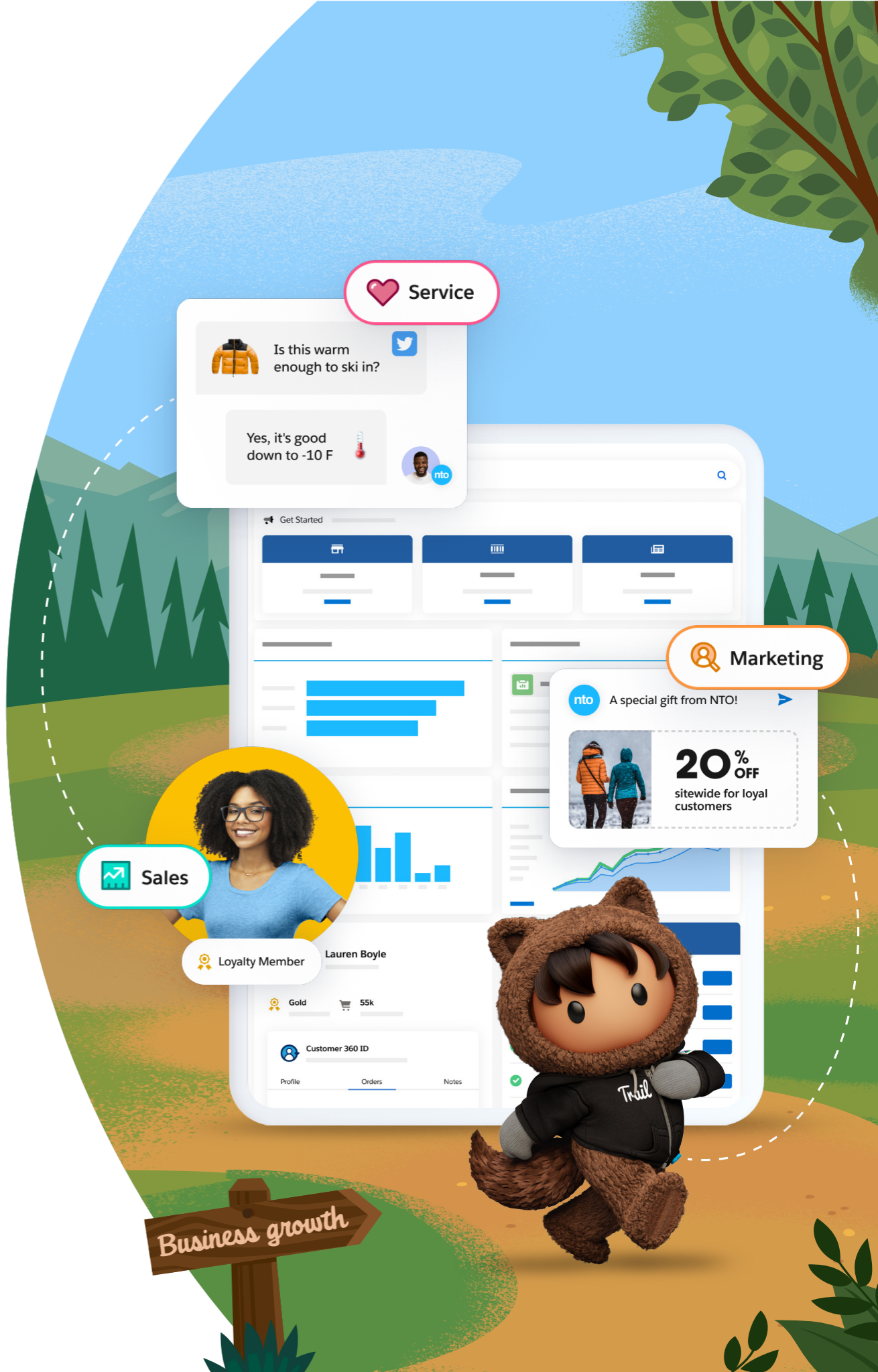




The Beginner's Guide to CRM

How to grow your business with customer relationship management technology



Service

Is this warm enough to ski in?

Yes, it's good down to -10 F

Marketing

A special gift from NTO!

20% OFF
sitewide for loyal customers

Sales

Loyalty Member
Lauren Boyle

Gold 55k

Customer 360 ID

Business growth

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Introduction: What is a CRM?

'CRM' stands for customer relationship management, which is a technology for storing and managing all your company's relationships and interactions with customers and prospects – all in one central location. But it's not just a fancy contact list. A CRM solution is one of the most valuable, game-changing pieces of business technology available because of how it helps you use your customer data.

The purpose of CRM is simple: Improve business relationships to grow your business. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability. You can store, track, and analyze customer and prospect information in one system of record, including contact and account

information, sales opportunities, service cases, e-commerce orders, and marketing campaigns. With data in one central location, organizations 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 included in your CRM, you can get deeper insights, improve decision-making, and enhance customer experiences, all while reducing costs.

For small businesses, CRM can help them successfully compete with larger, more established companies.

[LEARN MORE](#)



Signs You Really Need a CRM Solution

In the early stages of a 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 unwieldy, 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 short checklist sounds familiar, the benefits of a CRM might be worth exploring to help your business find, win, and keep customers more efficiently.

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

READ ON

Is it time to invest in a CRM?

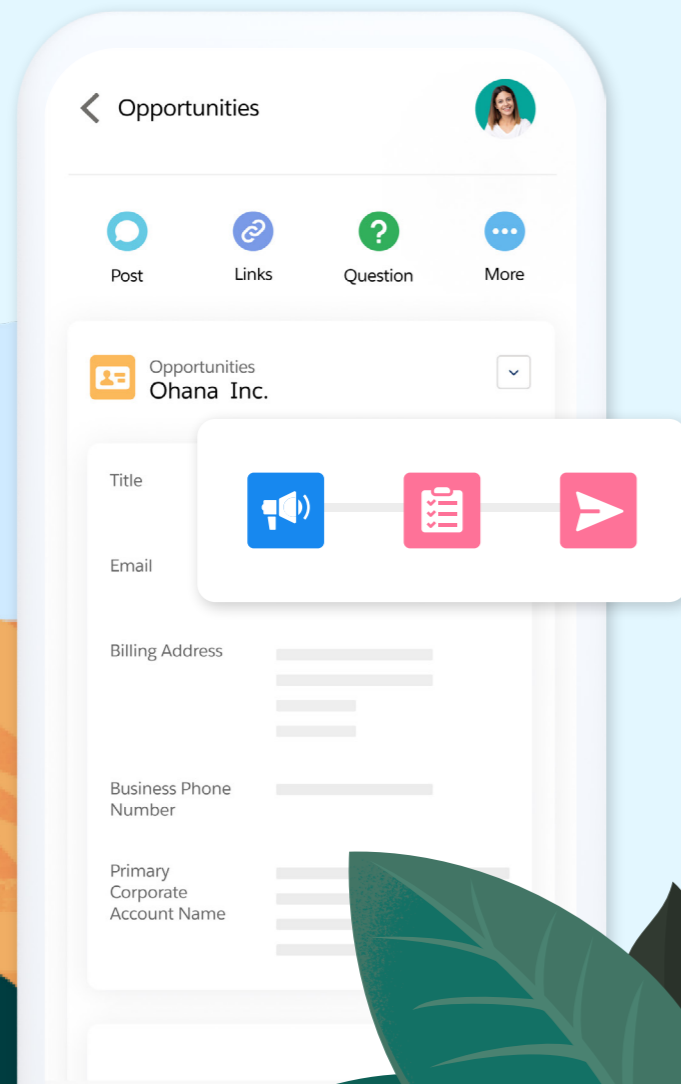
If you've checked off five or more of these statements, start considering a CRM.

- You have teams that work closely together, even when not actually together
 - Your sales and/or service teams are often on the road
 - You have little or no visibility into customer interactions and are unable to quickly find customer data to make decisions fast
 - You find reporting tedious and painful, and you want to automate repetitive tasks
 - You feel deals are falling through the cracks because you're managing customer information manually in spreadsheets and notebooks
 - You have a patchwork of apps that you call "CRM" but they are not really connected on top of a single database or "system of record"
 - Your business is growing quickly and you need to scale processes fast and efficiently
 - You can't forecast and plan for your business because you have data stored in different systems
 - You know that your business's customer service experience is lacking or you are losing customers because of service issues
 - You or your IT department is buried with maintenance requests
 - You are looking for deeper insights into your business
- 

02

How CRM Can Help Grow Your Business

Businesses grow faster by getting a steady flow of new and qualified prospects, having more time connecting and selling, and quickly resolving service cases.



Here are just a few ways a CRM can help a business grow at scale:

01

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 your teams know which opportunities are the hottest? Opportunities come in various sizes and it's important to have a strategy for nurturing them differently. An integrated CRM solution helps provide multiple departments with a complete view of leads and prospects so they can create targeted engagements and quickly reach key decision-makers.

A CRM solution can improve your marketing efforts in a variety of ways, including letting users manage and automate drip campaigns, providing insights into a contact's customer journey, and helping monitor social media campaigns and sentiment. Small businesses can also use data to inform upselling, cross-selling, and personalized marketing, such as recommending related products.

02 Proactively manage customer relationships.

Develop a deep understanding of a customer's business – beginning with a complete view of their history with your company – and you'll build a strong relationship founded on trust early on.

A CRM system can help an organization:

- **Understand customer needs:** Quickly learn what matters to your customers – their goals, challenges, and preferences – and have tailored recommendations automatically sent to them.
- **Engage with relevancy:** By collecting data on customer needs, marketing and service teams can equally recommend appropriate promotions, or educational content that aids their decision-making at the right time.
- **Scale your 1-to-1 relationships:** As a small (but mighty) business, your customers love you for the personal experiences you provide. A CRM helps you continue to track the nuances of relationships as you grow to hundreds of customers. It can host email templates, set up task reminders, and enable a single 360-degree view of the entire customer lifecycle.

03 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 new customer acquisition costs through sales to your existing customer base. Gain greater visibility into optimizing deal cycles, upsell, cross-sell, and renewal opportunities in your customer portfolio and you'll see an increase in repeatable sales thanks to the trust you've already earned. Adding AI can help sales teams prioritize opportunities, identify the best next-step actions, and generate personalized communications.



04 Increase employee productivity.

Adopting the right technology frees up your teams from process-heavy tasks and gives them more time to connect with customers. Manual operations like hunting for contact information or entering data can be automated or eliminated from customer-related processes. Automation across sales, service, and marketing will free your employees so they can spend more time talking to prospective customers and strengthening relationships with existing ones, moving the needle for your business. AI can give them performance and operational insights, and help them make data-driven decisions.

05 Deliver better customer service.

CRMs offer a variety of features to improve customer service and make it more personal, including first-contact resolution capabilities, contact tracking, and call recording. Plus, by storing all your customer information in one place, 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 reps can interact with each person with full knowledge of their customer history, speeding the process along and helping customers feel unique and valued. AI helps you quickly generate relevant answers, answer inquiries with chatbots and virtual assistants, and drive efficiency and cost savings.



06

Improve customer retention.

Visibility across all your relationships can help your teams proactively address at-risk accounts and 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 them coming back for more. AI can help you make informed decisions based on customer insights. Invest your time wisely now, and strong customer relationships will pay dividends for years to come.

Average Percentage Improvements Reported by Salesforce Customers:



Want to learn more about the benefits of a CRM?

EXPLORE MORE

Source: 2024 Salesforce Success Metrics Small Business Highlights. Data is aggregated from 347-898 customers across 10 countries.

03

How to Craft a CRM Strategy

Building a successful CRM system goes beyond choosing the right technology. You also need the right CRM plan and strategy in place from a business perspective.



Here are seven steps to build a winning plan:

01

Define your vision.

Successful business leaders know the value of having a clear, repeatable, action-oriented vision that your team 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 the entire organization 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, or by offering different products, or by emphasizing your great after-sales service? It's critical to plan 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 implementing a new CRM system is to replicate in it all the old business objectives and processes, complete with their inefficiencies. Instead, look at the ways that CRM and AI can help you work smarter and more efficiently. View your implementation as an opportunity to review and optimize how you get things done.

04 Get your team on board.

Executive sponsorship is vital for your overall vision, CRM strategy, and business objectives – for a successful rollout. A lack of executive sponsorship is one of the top five factors contributing to CRM failure.

05 Identify the metrics.

“You can’t manage what you can’t measure” is an adage attributed to many business thinkers. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organization, from sales reps and managers to the executive team.

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 at your business? Training is often the priority, so everyone is ready to use the new CRM system as soon as it is available.

07 Define your roadmap.

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



**Build a customer-focused
technology roadmap.**

[GET THE GUIDE](#)

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.

Scalability

What to Consider: Is the system built only for small businesses or can 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 move forward?

Salesforce Capability: Start with one user and expand as much as you need, but remember that some Editions have contact limits. For example, [small businesses](#) can use Marketing Cloud Account Engagement Growth for up to 10,000 contacts.

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 an intense process. Does the provider offer reliable, easy-to-use customer support options?

Salesforce Capability: All users have access to [Trailhead](#), the Help Portal, the Trailblazer Community, and the Success Center, as well as our expert technical support. For companies that want a partner to walk them through every step of their Salesforce journey, [more support is available](#).



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 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 on features due to evolving and expanding needs. Consider contact limits, available features, and growth potential when comparing different plans.

Salesforce Capability: Salesforce's suite of tools are available as Editions and Add-ons. Small businesses have [four Editions](#) to choose from, and as you grow, you can select [additional products](#) and tools to suit your needs.

Customization

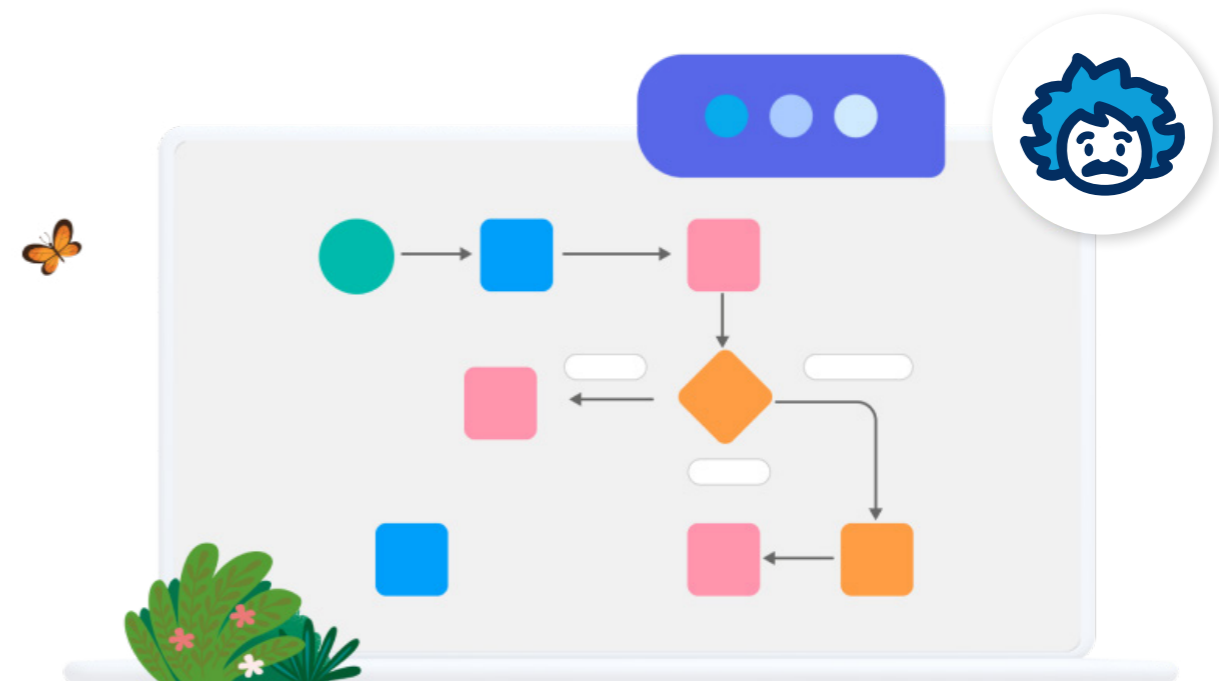
What to Consider: No two businesses are alike. Look for a CRM that is customizable so you can adjust it to meet your needs. For example, does it allow you to create customized sales reports or add custom fields to your contact database?

Salesforce Capability: You can customize your Salesforce experience in a variety of ways, including the CRM and the [mobile app](#).

Automation

What to Consider: CRM platforms can help users automate manual and repetitive tasks, which is a boon 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 others, all on its own. Once you configure the settings, your CRM will handle the rest.

Salesforce Capability: [Einstein Automate](#) is Salesforce's AI automation assistant and tool to automate everything – even integrations. You can learn more about creating end-to-end workflows with process automation with our [articles, videos, and Trailhead modules](#).



App Integration

What to Consider: CRMs are powerful, and for best results, you should integrate 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 platforms.

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



User Experience and Training

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

Salesforce Capability: Salesforce offers [Trailhead](#), which is a learning center with a breadth of different topics and lessons. Salesforce also provides dozens of [industry-recognized certifications](#) that not only benefits the holder but the company they work for as well.

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 up and running. Some CRM providers provide onboarding and training to make the process easier.

Salesforce Capability: We have [out-of-the-box solutions for small businesses](#) to get started fast, with in-app guidance to help users onboard quickly.

And as the cloud pioneer in CRM, there's no hardware or software to maintain – we deliver continual technology innovations three times a year at no additional cost to our customers.

Mobile Access

What to Consider: Mobile access to your CRM enables your team to log in and manage crucial business data from any device and any location. This improves adoption rates and allows you to run your business from outside the office.

Some CRM platforms 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](#) for all users.

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 trust with your CRM needs must take your security needs seriously.

Salesforce Capability: Trust is our #1 value. We offer information on performance, security, and compliance of our applications and infrastructure on the trust.salesforce.com website.

Artificial Intelligence (AI)

What to Consider: AI has the potential to reshape every corner of your company, from sales to service, from marketing to commerce. When integrated right into the flow of work, AI can help you make informed decisions based on business insights, create content in natural language, and recommend the next best actions. CRMs with AI capabilities will bring efficiency to your operations and future-proof your investment.

Salesforce Capability: [Salesforce Einstein](#) includes all the artificial intelligence capabilities you'll need, built directly into the Salesforce CRM.

We also provide an [AI strategy guide](#) to help you prepare for an AI future.



6 steps for choosing your CRM:

01

Outline your pain points.

Where does your business struggle? What systems aren't working for you? What goals do you have trouble meeting now, and what are your goals for the future? Write down the **biggest business challenges** and your expectations for a CRM.

02

Make a list of your current programs and systems.

What platforms do you already use for email, marketing, contact management, communications, customer service, social media, data management, and other processes? Make a list so you can evaluate how well your current programs work, and make sure the CRM you select will work for your business.

03

Set a budget.

How much can you invest in a CRM? Compare platforms based on the number of contacts you have and the features that will be most useful. Consider the value of a CRM platform: the features, customer service, and ease of use.

04

Compare features and resources.

Invest in what you need, with options to grow in the future. Choose the provider that offers onboarding and support so you can make the most of your new CRM.

05

Think about the future.

As you compare platforms, don't just think about your needs today. Will the platform continue to serve your business in the future?

06

Narrow down your list.

You may start with a list of a dozen different providers, but as you consider the features, functions, and values of each, this list will shrink. Once you have five or fewer options, request demos. Invite department heads or other potential users to try the platforms and give their feedback.



Conclusion: Maximizing Your CRM ROI

The [Connected Customer report](#) shows that 80% of customers say the experience a company provides is as important as its products and services. Customers are expecting highly personalized experiences; businesses need to connect their CRM to all parts of the customer lifecycle – from the first marketing campaign to the point of purchase, to the customer outreach (on their preferred channel) to your contact center – to gain that customer trust throughout their journey. When all teams have full visibility into the customer history and touchpoints, your teams are able to move faster and make better decisions to provide better outcomes for your customers – it's a win-win for all!

Selecting the right CRM for your small business is not just about technology adoption – it's a digital transformation for your organization to connect departmental silos, improve the ways your teams work together, and center your business around your customer.



About Salesforce

Salesforce is the customer company. From the day we opened our doors, focus on our customers drove our every decision. It fueled our growth and powered our customers' success. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service. With hundreds of thousands of customers and millions of users, Salesforce is a proven choice and the #1 CRM in the world.

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

The image displays a central Salesforce CRM interface for a customer named Lauren Boyle. The interface includes a profile card with her name and location (San Francisco, CA), a call log with details like 'Caller Number' and 'Call Type', and a 'Call Controls' section showing a 'Connected' call. Overlaid on the interface are several key features: a chat window where a customer asks 'Is this warm enough to ski in?' and the agent replies 'Yes, it's good down to -10 F'; an 'Einstein Recommendation' card suggesting a '20% OFF' reward for customer loyalty; and a 'Marketing' card offering a '20% OFF sitewide for loyal customers'. Navigation buttons for 'Sales', 'Service', and 'Marketing' are also visible, along with a 'CONTACT US' button on the left.



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