparency for both business and consumer alike. Social CRM capitalizes on this by adapting social media platforms into customer service vehicles.

Here are additional benefits of a social CRM:

- Social CRM focuses on strategically enhancing customer engagement, instead of using an automated system or script.
- Social CRM lets you track each customer's progress and location within the sales funnel so the sales team can create a personalized experience for each one, rather than using the traditional CRM blanket approach.
- When applied just to marketing alone, social CRM lets marketing departments save money by highlighting the indirect pathways to customers via online social channels.

Read on for tips to help you decide if your business needs Social CRM.



Social CRM makes salespeople 11.8 percent more productive.

—Nucleus, The Value of Mobile & Social for CRM

We are living in the social age:

1 in 7

people in the world have Facebook and login monthly.

(Facebook, Sept 2013)

56%

of customer tweets to companies are being ignored.

(Facebook, Sept 2013)

27%

of time spent online is on a social network.

(Facebook, Sept 2013)

Chapter 3

IS SOCIAL CRM RIGHT FOR YOU?

At this point, you should understand what social CRM is and the benefits it provides. But is this tool the right fit for your business?

Answering these simple questions will help you reach a decision:

- Do your customers use social media?
- Do your salespeople use social media?
- Would more customer knowledge help reps provide a better customer service experience?
- Do you want to know what people are saying about your brand, products, and company?

A “yes” to any of the questions on this list means you should look into a CRM system that can help you with social media.

A close-up photograph of a person's hand holding a black smartphone. The hand is positioned on the right side of the frame, with the thumb and index finger visible. The background is a blurred, warm-toned environment. A large, semi-transparent blue rectangle is overlaid on the left and center of the image, containing white text.

Conclusion

Why Social CRM Matters

Today's customers expect more from the products and services they use. They know social media is a great place to learn about what's new and to find other people's recommendations and complaints.

The time is now for your business to put technologies in place that take advantage of these social trends and connect to your customers where they are online. Social CRM turns your business' social network into your very own customer service touchpoint.

It's also worth noting that while you might prefer traditional CRM over social CRM, you do not necessarily have to choose between the two. The best traditional CRM systems also offer a way to use social for better customer insights and improved efficiency.

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

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.

32% Improvement in win rate.

40% Increased sales productivity.

32% Increase in sales revenue.

Source: Salesforce Customer Relationship Survey conducted May 2015, by an independent third-party, Confirmat 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.



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