

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



Step 1

Map your V2MOM.

Step 2

Socialize it and get buy-in from your team.

Step 3

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

Step 4

Revisit throughout the year to evaluate progress.

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, yet studies show that eighty-two percent of salespeople are not aligned with the needs of those buyers. Embracing a customer-first mindset by doing your research ahead of meeting with prospects can go a long way. Knowing your prospect's company, industry, and competitors allows you to ask the right questions and tailor your message to their specific challenges.

82%

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.

Check out these
**5 Sales Pitches That Hook
Prospects Every Time**

[Explore now](#)



Evaluate & optimize your tools for an AI-first world

Leveraging the right tools and technology is key for growing a small business in today's world. From digitizing records, processes and communication to enabling automation and implementing AI agents, you can achieve levels of performance and scalability that were previously unattainable.

Still, many small business owners have no structured system for tracking their sales prospects and customer information, which means they're bogged down in labor-intensive, manual processes. The fact is, relying on tools like email and spreadsheets, which are as antiquated as a rolodex for managing customer information, can slow you down in today's fast-paced landscape.



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 powerful AI agents that give you back the time you've been losing.

To gain a competitive edge and truly optimize how you work, you'll want to join other fast-growing companies who do things differently. While they owe their growth to everything from product innovation to improved internal processes, their technology makes the biggest difference.

With an AI-enabled CRM (customer relationship management) solution, you can build a unified customer experience with centralized data, streamlined communication, and AI agents to help take tasks off your plate.

**Small businesses that
adopt AI technologies
can see a productivity
increase of up to**

40%





Is it time for you to invest in new technology?

We've found six leading indicators that can help you answer that question, based on cases in which AI-enabled 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 information, orders, and interactions – and they're missing the opportunity to share notes immediately with the rest of the team.

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 time-consuming, you may not be doing it enough and when you do, the information may be outdated by the time it's ready. This deprives you of invaluable insights.

4. Future sales are difficult to predict

Without the ability to easily reference historical data, market trends and customer behavior, establishing accurate sales forecasts can be challenging. Identifying patterns in the sales cycle, seasonality, and marketing impact can be time-consuming and take focus away from driving growth.

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, and they're not personalized by previous interactions you've had with them – something customers are likely to expect.

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 AI agents paired with CRM **foster growth**

One of the most powerful technologies at your disposal is AI, and when implemented within a CRM system, this integration allows you to create and deploy AI agents that can handle a wide range of tasks, accelerating productivity and enabling growth. Here's how:

- ◆ **Automate routine tasks**, freeing up your team to focus on more strategic and value-adding tasks
- ◆ **Access real-time insights** to help make better decisions
- ◆ **Enhance customer service** with 24/7 availability and personalized communication
- ◆ **Improve time management** with AI agents helping prioritize tasks, track time, and automate workflows
- ◆ **Establish accurate sales forecasts** leveraging historical data, market trends, and customer behavior

Growing businesses that can effectively integrate these models into their operations will gain a significant competitive advantage



See how Mike Morse Law Firm **boosts productivity** with Sales Cloud and Agentforce

The challenge: Manual processes & siloed data

As a team focused on providing personalized, high-quality representation to clients, Mike Morse Law Firm's reps were tasked with gathering crucial, comprehensive case data during intake calls. With **1,000 calls per day**, the manual process of collecting data was overwhelming and inefficient, and the process of training new employees was just as cumbersome.

The solution: Automation & AI insights with Salesforce

Mike Morse Law Firm turned to Salesforce consulting partner Mamoon, to build an intake and settlement management platform on Salesforce to manage the client journey from first introduction to closed case, creating a single source of truth. They also implemented Einstein AI and integrated Sales Cloud with the company's Zoom Contact Center to automate call logging and transcripts for intake attorneys.



We've transformed the way we handle intake by investing in Salesforce. Its API capabilities have allowed us to seamlessly integrate with other partners, making our entire system more efficient and effective.

Mike Morse

President, Owner, Mike Morse Law Firm

This eliminated manual note-taking, dramatically improved efficiency and enabled reps to focus on empathizing with clients.

To reduce time spent reviewing call recordings, team members can now use Einstein Conversation Insights to generate call summaries, leave feedback, and provide training in one screen. This reduces manual admin tasks and spreadsheet tracking, saving managers 15% of review time weekly while boosting productivity by 35%.

Next: AgentForce will transform engagement

By implementing Agentforce, Mike Morse Law Firm will take their client engagement and efficiency to the next level. AI agents will autonomously schedule meetings, craft personalized follow-up emails, and even gather initial intake information, giving the team more time to spend engaging with clients and providing expert legal support.

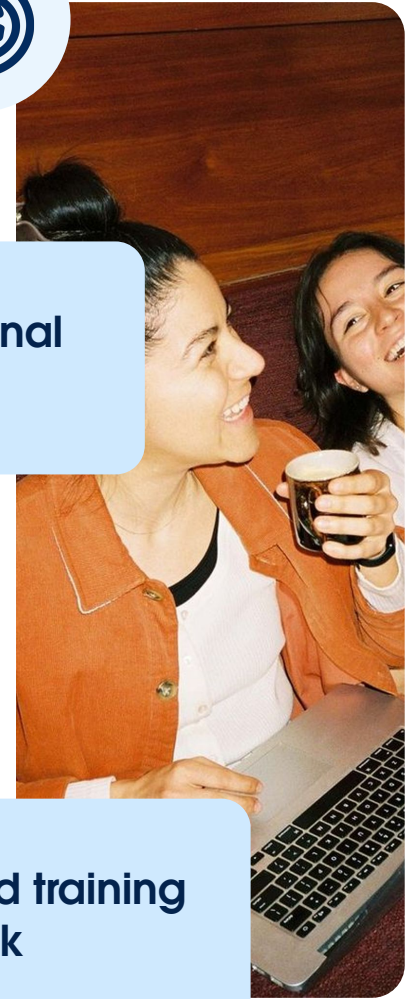
20% decrease in intake time



35% increase in operational efficiency

30% reduction in rep onboarding

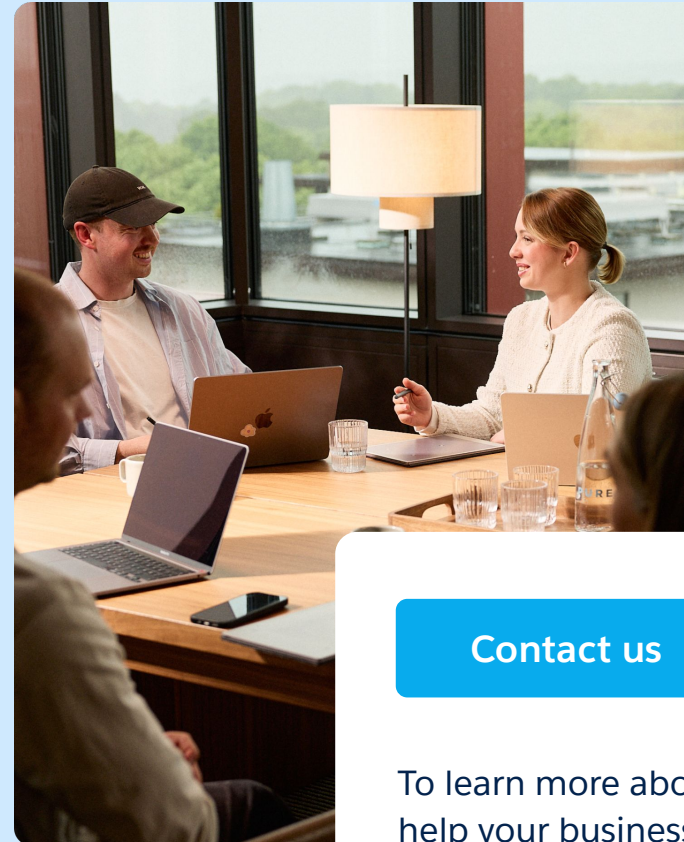
15% manager review and training time saved per week





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.



Contact us

To learn more about how Salesforce can help your business, visit:

salesforce.com/smb

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