

THE SKEPTIC'S GUIDE TO CRM

BUILD BREAKTHROUGH RELATIONSHIPS ON A
MODERN SALES PLATFORM.



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MEET ASTRO AND FRIENDS

As you may have noticed, the style of this e-book is inspired by the great outdoors and U.S. National Parks. Why? Because they express a feeling of fun, adventure, and exploration – and Salesforce is all about empowering people to blaze their own trails and be part of something greater. Pretty cool, huh?

If you want to know more, check out Trailhead, the fun way to learn about Salesforce.

Get started today at:
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INTRODUCTION

CRM is much more than a buzzy acronym that's been tossed around the business and sales world for the past decade or so.

C-R-M STANDS FOR CUSTOMER RELATIONSHIP MANAGEMENT

Put simply, a CRM system manages most of your critical customer information so that you can see it all in one place. But more than just storing and displaying simple contact info, modern CRM is a platform for building customer relationships. You can follow up via email or social media, manage tasks, track your performance, and much more without launching another app. And you can do it all on any screen, including your phone. Implementing the right CRM can have a dramatically positive impact on sales productivity, so your reps don't just have the tools to better connect with customers, they have the time to build valuable sales relationships.

IS IT TIME TO INVEST IN A CRM?

The contents of this e-book will help you determine that. Over the next four chapters, we will examine the following topics:

- Signs your business needs a CRM solution
- How CRM can improve your sales and productivity
- Building your CRM strategy
- How to maximize your ROI



CHAPTER 1

SIGNS YOU REALLY NEED A CRM SOLUTION

Businesses start with a basic relationship of seller-to-customer – simple enough, right?

In such an early stage, it might be fine to just maintain an Excel spreadsheet or jot down notes about customers and incoming orders. But as your business grows, this sort of record-keeping not only becomes unwieldy, but can actually cost you revenue, customers, and new opportunities.

Here are six warning signs it's time to trade in those old ways and start managing your customer relationships more effectively.



1

THERE'S NO SINGLE SOURCE FOR INFORMATION

Storing your customer and order info in more than one location, such as a spreadsheet or notes stuck to your computer, puts your sales team at a disadvantage. They lack a single view of every customer's contact info, orders, and interactions.

2

THERE'S LITTLE OR NO VISIBILITY

Not only do you lack visibility into how your customers are connecting with employees, you also lack insight into what your salespeople are doing. This makes it difficult to help them be successful – and keep them accountable.

3

REPORTS ARE HARD TO SHARE

Generating reports and analytics of your sales team's monthly progress against their quota would be ideal. But creating reports manually is cumbersome, often resulting in no tracking at all.

4

YOU DON'T HAVE A MOBILE SOLUTION

Your sales reps are out in the field, meeting prospects and discovering valuable info. But all this new data gets stored on handwritten notes or in files on personal computers. Great meetings happen on the road, but the sales teams don't always transfer their notes and important details get lost, especially if an employee leaves the company.

5

CROSS-SELL/UPSELL OPPORTUNITIES ARE LOST

You don't target prospects based on their value to the business. Rather, you are sending the same types of offers and messages to customers and prospects in very different stages of the buying process, as well as in different industries or geographies.

6

YOU LACK A PLAN TO SCALE FAST

What if your business grew from 20 to 200 this year? Are you confident that your current processes will scale? If you know that you are going to grow, are you worried about keeping productivity up while scaling up? If any of these apply to you or your team, don't despair. These are exactly the issues that a CRM system can address.



NEXT UP

Let's take a look at how a CRM system makes your business more productive.

CHAPTER 2

HOW CRM IMPROVES PRODUCTIVITY

The more effectively and efficiently you use your time, the better results to your bottom line.

You probably know the old saying, “There never seems to be enough hours in the day.” This is especially true in the sales world, where time truly is money. According to a study by Mavenlink, two out of five small business owners rank time as their most valuable asset, and a quarter of those would pay \$500 for just one extra hour in the day.

Businesses grow faster by getting better at providing a steady flow of new prospects, increasing time spent selling, and arming their sales reps with the info they need to close deals more quickly. That is where a CRM application comes in.



1

BUILD PIPELINE FASTER

Finding time to bring in a steady flow of new customers can be quite the challenge for a sales team. Pipeline problems are often caused by issues such as:

- Inability to route leads to the appropriate sales rep
- Lack of information on potential clients
- Inadequate knowledge about a prospect before calling
- Poor visibility and forecasting of future pipeline.

A CRM app allows sales reps to store and work with the data on prospects so the information's ready at each interaction. Plus, it quickly provides metrics related to visibility and forecasting.

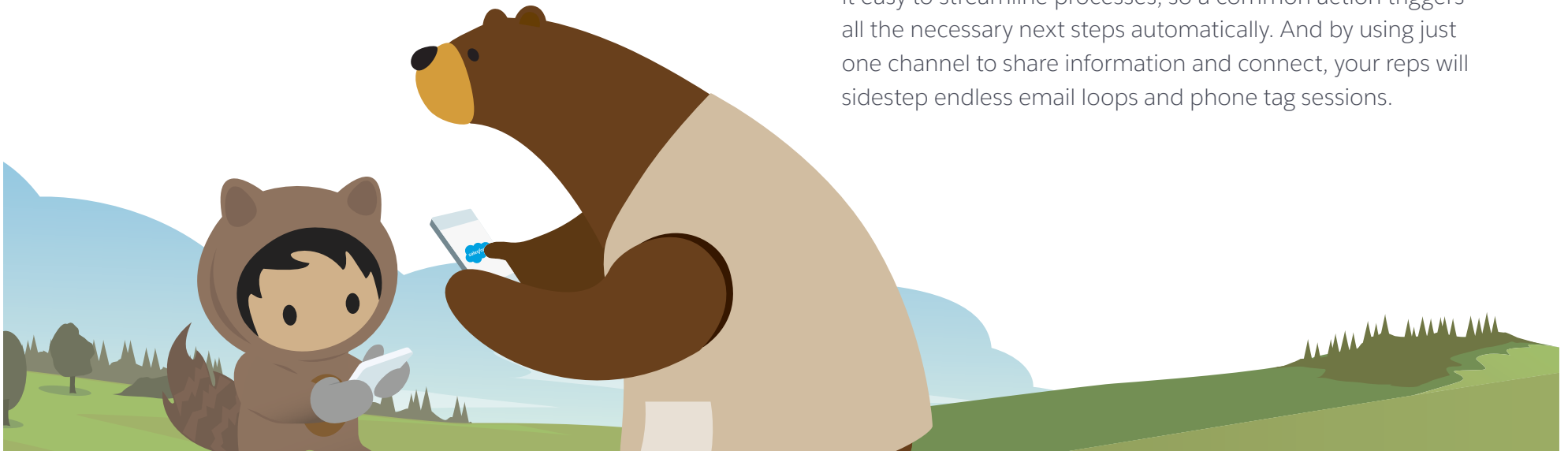
2

MAXIMIZE SELLING TIME

Obviously, representatives need time to sell. Some of the time traps faced by salespeople are hard to overcome, but others can be easily fixed.

Communication is a big challenge for a sales team on the go, but surprisingly few teams leverage smartphones and tablets as part of their regular workflow. Making the switch to mobile can eliminate downtime and strengthen relationships. The right CRM system syncs with mobile devices anywhere, anytime, via the cloud, so the entire team is on the same page and has the most current information at their fingertips.

By automating repetitive tasks, salespeople gain valuable time to concentrate on connecting with customers. CRM makes it easy to streamline processes, so a common action triggers all the necessary next steps automatically. And by using just one channel to share information and connect, your reps will sidestep endless email loops and phone tag sessions.




3

ADD SALES INTELLIGENCE

Companies that embrace the advanced intelligence capabilities of CRM will find it far easier to create the modern experiences their customers crave. For the first time, businesses have access to the analytics, computing power, data, and ease of use that will transform how they build customer relationships. AI will help these leaders discover critical insights about customers and their preferences, predict the best actions to move relationships forward, and apply automation to increase sales productivity.

What does AI for CRM look like? Imagine being able to capture real-time signals, wherever they occur – from a customer’s support request to a prospect’s tweet. Then imagine being able to use every data point to detect patterns and surface insights that it would take an entire team weeks, or months, to uncover. It’s a whole new way of building sales relationships, with intelligence powering a new era of customer success.



Artificial intelligence gives sales reps a huge advantage. Here are three ways to use AI to close more deals.

Data is automatically captured, enabling reps to focus on the most valuable leads first.

Predictive guidance helps reps capture new opportunities and forecast potential sales.

Digital assistants analyze news about each prospect and customer, speeding prospecting and pitching.



4

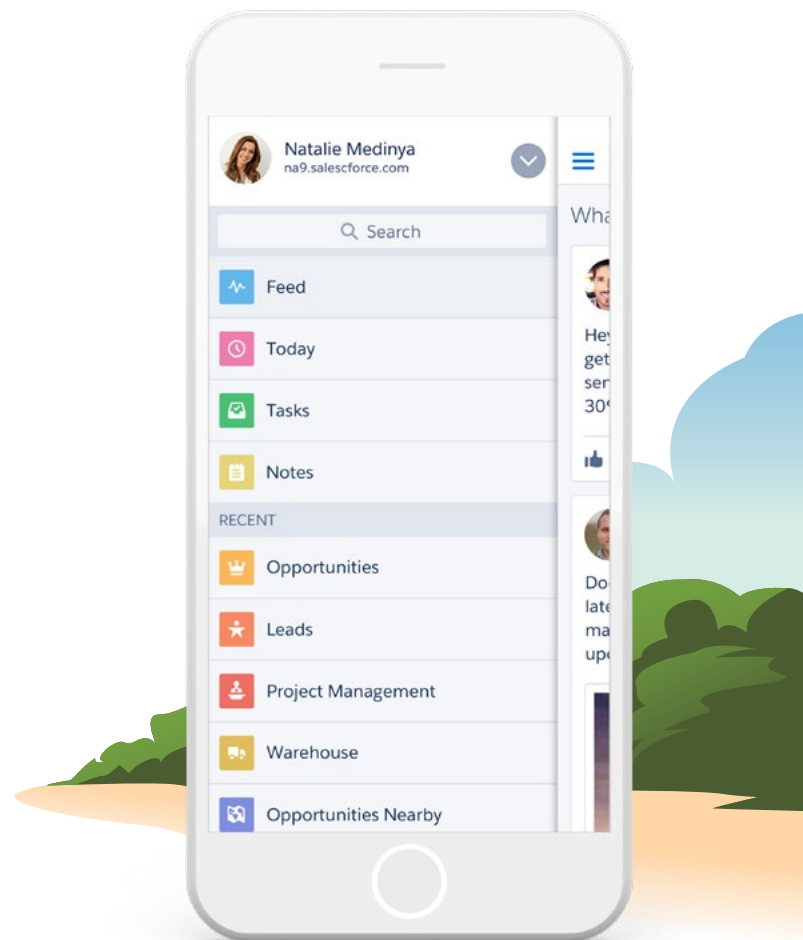
WORK ANYWHERE, ANYTIME

The Mobile Sales Team

As you consider CRM solutions, it's important to consider that the modern sales team is no longer confined to their desks for 8 hours a day. They are always on, always connected, and incredibly mobile. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity and fits into your sales team's existing workflow.

Mobile CRM Tools

In today's mobile age, you'd expect all CRM tools to follow suit, but it's rare to find mobile extensions with the power and functionality you need. Make sure the technology you're considering does more than add mobile functionality as an afterthought. Salesforce apps are built mobile-first with a team's productivity in mind. Choosing a true mobile CRM can mean the difference between a solution that merely helps your business, and one that revolutionizes it.



NEXT UP

Let's take a look at how to craft a CRM strategy.

CHAPTER 3

HOW TO CRAFT A CRM STRATEGY

Building a successful CRM strategy goes beyond choosing the right technology – you also need the right plan.

Smart planning is good business. Your seven basic steps to build a winning plan start with a vision statement. Successful leaders know the value of having a clear, repeatable, action-oriented vision to rally their teams.

1

DEFINE YOUR VISION

Your vision can be many things, from becoming the market leader for sales in your region, to redefining customer service within your industry. Make your vision aspirational enough to have an impact and clear enough for your entire organization to understand.

2

DEFINE YOUR STRATEGY

Strategy is what makes your vision achievable. Say you want to be market leader for sales. Do you do this by competing on price, or by offering different products, or by emphasizing your great after-sales service?



3

DEFINE YOUR BUSINESS OBJECTIVES

Business objectives are where vision and strategy get translated into the day-to-day work. A common mistake when implementing a new CRM system is to replicate in it all the old business objectives and processes, complete with their inefficiencies. Instead, view your implementation as an opportunity to review and optimize how you work.

4

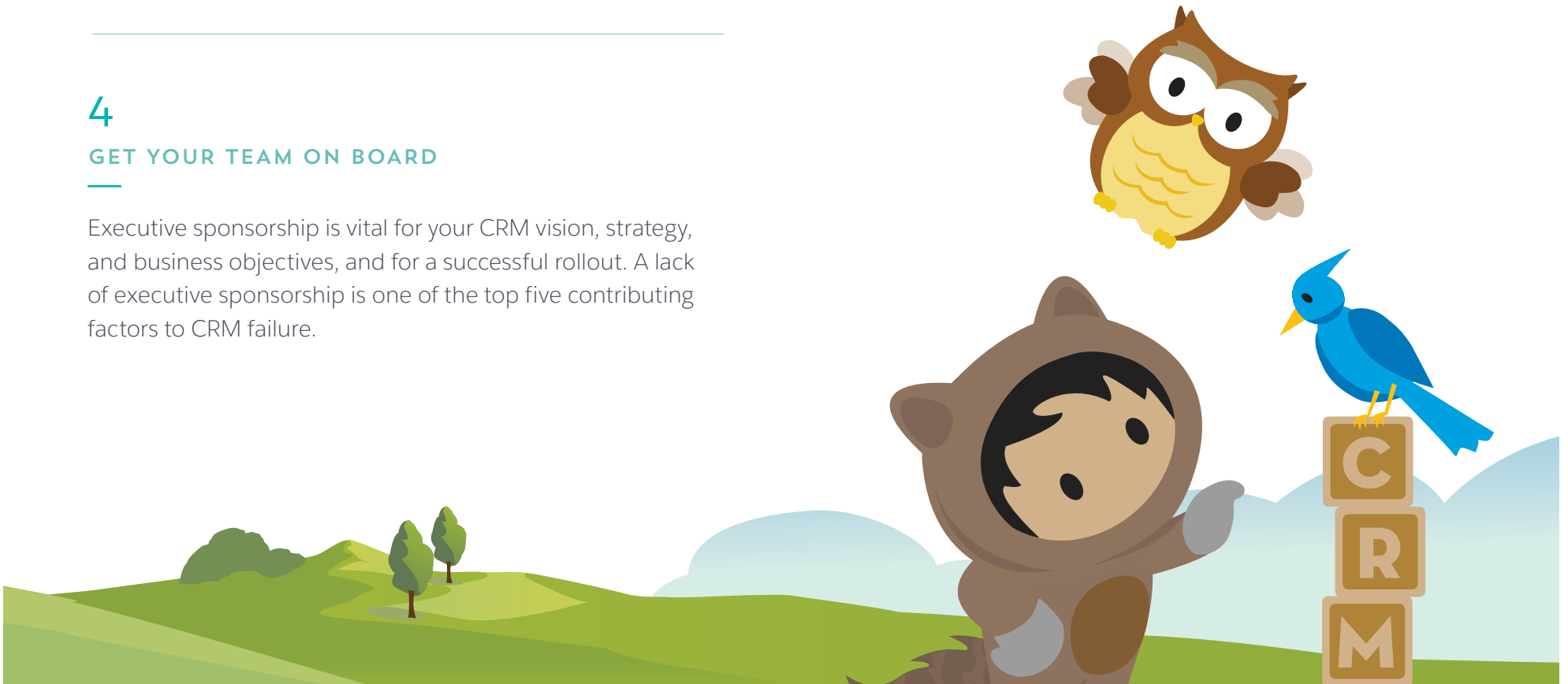
GET YOUR TEAM ON BOARD

Executive sponsorship is vital for your CRM vision, strategy, and business objectives, and for a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

5

IDENTIFY THE METRICS

“You can’t manage what you can’t measure” is a timeless piece of advice. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organization, from sales reps and managers, to the executive team.



6

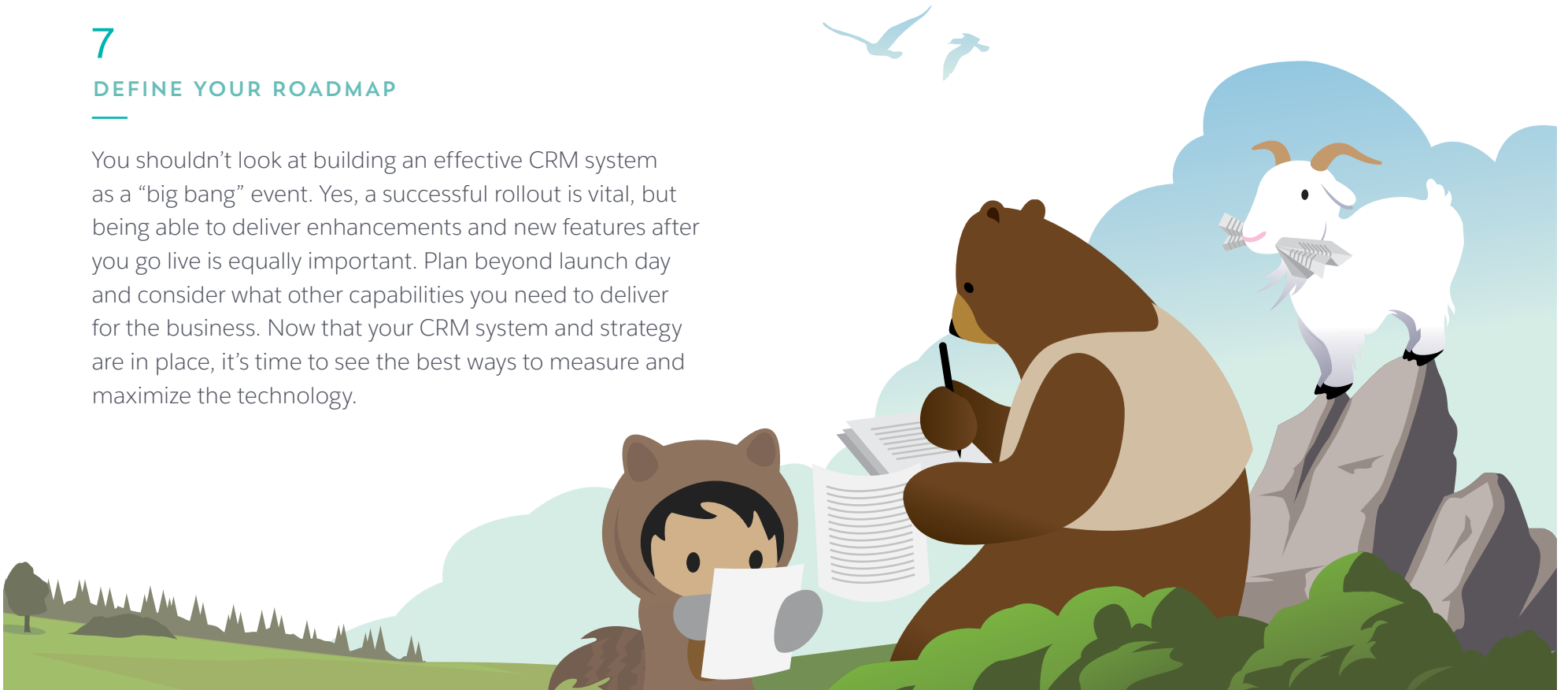
PRIORITIZE YOUR INITIATIVES

You're not going to get everything done at once, so decide what's most important to deliver first. Training is often the priority, so everyone is ready to use the new CRM system as soon as it is available.

7

DEFINE YOUR ROADMAP

You shouldn't look at building an effective CRM system as a "big bang" event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you go live is equally important. Plan beyond launch day and consider what other capabilities you need to deliver for the business. Now that your CRM system and strategy are in place, it's time to see the best ways to measure and maximize the technology.

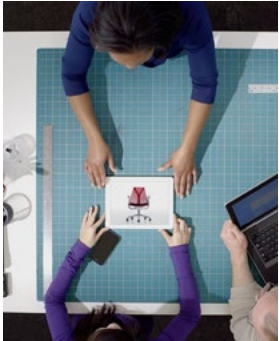
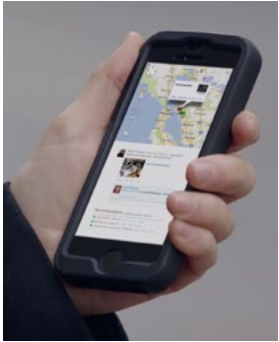
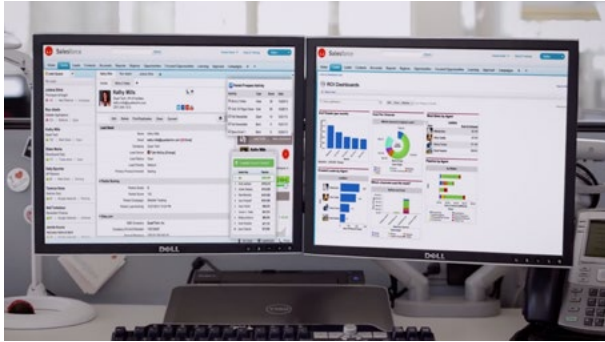


CUSTOMER SPOTLIGHT

Herman Miller

Successful CRM strategies create successful outcomes. When global furniture manufacturer Herman Miller was looking for a tool to help it grow and modernize its business processes, it turned to Salesforce to help it do it. With new insights into its sales cycle, enhanced mobile functionality, and cross-company collaboration, Herman Miller now understands its customers like never before.

WATCH THE FILM

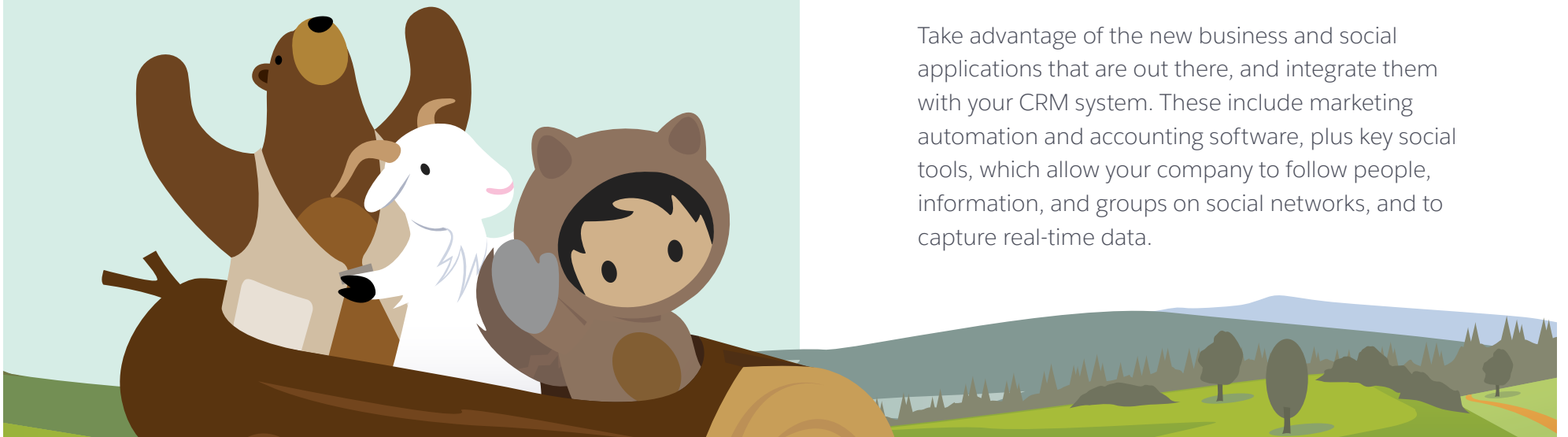


NEXT UP
Let's take a look at how to maximize your ROI.

CHAPTER 4

MAXIMIZING YOUR ROI

Turning your ROI all the way up can be hard without the right guidance. We've enlisted the help of Karen D. Schwartz of CRM Search and Christopher Bucholtz from CRM Buyer to bring you the DO's and DON'Ts of getting the most from your investment.



The DO List:

1

CHOOSE A CLOUD-BASED CRM SOLUTION

All major CRM vendors offer cloud versions of their apps. Choosing this software as a service (SaaS) model means companies no longer have to deal with issues that on-premises CRM apps present, like servers, software issues, and new version upgrades.

2

INTEGRATE WITH APPLICATIONS THAT PROVIDE VALUE

Take advantage of the new business and social applications that are out there, and integrate them with your CRM system. These include marketing automation and accounting software, plus key social tools, which allow your company to follow people, information, and groups on social networks, and to capture real-time data.

3

ALLOW FOR MOBILE INTEGRATION

Make everything accessible on mobile devices for your salespeople so they can work on the road – tasks like reviewing correspondence, and managing contacts and accounts. The integration should also ideally work with back-office systems, social networks, and web conferencing.

The DON'T List:

1

INFIGHTING BETWEEN SALES & MARKETING

CRM data is valuable when used to qualify leads for the sales department and to show which marketing campaigns lead to closed sales. But these insights can be missed if sales and marketing don't work together. Before you do anything else, get both departments in a room to map out common goals, and to discuss how to use the data.

2

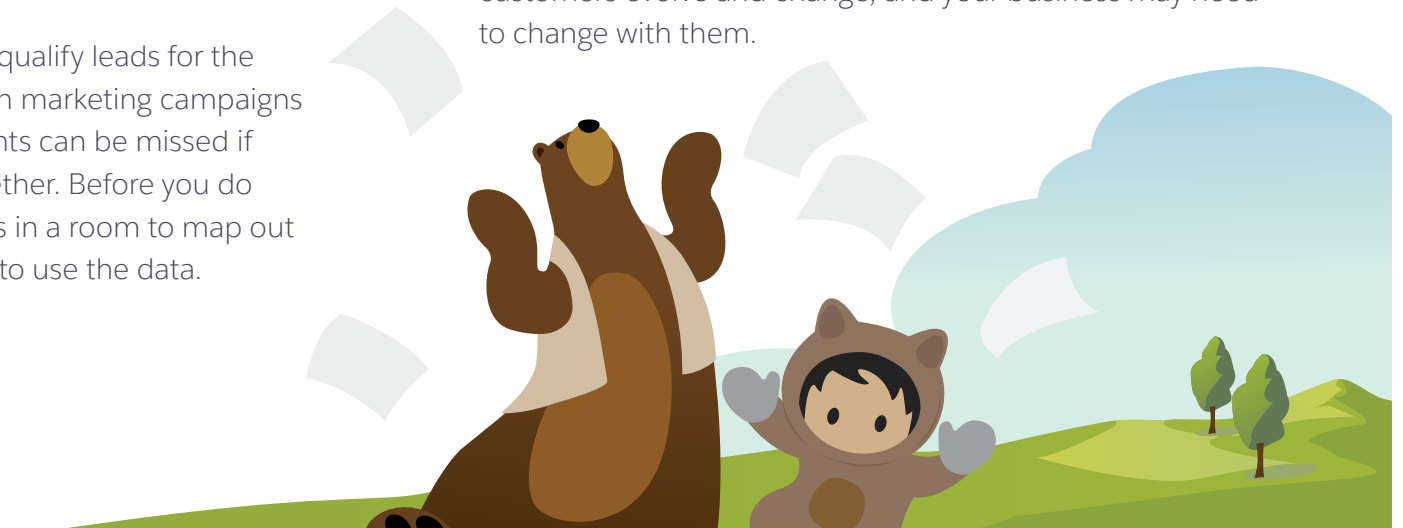
GENERATING REPORTS FOR THE SAKE OF IT

The right CRM application can present data in an almost effortless preformatted report. But this analysis will do you no good if it is ignored. Take the time to not only read the reports, but to understand and act on them when needed.

3

IGNORING RELATIONSHIPS WITH CUSTOMERS

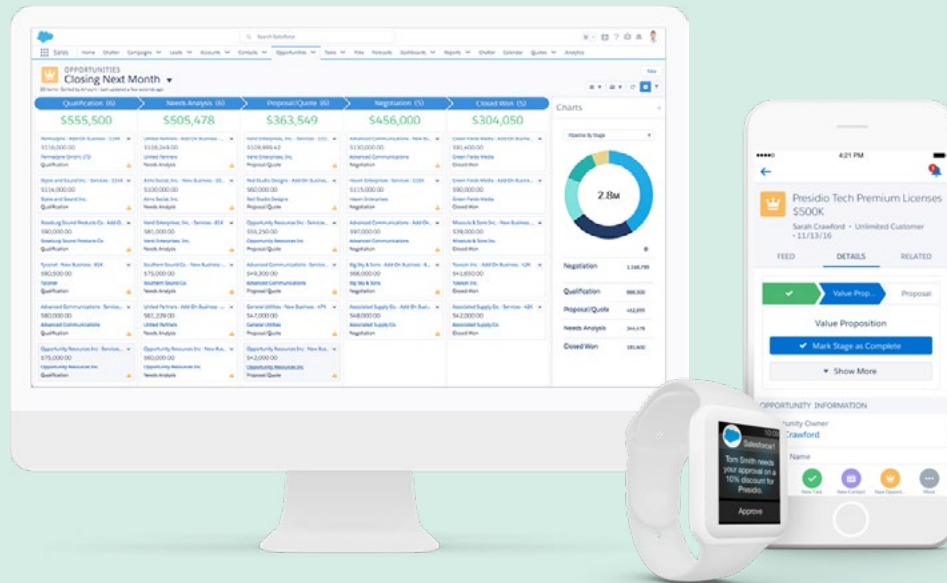
CRMs are an excellent tool to connect with your customers and build relationships that grow over time. But don't just assume that everything is fine and well. Be aware that customers evolve and change, and your business may need to change with them.



CONCLUSION

Any successful enterprise should start with a foundation of great customer relationships, with you, the seller, connecting with people who need your product or service. As your company expands, these connections become harder to manage. It's not just a transaction between the buyer and seller; it's an ongoing team effort with many stakeholders. Things can get really complicated fast unless you have a modern CRM system keeping everyone on the same page, generating insights, boosting productivity, and giving your team more time to build relationships. The right CRM is always the one that keeps you closest to your customers, no matter how much your business grows.

Salesforce builds CRM for companies of all sizes and industries. To explore your options, go to: salesforce.com/products/sales-cloud/overview.



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