4 ways to grow your small business with Salesforce CRM
Contents

Executive Summary ................................................................................................................................2

Make everyone more productive ..............................................................................................................2

Customize: Make Salesforce CRM work the way you do.................................................................2

Organize: Centralize your information ........................................................................................................2

Stay up to date with Chatter ...........................................................................................................................3

Integrate: Don't switch between applications .........................................................................................3

Go mobile: You can take it with you ........................................................................................................4

Generate more business ...........................................................................................................................4

Set up reminders .............................................................................................................................................4

Help people find you .......................................................................................................................................4

Make your small business run like a big business ...........................................................................................5

Capture Web leads automatically ...................................................................................................................5

Manage your sales cycle ...........................................................................................................................6

Track each deal—and get an overview of all deals ..........................................................................................6

Create reports and real-time dashboards ........................................................................................................6

Get even more from Salesforce CRM ......................................................................................................6

Expand Salesforce CRM with these apps ......................................................................................................7
Executive Summary
Making your people more productive, getting more leads, and closing more deals are key to the success of any business, large or small. For small businesses, cloud-based technologies such as Salesforce CRM level the playing field. Instead of needing to make huge investments in hardware, software, and staff to manage it all, small businesses can use CRM to manage their businesses efficiently—to jump-start and nurture their growth.

Salesforce CRM is ideal for small businesses that need to make the most of all their assets, including their people, customers, and technologies. It’s low cost because there are no big up-front investments in hardware, software, or getting up and running. It’s low risk because you pay as you go—and as you grow, the application grows with you. What’s more, you don’t have to invest in security because your data is protected by the same security trusted by some of the world’s largest and most security-conscious organizations.

In this paper, you’ll learn about four ways Salesforce CRM can help you can grow your business:

1. Make everyone more productive
2. Generate more business
3. Take control of your sales cycle
4. Enhance CRM and go beyond it

Make everyone more productive
A great way to grow your business is to make everyone at your company more productive. To help them work faster and smarter. To spend less time on busywork so they can spend more time with prospects and customers. And to take advantage of any other applications you’ve already invested in, so that everything works together.

Here are five ways to make people more productive:

1. Customize Salesforce CRM to fit your needs.
2. Centralize information so it’s easy to find what you need, when you need it.
3. Stay informed with automatic updates on the people, documents, and deals that matter most.
4. Integrate with other applications so your users don’t have to switch applications or miss out on information.
5. Go mobile so your users are never out of touch.

Customize: Make Salesforce CRM work the way you do
One way to make life better for everyone is to make the application really easy to use. Because every business is different, we made it easy to change how Salesforce CRM looks and works. You can get rid of unneeded fields so nobody is overwhelmed. Change the names of tabs so they make sense for your business and your industry. Create any extra tabs and fields you may need. And change where information appears on the page.

In other words, you don’t have to change the way you do business to fit the application. Instead, you can change the application to fit you. And you don’t need to hire developers to do it. Anyone can make these changes—with clicks, not code.

Organize: Centralize your information
In many companies, people waste lots of time tracking down information that’s stored in email, spreadsheets, documents, notebooks, or even on sticky notes. Of course, sometimes the information they’re trying to find was simply lost.

Salesforce CRM puts an end to scattered and misplaced information because it stores everything about each contact, lead, and account in a centralized place. Instead of everyone using a separate system for organizing information, it all becomes a part of your company’s knowledge base. As a result, you always see
all information related to your prospects and customers, created by anyone and everyone. You only need a computer with a browser or your mobile phone to have the information at your fingertips.

Stay up to date with Chatter

Chatter, which is available for free, makes working with people in your company as easy and personal as Facebook. Chatter is different from Facebook because you don’t just follow people, but also documents, deal status, or anything else in the application that’s important to you. For example, use Chatter to find experts, be notified when a pricelist is updated, or when an important deal closes—you get the idea. You’ll always be up to date on what matters most to you. Plus Chatter’s safe and secure, using the underlying security structure of Salesforce CRM.

Integrate: Don’t switch between applications

Don’t let the word “integration” scare you. Salesforce CRM makes it easy to connect to the applications you already rely on, so you can get the big picture and get more done.

- **Integrate with email applications** – Chances are you already use Gmail, Outlook, Yahoo!, or another email system. With Salesforce CRM, you don’t have to change the way you work with your current email application. Instead, you can simply use it within the Salesforce CRM interface—or embed Salesforce CRM into Outlook. You can also synchronize Salesforce CRM with your Outlook address books and calendar. With email integration, you no longer have to switch applications, plus you can easily track all email interactions you have with your prospects and customers. That way, you can stay on top of what’s going on with your contacts and deals, and decide where you need to spend your time.

- **Integrate with Google Apps** – In addition to Gmail, Google offers applications you can use for just about any business need, including document creation, spreadsheets, presentations, and more. Because these applications integrate with Salesforce CRM, it’s easy to use and store any business document you may need in Salesforce CRM.

- **Integrate with other apps** – Many small businesses also integrate Salesforce CRM with their accounting and back-office systems; for example, with QuickBooks. Such integrations can eliminate hours of duplicated data entry—and the errors that come with it. In addition, you can be more productive by seeing all information related to a customer in a single place, such as whether customers are current on paying their invoices.
Go mobile: You can take it with you
With Salesforce CRM’s Mobile Lite, you can access your contacts, accounts, opportunities, and other important information from your mobile device. Mobile Lite, which is free for all customers, lets you read and edit information in Salesforce CRM on the go. Now you can take all your CRM data with you and still pack light.

Generate more business
Generating new leads is vital to future sales and the survival of a business. Traditionally, marketing efforts to generate leads have been costly, plus it’s been difficult to track which of those efforts was most effective.

One way to get the most from your marketing dollars is to meet your customers where they are—on the Internet. With Salesforce CRM, you can automatically capture leads when people find your site via search engines and fill out your Web forms. You can then route those leads to your people to follow up immediately.

Because consumer behavior changes constantly, so do opportunities for lead generation. That’s why it’s important to periodically revisit your strategies for capturing leads to take advantage of evolving consumer behavior and technical trends.

Here’s how Salesforce CRM can help you get more business, process leads more effectively, and keep getting better at getting leads:

- Set up reminders
- Help people find you on the Web
- Make your business run like a big business
- Capture Web leads automatically

Set up reminders
Often business is lost for very simple reasons: Leads fall through the cracks, someone forgets about a meeting, or a promised document isn’t sent. With the reminders feature, you’ll never have those problems again. By setting up tasks in Salesforce CRM, you’ll be reminded of key meetings, follow-up tasks, and any important deadlines you need to meet.

Help people find you
The Internet lets small businesses compete with companies that are much larger because it no longer takes a huge advertising budget to get the word out. By using search engine marketing (SEM) to find potential customers, you can target the right people more effectively than ever before. Instead of bombarding everyone with your message, the trick is to be found by those who may already be interested in your product.

To capitalize on this opportunity, you need a strategy to make sure your site ranks highly in search results and create a site that appeals to your prospects. Once they visit your site and you’ve got their attention, you can use the built-in Web-to-lead functionality to capture their contact information.
To help you create SEM campaigns to get people to your site, consider Salesforce CRM and Google AdWords. You can use this tool to select keywords and then track the effectiveness of your campaigns—not just the number of leads generated, but the revenues generated by those leads. The result? Complete visibility and control over your investment in SEM, so you can make smarter business decisions.

To evaluate your lead sources for each campaign, take advantage of reports that show the quality of leads from each lead source (Lead Source report) as well as which lead sources brought in the most customers (Lead Conversion report). On the AppExchange, you’ll find other tools to enhance your lead evaluation efforts.

Make your small business run like a big business
Salesforce CRM gives you features that only large businesses can typically afford, so you can run your business much more effectively. By automating key tasks, you can do more without having to hire more people.

Check out the following features that help your business look—and perform—like a bigger company:

- **Email templates** – Use email templates to control your branding and messaging and to make sure all communications are consistent and professional. Email templates are great for making key messages from different people or departments consistent; for example, for responding to inquiries, communicating about your product, or promoting regional events.

- **Lead assignment & auto-response emails** – You can generate customized automatic responses—so that prospects immediately hear from you when they contact you. You can also route leads to specific people, whether they’re the most qualified, located in a particular region, or for any other reason. Or simply route leads to the first available person.

Capture Web leads automatically
Your Web site is a valuable marketing tool that informs people about your products or services. You can also turn your site into an automated lead-capture machine. It’s easy to set up—you simply create the forms to capture visitor information and generate the code that pulls that information into Salesforce CRM.

You can use several Web-to-lead forms to capture different types of information, depending on where the form appears. For example, you may want to collect different information in a “Contact me” form than in an “Event Registration” lead form.

In addition to using the standard Web-to-lead functionality in Salesforce CRM, you can pull in lead information with the following tools:

- **Twitter-to-lead** – You can convert Twitter conversations—“tweets”—to leads with just a few clicks and then convert those leads into sales. While you’re in Salesforce CRM, search across the millions of tweets generated daily to find and capture mentions of your product, competitors, or anything else you care about. Then convert tweets to leads and reply to prospects while tracking the conversations on the lead record. Plus, you get trending reports so you can learn what works and what doesn’t with this new marketing channel.
4 ways to grow your small business with Salesforce CRM

- **WordPress-to-lead** – If you use WordPress to create a blog on your Web site, you can use your WordPress contact forms to collect and manage contact information. With just a few clicks you can add contact forms that capture visitor information and automatically pass that information into Salesforce CRM.

**Manage your sales cycle**

Do you know what’s happening with every deal, at every stage? With Salesforce CRM, everything about every deal and every customer is in one place, so you can see at a glance what’s happening with all your deals. That way you’ll always know where you’re winning and losing, which deals need help, and when to get ready to celebrate.

Here’s what you can do to manage your sales cycle:

- Track your deals in Salesforce CRM, from lead to close
- Create reports and real-time dashboards to always know where you stand

**Track each deal—and get an overview of all deals**

With Salesforce CRM, you can monitor all deals in progress to decide where you need to spend time and how to move the deal along. You’ll see which deals are most important and which need the most attention.

These capabilities are extremely helpful for just one person managing his or her deals. When several people are involved, however, being able to monitor deals quickly and accurately becomes critical. With Salesforce CRM, you can get an overview of all deals in progress, see what’s happening with the business overall, and even forecast revenues.

In addition to seeing how deals move through the sales funnel, you can track all customer interactions. Every email, every call, and every document is tracked and stored with the customer’s contact information. That means you save time because you no longer have to hunt for such information and it’s easy to get up to speed on any particular deal. Over time, you can also evaluate what approaches are most helpful to closing deals.

**Create reports and real-time dashboards**

Creating reports can be a tedious process; plus reports show only what happened in the past. Salesforce CRM makes creating those reports easy; no special expertise is required. Because Salesforce CRM runs in the cloud, these reports are updated in real time, so you always have an up-to-the-minute picture of your business. That way, you’re aware of potential problems—and opportunities—right away.

With Salesforce CRM, you’re not limited to reports with just rows of numbers; instead, you can create dashboards that turn reporting data into colorful graphs and gauges. Dashboards are great for getting an at-a-glance snapshot of your business. By putting these dashboards on everyone’s home page, you can be sure that critical information is always front and center.

Salesforce CRM comes with lots of standard reports you can use as is or modify as needed, along with ready-made dashboards you can download. You can set up Salesforce CRM to constantly update your dashboards and anyone can create reports in minutes.

**Get even more from Salesforce CRM**

Once you’re up and running with Salesforce CRM, you’ll think of lots of other things you’ll want to do. Chances are someone else has thought of them as well—and created apps to do them. To make these apps available, salesforce.com created the AppExchange, a one-stop shop for business applications you can easily add to Salesforce CRM.

You won’t need developers to help install these apps into your account. Many apps are free; others are available for a fee. You can use these apps to extend CRM or to go far beyond CRM.
On the AppExchange, you’ll find hundreds of applications to add functionality such as quoting, professional services automation, HR management, and events management. It’s also a great source for instant customizations and free dashboards.

**Expand Salesforce CRM with these apps**

To get started, check out the following apps that are popular with small businesses. All apps are available for Salesforce CRM Group Edition; those marked with an asterisk (*) require Professional Edition or above:

- **Appirio Calendar Sync for Salesforce and Google Apps**: Keep your Salesforce calendar synchronized with your Google calendar. Free.
- **Expensify**: Create and manage expense records from within Salesforce CRM. Free.
- **FedEx Shipping by ZenKraft**: Add FedEx shipping from within Salesforce CRM. Ship orders, track packages, calculate rates, generate labels, and more. Fee.
- **Maildrop**: Integrate with Mac OSC to easily create new cases and attach emails to contacts and leads from both Apple Mail and Microsoft Entourage. Free.
- **Salesforce for Google AdWords**: Track the effectiveness of your Google ad campaigns and your Web site lead-generation activities. Fee.
- **SalesView**: Find sales opportunities in both internal and Web 2.0 sources such as D&B, Facebook, Hoovers, Jigsaw, LinkedIn, Reuters, and Twitter, all from within Salesforce CRM. Free.
- **Vertical Response for Group Edition**: Send marketing emails and postcards in minutes. Use customized mailing lists, design campaigns, and track statistics. Fee.

- ***Avankia**: DBSync for Salesforce & QuickBooks Integration: Map your Salesforce CRM accounts, contacts, products, and opportunities to QuickBooks. It’s available in three editions—the Standard Edition is free.
- ***Conga Composer**: Create one-click proposals, account plans, and more from objects and related lists. Fee.
- ***DupeBlocker 2.0**: Stop and merge dupes from user entries, Web-to-lead captures, and integrations. Fee.
- ***Lead and Opportunity Management Dashboards**: Get dashboards to track leads and manage opportunities from within Salesforce CRM. Free.
- ***Lead Scoring**: Prioritize leads and nurture those that are ready to buy. Free.