

salesforce



Small Business Growth Kit

Tips and tools from the experts
to chart your path to growth

Introduction

The trail to growth can be quite twisty-turny. But there are three things you can think about to make the trek easier: your plan, your preparation, and the tools and solutions you'll need to bring your vision to life. This kit offers guidance in all three areas. So whether you're just starting to define your destination, or you're already on your way, you'll find some helpful insights here.



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Charting your path to growth

Growing your business is an uphill climb – especially without a clear understanding of where you want to go. So how do you map out your path?

As a market leader in sales tools and insights, Salesforce has experienced tremendous growth. But that growth is a product of more than what we do and sell. It comes from a plan defined by our V2MOM process. V2MOM stands for vision, values, methods, obstacles, and measures; and those words represent the five most important questions you can ask yourself as you strive to grow:



Vision

What do you want?



Values

What's important about it?



Methods

How do you get it?



Obstacles

What might stand in the way of getting it?



Metrics

How will you know when you have it?



Chart your path in 4 steps



Map your V2MOM.



Socialize it and get buy-in from your team.



Have each team create its own, and then each employee.



Revisit throughout the year to evaluate progress.

4

But there's more to the process than answering the questions. The transformative power of the process lies in sharing your answers with your team and asking your team to answer the questions, too, in the context of your answers. (For instance, if your vision is X, their vision should complement X.)

Then as they use their answers to perform the same process with their own teams (and so on), everyone in the company becomes aligned. That alignment is not only the key to growth, but the key to achieving just about anything.



**While a company
is growing fast,
there's nothing
more important
than constant
communication
and complete
alignment.** 

Marc Benioff

Chairman & CEO, [salesforce.com](https://www.salesforce.com)



Preparing for your journey

A successful sales expedition requires an effective pitch. But a good pitch is not simply about what you have to offer. It's a framework for give and take – an adaptive model driven by the changing needs of your buyers and the challenges you can help them meet. With that in mind, here are a few tips to get your pitch on track.

1. Adopt a customer-centric mindset

Eighty-five percent of business buyers expect sales reps to demonstrate a firm understanding of their business. Embrace a customer-first mindset by doing your research ahead of meeting with prospects. Knowing your prospect's company, industry, and competitors allows you to ask the right questions and tailor your message to their specific challenges.



of salespeople are not aligned with the needs of their buyers.

2. Talk to the right person

All the research and customer information in the world won't help you if you aren't in touch with the person who can approve the purchase. Leveraging sales intelligence tools or social media resources like LinkedIn can help you identify the best contacts to pursue.

3. Prepare for objections

As you're reviewing your pitch, be sure it can accommodate potential sales objections. The most common objections fall into four buckets:

Budget "We just don't have the budget."

Authority "I need to consult with X."

Need "I'm happy with my current solution."

Time "We're too busy right now."

Be prepared to discuss each objection, ideally framing it in terms of how that objection reveals a need for your product or service. *(ie: If your product can save the customer money, that's a great counter to the lack of budget objection.)*

4. Think on your feet

Once your pitch is polished, don't cling to the script. Talk less and listen more, sharing only what appeals most to the customer. Pitches with real potential feel less like a business presentation and more like a healthy conversation about business needs.

5. Always end with agreed next steps

Every sales pitch should end with a call to action that makes sense. Even if the customer isn't ready to complete the sale yet, be sure to keep the prospect on the journey and move forward with a follow-up meeting or a trial period.



Sales Pitch Worksheet

[Download Now](#)

A step by step guide to building your pitch.

Evaluate & optimize your tools for a digital-first world

Digitizing your business – transforming everything from how you store critical information to your business' culture itself – is a necessary step to growing an SMB in today's world. In fact, 71% of growing SMBs say digitization helped them survive the pandemic. Still, many small business owners have no structured system for tracking their sales prospects and customer information. A large number of those businesses rely instead on tools like email and spreadsheets, which are as antiquated as a rolodex for managing customer information.

35%

of small business owners say that not having enough time in the day keeps them up at night.

Salesforce can help you reach your next peak, with smart sales and service automation that gives you back the time you've been losing.

But fast-growing companies do things differently. While they owe their growth to everything from product innovation to improved internal processes, one technology that makes the biggest difference is CRM, which stands for customer relationship management.

More than two-thirds (67%) of growing SMBs use a CRM tool to help run their business. While the results are extraordinary, there's no magic in how it works. A CRM tool simply puts all of your critical customer information in one place and allows you to view contact info, follow up via email or social media, manage tasks, track performance, and more – all within a single application. In short, finding the right CRM can translate to closing more deals, boosting sales, and improving forecast accuracy.



Is it time for you to invest in CRM?

We've found six leading indicators that can help you answer that question, based on cases in which CRM has had the greatest impact.

1. There's no single source for information.

You store your customer and order information in more than one location, such as a spreadsheet or notes stuck to your computer. This 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.

You have no system that lets you see what your salespeople are doing or how your customers are connecting with employees. This makes it difficult to help your sales team succeed – and keep them accountable.



3. You create reports manually or not at all.

You're not using an automated resource to produce reports and/or analytics that map your sales team's monthly progress against its quota. Because doing this by hand is tedious and painful, you're likely not doing it as much as you should, if you're doing it at all. This deprives you of invaluable insights.

4. Sales notes aren't automatically shared.

You lack a shared, mobile-friendly system in which all salespeople keep their notes. This means reps on the road can't share notes immediately and may forget to do so when they get home. That slows the flow of information and increases the likelihood it will be lost – especially if an employee leaves the company.

5. Every customer is treated the same.

You're not able to distinguish which offers and messages are going to which targets. So the same information is going to customers and prospects in very different stages of the buying process, as well as in different industries or geographies. That means your messages are not resonating with specific needs.

6. You lack a plan to scale fast.

You're not confident your current processes will accommodate that growth you're striving to achieve. So you may not be able to keep productivity high while scaling up.



How CRM improves productivity

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 is truly 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.

Unfortunately, you can't buy more time. But you can use it more effectively and efficiently – with CRM. A CRM system optimizes your sales process, which means more time to generate new prospects. A CRM system arms your sales reps with the info they need when they need it, which means it takes less time to close sales. A CRM system allows you to sell smarter and better, which means you grow your business faster.



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Mavenlink

See how Jet It took flight

Jet It is disrupting the aviation industry with a fast and smart private travel solution. Founded in 2018, the small aviation company initially tried a few free CRM solutions to handle its business technology needs. The business quickly ran up against critical limitations around data sharing and customization. As a small, new company in the private aviation space, Jet It also needed an email marketing tool that could help it make a big impression.

Jet It's deals regularly take anywhere from a month to five years to close – typical for an industry with long deal cycles. As such, tight integration between CRM and email marketing systems – to stay continuously connected with qualified leads throughout the long process – was at the top of the company's technology wish list.

Salesforce offered Jet It exactly what it needed, through a combination of Sales Cloud CRM, Marketing Cloud for



Now every sales rep knows exactly what to do at every stage of the deal, and we can ensure a consistent customer experience across the company.

Glenn Gonzales
Founder & CEO, Jet It

email automation and data analytics, and the CRM Starter Pack for implementation. The implementation team got Jet It's Salesforce instance up and running, and also offered industry best practices to foster internal collaboration. "The Customer Success Group and Jump Start team were kind, patient, and detailed," said Glenn Gonzales, Jet It's Founder and CEO.

Jet It has realized a 300% increase in sales year over year since adopting Salesforce. Campaign teams are able to stay top of mind with prospects using Marketing Cloud Account Engagement, and sales teams can visualize and manage pipeline with just a few clicks. "Now every sales rep knows exactly what to do at every stage of the deal," Gonzales said.

The teams deliver multiple campaigns each week to stay connected to their very niche, targeted audiences. "Customers receive a link to a video tour of the aircraft that they can experience from the comfort of their own home, and then contact our sales executive to set up a meeting," Gonzales said. Not only does Marketing Cloud Account Engagement make it easy to execute on campaigns, but it also gives Jet It's team in-depth analytics and insights around campaign performance.



[Watch the Jet It story video to learn more.](#)

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Your partner in growth

Salesforce helps you find customers, win their business, and keep them happy so you can grow faster than ever. With Salesforce's out-of-the-box solutions, small businesses can easily implement cutting-edge technology and connect everything they use to run their businesses. On average, customers using Salesforce have realized 29% faster decision-making, a 27% increase in revenue, and a 30% jump in customer satisfaction.

To learn more about how Salesforce can help your business, visit: salesforce.com/smb

To see how easy it is to learn Salesforce, visit: trailhead.salesforce.com

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