

# The CRM Switcher's Guide

Five steps from old-school to social, mobile, cloud-powered CRM

→ switch

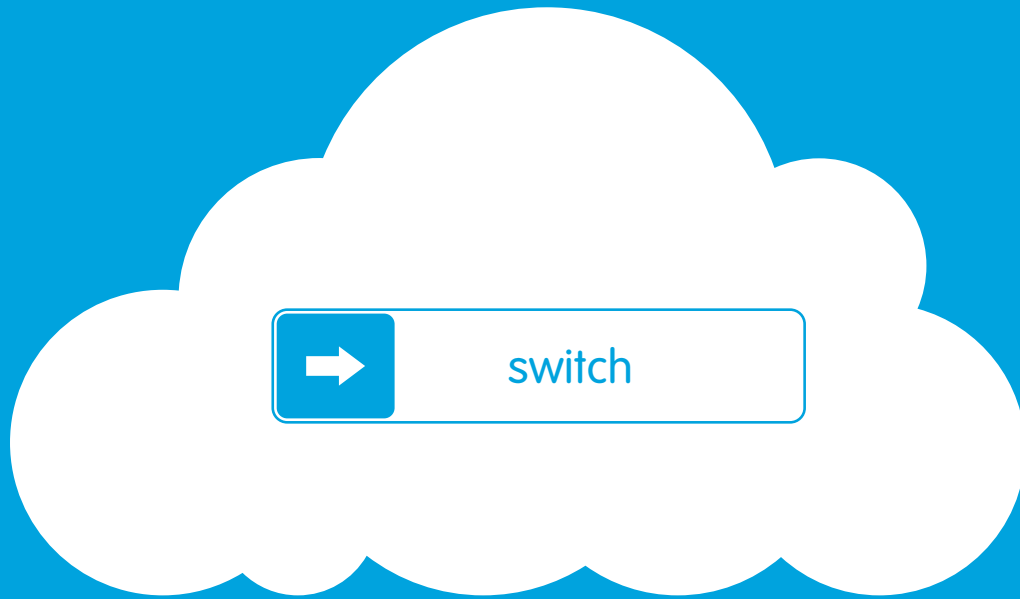


the real power of CRM

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# Introduction: It's Time to Switch



If you're reading this guide, there's a very good chance it's because your current CRM system isn't delivering the value you need.

Maybe your sales people don't use it properly (or at all). Maybe it's a relic from the old days of contact management systems, before social media and mobile computing transformed the way customers and businesses engage with each other.

Maybe you don't actually have a CRM system as such, and you're just relying on an increasingly chaotic array of spreadsheets.

Or maybe the IT headaches, management and upgrade costs of an on-premise system are getting you down.

If any of these things strike a chord, it's time to switch to a modern, social-powered CRM system that's in tune with the way you work and the way your customers want to interact with you. With Salesforce, making that switch is easy. This guide will show you how.

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# Introduction: It's Time to Switch



## Why Salesforce?

Whatever the reason your current CRM system isn't working for you, we can guarantee you'll be (infinitely) better off with Salesforce. Here are just a few reasons why.

**1. Sales reps love it:** because the Salesforce Sales Cloud gives them everything they need to keep track of contacts, engage via social media, find relevant information, collaborate with colleagues and sell faster and better than ever before.

**2. It gets all your customer data in one place:** if you've been struggling to make sense of masses of spreadsheets or capture the knowledge locked up in sales reps' heads, you're going to love Salesforce.

**3. It's CRM for the social age:** with a real-time news feed showing what your contacts are posting and sharing, giving you hundreds of chances to engage with them on topics you know they want to discuss.

**4. It's accessible anywhere:** with full mobile functionality for smartphones and tablets, you can work, sell, engage with contacts and view dashboards wherever you and your team happen to be.

**5. It puts you in total control:** with hundreds of reports and dashboards you can configure to your own needs, you can see everything that's going on at a glance.

And best of all, getting there is easy. Switching to Salesforce is quick and (almost) effortless. Follow the five steps in this guide and you'll be up and selling in the new world of CRM in no time.



## Sell More, Sell Better, Sell Faster with Salesforce

After switching to Salesforce, customers report:

25% increase in win rate

27% increase in sales revenues

28% increase in deal size

28% increase in number of deals

30% increase in leads from social sources

24% increase in sales cross-sell/up-sell revenue

44% increase in forecast accuracy

32% increase in sales productivity

Based on an independent 2012 survey of more than 5,000 Salesforce customers by Market Tools, Inc.

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# Step 1: Plan

One of the reasons so many CRM systems fail to deliver value is lack of planning. Salesforce is simple to get up and running, but without a proper switchover plan, it may not deliver its full value. Here's what we recommend:

**Get buy-in:** Lots of software projects fail because no one championed the new system. Salesforce is an easy sell because its benefits speak for themselves (see the preceding page), but it still needs cheerleaders to get behind it and get everyone excited about its potential. Get a senior influencer on board to sponsor the switch and it will be easier still.

**Appoint your switchover team:** Get the right people in place to manage the switch. If you're a small business, that could just be the project champion and one or two trial users. For larger organisations, it may be a mixture of pilot users, super-users, representatives from the teams and departments who'll be using it, IT folk (either in-house or partners) and expert consultants from Salesforce. Whoever you appoint to the team, make sure everyone knows their role and responsibilities, what they need to do and when.

**Set objectives:** Document what you want to achieve in the first three, six twelve months of using Salesforce. Once you've got it going, you can track hundreds of KPIs with our dashboards and reports – so you'll be able to monitor and prove its value straightaway. And with Salesforce users reporting an average 27% increase in revenues after switching, we're sure you'll have something to shout about.

**Update your processes:** Switching to a modern, intuitive, social CRM system is an ideal opportunity to review your current CRM processes and make any improvements. Those changes can then be reflected from day one of using Salesforce. If your processes are already working fine for you, that's not a problem either – Salesforce is designed to fit with the way you work best.

**Create a roadmap:** Set a deadline for the switchover, and draw up a roadmap leading up to it (and beyond), with roles, responsibilities and project milestones. Make sure everyone knows what the plan is, why Salesforce has been chosen, when the switch will happen and what they need to do.

STEP ONE



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Configure

We built Salesforce to be as easy as possible to use – after all, no one needs training to start using Amazon or eBay, they're just intuitive. We wanted to build a CRM system that's just as easy to use. That's why Salesforce has been 100% cloud-based from the start: there's no software to install, no hardware to buy, and no coding to do to get it going.

At the same time, we recognise that introducing any new CRM system into a modern enterprise is a more complex undertaking than buying a book over the internet. And that many organisations – rightly – want to extend CRM beyond the sales function and make it the DNA of the whole business.

So while we've made Salesforce as easy as possible to buy, configure and use, there's still going to be some work to do – especially if you plan to integrate it with other systems in the business.

The question most prospective new customers ask us is: "will I have to get IT involved"? And the answer is: "it depends what you want to do". Here's a quick checklist to show what you'll be able to do without technical assistance, and where you might need help from your IT department, implementation partner, or our own Salesforce experts.

## Easy to Do

- Take a free trial of Sales Cloud – [go here](#) to get started
- Buy a subscription to Sales Cloud – this is enterprise-grade CRM that you can buy today with a credit card. It's as easy as that
- Manually enter contacts and other data
- Supplement contact information with clean, up-to-date business data from data.com (requires a separate subscription)
- Connect Salesforce to Twitter, Facebook and LinkedIn to start seeing your contacts' social media activity alongside your own interactions with them
- Synchronise Sales Cloud with your favourite email client
- Configure it for the way you want to work – set up your own dashboards and configure what you want to see in your Chatter feed
- Add new users – simply click to create a new user profile
- Bulk import existing contact data from your current system, using Salesforce's data loading tool

## Will Need Technical Help

- Integration with on-premise finance, ERP and other systems (e.g. SAP, Oracle)
- Integration with other cloud applications and services (e.g. marketing automation tools, Amazon Web Services)



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### Two helping hands from Salesforce

**Expert Services:** If you're working with one of our certified partners or implementing on your own, get one of our experts on your team. They've helped thousands of companies to achieve success with Salesforce CRM. They have direct access to our product teams. And they help you make smart decisions that ensure your sales force is ready for whatever the future brings.

#### Our Expert Services team can:

- Validate your design, development, and deployment decisions
- Identify design improvements early
- Add critical skills and knowledge to your deployment
- Keep your implementation on the right track every step of the way

**Custom Consulting Services:** If you'd prefer us to do all the heavy lifting when it comes to the design and integration of your Salesforce deployment, our expert consultants are highly skilled, specialised along our product lines, and certified in all Salesforce CRM solutions.

#### With Custom Consulting Services, you get:

- Expertise and best practices based on thousands of world-wide implementations
- An iterative methodology focused on process and change management
- Access to exclusive tools and resources, including a project management toolkit and a comprehensive knowledge database

To find out more, visit [www.salesforce.com/uk/services-training/professional-services/](http://www.salesforce.com/uk/services-training/professional-services/)



### Faster to Deploy, Less Expensive to Run

Compared to deploying other CRM solutions, Salesforce users report:

- 56% faster deployment
- 52% faster configuration
- 49% faster design
- 47% faster system testing
- 45% faster integration
- 43% decrease in IT costs

Based on an independent 2012 survey of over 5,000 Salesforce customers by Market Tools, Inc.



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# Step 3: Clean Up Your Data

Salesforce is just like other CRM systems in one important respect: it's only as good as the data you put into it. To get the most value from it, quickly, it pays to get your customer data into the best possible shape before you bring it across into the new system. That means doing three things:

1. Cleaning your database of any old or invalid records
2. De-duplicating any records that appear more than once
3. Making sure all your customer records are accurate and up to date

Once that's done, you're ready to bring your data across into the Sales Cloud. We recommend using Salesforce's data loading tool to perform a bulk import from your current system.

**PRO TIP:** The [Data.com](#) service from salesforce.com gives you access to thousands of records from Dun & Bradstreet and other respected business data providers – all guaranteed to be clean, accurate and up to date. Subscribe to [Data.com](#) and watch your partial customer records automatically fill with accurate contact information and other really useful details to help you sell more and sell better.



### Case Study: Coraid

To keep its record growth on track, data storage up-and-comer Coraid had to build a B2B contact database nearly from scratch. It needed high-quality, highly targeted contacts at a good price. And there had to be a way to keep the data clean, complete, and current at all times.

### Solution

Data.com gives Coraid 30+ million high-quality contacts to choose from, and keeps them updated, accurate, and instantly accessible in the cloud.

### Results

- Added 95,000 Data.com contacts to B2B database in one year
- 62% of leads are Data.com-sourced
- Realized an ROI of 1,208%



# clean up



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## Step 4: Get Trained

We designed Salesforce to be super-easy and a joy to use, but to get the most value out of it, you and your reps will almost certainly benefit from some training. There are three ways you can get everyone up to speed on all the great features of the Sales Cloud:

### 1. Get started with our online tutorials.

To get your team started fast, or for a quick refresher in the key features of Sales Cloud, access a selection of short (15-60 mins) tutorials on the salesforce.com site. A full catalogue of online training sessions is available with our highly recommended Premier Success plan.

**2. Let us train your team.** According to MarketTools Inc., organisations trained by salesforce.com have 52% higher user adoption rates and increase sales pipeline by 132%. Our Premier Success plan includes a wide range of end-user training options, including classroom-based training, instructor-led virtual classes, or self-paced online courses. We can even come and train your entire team at your premises.

**3. Send us your super-users.** Our administrator learning path is the quickest way to get your super-users up to speed and ready to train the rest of your team. Our top-rated instructors take your administrators through hands-on exercises, Q&A sessions and shared best practice from experts around the world. There's also the opportunity to earn exclusive Salesforce certification.

For more about the training options available to you, visit [www.salesforce.com/uk/services-training/training/certification/](http://www.salesforce.com/uk/services-training/training/certification/)



### Accelerate Your Success with Premier Success Plan

Every Salesforce customer automatically gets a Standard Success Plan for online support and getting-started training – but our most successful customers choose the additional benefits available with Premier Success Plan or Premier+ Success Plan.

With the Premier Success Plan you get access to best practices and success programs, fast 24x7 support, comprehensive and customizable training, and extensive admin services to drive productivity and accelerate ROI – so you can:

- Extend your team with Salesforce certified experts
- Drive user adoption and increase productivity
- Get fast answers, best practices and recommendations
- Make employees more productive through training
- Maximize your ROI on Salesforce

STEP  
FOUR

train



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## Step 5: Sell!

This is what it's all about, and we get you there fast. Going live with Salesforce is as easy as clicking a button. Because it's cloud-based, there's no software or hardware to install – it just starts working. Your sales people can log in from their desks, smartphones or tablets, and start collaborating and selling from day one.

The impact it can make is huge, but here are some things you'll start to notice straightaway:

- **Top-notch adoption:** sales people love using Sales Cloud, because it speeds them up rather than slowing them down
- **Better visibility:** into everything from sales pipelines to customer activity on social channels like Facebook, Twitter, LinkedIn, YouTube, and Klout
- **Increased productivity:** with full mobile access so your people can log calls, respond to hot leads, work with opportunities, collaborate with colleagues or check the latest figures, wherever they are
- **More accurate forecasting:** with dashboards that show the true picture across the business at all times
- **Higher revenues:** with the power to turbo-charge your sales activities, driving more deals, faster deals and increased up-sell and cross-sell rates
- **Hard evidence of your success:** with hundreds of ROI metrics and reports to demonstrate how much your sales have improved

Sounds good? Visit [www.salesforce.com](http://www.salesforce.com) and start your switch today.




18 months – average time to achieve ROI after switching to Salesforce

Based on an independent 2012 survey of over 5,000 business executives conducted by Market Tools, Inc.

STEP  
FIVE

sell



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# Let Us Help You Switch

No matter what system you're using for CRM today, switching to Salesforce is easy. And if you have any questions at all, we're here to help. Contact us on 0800 0921223 or connect with us via social media and we'll be only too happy to guide you.



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# About Salesforce.com

Founded in 1999, [salesforce.com](#) is the enterprise [cloud computing](#) leader. Using [salesforce.com's](#) social and mobile cloud technologies, companies can connect with customers, partners and employees in entirely new ways. Based

on [salesforce.com's](#) real-time, multitenant architecture, the company's platform and apps give customers the tools to create a social front office and revolutionize the way they sell, service, market, collaborate, work, and innovate.

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- Grow your business with the world's #1 sales app, [Salesforce Sales Cloud](#).
  - Deliver amazing customer service with the award-winning [Salesforce Service Cloud](#).
  - Listen, engage, advertise, and measure social media marketing with the [Salesforce Marketing Cloud](#).
  - Achieve breakthrough collaboration and productivity with [Salesforce Chatter](#).
  - Align, motivate and drive performance with [Salesforce Work.com](#).
  - Build social and mobile cloud apps on the [Salesforce Platform](#) and extend success with the world's leading enterprise app marketplace, [the AppExchange](#).

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