

# *Your* **COMPLETE CRM HANDBOOK**

Everything you need to know to get started with CRM

salesforce



# Introduction

CRM is much more than an 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”

With a CRM application, there's no secret formula. It simply manages most of your critical customer information so that you can see it all in one place. Without leaving the app, you can view contact info, follow up via email or social media, manage tasks, and track your performance, among other benefits. Implementing the right CRM can increase sales efficiency. You can close more deals, boost sales, and improve forecast accuracy.

## Is it time to invest in CRM?

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

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

First up, the six signs your business needs a CRM.



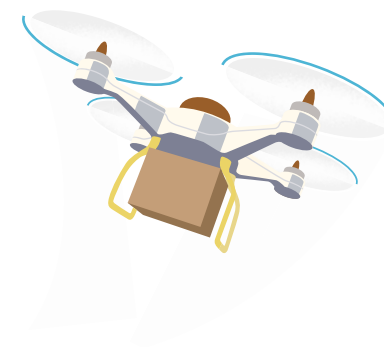
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# Signs You Need a CRM

Businesses typically begin with a basic relationship of seller-to-customer – simple. 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 simply can't do what you need anymore. Here are some 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, but you also lack insight into what your salespeople are doing. This makes it difficult to help them be successful – and keep them accountable.



**“When your business thrives, spreadsheets are no longer enough to run your business.”**

### 3 Reports are hard to create and 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

In recent times, working from home has become normal. Your sales reps will be communicating with potential customers and obtaining valuable information away from the office. However, if this new data is stored on personal computer files and handwritten notes and is not properly transferred, the rest of the sales team will not be up to date on important details. These notes can also be easily lost - especially if an employee leaves the company.

### 5 All customers are given the same priority

Interested parties are not differentiated according to their value to the company. Instead, all customers and prospects receive the same offers and information - regardless as to which phase of the buying process they are in and which industry and region they belong to.

### 6 You don't have a plan to support growth

What if your business grew from 20 to 200 this year? Are you confident that your current processes can support such growth? If you know that your business will grow and you are worried about keeping up, don't stress. This is exactly the type of issue that a CRM system can address.



# How CRM Improves Productivity

The saying “there never seem to be enough hours in the day” is well known in the sales world, where time quite literally equals money.

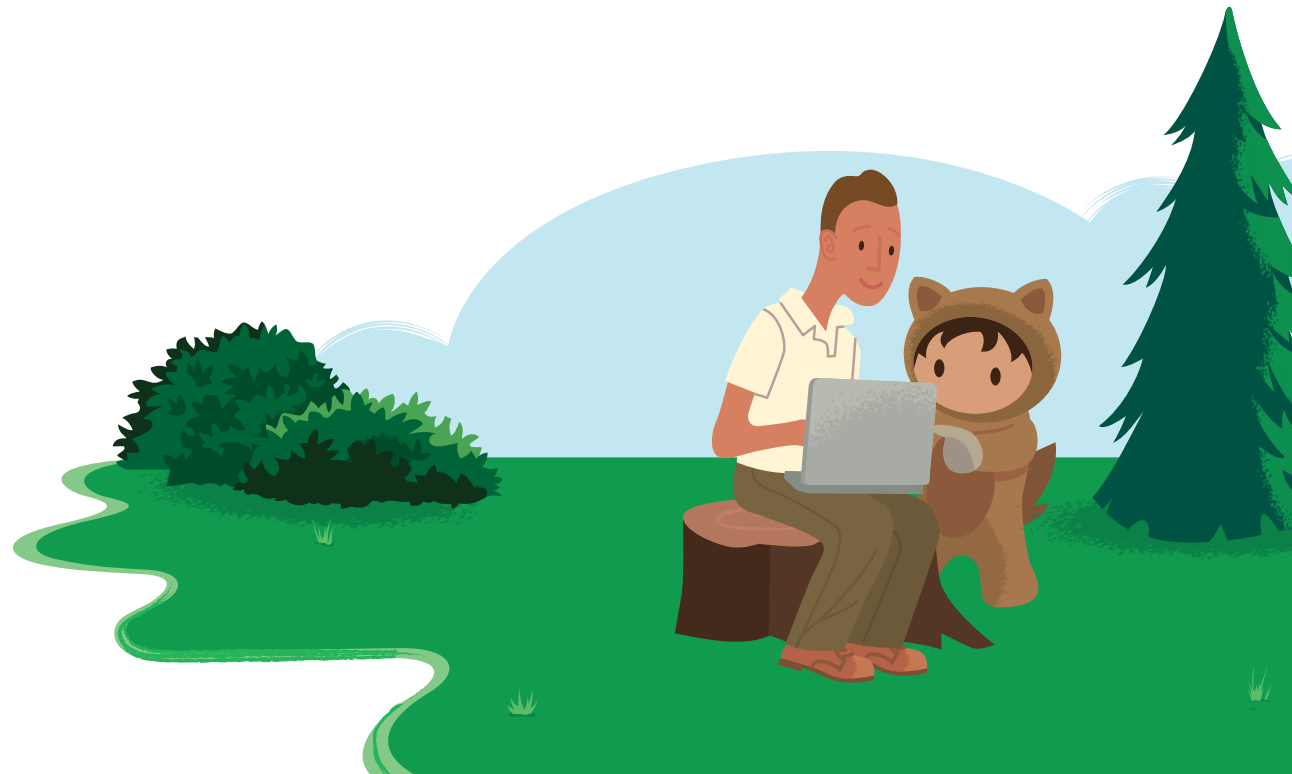
According to our third edition of the Small and Medium Businesses Trends Report, lack of time is the main constraint for SME decision makers.

The more effectively and efficiently you use your time, the better it is for your business. With a combination of a steady flow of new prospects, an increase in time spent selling, and arming sales reps with the info they need to close deals more quickly, small businesses can grow rapidly. CRM applications enable exactly this.

## Top Factors Constraining Business Activities\*

- 1 Insufficient time
- 2 Hiring the right talent
- 3 Money/access to capital

\*Source: [Small & Medium Business Trends Report](#)



## Sales Pipeline

Finding time to bring in a steady flow of new customers can be quite a challenge for a small business sales team. This is 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 the future pipeline.

A CRM allows sales reps to store the data on prospects to ensure relevant information is ready at each interaction along the customer purchase process. Plus, it quickly provides metrics related to visibility and forecasting.

## Selling Time

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

- Automation of repetitive tasks gives salespeople more time to concentrate on closing deals.
- Providing one channel for reps to share information and connect eliminates endless email loops and phone tag.
- Making the switch to mobile can eliminate downtime and increase communication, which is a big challenge for a sales team on the go.

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.

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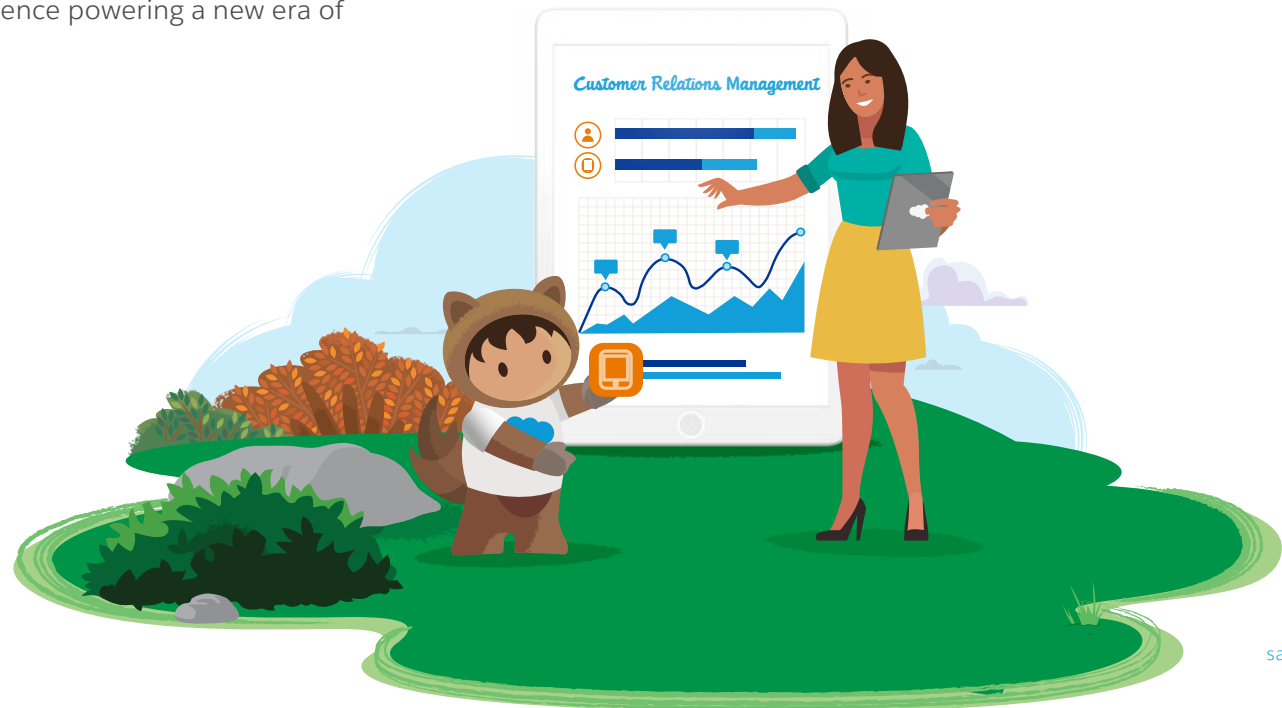
## Better Intelligence

Companies that embrace the AI opportunity will be able to create modern experiences their customers expect. For the first time, businesses have access to the analytics, computing power and data that will transform how they approach their customer relationships. AI will help discover critical insights about customers and their preferences, predict the best actions to move relationships forward, and recommend and automate actions to increase sales productivity.

So, 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. Now, imagine being able to analyse every data point pulled from your CRM to create a complete view for each customer. Integrating AI and CRM essentially allows for automated customer reports, efficient data capture, and even a prediction of future customer behaviour. It’s a whole new way of connecting to your customers and prospects, with intelligence powering a new era of customer success.

Artificial intelligence also creates opportunities for sales reps. Here are three ways in which sales reps can leverage AI to close more deals:

- Data is automatically captured, enabling reps to focus on the most valuable leads first.
- Predictive sales help reps capture new opportunities and forecast potential sales.
- Digital assistants will analyse relevant news about each prospect and customer.





## Collecting Customer Data

For successful prospecting and pitching, you must gather vital information on potential clients. However, finding time to do so while also trying to make your month's numbers can be hard. CRMs help solve this problem by collecting valuable customer data, including:

- Client history
- Current client preferences
- Client social media presence
- Client infrastructure details
- Past sales interactions

## Don't Forget to Think Mobile

### 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 workflows.

### Mobile CRM Tools

When considering CRM tools, you'll notice that a rare few have functional mobile components. Make sure the technology you are considering does not just add mobile functionality as an afterthought. Solutions like the Salesforce Mobile App were built with a team's productivity in mind. Designed with apps and features that streamline the sales process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your business and one that revolutionizes it.



# How to Craft a CRM Strategy

As significant as it may be, building a successful CRM system isn't just about choosing the right technology. From a business perspective, you also need a fool-proof plan. Here are seven basic steps to building a winning plan:

## 1 Define Your Vision

Some people dismiss vision statements as a waste of time, but successful sales leaders know the value of having a clear, repeatable, action-oriented vision that your team can rally around. Your vision can be many things, from becoming a market leader for sales in your region to redefining customer service within your industry. Make it both aspirational enough to have an impact and clear enough that the entire organization can understand it.

## 2 Define Your Strategy

Your strategy is what makes your vision achievable. Say you want to be a 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 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 a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

### 5 Identify the Metrics

The saying “you can’t manage what you can’t measure” sums up this point nicely. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organisation, 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.

#### QUICK SUMMARY:

**Get on the path to success by creating a comprehensive CRM strategy. Follow these tips to get started on the right foot:**

- Define Your Vision
- Define Your Strategy
- Define Your Business Objectives
- Get Your Team on Board
- Identify the Metrics
- Prioritise Your Initiatives
- Define Your Roadmap

CUSTOMER SPOTLIGHT:

# TOOLTO

TOOLTO has a diverse range of customers - from insurers and banks to car hire firms and fleet management companies- so when they were looking for a tool to help them keep the customer at the heart of their operations, they turned to Salesforce to help them do it.

With innovative technology and augmented reality, Salesforce has helped TOOLTO stay customer-orientated whilst providing them with the scalability to grow.

[SEE THE WHOLE STORY](#)



Salesforce gives us the agility to innovate faster and scale quickly as we break into new territories and new markets.

**NUNO SOBRAL**  
TOOLTO CEO

**TOOLTO**



# Maximising Your ROI

Here are several best practices to remember when working to maximize your ROI, from CRM search's Karen D. Schwartz:

## 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 things that on-premise CRM apps demand, like servers, software issues, and new version upgrades.

## 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, information, and groups on social networks, and capture real-time data.

## Allow for Mobile Integration

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

And so you are fully covered, here are some practices to avoid when working to maximize your CRM ROI, from CRM Buyer's Christopher Bucholtz:

## 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.

## Generating Reports for the Sake of It

The right CRM application can present data in an almost effortless preformatted report or dashboard. 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.

## Building "Relationships" with Customers

CRMs are excellent tools 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

A successful enterprise starts with a foundation of great customer relationships. It is never just a transaction between the buyer and seller, but more so a relationship in which you, as the seller, connect with people who need your product or service.

As your company expands, these connections become more and more important. You should share relevant information across the various teams in your organisation that are in contact with the customers. A CRM system can serve as a vital nerve centre to manage the customer information needed in a growing business. In a world where the most successful companies are customer-focused, CRM apps are the key.



# Useful resources

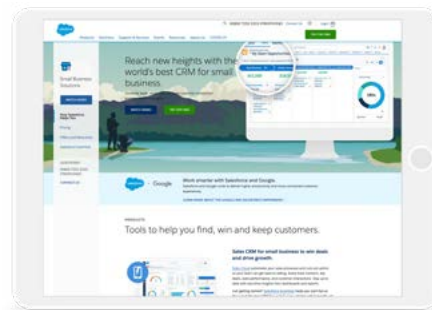
## Salesforce Small Business Demo



Salesforce is the world's No.1 Customer Relationship Management (CRM) solution for small businesses. It's cloud-based and easy to use, making it an ideal solution for growing businesses.

[WATCH THE DEMO](#)

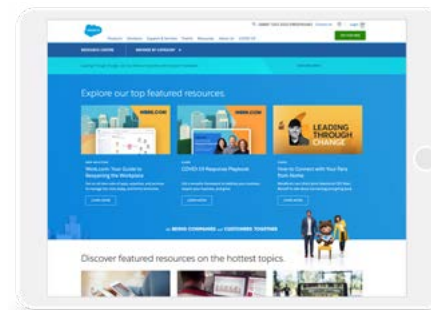
## Small Business Solutions



Generate leads, drive sales, increase customer satisfaction and innovate as you grow.

[LEARN MORE](#)

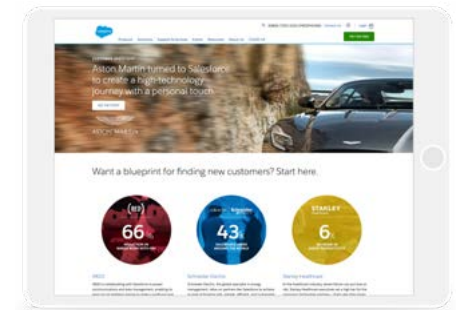
## Salesforce Resource Centre



Discover many useful resources with guides on just about everything you need to help your business grow.

[LEARN MORE](#)

## Customer Stories



Find some inspiration by exploring how Salesforce helped other businesses just like yours to grow and succeed.

[LEARN MORE](#)

The Salesforce logo is a blue cloud shape with the word "salesforce" written inside in white lowercase letters. The background is a solid blue gradient with three stylized white clouds: one on the left, one on the right, and one smaller one above the left cloud.

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