

A smiling woman is shown from the chest up, holding a smartphone to her ear. Overlaid on the image is a mobile application interface. The interface features a calendar icon at the top, followed by the text 'Sales Cloud Monday Sync' and 'Mon, Apr 21 11-12 pm • SF-Landmark-9th..'. Below this is a section titled 'INFORMATION' with a list of items, including 'Title: Sales Cloud Monday Sync' and 'Mon, Apr 21 11-12 pm'. A blue plus icon is visible next to the last item in the list. The background of the image is a blurred yellow taxi cab.

HOW A MOBILE CRM MAKES YOU MORE SUCCESSFUL

PART OF THE CRM SUCCESS SERIES



Introduction

THE MODERN CRM

Sales Cloud Monday Sync

Customer relationship management (CRM) solutions 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.

Sales Cloud Monday Sync

But as technology has raced forward, CRM solutions have had to evolve as well, delivering the tools, speed, and functionality that modern businesses need to succeed. The best CRM solutions go beyond basic functionality and deliver cutting-edge features that make the companies that use them more efficient, more effective, and more successful. Chief among these cutting edge features is mobile functionality.

A mobile CRM allows your company to sell, market, and service the way you want. Teams are no longer confined to cubicles for eight-hour workdays; instead, they are always on and always connected. A mobile CRM allows your company to:

- Sell faster
- Sell smarter
- Be unstoppable

Let's take a look at how a mobile CRM can revolutionize your business.

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Chapter 1

SELL FASTER

In nearly every industry, paradigm-shifting companies are moving quickly and connecting to their customers in whole new ways. The disruptive power of customer-centered companies is redefining the business landscape.

In order to thrive in the digital age, businesses must make similar shifts. They must meet their customers where they are — on mobile devices and in the cloud — and connect to them in new and exciting ways.

At the same time, companies of all sizes, in all industries, must continue to grow their accounts, find new customers, and close deals faster — at anytime, from anywhere. The best CRM solutions have the functionality and mobile apps to make this easier than ever.

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Be More Productive

Sales is not an easy job. It takes a special personality to juggle dozens of accounts, manage countless meetings, and respond to dozens of follow-up emails and tasks every day. You'd be hard-pressed to find a company employee with more on his plate than the average sales rep.

With so many appointments and responsibilities to handle, sales professionals deserve their own personal assistants. They need somebody to keep all of their accounts, tasks, and appointments organized so they can focus on what they were hired to do: sell. Unfortunately, a personal assistant for every sales rep just isn't in the cards for most companies.

However, Salesforce has changed that with a suite of productivity apps that will keep organize your days, automate repetitive tasks, and allow you to focus on what matters most: the customer.

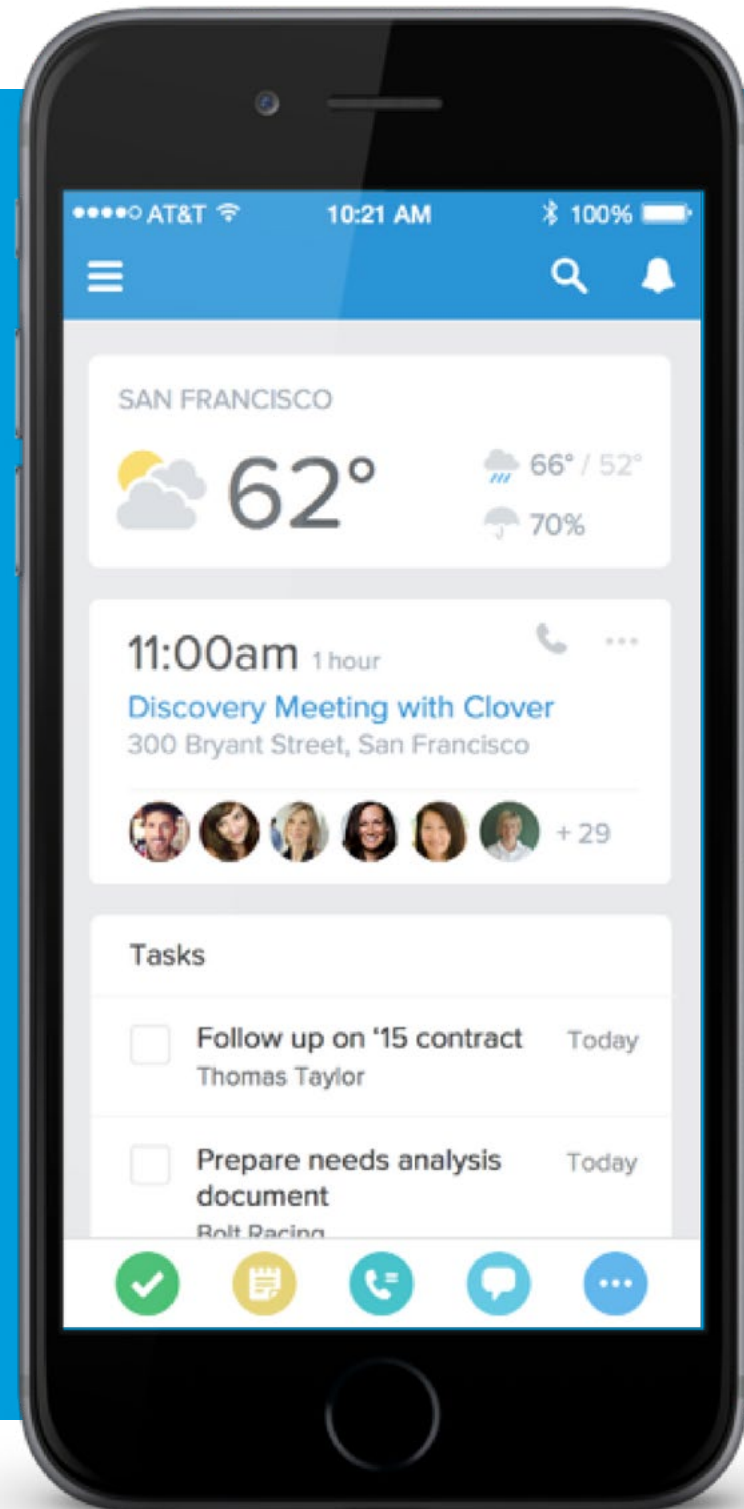


YOUR SCHEDULE

Getting a complete view of your day often requires visiting multiple apps. You need to visit your calendar app to see the day's appointments, your to-do list for daily tasks, etc. The Today App in Salesforce1 brings all of this into one location so you can get a complete briefing on your day at a glance.

AND EVERYTHING ELSE

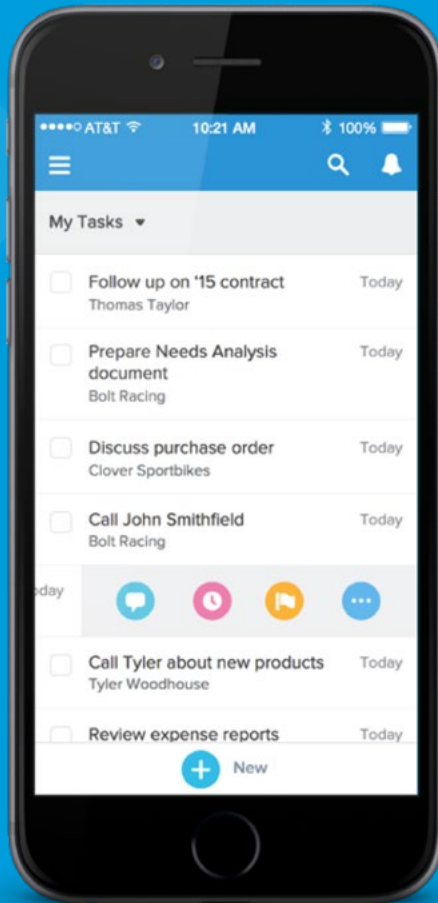
In addition to your daily schedule, the new Today App provides everything else you might need for a productive day. From the day's weather forecast to news alerts for any breaking news around your accounts, Today keeps you up-to-date and informed. The Today App even gives you a daily status update on your progress toward quota.



PRODUCTIVITY APPS



Tasks

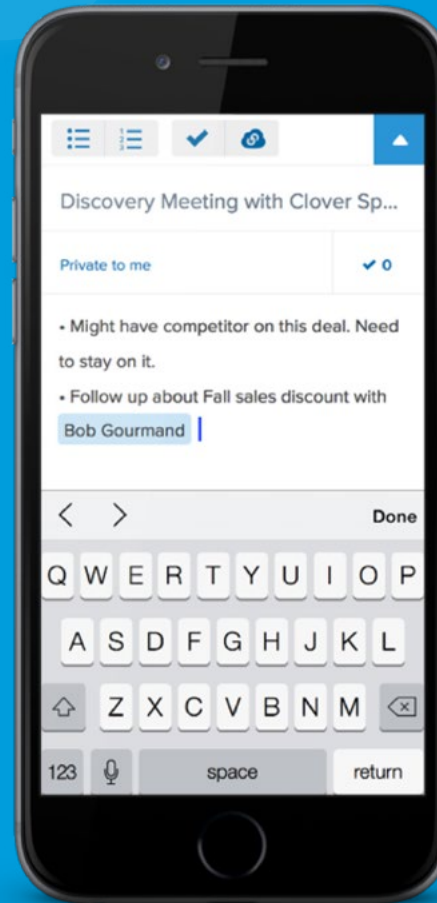


TASKS

Create tasks and receive alerts on the go with the redesigned Tasks App.



Notes

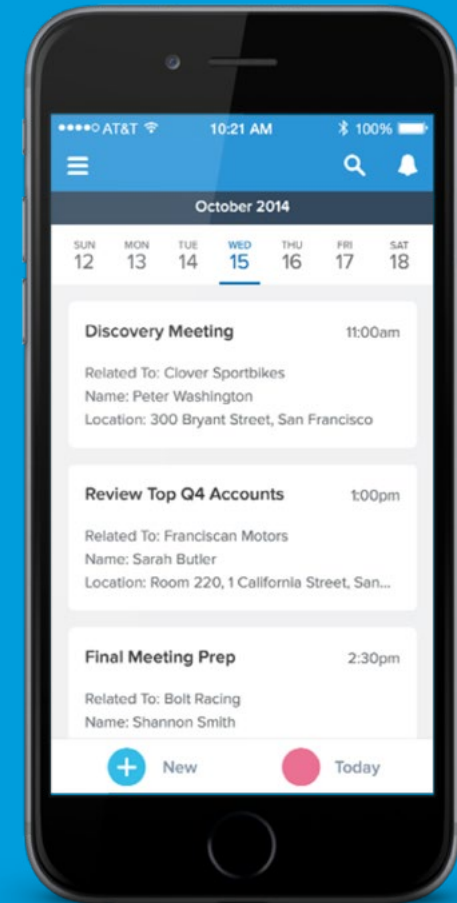


NOTES

Meeting notes are most effective when the information is still fresh. Start making them right on your phone.

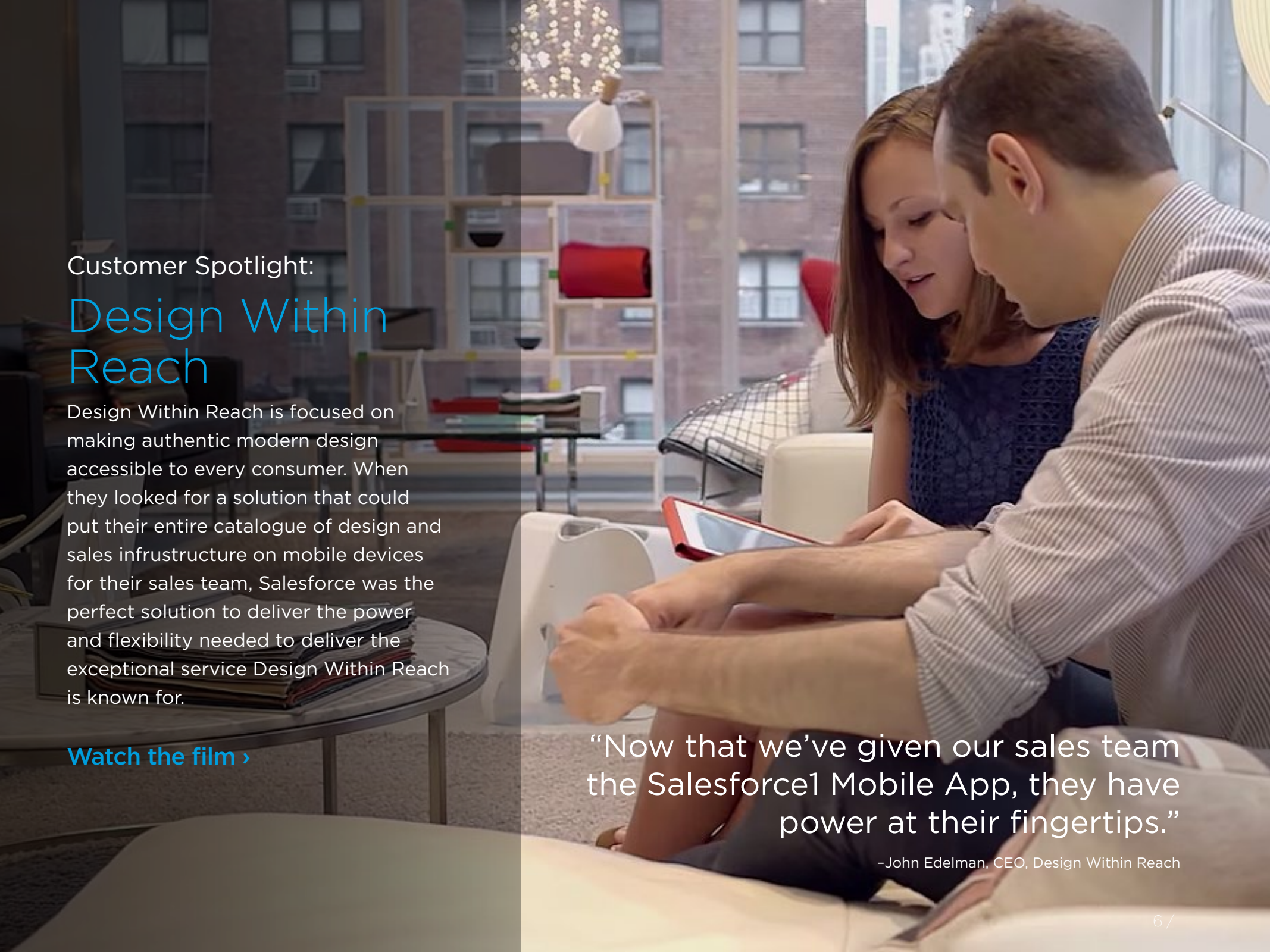


Events



EVENTS

Sales reps need a calendar app that keeps them organized, and the new Events App delivers.

A man and a woman are sitting at a table in a modern office or design studio. The man, wearing a striped shirt, is pointing at a tablet held by the woman, who is wearing a blue patterned top. They are both looking intently at the screen. In the background, there is a white shelving unit with various items, a red chair, and a window looking out onto a city building. The lighting is warm and modern.

Customer Spotlight:

Design Within Reach

Design Within Reach is focused on making authentic modern design accessible to every consumer. When they looked for a solution that could put their entire catalogue of design and sales infrastructure on mobile devices for their sales team, Salesforce was the perfect solution to deliver the power and flexibility needed to deliver the exceptional service Design Within Reach is known for.

[Watch the film >](#)

“Now that we’ve given our sales team the Salesforce1 Mobile App, they have power at their fingertips.”

—John Edelman, CEO, Design Within Reach

Chapter 2


SELL SMARTER

Modern sales professionals face an interesting challenge: they spend most of their time not selling.

It sounds crazy, but the majority of a salesperson's time is actually consumed by the day-to-day tasks of finding contact information, updating accounts, and entering data. This can be a major hindrance for any company looking to grow their business.

To be successful, sales teams need to focus on not just working harder than their competition, but working smarter, too.

To help make this happen, Salesforce has mobile tools that can dramatically improve the effectiveness of your sales team on the go: analytics, intelligence, and account planning. Let's take a look at each and see what these new tools can help you accomplish.

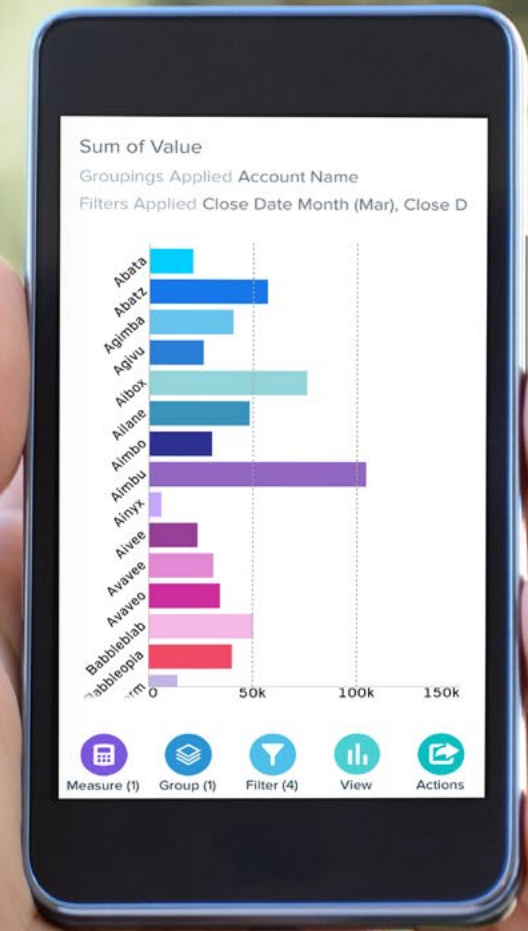


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Analytics

Analytics has long been the domain of IT or specialized data teams, viewed as far too complex to be used by the average sales professional. But as the amount of accessible data has skyrocketed, analytics has become too valuable a tool to hide away in a back office. Salesforce is bringing analytics to everyone with Sales Analytics.

To be truly actionable, the right data needs to be applied to the right context. With mobile functionality, Sales Analytics is accessible from the palm of your hand, anywhere you need it. With so much data available to sales professionals, the problem is no longer merely obtaining data, but sorting through massive data sets to find the insights you really need. Sales Analytics makes this easy with robust filtering options and a visual interface that helps identify patterns and insights.



Sales Intelligence

Marketing automation tools are rapidly rising to the top of the heap as the go-to way to enhance sales and marketing performance. After last year's acquisition of Pardot, Salesforce has added industry-leading automation technology to its Sales Reach product.

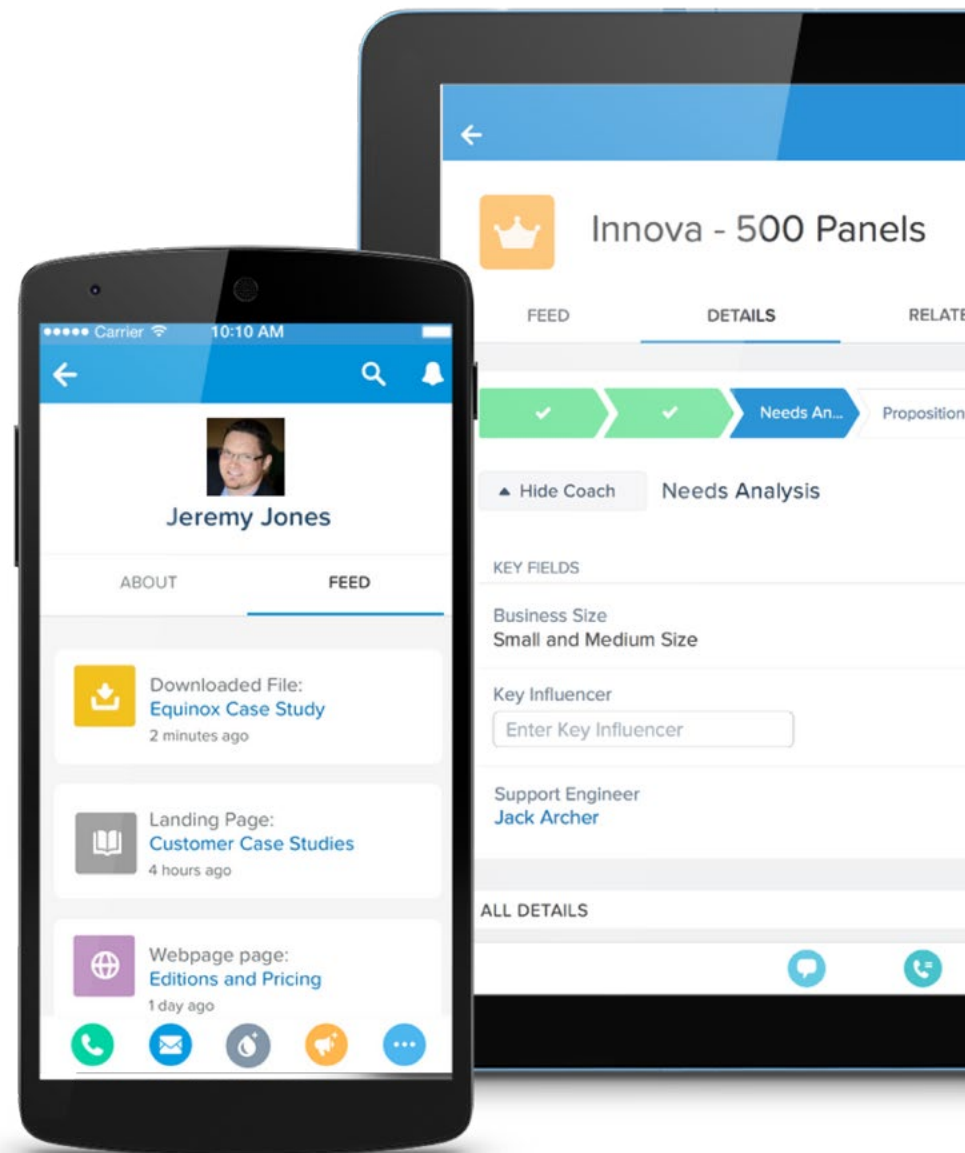
With prospect tracking, you'll never have to wonder what your prospects are up to. You can automatically track the pages they visit on your site and set notifications that let you know when they take purchase-ready actions like viewing your pricing page.

Account Planning

Prospects are now engaging in more places and ways than ever before. They expect to have their sales experience tailored to meet their needs at every stage and on any channel.

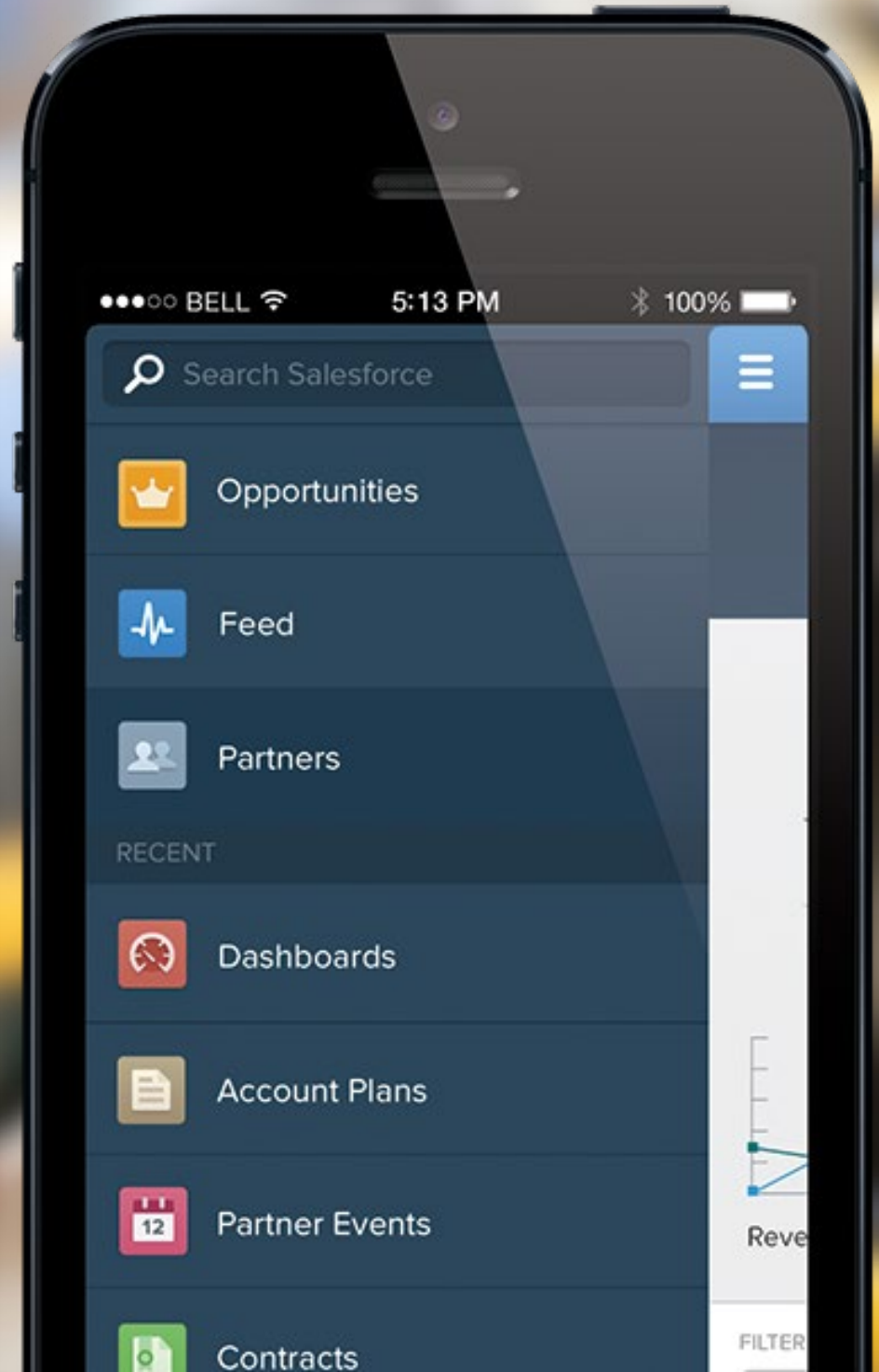
This means modern sales professionals must understand not only where their prospects are in the sales process, but how to tailor their approach to each stage. Sales Coach makes this process a breeze by helping identify sales stages, surfacing the right data, and suggesting guidance.

Each stage of the buying process requires a slightly different approach. Sales Coach breaks down the right steps to take at each stage and the data you need to take action. Moving a deal forward is the most important part of any sales activity, but it can be hard to identify next steps. Sales Coach makes this easier by offering guidance on what to do next.



Take an interactive guided tour.

Learn how a sales manager and sales rep use Salesforce to manage their day. This interactive tour guides you through the different capabilities of Salesforce. Experience the world's #1 CRM app today.




Chapter 3

BE UNSTOPPABLE

The modern sales professional is no longer tied to the outdated paradigms of the past. Salespeople are no longer lone wolves, solitary road warriors, or cube dwellers. Technology is creating a new breed of sales rep who is more informed, more connected, and better able to tailor her approach to her customer.

But in order to succeed, modern sales professionals need a tool to match their skills. They need to be able to sell from anywhere, backed by an incredible wealth of technology, and have access to the collective intelligence of their entire organization through social collaboration.

Salesforce transforms the best sales reps from merely effective, to unstoppable. You can go anywhere and do anything with the power of Salesforce and the new Sales Cloud.



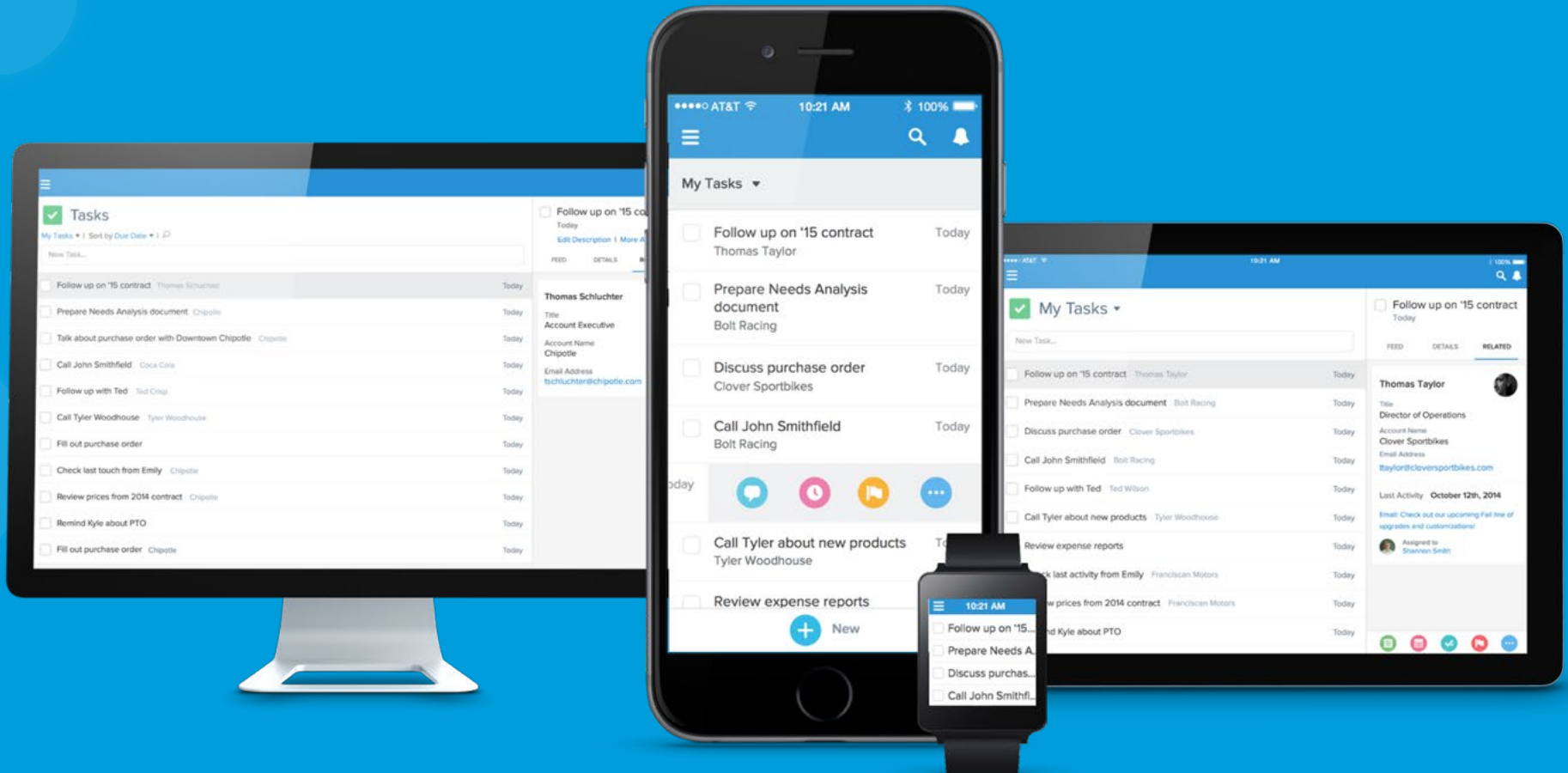
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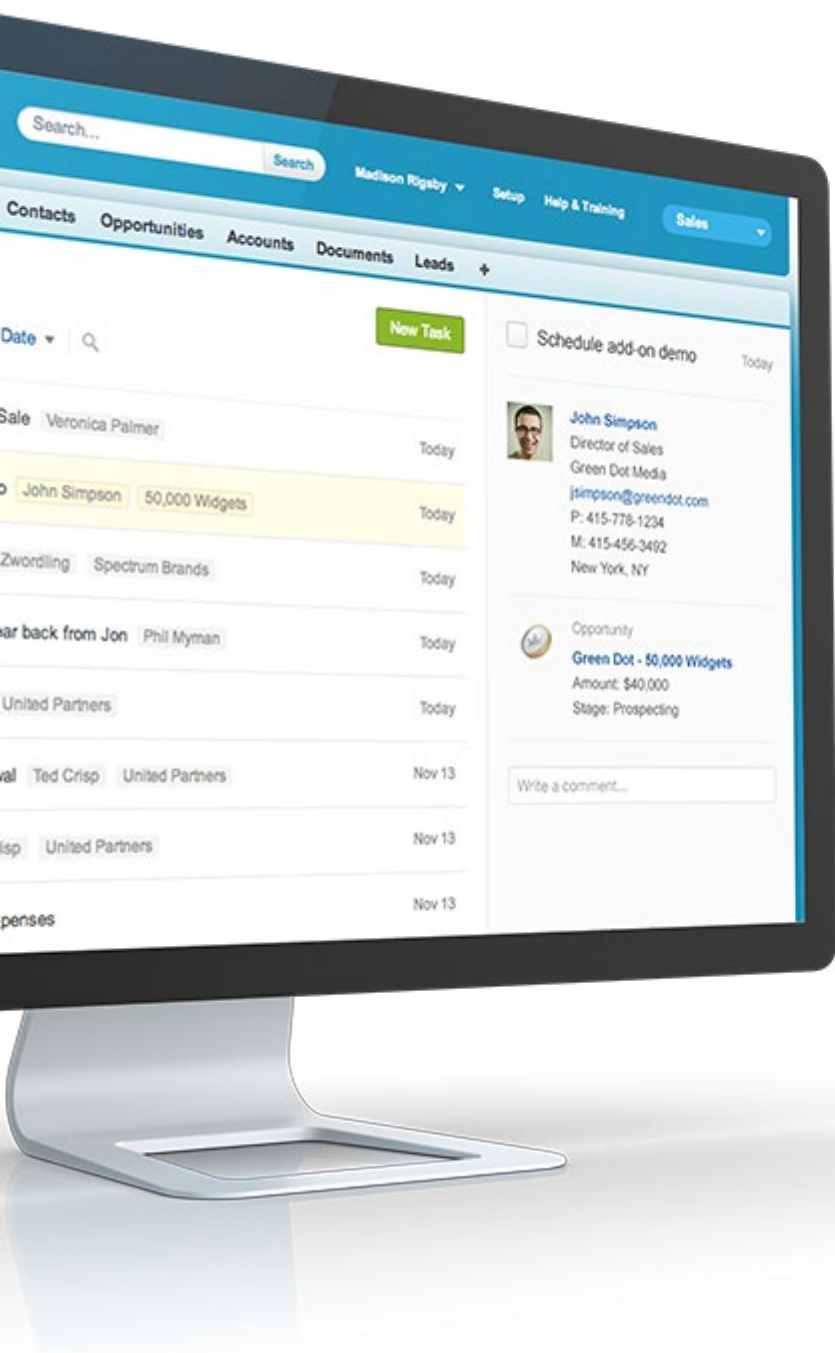
Responsive Design

You are no longer confined to your desktop computer for work. Today's workforce is on multiple devices, and always connected. The tools you use most should work the same across all of your devices and feel like a consistent experience on every screen. With Salesforce's responsive design, you now get the same experience no matter where you are or what device you are using.

Usability

Today's workforce has access to dozens of tools to solve their business problems and enhance their productivity. But more tools doesn't always equal higher productivity; often, they wind up fracturing our attention and ultimately making us less productive. However, that all changes with the consistent user experience of the new Sales Cloud.





In addition to its tremendous functionality, the new Sales Cloud also feels like one tool designed to fit all your needs. Sales Cloud works the way you expect it to and feels like one tool designed to meet all your sales needs, no matter what device you're using. With a refined desktop experience to match the existing responsive design of Salesforce1, you can move from your desktop to your phone without missing a beat.

Social collaboration

The lone-wolf salesperson is quickly becoming an endangered species. Sales organizations are slowly realizing that their productivity is far greater when they work together instead of in isolation. However, most CRM tools are not designed to accommodate this new era of social collaboration.

Salesforce was designed with social collaboration at its core, breaking down silos with the enterprise social networking capabilities of Chatter. Salespeople can crowdsource advice from their peers in seconds or get answers to even the most technical product questions from the product team, even if they are halfway around the world. Two heads are better than one. Imagine what the collective intelligence of your entire organization could accomplish.



Prospect Activities

Activity	Type	Score	Date
Video	Watched 75%+	5	08/20/13
Video	Play	10	12/11/12
Video	Play	10	08/20/13
Video	Play	10	08/29/13
Video	Play	10	11/16/13

Adam Blitzler

B2B Marketing Automation - Pardot

Conclusion

Reach the Next Level

Mobile is more than a passing fad. Companies in every industry are realizing the power of mobility and are scrambling to deliver the mobile functionality their users demand.

Unlike many of its competitors, Salesforce is mobile-first. Born cloud, we recognized the shift toward a mobile world early and continues to deliver mobile functionality that keeps users not just in step with current trends, but way out in front. With the Salesforce1 Mobile App, Salesforce users can run their entire business, right from their phones.

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.



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