CRM for SMALL and MEDIUM-SIZED BUSINESS
A RECIPE FOR SUCCESS
## CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>03</td>
<td>INTRODUCTION</td>
</tr>
<tr>
<td>04</td>
<td>BE COMPETITIVE WITH THE RIGHT TOOL</td>
</tr>
<tr>
<td>05</td>
<td>WHY SHOULD YOU BE CONSIDERING A CRM PLATFORM?</td>
</tr>
<tr>
<td>07</td>
<td>CRM SMALL BUSINESS SOLUTIONS</td>
</tr>
</tbody>
</table>
| 09   | CUSTOMER SPOTLIGHT  
    PensionBee  
    Snowleader  
    Abitare In  
    Compeon |
| 12   | GROWING YOUR BUSINESS |
| 14   | CONCLUSION |
INTRODUCTION

Small businesses face unique challenges in the evolving modern business landscape. Compared to those managing large businesses or corporations, small business owners may be working with fewer resources and less time, making it more challenging to gain an edge over the competition.

Whether you’re just launching your business, searching for manageable growth, or looking for ways to improve and strengthen your relationship with your customers, read and learn how a Customer Relationship Management (CRM) can easily help you achieve your goals and drive your business forward.

Biggest Constraints on Business Activities*

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<th>Constraint</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring the right talent</td>
<td>60%</td>
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<tr>
<td>Money/access to capital</td>
<td>59%</td>
</tr>
<tr>
<td>Insufficient time</td>
<td>58%</td>
</tr>
</tbody>
</table>

BE COMPETITIVE WITH THE RIGHT TOOL

With technology for business rapidly advancing, small businesses are in a better position to compete with large corporations than ever before. The size and resources of corporations were once an advantage, but they have now become an obstacle to growth and agility for some.

Armed with the right tools, a small business can rapidly access the most advanced modern technology to gain a considerable competitive advantage. They can even become a serious competitor in industries dominated by established enterprises.

While there are many tools that can help you, one of the most useful solutions for growing and scaling a business is a CRM platform. It collects and manages the information and interactions your business has with your customers, sales leads, suppliers, or other businesses.

Customer relationship management has many benefits, such as the ability to:

- Communicate smarter to a broad audience
- Understand and target your ideal customers better
- Boost your productivity
- Increase your profitability

In the latest edition of the SMB Trends Report 2019, we learned that sales and customer service are considered the most crucial roles for SMB** success, reflecting the importance of not just acquiring customers, but also keeping them happy in the long term. Streamlined, organised, and prepared, your data is therefore key to gaining an edge over the competition.

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53% of SMB leaders feel at a competitive disadvantage versus enterprises in meeting customer expectations*

**SMB: Small and medium-sized business.
WHY SHOULD YOU BE CONSIDERING A CRM PLATFORM?

**ORGANISATION**
One of the challenges of scaling a business is developing an agile organisational structure and managing the information for an ever-growing list of customers. Many traditional systems keep information siloed and inhibit security, accessibility, and accuracy, preventing a clear picture of your customer base and business performance.

Small businesses need a clear overview of customers, all in one secure location. A CRM system allows you to assign authorised users and access information about customers’ history, past orders, customer service issues, social media activity, and more, providing a comprehensive view of your pipeline.

An effective CRM can also help organise other aspects of your business. Though traditionally used as a sales and marketing tool, a CRM can integrate across departments and track information from supply chain, customer service, human resources, and marketing.

**EFFICIENCY**
The more time you and your employees spend on administrative tasks, the less you can focus on your passion for your business and your customers. When information is stored across systems, departments, and platforms, it leads to significant time lost in aggregating data and communicating effectively across teams. On top of that, your team could lose track of leads, service issues, or follow-ups, causing customers to lose trust in your business.

With a CRM, the customer’s website, email, phone number, social media data, and other information is pulled into the system to be stored alongside inputs from employees across departments, providing a comprehensive view of your business relationship with the customer. Employees are able to pull reports and work directly on the platform, and all authorised users have access to this information, reducing time lost with interdepartmental communication.

**ANALYSIS OF CUSTOMER DATA**
A CRM system also helps to identify and add new leads quickly and easily. Sales can maximise information to close more deals, and marketing can identify the leads that need more nurturing and prime them to become qualified leads. Sales can also run micro-campaigns to engage and nurture leads, improving response time and increasing personalisation.

Modern customers are savvy, so sales teams should know their leads and deliver personalised...
CRM gives you the tools to tailor your pitch to their specific needs and pain points. The system gathers information from conversations on social media, internal account discussions, account history, and business information. This data provides actionable intelligence that can be used to find the right prospects and make the right pitch at the right time.

COMMUNICATION
With more channels and touchpoints than ever before, businesses need to be able to communicate at scale to gain loyal customers. In addition to enhancing the business process, saving you time and bolstering success, a CRM can also improve communication in a variety of ways.

Email is still one of the most powerful marketing and sales tools, and CRM integrates into existing email accounts seamlessly to read, send, track, and share emails without disrupting workflow. Additional email features, such as templates, allow employees to create targeted, personalised email communication and follow-ups that can be shared between departments, maximising efficiency.

Social media is another vital aspect of communication in the modern business world. CRM integrates social media platforms like Twitter, Facebook, and LinkedIn to provide a detailed picture of customer interest, pain points, and business challenges to help you tailor the perfect pitch, keep customers happy, and improve retention.

COMPETITIVE EDGE
In the current business landscape, the competition is fierce and everyone is looking for an edge. Winning the customer comes down to the business that’s more organised, better informed, and inspires more trust. These are areas in which small businesses or startups struggle to compete with the size and resources of large corporations, but not when armed with a CRM.

This solution also helps you monitor your performance and discover what’s working – and what isn’t – so you can continue to improve your pitches and communicate effectively with prospects. You can also track your leads in your pipeline and see exactly where they are in the sales cycle to assess performance and forecast accurately.
There are multiple CRM platforms available on the market, each of them offering a different set of specifications or range of solutions. Harnessing the full potential of CRM depends on its available features and how they work for your business needs and future planning.

Here are some features to look for in choosing a CRM system:

**INTEGRATED PLATFORM**
One of the greatest assets of a CRM platform is its integration. By connecting products for marketing, sales, commerce, service, information technology, and more, you have a comprehensive view of your customer base and a team with a single, shared view of every customer.

With this capability, you can:
- Attract more buyers using personalised marketing tools
- Win more customers with in-depth information about their needs
- Deliver customised, streamlined shopping experiences
- Respond to customer concerns or questions across multiple communication channels
- Automate administrative tasks with custom apps
- Assign different access and capabilities to different users or business roles
- Collaborate for more effective and efficient teams
An effective CRM system will also have customised tools to address unique industry needs, such as policyholder information for insurance companies, volunteers and benefactors for non-profit organisations, and care teams and patients in healthcare systems.

**SCALABILITY**

Many small businesses avoid large, sophisticated CRM systems because they believe that they’re too expensive for a small business budget or unnecessary for a growing business at early stages of the process.

With the right CRM system, however, you can choose the plan and features that are most appropriate for your business right now. As your customer base and teams grow, you can seamlessly scale the system to meet your changing needs and stay ahead, without disrupting your day-to-day. On top of that, some CRM systems have scalable, customisable features that are equipped for the future with built-in AI and automatic upgrades, so you’ll never ‘outgrow’ your system’s capabilities.

**CUSTOMER SUPPORT**

No matter how impressive a CRM system is, its true value lies in the vendor’s customer support. From implementation to upgrades and customisation, you’ll want to know that you have the support you need to get your system online as quickly as possible and reduce potential downtime and loss of profits and productivity.

**CLOUD-BASED CRM**

Cloud-based CRM systems take the capabilities of CRM a step further by providing all users with access to information anywhere, at any time. Sales teams on the road can check data and update customer profiles, remote employees can stay updated on changes in real time, and event staff can add leads immediately after a trade show or convention for timely follow-up.

Cloud-based solutions also reduce the overall costs of such a system, which is a huge advantage for a small-business owner. These systems don’t need special installation or hardware, reducing the workload for IT teams and taking the downtime and hassle out of version control and updates. Cloud systems typically work on subscription models as well, so you can choose the features appropriate for your current business needs to save money and scale up with features as your business grows.

**WHAT THE RESEARCH SHOWS**

Introducing a CRM platform produces real results, especially to the bottom line. It has demonstrated ability to improve:

- ✔ Lead conversion by up to 30%
- ✔ Sales by up to 30%
- ✔ Sales productivity by up to 35%
- ✔ Customer satisfaction by up to 35%
- ✔ Faster decision-making by up to 38%
- ✔ Revenue by up to 25%, according to Salesforce Relationship Survey 2014-2016 among 10,500+ customers
PensionBee is revolutionising the pension industry with a modern, mobile-based experience that enables people to combine different pension pots into a single online plan and easily check their current pot size, projected retirement income, and set up contributions via an app. At least 30 million people in the UK have pensions, many of them sitting in fragmented - and even forgotten - plans. Locating and aggregating these pension pots is core to PensionBee’s success.

PensionBee has built a Trailblazing pension administration app on Sales Cloud to simplify this and many other core processes. Since launching the app, Honeycomb, PensionBee has been able to slash the time spent on administration by 75%.

By continuing to automate and digitalise repetitive tasks, PensionBee is tripling the number of customers that its service team can handle every year and it has already signed up 137,000 customers in just three years.

“Salesforce has helped us turn an archaic paper-based process into a real-time experience. And the more efficient we get, the more customers we can help. We’ve brought pensions kicking and screaming into the digital age”
— Jasper Martens, CMO, PensionBee.

Learn more: sfdc.co/PensionBee
For Snowleader, the customer is the big cheese!

Snowleader, The Reblochon company: a surprising tagline for an online outdoor retailer, but one that summarizes well their fun and quirky spirit.

Born ten years ago, in Haute-Savoie, where winter sports are considered part of the region specialities, the company has decided to maintain its “terroir” spirit by focusing on customer satisfaction. To achieve this mission, they needed the right technology.

“Our sales representatives have a 360° view and can interact more efficiently with our customers.”

– Thomas Rouault - CEO and Co-Funder

Snowleader can offer the widest catalogue of items online while proposing personalised advices and products relevant to each buyer. With Marketing Cloud’s flexibility and scalability, Snowleader is empowered to maintain 1-to-1 relationships with its worldwide customers. Thanks to its intelligence, they can identify the right audience to reach, A/B test and adjust their campaigns for the best result.

From the garage born start-up, Snowleader has grown into a company that now employs 80 people with an annual revenue of 30 million euro... without compromising its quality of service.

Learn more: sfdc.co/Snowleader
Abitare In is a Trailblazer for tailor-made housing.

Can a real estate company be innovative? Certainly it can if we are talking about Abitare In, a company listed on the Milan Stock Exchange in the AIM trading market. Abitare In has an innovative business model which operates exclusively in Milan with the creation and sale of tailor-made residential properties, already designed on paper, that can be modified according to the needs of the customer. The properties are mainly located in areas of urban regeneration and redevelopment.

For Abitare In, a digital native company, the adoption of a CRM was therefore a natural development of its IT infrastructure. The adoption of Sales Cloud and Service Cloud has helped the company to increase the conversion rate from leads to appointments by up to 95% and significantly speed up this part of the process. Also, the conversion rate from appointments to sales rose from 12:1 to 8:1, an increase of around 50%. By centralising and sharing customer data, the Salesforce platform has enabled the company to optimise the sales process.

“The simplicity of the process and its customisation and flexibility alongside the wide range of the Salesforce offer – also thanks to the App Exchange - allow those who are not IT experts to quickly gain concrete results”

– Omar Zampollo, Manager
Customer Relations

Learn more: sfdc.co/Abitare-In
COMPEON is a financial portal for SMEs and the largest platform for commercial finance operations in Germany. Companies receive free, customised quotes from up to 220 financial services providers that they can finalise online. First-class customer service acts as a cornerstone for success.

In the search for a suitable CRM system it was important to the fast-growing company to find a partner that had as clear a vision of the future as COMPEON.

“When we looked at all the solutions more closely it became clear that Salesforce could be more than a CRM solution for us. This is because the platform covers all the areas that I already knew would be crucial to us in the near future – like marketing and analytics,”

– Alex Bierhaus, CEO, COMPEON.

With Salesforce COMPEON is counting on a platform that enables entire business processes to be modelled with the help of technologies such as Heroku, Heroku Connect, Sales Cloud and Pardot, Community Cloud, plus Einstein Analytics. When it comes to privacy, GDPR and close collaboration with banks, Salesforce’s German data centre was likewise a decisive factor.

Salesforce’s integrated digital system has impressed COMPEON with its clear customer focus. The installation of the system has led to increases in labour productivity of 18 per cent and processing speed of 27 per cent.

Learn more: sfdc.co/compeon
Growing your business is always a challenge, especially if you don’t start with a plan in place to prepare for obstacles and setbacks.

Here are some best practices for business growth:

**FREE UP TIME**

Running a small business is a juggling act, so it can be difficult to move forward with a growth strategy when there’s barely time for the day-to-day. According to the Time to Transform survey**, business owners are spending the majority of their time on in-house tasks aimed at sustaining current business, rather than on generating growth. Having the right technology in place is a huge part of the equation, as it frees up your time to focus on a growth plan.

Having a CRM system makes processes more efficient and helps your team deliver on their tasks by automating some administrative tasks to improve overall productivity. It also keeps all your data in one place, eliminating disconnected systems like spreadsheets or physical paperwork that can slow your business down as you manage growth.

Once you have goals in place, the centralised reporting from a CRM system helps you understand different aspects of your business to see how your individual employees and teams are progressing toward those goals. Comprehensive dashboards track key metrics to monitor progress at a glance.

Growing businesses also requires team members to fill multiple roles, especially with certain projects. CRM enhances collaboration among team members to ensure open communication and support.

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**Source: Salesforce Time to Transform Survey
SCALE YOUR BUSINESS FOR GROWTH

One advantage small businesses have over large corporations is the high level of quality and service. As the business grows, however, it can be more difficult to maintain these standards, particularly in customer service.

A CRM system automates processes to accommodate the ebbs and flows of growth. If your basic administrative needs are automated, your team will be better equipped to adjust to rapid influxes of customers without sacrificing service. It also helps you keep all your customer information centralised, ensuring that your customer relationships don’t suffer as the customer base grows. With CRM reporting tools, you can track all aspects of your business to see which areas need improvement as you scale.

In-house IT support is often one of the last additions to a growing business. CRM systems can include staff training, maintenance, updates, and other features that minimise the downtime and allow business users to work with the system without the need for IT resources.

CONNECT TO CUSTOMERS

With instant access to information available on the internet, customers are savvier than ever. Trust and transparency are paramount to customers, which makes it easier for small businesses to gain the attention of valuable customers.

CRM systems improve this ‘customer first’ mentality in a number of ways. Your business should focus on your customers’ needs, wants, and desires – information you can find much more easily with a CRM system. You can not only learn about your customers and track their behaviours on social media and the web, but you can also link sales, marketing, products, and other features together to connect with your target audience.

Cloud-based CRM allows you to connect with your customers in real time from anywhere and address their needs quickly, which bolsters trust and assures them that they can count on your service long after purchase. You can also equip your entire team with customer order statuses, inventory counts, billing, and more, so your team can stay informed and serve customers more effectively.

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Major Challenges as an SMB Leader*

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<th>Medium-sized businesses (21–200 employees)</th>
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<td>1. Acquiring new customers</td>
<td>1. Acquiring new customers</td>
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<tr>
<td>2. Access to investment capital</td>
<td>2. Achieving work-life balance</td>
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<tr>
<td>3. Not enough time</td>
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CONCLUSION

In the modern business world, deals are no longer won by only the biggest and wealthiest companies. Agility and flexibility in business are the new currency, allowing small businesses to position themselves as worthy contenders against the established competitors.

With a CRM system that fits your needs, you can enhance these assets further to improve productivity, collaboration, and customisation to close deals and drive your business forward.
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: sfdc.co/SMB-Demo-EN

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

Learn more: sfdc.co/8AI5S
THANK YOU