



Prepare your Business for a Digital Future

A guide to wowing your customers and driving efficient business growth



Welcome

Businesses of all sizes are feeling pressure – pressure from evolving customer expectations, pressure to optimise their operations, and pressure to reduce costs.

A CRM gives your teams the tools to meet those challenges:

- Accelerate your sales pipeline
- Reach a larger audience for less marketing spend
- Serve existing customers more efficiently

In this guide, we'll tell you all about Salesforce, and what makes us different. We'll explore the future of work and what it means for you. And you won't have to take our word for it – we'll share stories from some of our most successful customers, who have all seen the benefits of a Salesforce CRM.

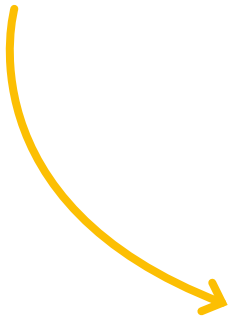




How to use this guide

We know that you don't have time to read this whole guide front to back. That's why we've created this **quick navigation system**.

Just tap on the section you want to visit, and you'll be taken straight there.



What do you need to know?

I want to know about **Salesforce and CRM** >

I want to make sure **my business is ready for the future** >

I want to know **how other businesses have used CRM** >

I want to know **what the next steps are** >

Salesforce and CRM > 5





You can **move between** sections using these buttons.

The screenshot shows a page from an e-book. At the top, there are four navigation buttons: "Salesforce & CRM", "Future ready", "Customer stories", and "Next step". The "Next step" button is circled in yellow, with a yellow arrow pointing to it from the text above. Below the buttons is the section header "What does Salesforce do?". The main text describes how Salesforce CRM brings customers and companies together. Below the text is an illustration of a man, a woman, and a Salesforce mascot (a dog in a hoodie) standing in a garden. A speech bubble from the man says "We bring companies and customers together." At the bottom of the page, there are two buttons: "< Back to contents" and "Why do businesses choose Salesforce? >". The "< Back to contents" button is circled in yellow, with a yellow arrow pointing to it from the text below. A page number "7" is in a small circle in the bottom right corner.

When you're done, you can tap the **Back to contents** or **Keep reading** buttons.

Of course, you can move between sections in sequence, just like any other e-book.

What do you need to know?

I want to know about **Salesforce and CRM** >



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Salesforce and CRM



What does Salesforce do?

In a digital age, Salesforce CRM brings customers and companies together, uniting teams within those businesses around each customer. In doing so, this leading CRM platform helps businesses get closer to and focus on their customers.

Over the past 20 years, Salesforce has been integral to the digital transformations of many of the world's leading businesses, large and small. Salesforce CRM products have been trusted to lead customers through innovation and change.

An illustration featuring three characters in a lush, green forest setting. On the left, a man in a light purple shirt and red tie holds a tablet. In the center, a brown bear mascot wearing a white t-shirt with a blue cloud logo stands on a tree stump. On the right, a woman in a teal top and black skirt holds a smartphone. The background includes green foliage, white flowers, and butterflies. A large light blue circle on the left contains the text 'We bring companies and customers together.'

We bring companies and customers together.

Why do businesses choose Salesforce?

Salesforce is committed to a deep and core set of values. They are:

Trust

Customer success

Innovation

Equality

Sustainability

We believe business is the single greatest platform for change. We're committed to having a positive impact on:

Public education

Equal pay

Racial equality and justice

Equal opportunity



If we can achieve our lofty goals and help our own customers to do the same, we will have a powerful, positive impact on our community.

We are also proud of the power of our systems. We have created the #1 CRM platform. There's a best-in-class app for every phase of your customer's journey, from lead to loyalty.

What is Salesforce CRM?

Salesforce CRM is not a single product. That's because in business, one size does not fit all.

Instead, it's a collection of powerful, cloud-hosted and data-driven solutions that our customers bring together on one platform, forming the all-important single source of truth.

[Salesforce Customer 360](#), our vision for digital success, enables all teams – including sales, service, marketing, IT, analytics and more – to share a real-time, single view of customer data. This means collaboration is not just easy, it's the only way.

Salesforce solutions introduce automation, meaning previously time-consuming and repetitive tasks become a thing of the past. Best of all, they are powered by AI. Important insights, customised for each user and always focussed on customer success, are identified and presented in a user-friendly format.



Key Salesforce CRM solutions cover:



Sales:

modernise how you sell in a digital-first, work-from-anywhere world



Analytics:

help your people see, understand and action customer and business data



Customer service:

exceptional, personalised experiences



Data integration:

create smarter, connected experiences by integrating data from other systems into the one platform



Marketing:

automated and personalised, across multiple channels and touchpoints



Enterprise platform:

develop engaging, smart apps for customers, employees and partners

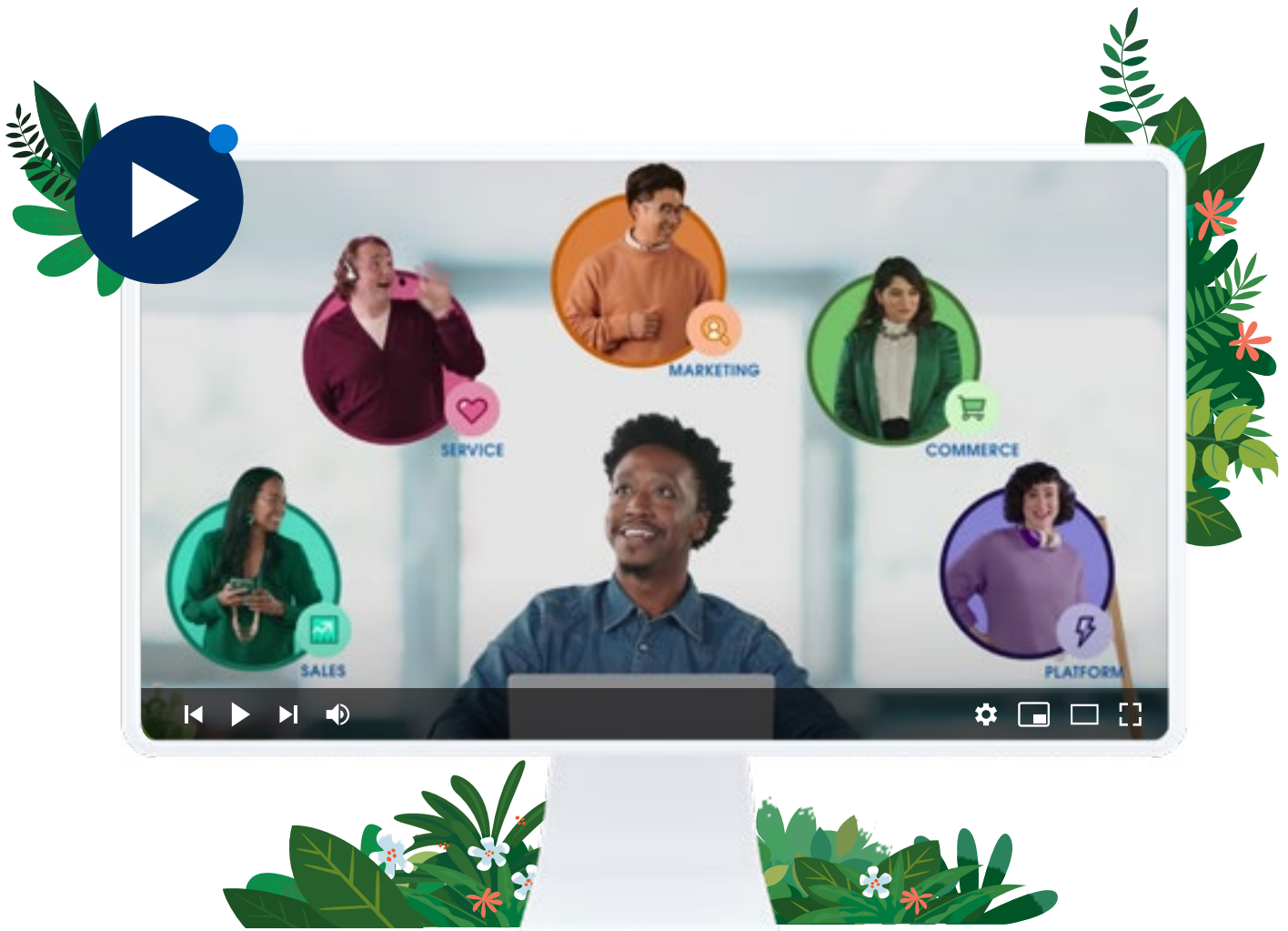


Commerce:

develop meaningful customer relationships



It all adds up to the fact that Salesforce Customer 360 solutions provide businesses with the tools to connect with their customers and provide them with seamless, personalised, trusted experiences.



[Watch a demo of Customer 360](#)



1
Trustworthy reporting



2
Dynamic dashboards



6
Simplified collaboration



The benefits of CRM



3
Improved automation



5
AI-powered efficiency



4
Proactive service



Signs you need a cloud-based CRM solution

We've pulled together 7 signs you need a CRM. If any of these look familiar, you might benefit from a cloud-based CRM

1. No single source of information

Having information in different places or multiple systems wastes time for staff, can lead to lost sales, and impacts on customer experience, all because no one has a complete view of the customer.

2. Little to no visibility

As your business grows, do you still know exactly how your team is performing? Have you got visibility into every customer interaction – and the outcomes – or do you feel increasingly in the dark, as you become more hands-off?

3. Reporting = tedious and painful

Pulling reports and getting business data – more painful than it's worth? You should be able to easily see sales forecasts and business data that's up-to-the minute; imagine that!

4. You're losing data

If you don't have a single source of information, you're probably losing information. What happens when someone leaves your business – where does that important data go? >>

5. It's hard to stay connected

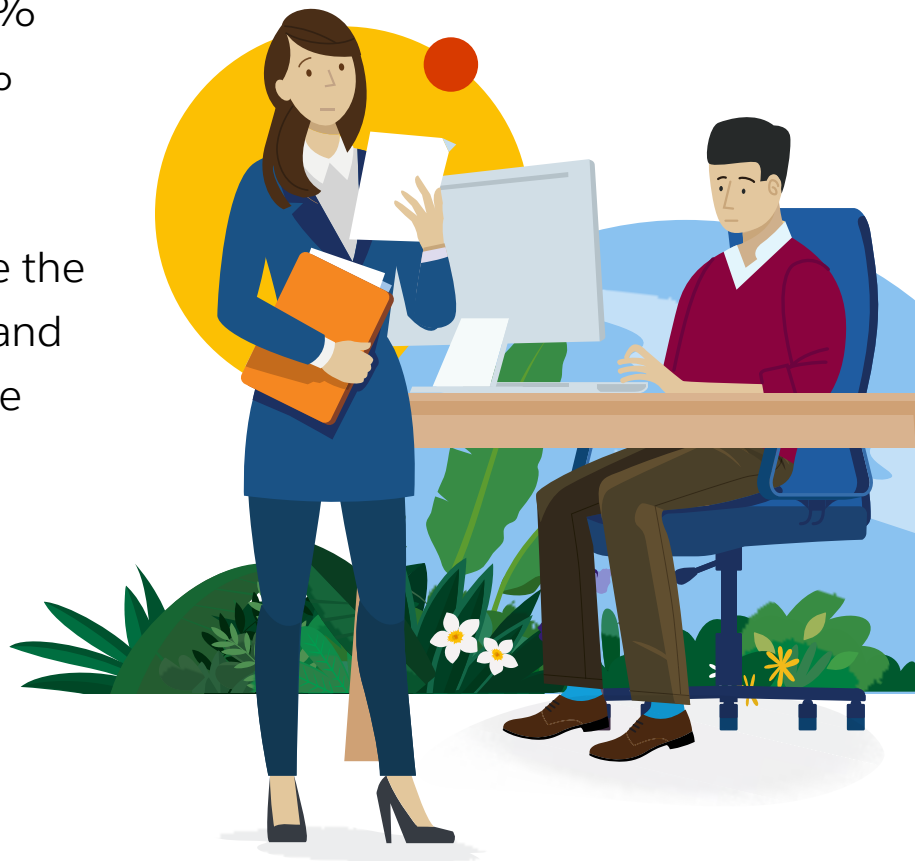
Salespeople are always on the road, and more and more colleagues are working from home. What happens to the data they're creating? Without a fully mobile-optimised CRM, who knows what information you're missing.

6. Every customer is treated the same

You probably generate 80% of business from only 20% of your customers, but do you talk to those 20% in a different way? Do you have the ability to target your sales and marketing – or is it 'one size fits all'?

7. You don't have a plan to scale quickly

How will your existing systems and processes scale as your business grows – without sacrificing productivity? Without an adaptable CRM, you'll spend more and more time on micromanagement, and less time on generating even more business.



The Future of Work



The challenge currently facing enterprises

Across every industry, organisations are facing massive disruption in a business environment that is changing at pace.

Many are still struggling to meet their digital customers in the right place and at the right time. Those digital customers, at the same time, are constantly being reminded of trust issues that exist around data security and privacy. That's a serious problem, but it's also an opportunity.



47%

of customers believe most companies **don't use personal information to their customers' benefit.**

86%

of customers want more **transparency over how their personal information is used.**

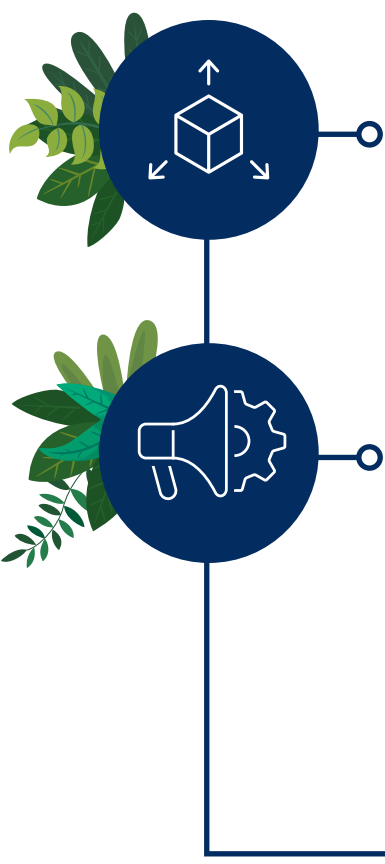
Source: State of the Connected Customer

How can Salesforce help?

For many large organisations, legacy customer systems present a challenge. Their systems and data are disconnected and don't offer a single source of customer truth.

At the same time, there has been a permanent shift towards hybrid working, further adding to the challenge. Those without distributed cloud tools are having a particularly difficult time.

Salesforce can help to bridge the digital divide, quickly and efficiently.



Scale as your business grows

Build deeper connections with your customers, manage and monitor your business in real time, and pivot fast as the world continues to evolve.

Marketing automation

Automation removes much of the time-consuming and repetitive work, and ensures customers receive relevant, personalised messaging at the right time and on the right channel. >>



Understand your customers

As expectations change, Salesforce solutions help you keep pace and deliver products and services that customers want.



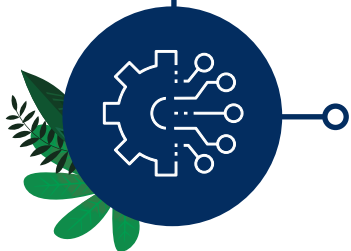
Team integration

Sourcing their customer data from a single source of truth, all departments and functions work collaboratively. From the customer point of view, it provides a cohesive, consistent experience. They sense how well the business knows them, increasing loyalty and trust.



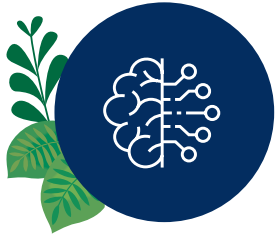
Business reporting

Decisions are informed by real-time data and market intelligence, rather than historical numbers on spreadsheets.



Automation and AI

From lead, prospect and pipeline management to proactive customer service solutions and client management insights, Salesforce tools save administrative and management time, liberating staff to do higher-value work whilst eliminating human error.



How AI will help you become more efficient

CRM automation features will empower you to work more efficiently

Just about every department can benefit from automation:



Sales

The AI built into your CRM can automatically score and prioritise leads, accelerating your sales process.



Service

Self-service and automated messaging can answer common customer queries, leaving your agents to concentrate on the tougher questions.



Marketing

Automate your email communications and use AI to determine when a customer should be moved to a different campaign.





Six ways to prepare for the future of work

The way we work together is evolving, and the most successful companies will be those that keep ahead of the curve. Here are six ways you can prepare for the future of work:

1. Create flexible and supportive working arrangements

Businesses that are flexible about work options appear more attractive to job-seekers in the future, as well as incurring lower costs with fewer overheads and salary demands.

2. Focus on results

Businesses that measure employee performance through good results and customer feedback, rather than the hours they put in, are well-placed for the future of work.

3. Adapt to business models to meet consumer expectations

Investing in digital transformation to meet ever-changing customer expectations could include automating the supply chain; using the cloud; crafting a digital strategy; and bringing in experts and consultants to offer guidance. >>



4. Capacity planning

Successful businesses can redeploy employees to help departments under pressure. Customer-facing retail staff, for example, could help in virtual service centres.

5. Transparency in customer communications

It's more important than ever to maintain customer trust. Out-of-stock products, delayed deliveries, and poor customer service can cause major damage to a business' reputation.

Use all your available communication channels to let your customers know if business isn't running as usual.

6. Adopt cloud services

With improved security and flexibility, cloud-based storage and applications give businesses a long-term competitive advantage in a changing world.





Why is a cloud solution better?

Most people today are familiar with using services on the cloud – servers that are accessed online, via the internet.

But cloud-based software is more than just a buzzword – it has real-world benefits:

Succeed from anywhere

In the past, you needed a connection to a local server to share software and documents on specific computers. Cloud computing allows us complete freedom of access. We can use and share software, apps and information from anywhere and on any device, at any time.

No more updates!

On the cloud, software updates occur in the background, continuously and automatically. Every time you use cloud-hosted software, you're using the latest and greatest version. It's that simple.

Consistency for the customer

Customers expect brands to be available to them in every channel and at any time. This includes in-person, email, social, SMS, phone, chat and more. Cloud-based CRM solutions mean that data is updated and shared in real time.



Evaluating Cloud-Based CRM Systems

Once you've decided that you want a cloud-based CRM solution for your business, you'll need to decide which of the many available platforms is right for you. The question is, what do you look for when shopping for a cloud-based CRM system?

There are a number of things to consider. Here are a few:



Security

Not all cloud security systems are created equal. Ensure the platform you choose is certified to international standards.



User experience

Good user experience is essential to having a business tool your employees will use to the fullest. Make sure it has the social and mobile capabilities they expect.



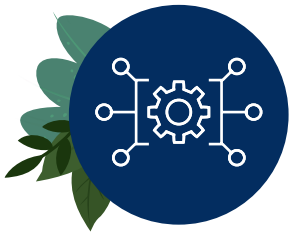
Budget

Be careful of the “freemium” options available – they may not have the features and integration options you'll need as you grow. >>



ROI

How quickly will your chosen CRM system pay for itself? Upfront costs may seem large, but if the benefits can be realised quickly, it will be worth it.



Integration

Check that your chosen solution can integrate with all your existing systems, as well as other major providers that you might want to use in the future.



Adoption

Choose a platform that's intuitive and a vendor that can help you get everyone on board.



Scalability

Choose a CRM solution that you know has the power to exceed your current needs, and that can scale with you as you grow.

Customer Success Stories





**Balesh
Lakshminarayanan**
Co-founder

ABSYZ provides 'wow' customer and employee experiences with Salesforce

Salesforce solutions used:



- Sales Cloud
- Experience Cloud

Systems integrator ABSYZ wants to deliver customer experiences that aren't just good, but 'wow'. Earlier, this vision was hindered by patchwork tools and manual methods of capturing and tracking data. ABSYZ needed to upgrade their tech stack - and being a Platinum Salesforce implementation partner, they chose Salesforce.

Today, all of ABSYZ's functions, from sales and operations, to HR and finance, are automated and streamlined on Salesforce. With marketing automation, campaigns are created and launched faster. With leads and sales data consolidated in one place, sales teams can manage opportunities better. A single source of customer truth makes the project management team more efficient. >>

And with all invoices and contracts flowing through Salesforce, the finance team can stay on top of contract renewals and payments.

“All our teams have full visibility into customer data,” says Lakshminarayanan. “With everyone on the same page, we now deliver a seamless and transparent customer experience.”

Results

↑ **35%**

increase in
**lead-to-
conversion
ratio**

↑ **25%**

improvement
in
**sales team
productivity**

↓ **12**

**percentage
point**
reduction in
**accounts
receivables**

↓ **90%**

reduction in
**annual paper
costs with
digitised
employee
onboarding**



[Read the full story](#)



Rajiv Sethi
Managing Director and
Founder

Gemini Power Hydraulics builds repeatable processes and strengthens customer connect with Salesforce

Salesforce solutions used:



- Sales Cloud
- Service Cloud
- Pardot

For Gemini Power Hydraulics, operating in a capital-intensive industry means that process efficiency is key.

Earlier, sales efficiency was hampered by limited, home-grown CRMs. Teams couldn't access the latest product information; nor could they record customer data on-the-go. Without this information at hand, their ability to make informed decisions

during customer interactions was limited.

With Salesforce, they now have all product details and customer data available at their fingertips in real time. They can see how likely a lead is to convert, or how urgent a customer need is. They can also use the data to accurately map customers to the solutions they may need. All this intelligence helps the sales team get the best out >>

of every customer interaction, and sell smarter.

“We’ve said goodbye to subjectivity in our sales cycle,” explains the company’s Managing Director and Founder, Rajiv Sethi. “Salesforce has made sales processes and decision-making entirely data-based.”

Service processes have also been streamlined and automated - from assigning cases, to raising tickets, to tracking the complete schedule of repairs performed on customer assets. This has strengthened service speed and efficiency.

Results

↑ **60%**

increase in
**sales team
productivity**

↓ **25%**

reduction in
sales cycle

↑ **25%**

boost in
**service team
productivity**



[Read the full story](#)

So why should you choose Salesforce as your CRM partner?

Salesforce has earned the position of the world's #1 CRM through a deep focus on customer success. In doing so, we provide a customer relationship management platform that brings departments and teams together around a single source of customer data truth.

The broad choice of cloud-hosted CRM tools on the Salesforce platform make a customised CRM implementation strategy a powerful reality at any scale. Other solutions within and around the Salesforce environment, including in the AppExchange, further extend the opportunity to boost customer experience and business results.

With a Salesforce CRM solution, customers notice the difference. It's nothing more than they expect.

[Learn more about Salesforce and what it can do for your business](#)





We bring customers and companies together



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