



The Beginner's Guide to CRM

How to Win More Customers and Build an AI-Ready Foundation

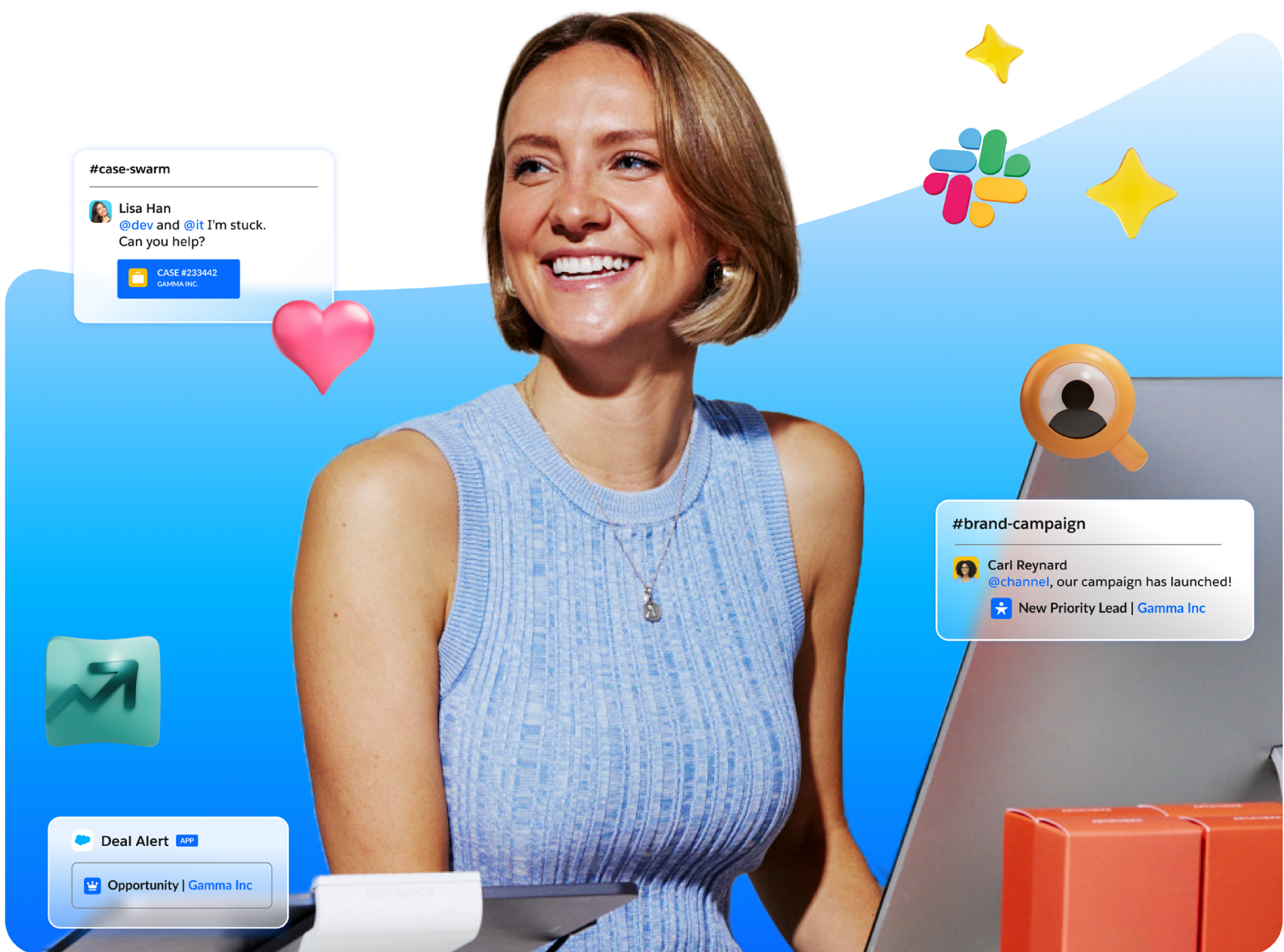


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Introduction: What is a CRM?

“CRM” stands for customer relationship management. At its core, it is technology for storing and managing all your company’s relationships and interactions with customers and prospects – all in one central location. But if you look beyond its initial purpose, you’ll see that it’s one of the most valuable pieces of business technology available to help you meet your business’s vision.

The right CRM goes beyond storing your customer data; it provides the business context that serves as the foundation for AI. By capturing and organizing high-quality customer data, the right CRM becomes that strong foundation for AI to help transform your small business operations to win more customers and create more personalized customer experiences.

The purpose of CRM is simple: better understand your relationships through data to win more deals. A CRM platform helps your company stay connected to customers, streamline processes, and improve revenue. You can store, track, and analyze customer and prospect information in one system of record, including contact and account information, sales opportunities, service cases, ecommerce orders, and marketing campaigns.

With all your information in one place, you have a complete picture of customers and prospects that can be shared and analyzed by teams across the company in real time. And with AI built into your CRM, you give AI the context needed to improve decision-making and enhance customer experiences. A CRM platform supercharged with AI gives your small business the ability to compete with any competitor, regardless of your size.

[**Learn More about CRM**](#)

Chapter 1: Signs You Really Need a CRM Solution

In the early stages of your business, it might be fine to just maintain a spreadsheet or jot down notes about customers and incoming orders. As your business grows, this sort of record-keeping not only becomes unmanageable, but it can actually cost you revenue, customers, and new opportunities.

Is it time to invest in a CRM? Below are some clues that can help you in your decision. If anything on this checklist resonates with you, the benefits of a CRM might be worth exploring to help you free up your time to focus on what's most important to your business.

- ☐ You feel like deals are falling through the cracks because you're managing customer information manually in spreadsheets and notebooks
- ☐ You're losing time on manual busywork, like data entry, and want to automate repetitive tasks
- ☐ You have little or no visibility into all your customer interactions and data to make fast, confident decisions
- ☐ You find reporting and forecasting tedious and painful due to data spread across different systems
- ☐ You have a mix of applications that are not connected on top of a single database or "system of record"
- ☐ You have teams that work closely together, like sales and service, but work off different data sources and don't have a shared view of the same customer
- ☐ You're losing customers because of service issues and rising customer service expectations
- ☐ Your business is growing quickly, but you're struggling to keep up with demand without continuously adding headcount
- ☐ You know AI can help your business but are unsure where to start

See how other small businesses of different industries are using a CRM to run their business:

[Read on](#)

Chapter 2: How CRM Can Help Increase Your Win Rate and Maximize Every Opportunity

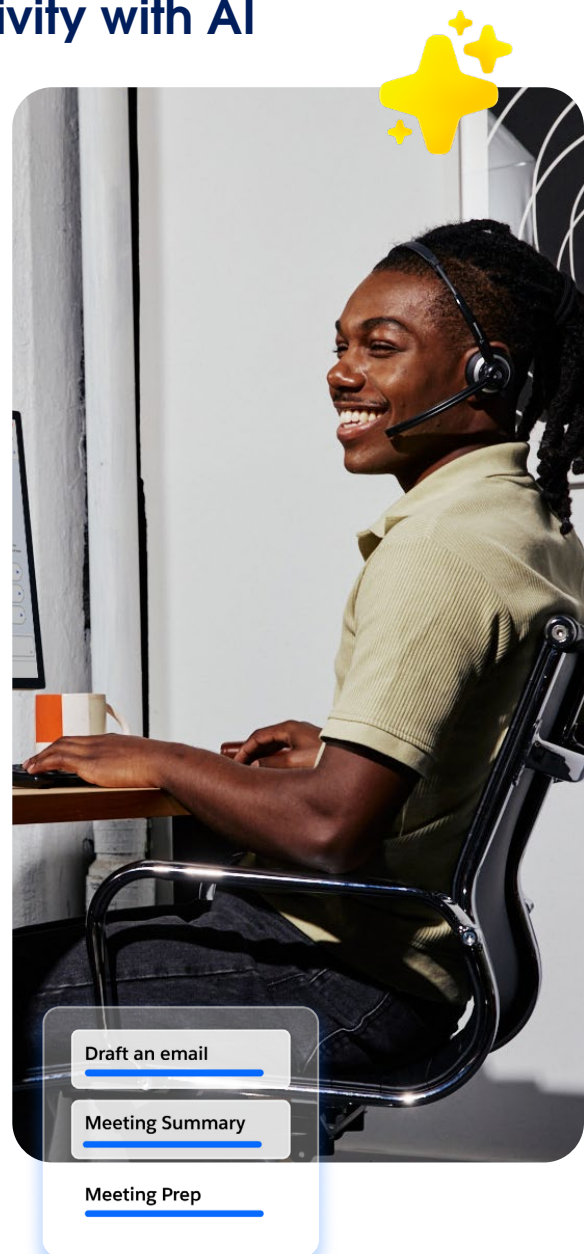
Your business wins more deals by getting a steady flow of new and qualified prospects, having more time connecting and selling, and quickly resolving customer issues. Here are just a few additional ways a CRM can help increase your win rate:

01. Increase employee productivity with AI

Adopting the right technology stops you from getting bogged down in busywork, so you can focus on work that advances your business's mission. With AI, you can increase productivity by:

-  **Automating** or handing off repetitive tasks, like hunting for contact information or logging sales activities, to save time.
-  **Summarizing** insights, like account history, to ensure you and your team are prepared for every meeting.
-  **Analyzing** CRM data, like customer interactions, to prioritize the most promising leads and reduce the guesswork of who to follow up with.

Whatever the task, with AI and automation built into your CRM across your whole business, you and your team can focus on what matters most – building customer relationships and experiences.



02. Connect with your ideal prospects

You've spent time and resources attracting and generating new leads, but do you know how to prioritize them? How do you know which opportunities are the most likely to close? Opportunities come in various sizes, and it's important to have a strategy for nurturing each one differently.

A CRM solution with AI embedded in its functionality gives you a complete view of leads and prospects, so you can create targeted engagements and quickly reach key decision-makers. A CRM solution can also improve your marketing efforts in a variety of ways. It can help you gain insights into a contact's customer journey, create campaigns and nurture leads with AI agents, personalize every interaction with AI that references CRM data, and proactively monitor social media campaigns and sentiment.

Your small business now has a foundation of data captured in a CRM. With AI capabilities referencing your CRM data, you can personalize marketing, sell more to existing customers, and uncover new opportunities faster and easier than ever.

03. Proactively manage customer relationships

To build a strong relationship founded on trust early on, you need to develop a deep understanding of your customer – starting from their first interaction with your business to anticipating their future needs.

A CRM can help your team:



Understand customer needs: Quickly learn what matters to your customers – their goals, challenges, and preferences – and automatically send tailored recommendations to them.



Engage with relevancy: By collecting data on your customer interactions and needs, your teams can better recommend appropriate promotions or educational content that aids their decision-making at the right time.



Scale your personalized experiences: As a lean and agile business, your customers love you for the personal experiences you provide. A CRM helps you continue to track the nuances of relationships as you scale. It can host email templates, set up task reminders, and enable a single complete view of the entire customer journey.

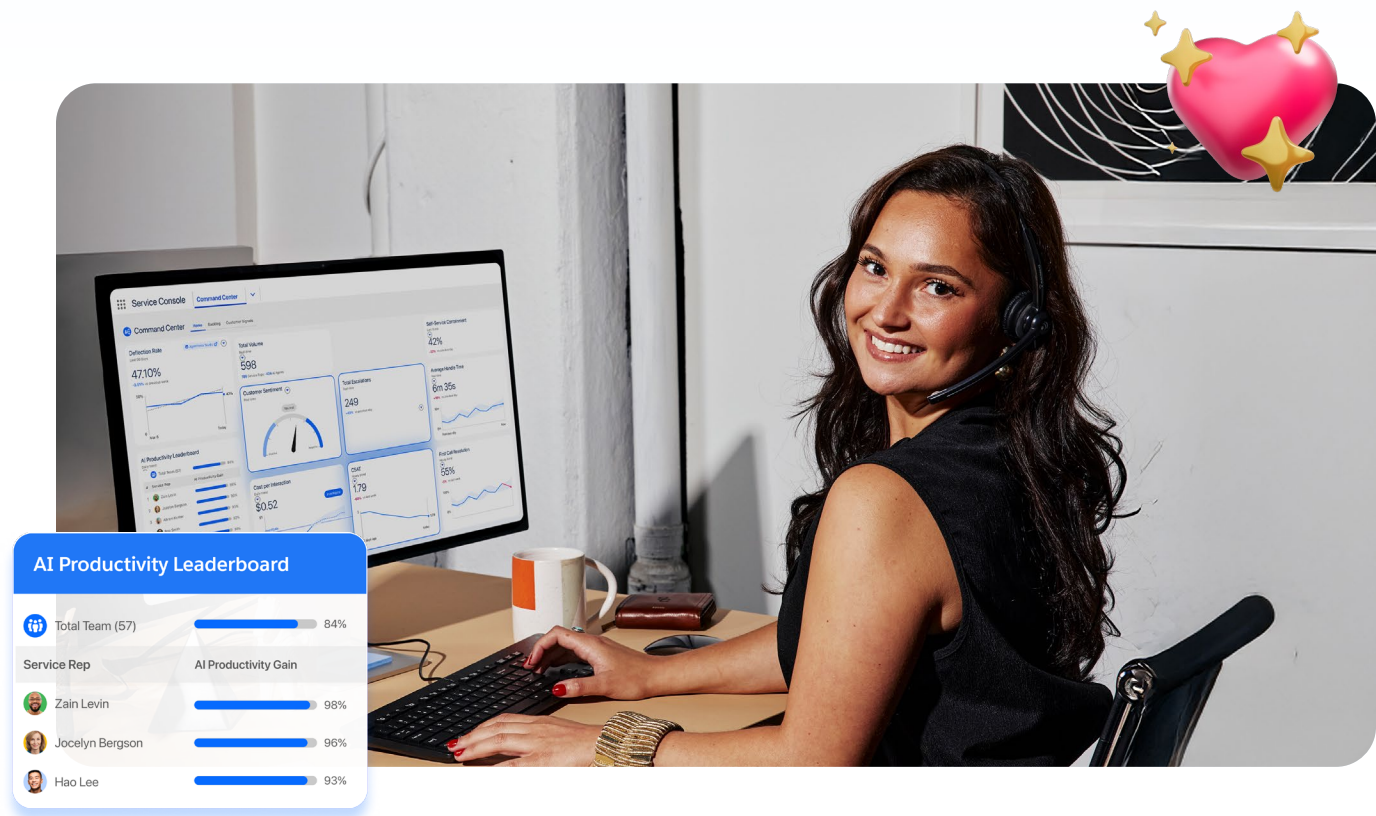
04. Reduce the cost of sales

New customers are a key ingredient of continued growth, but they're not easy to come by. The good news is you can offset the cost of winning new customers through sales to your existing customer base. With greater visibility into your deal cycles, upsell, cross-sell, and renewal opportunities in your current customer base, you'll see an increase in sales thanks to the trust you've already earned. AI also helps you prioritize opportunities, identify the best next step, and generate personalized communications.

05. Deliver better customer service

CRMs offer a variety of features to improve customer service and make it more personal, including contact tracking and call recording. By storing all your customer information in one place, AI agents can quickly see how a customer has interacted with your company in the past and address any issues that a customer may face – sometimes preemptively. Because a CRM hosts all your customer information, your teams can interact with each person with full knowledge of their customer history, speeding the process along and helping customers feel unique and valued.

AI agents can also help you quickly generate relevant, intelligent answers, provide 24/7 customer support to answer inquiries, and update manual records. This frees up time for your teams to focus on the more complex, high-value cases to drive faster resolutions and higher customer satisfaction.



06. Improve customer retention

Visibility across all your relationships can help you proactively address at-risk accounts or present satisfied customers with new opportunities at just the right moment. With transparency into customer histories, active campaigns, or open cases, you can provide more satisfying purchases and service experiences that keep customers coming back for more. And with AI, you can make informed decisions based on customer insights and data stored all in your CRM. Invest your time wisely now, and strong customer relationships will pay dividends for years to come.

Average Percentage Improvement Report by Salesforce Customers:



Source: 2025 Salesforce Success Metrics Growing Business Highlights. Data is aggregated from 31- 311 customers across 9 countries.



Want to learn more about the benefits of a CRM?

Explore more

Chapter 3: How to craft a CRM Strategy

Building a successful CRM platform goes beyond choosing the right technology. You also need the right CRM plan and strategy in place. Here are seven steps to build a plan that works for your business:

01. Define your vision

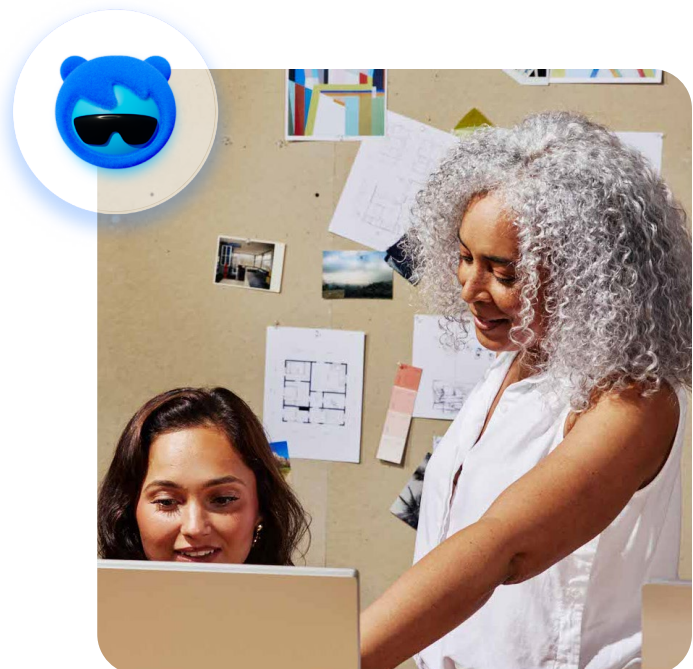
As a business leader, you know the value of having a clear, repeatable, actionable vision that everyone in your business can rally around. It can be many things – from becoming the market leader for sales in your region to redefining customer service within your industry. Make your vision both aspirational enough to have an impact and clear enough that your entire business can understand it.

02. Define your strategy

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, by offering different products, or by emphasizing your great after-sales service? Maybe you do this with the technology you choose, like integrating AI to help your team identify and prioritize your highest-value leads or by using predictive insights to win more sales faster. Whatever your approach, make sure you're identifying the right strategy and planning your method for reaching your goals.

03. Define your business objectives

Business objectives are where vision and strategy get translated into day-to-day work. A common mistake when setting up a new CRM platform is to copy over all the old business objectives and processes, complete with their inefficiencies. Instead, look at how CRM and AI help you work smarter and more efficiently. View your implementation as an opportunity to review and improve how you get things done.



04. Get your team on board

For a successful rollout, aligning your teams – from leadership to those who use the CRM – is vital to accomplish your overall vision, CRM strategy, and business objectives. And it starts with leadership. In fact, a lack of executive sponsorship is one of the top five factors contributing to CRM failure. Leadership support, when paired with a thoughtful adoption plan, ensures your end users feel prepared to take full advantage of the tool's benefits. Getting your team on board from the start helps turn your CRM strategy into a sustained competitive advantage.

05. Identify the metrics

“You can’t manage what you can’t measure” is a business saying that reminds us metrics should be visible to everyone. This means creating dashboards for everyone in your business, from your sales reps and managers to your leadership team. Success metrics can include revenue and growth metrics, such as how long it takes to close a deal, or adoption metrics, such as how often your team logs in and uses the CRM.

06. Prioritize your initiatives

You’re not going to get everything done at once, so decide what’s most important to deliver first. Which are the most impactful use cases for your business? Training is often the priority, so everyone is ready to use the new CRM platform from day one.

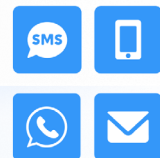
07. Define your roadmap

You shouldn’t look at building an effective CRM platform as a “big bang” event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you launch is equally important. Plan beyond launch day and consider what other features you need to deliver for your business.



Build a customer-focused technology roadmap

[Get the guide](#)



Chapter 4: Finding the Right CRM for Your Growing Business

Comparing CRM systems can be overwhelming. There are dozens of features to consider and plenty of platform options. When comparing different CRMs, here are several feature considerations to keep in mind.

Pricing

WHAT TO CONSIDER

Price comparison is not always straightforward. Some CRM providers offer affordable plans but limit the storage or number of contacts. Features such as AI, automation, or marketing tools may only be available as add-ons. The price is low, but the value may be too.

For small businesses, a la carte pricing can lower costs, as you only pay for the features you need. However, the costs can quickly pile up as you add features due to changing needs. Consider contact limits, available features, and growth potential when comparing different plans.

SALESFORCE CAPABILITY

Salesforce has a wide range of products for any phase of your business. Salesforce's suite of tools ranges from its [Free CRM](#) and lighter CRMs, like Starter and Pro Suite that all have [AI features](#) from the start, to higher [Editions](#) and add-ons. You can find the Editions that are right for your current business goals, and if you need more features, you can upgrade without losing your data with [additional products](#) and tools to support your needs.

Scalability

WHAT TO CONSIDER

Is the system built only for small businesses or does it grow with you? Investing in something that might work well for now but will need to be replaced in the future can create frustrating, avoidable issues. Your CRM should fit your needs now and scale with your business. Switching CRMs can be a hassle, so look for a platform designed for growth. For example, does it offer additional storage, user logins (seats), features, and reporting tools to help your business accomplish its vision?

SALESFORCE CAPABILITY

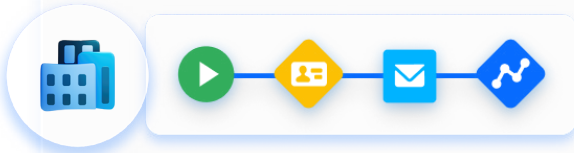
Start with one user and expand as much as you need. Remember, each edition has certain limits, but look for a CRM that lets you easily upgrade to editions with higher limits as your needs grow. For example, your business might start with [Starter Suite](#), if you don't need to create quotes in your CRM. However, as your business grows, you can upgrade to Pro Suite or the Editions to create custom quotes unique to your business.



Customization

WHAT TO CONSIDER

No two businesses are alike. Look for a CRM that is customizable so you can adjust it to meet your needs. For example, does it allow you to create customized sales reports or add custom data fields to your contact list?



SALESFORCE CAPABILITY

No matter what your business process or workflows are, one of Salesforce's strengths is its ability to customize your CRM to fit your business.

You can do that in a variety of ways. One of those ways is [Salesforce's industry solutions](#) - pre-built CRM solutions that are already customized and designed for specific sectors – like Financial Services, Healthcare, Manufacturing, and more! These custom CRMs are configured with industry best practices and workflows for a faster time to value.

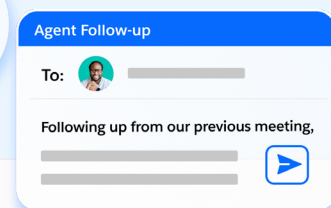
Artificial Intelligence (AI)

WHAT TO CONSIDER

AI agents have the potential to reshape every corner of your company, from sales to service to marketing and commerce. When agents are integrated right into your CRM, they have the knowledge of your business and how it runs. This gives AI the context needed to make informed decisions based on business insights, create content in natural language, and recommend the next best actions. CRMs with AI agent capabilities will help you save time on repetitive tasks, win more deals, and drive you towards your vision.

SALESFORCE CAPABILITY

[Salesforce Agentforce](#) is the agentic AI solution that improves every interaction by bringing together humans, applications, AI agents, and data – all built directly into the Salesforce CRM. Learn more about how [AI agents can help grow your business](#).



Automation

WHAT TO CONSIDER

Your CRM platform can help you and your team automate manual and repetitive tasks, which is a big win for small businesses with limited teams. Rather than using valuable time entering routine information and generating reports, your CRM can take care of these tasks (and more!) all on its own. Once you configure the settings, your CRM will handle the rest.

SALESFORCE CAPABILITY

Agentforce and Flow Builder help you automate anything in Salesforce – including integrations. You can learn more about creating end-to-end workflows with process automation with our [Agentforce](#) and [Automation](#) articles, videos, and [Trailhead](#) modules.

Security

WHAT TO CONSIDER

Security can be a concern, especially for businesses that work with sensitive data. Make sure your CRM provider can handle this kind of data. For example, you may need data encryption. The company you choose for your CRM must take your security needs seriously.

SALESFORCE CAPABILITY

Trust is our #1 value. You can trust our technology and infrastructure to perform, to be available, and to be secure. We offer information on performance, security, and compliance of our applications and infrastructure on the trust.salesforce.com website.

App Integration

WHAT TO CONSIDER

CRMs are powerful, but what makes them even more powerful is the ability to connect with your other business software and tools. Integration refers to connecting two pieces of software so they can share data. Most CRMs integrate with other platforms, software, apps, and tools, which allows them to share data and automate tasks across systems.

Think about what other tools you currently have and make sure they integrate with the CRM you're considering.

SALESFORCE CAPABILITY

Salesforce's [AppExchange](#) is a marketplace of free and paid apps that work directly with the Salesforce CRM platform or help you integrate separate software with Salesforce. Another method to integrate your existing tools is to use [MuleSoft](#), an integration and API platform, that can connect any system, application, data, and device to the Salesforce CRM platform.

Setup and Maintenance

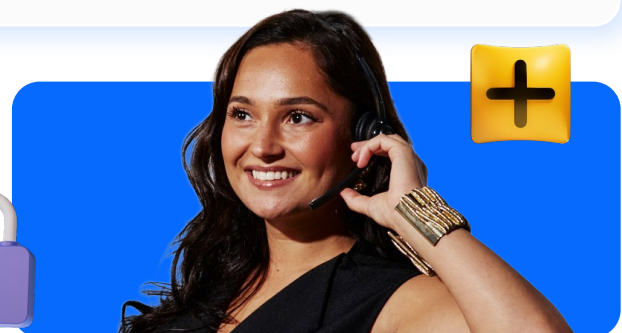
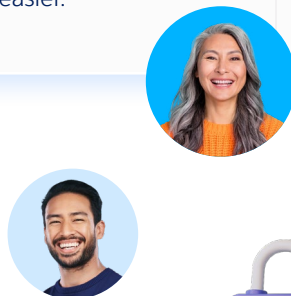
WHAT TO CONSIDER

You may not have a dedicated IT person – or you may have a full team of professionals. Find out what it takes to set up, use, update, and maintain the CRM platform you're researching. Look for a system that's easy to set up or a provider that offers assistance getting your system ready to use. Some CRM providers provide onboarding and training to make the process easier.

SALESFORCE CAPABILITY

Salesforce has [out-of-the-box solutions for small businesses](#) to get started fast, with built-in guidance to help you onboard quickly.

Salesforce also delivers regular technology innovations and updates three times a year, at no additional cost to your business and no hardware or software to maintain.



User Experience and Training

WHAT TO CONSIDER

Your CRM is only useful if it’s being used. Make sure the platform you choose is easy to use and well-designed. Look at onboarding and training options to ensure you and your team will have the support you need as you learn how to use the platform.

SALESFORCE CAPABILITY

Salesforce offers [Trailhead](#), which is a learning center with many different topics and lessons. Salesforce also provides dozens of [industry-recognized certifications](#) that not only benefit the holder but your company as well.

Customer Support

WHAT TO CONSIDER

No matter how great a system is, you will need help at some point, whether it’s a simple question or a complex issue.

Does the provider offer reliable, simple customer support options?

SALESFORCE CAPABILITY

Everyone has access to [Trailhead](#), the Help Portal, the Trailblazer Community, and the Success Center, as well as our expert technical support.

If your company wants a partner to walk you through every step of your Salesforce journey, more support is available through our [different success plans](#).

Mobile Access

WHAT TO CONSIDER

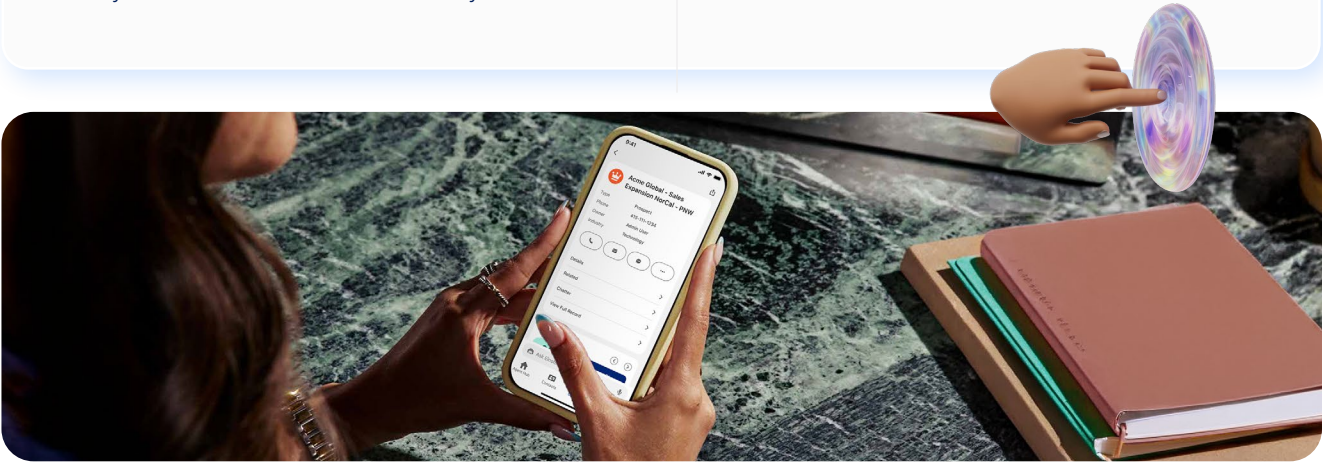
Mobile access to your CRM enables your team to log in and manage important business data from any device and any location. This makes it easier for your teams to use and allows you to run your business from outside the office.

Some CRMs offer limited mobile features or may not work as well on mobile devices, such as phones or tablets. Ensure the solution you select offers the level of mobile access your team needs to work efficiently.

SALESFORCE CAPABILITY

Salesforce is available as a [mobile app](#). With the Salesforce mobile app, get instant access to your business data, allowing you to manage customer relationships from an iPhone, iPad, or Android device.

The app also connects AI agents and CRM data to help you and your team stay productive while working remotely.



6 factors to consider when choosing the right CRM:

Now that you know what features to evaluate when choosing a CRM, consider the following factors to ensure you're choosing the right CRM for your business.

01 Start with the problem you're actually trying to solve:

You already know where deals aren't closing, where follow-ups fall through the cracks, and where your team is duct-taping spreadsheets together. A CRM should solve those specific problems that you're experiencing now, not the hypothetical ones. [Write your biggest challenges down](#). That list becomes your evaluation filter.

02 Know what "success" looks like in 90 days:

Don't just think about where you want to be in three years. Get as specific as possible about the next 90 days. A clearer view of your deals? No more missed contract renewals? Fewer "wait, who's handling that account?" moments? The CRM you choose should make a noticeable dent in the problems you're trying to solve quickly, or it's the wrong fit.

03 Pressure-test it against how your team actually works:

The best CRM is the one your team will actually use. Before committing, map out how your team actually works day-to-day and see where the tool fits (or fights). A solution that requires your team to change everything they do isn't a solution. It's a project.

04 Ask harder questions about growth:

Not just "can this grow with me?" That's too vague. Ask: Can it handle double my customers without a full re-implementation? Can I add AI features when I'm ready? Will my data still be mine if I switch? The answers will tell you a lot about whether a vendor is building for your ambition or just your budget.

05 Evaluate the ecosystem, not just the product:

A CRM isn't a standalone tool. It's the center of how your business runs. Look at your current tools and what integrates natively, what the partner ecosystem looks like, and what AI and automations that platform has that you'll want in 12 months. Buying a closed system today means paying for a migration tomorrow.

06 Pick the one that makes you faster:

Choose a CRM that doesn't just make you faster at closing deals, but faster at knowing what's happening in your business, faster at spotting problems before they escalate, faster at anticipating your customers' needs. The right CRM doesn't just support your vision – it gets you there faster.

Conclusion: Maximizing Your CRM ROI

The businesses that will be successful over the next decade aren't the ones with the biggest teams or the deepest pockets. They're the ones that move faster, know their customers better, and make smarter decisions every single day. They're the ones making a lasting impression on the entire customer journey – from the marketing campaign that drives the first impression to the ongoing experiences that turn a one-time buyer into a loyal customer.

Choosing the right CRM isn't just about upgrading your tools. It's about building the foundation for your business to help you become more customer-centric, make smarter decisions, and prepare your business for AI. With the right foundation in place, your CRM becomes the engine that drives your operations today and equips you with the insights to realize your long-term vision tomorrow.

If you're ready to start building a strong foundation, Salesforce is here to help you take your business wherever you've dreamed of going.



See for yourself how Salesforce can help your business with a free trial of

Salesforce Starter Suite



About Salesforce

Salesforce for Small Business gives your growing business all the tools you need in a single place to scale operations and drive customer success. Collaborate easily and spend less time switching between apps and more time acquiring customers and building loyalty. Scale operations without adding headcount and save time on repetitive tasks with trusted autonomous AI agents and automation built on your data right where you work. Whether you're just getting started or scaling up, Salesforce has a flexible and complete suite of products designed to meet you where you are now and where you'll grow in the future.

Questions? We'll put you on the right path.

Ask about Salesforce products, pricing, implementation, or anything else. Our knowledgeable reps are standing by, ready to help.



Contact us



1-800-664-9073



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