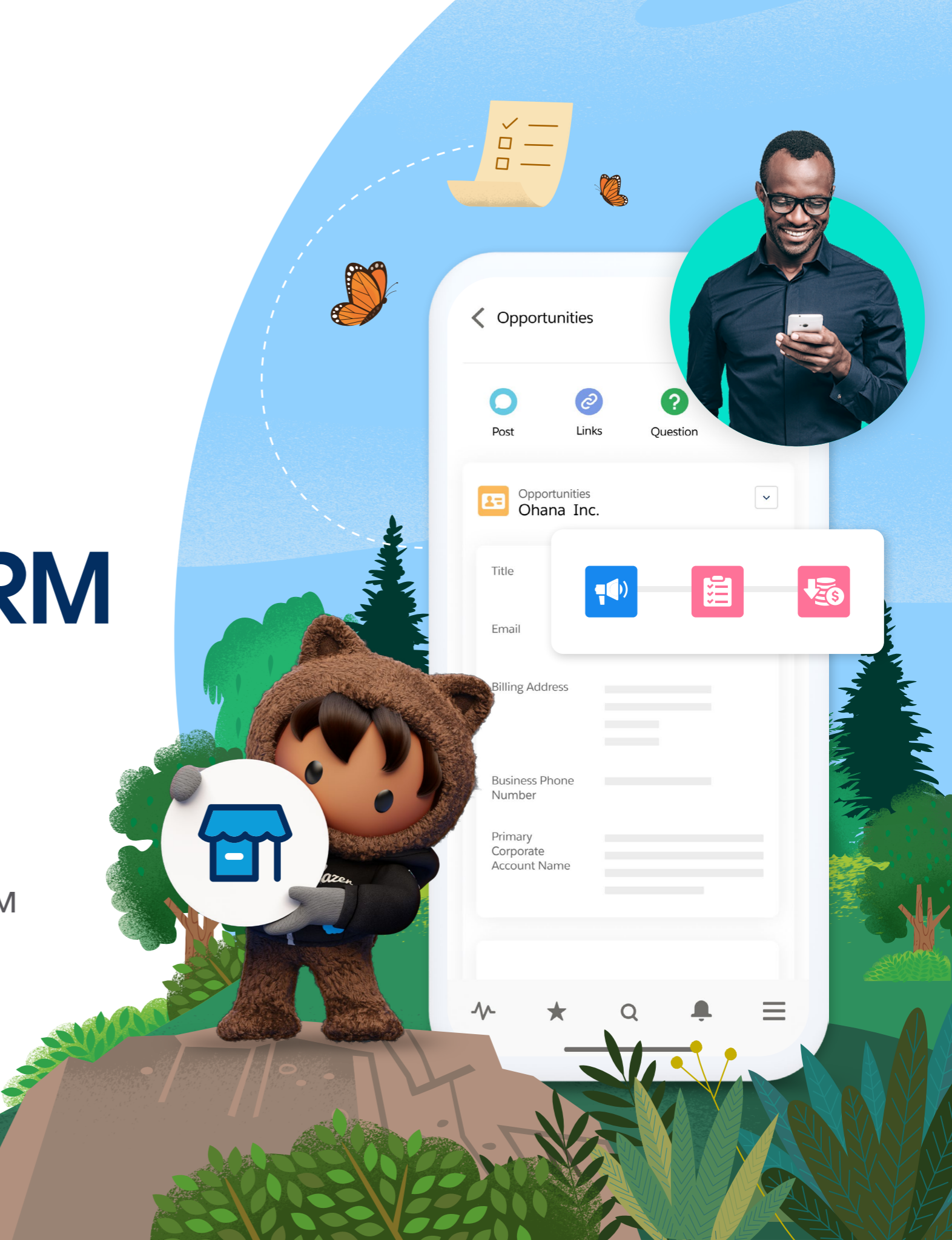




How to Maximize CRM Productivity

The small business guide to unlocking efficiencies and the full value of your CRM



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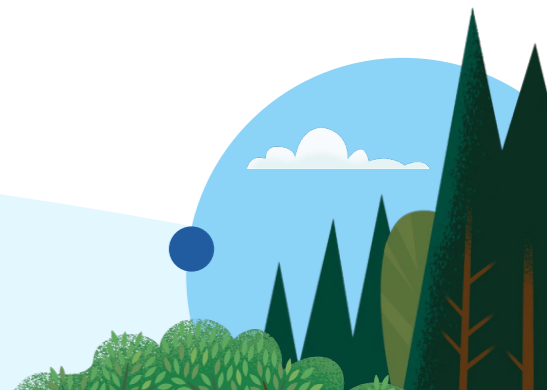
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Introduction

It's no secret that we're in the age of the customer. Expectations are higher than ever, with customers expecting companies to understand their needs and offer highly personalized experiences. And they look for the same level of personalization, whether they interact with a large company or a small one.

Just how different is this new landscape from past ones, where one-size-fits-all engagement, expensive marketing campaigns and faceless advertising blitzes were standard? Take a look at some of the numbers from the [Sixth Edition of the State of the Connected Customer report](#):

- 80% of consumers say that the experience a company provides is as important as its products or services
- 65% expect companies to adapt to their changing needs/preferences
- 53% expect companies to anticipate their needs
- 77% of customers expect to interact with someone immediately when they contact a company

Today, small businesses need to understand their customers more deeply than ever before: their wants, their goals, their lifestyles, their means of communication and their pain points. Companies are prioritizing the creation of long-term relationships over transactional ones, and they're building the foundation for those relationships to grow on. Behind the curtain, these businesses are being driven by data – and they're using customer relationship management (CRM) systems to apply that data to their relationships.

It's no surprise, then, that [Forrester's State of CRM report](#) shows that:

90% of executives and 94% of employees find value in the single source of truth that a CRM provides.

However, CRM tools do much more than empower businesses to be more customer-centric; they deliver a number of other business-changing benefits as well.



Here are some of the ways that Salesforce’s CRM is helping today’s businesses find success:



CRM platforms are a great equalizer for small and medium-sized businesses (SMBs) that need to do more with less. Let’s take a look at how your business can use a CRM system to work smarter, empower your workforce, and chart a course for a more data-driven future to connect with your customers in a whole new way.

Source: 2024 Salesforce Success Metrics Global Highlights. Data is aggregated from 2,165 customers across 10 countries.



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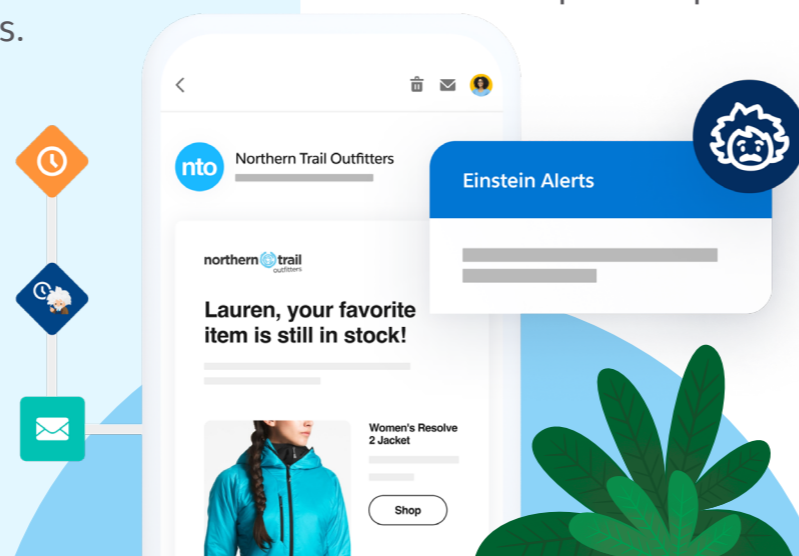
Save Time Through Automation

One of the most beneficial aspects of CRM systems is automation. By automating time-consuming workflows and customer management tasks, you can free up your teams to focus on more creative, business-critical work. For example, you can automate data entry, email marketing campaigns, sales call scheduling, assignment of qualified sales leads, and customer information updates.

Artificial Intelligence (AI) is making outreach even more powerful. In fact, the [State of CRM report](#) reveals that by 2023 nearly 80% of organizations will be using AI-powered automation to enable customer/prospect outreach. Additionally, 78% will be using it to relieve employees of manual, day-to-day processes.

Some of the benefits of automation include:

- More tailored customer communications, meaning better engagement and higher customer retention.
- A faster sales cycle, where lead generation and scoring are improved and high-value leads are automatically matched with high-performing reps.
- A better employee experience, as workers can focus on meaningful work that plays to their strengths, instead of being tied up by backend administrative tasks.
- A clearer big picture, as customer interactions are tracked throughout the pipeline, enabling teams to identify inefficiencies and redundancies.
- More reliable information, as automated data-keeping and scheduling take the possibility of human error out of mundane, repetitive processes.



CRM tools that use AI to automate processes can help your business reach its peak potential. Here are some best practices for automating processes with CRM that your SMB can do now.

5 tips for unleashing the power of automation with CRM

01 Automate repetitive or low-value sales tasks.

For instance, instead of tying up a sales rep, you can use CRM to schedule calls, send personalized emails, create follow-up tasks, and qualify, score, and route leads. Freeing up your teams to focus on more business-critical work not only increases productivity – it increases employee satisfaction. As sales operations becomes more strategic and salespeople take on new responsibilities, it's important to give them the tool – and time! – they need to succeed.

02 Create self-service portals.

Set up self-service options and knowledge bases to enable customers to resolve simple issues quickly and easily on their own; then look at adding chatbots to further enhance your customer experience. Chatbots can mine audio calls and automate data entry, as well as provide faster access to data in real time. Some chatbots can even use voice commands to update customer records in the CRM with relevant information.

03 Automatically log online purchases and form submissions.

By adding this information to your CRM automatically, you can get a complete picture of your customers, more easily identify their needs and pain point, and free up your reps for more valuable work.

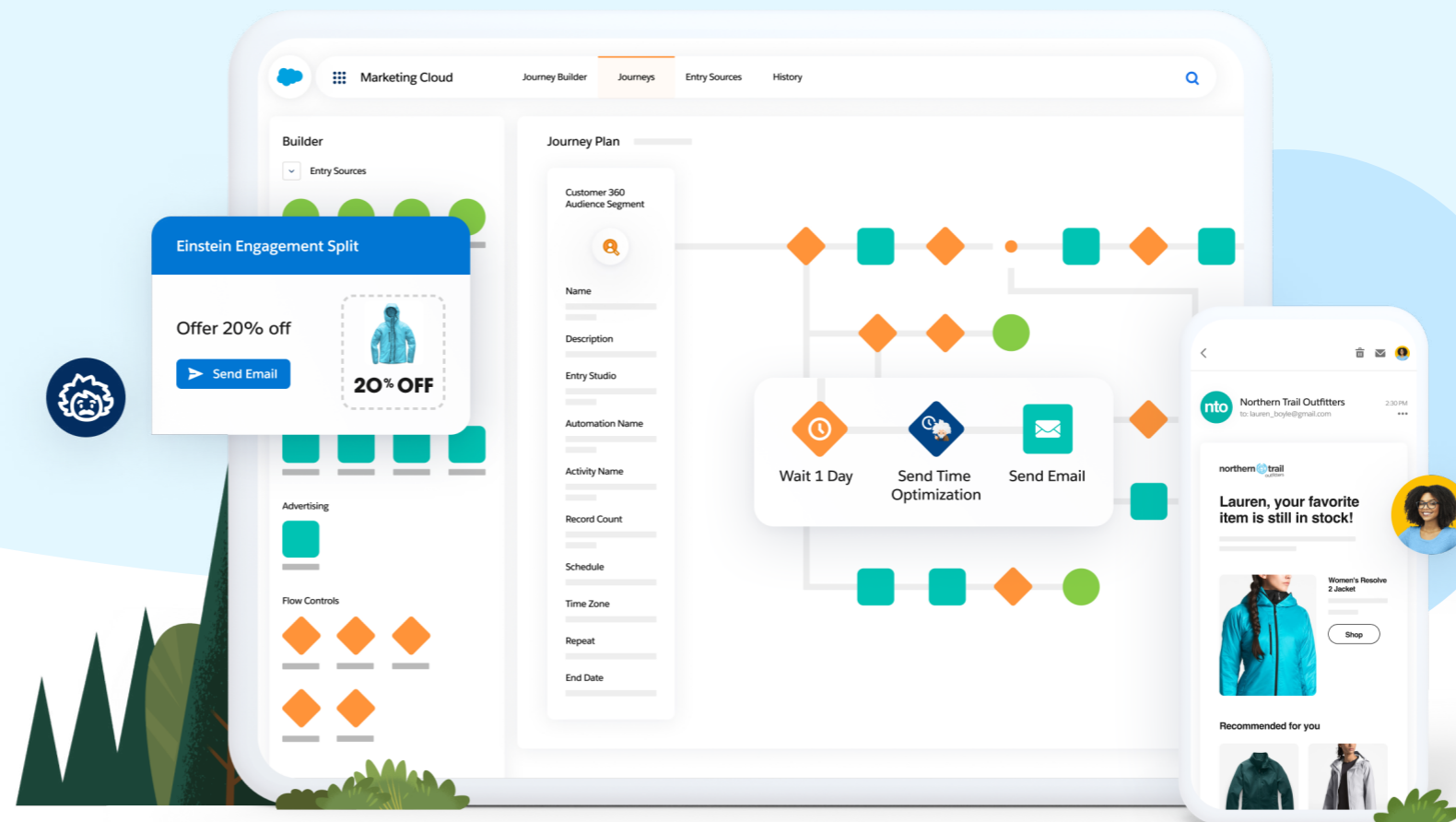


04 Create personalized welcome campaigns.

You can set up a CRM to segment your contact lists, and then deploy welcome messages and offers to customers and potential customers. Use your data to see how customers can be effectively segmented – whether that’s by past purchases, interests, demographics, or other shared qualities – and then create communications to automatically engage these groups.

05 Search for referrals and potential advocates.

Building your brand’s online reputation can be a critical driver of success. Use a CRM to send automated requests to customers, asking if they’d like to share their thoughts on your products or services. These requests can be triggered at the time of purchase, with a timed delay to give the customer a chance to become familiar with your offerings.



Increase Workforce Productivity

You can use a CRM to collaborate across departments, provide your employees with 360-degree customer views, and create dashboards with easy-to-digest, real-time information. Even better, you can create and deploy custom workflows to help with some of the heavy lifting, then test and tweak those workflows until they're delivering a highly efficient and effective experience across departments. In an era of budget squeezes, remote/hybrid working and migrating talent, the ability to improve your business's productivity can be a true difference-maker.

According to MuleSoft's [IT and Business Alignment Barometer](#), 95% of businesses have implemented or are implementing automation initiatives. This push towards a more productive future is no surprise, as increasing productivity can deliver value in a number of different ways.

Some of the benefits of increased productivity include:

- Less employee stress and work-related burnout
- Better customer service
- More profitability due to a higher output
- Faster response times to business-critical situations
- A more engaged workforce
- Improved workplace culture

Of course, boosting productivity isn't just a case of working harder – it's working smarter.



Here are some ways that SMBs can leverage a CRM system to increase productivity and bring out the best in your team.

5 tips for unleashing the power of automation with CRM

01

Create to-do lists to give a structure to the workday.

Keep tasks, contacts, notes and records all in one place, eliminating the need to deal with unwieldy, macro-filled spreadsheets. By tracking all tasks, the time they take, and the results, it's easier to identify the most impactful and efficient actions. On the flip side, it's also easy to identify the most ineffective, time-consuming tasks – revealing actions or workflows that could possibly be automated or at least reimaged.

02

Train employees to expertly use CRM and become changemakers.

On-demand training platforms have made it easy to skill up your team and turn every worker into a data-driven digital disrupter. You can use platforms like [MyTrailhead](#) to create custom learning paths that deliver journeys pertinent to your business, while also connecting your teams with the 15-million-strong [Trailblazer community](#). Best of all, these training platforms are cost-effective and can be accessed from anywhere, at any time.

03

Ensure that all teams across your business are using your CRM.

Research shows that it's much easier to create consistent experiences when all teams are on the same page, rather than operating with siloed, potentially untrustworthy data. Once all functions and departments have had their data centralized in a CRM, you can share reliable information and insights, encourage collaboration, and make sure that customers are getting the best experience possible.

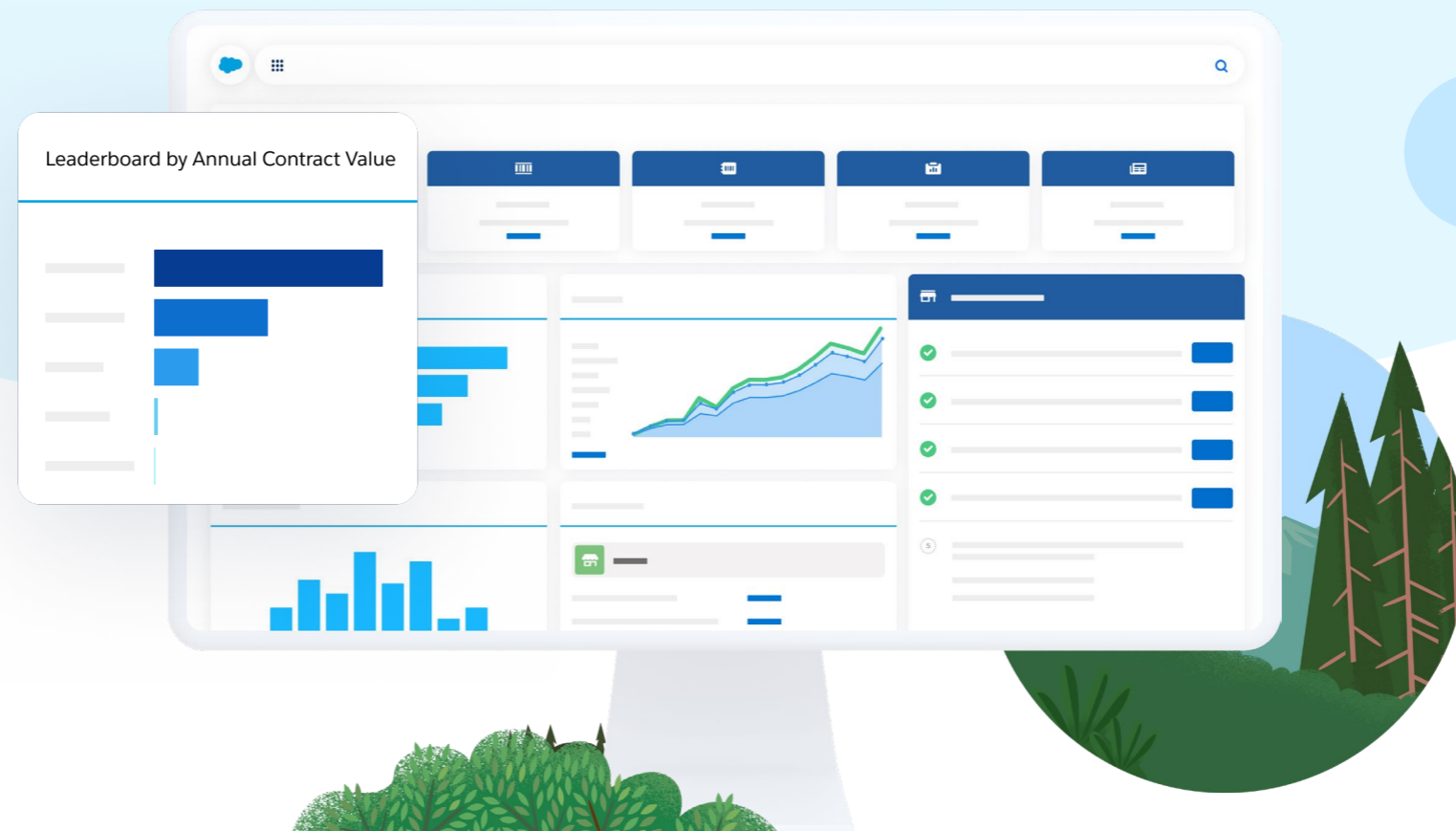


04 Visualize your KPIs and share them with the team.

Leveraging a CRM's integrated reporting capabilities can help create visually impactful dashboards to track your team's performance and keep them aligned towards common goals. Having access to actionable information in real-time will allow your employees to pivot from any ongoing, grunt tasks to focus on valuable opportunities as they arise.

05 Introduce rewards for innovative use cases of a CRM.

Brainstorming creative uses for a CRM can yield some surprising and effective suggestions, helping to turbocharge everything from the recruiting process to employee onboarding. Incentivizing your employees to think about new use cases can not only increase productivity and unlock opportunities; it can help build morale and create a more data-centric culture.



03

Improve Operational Efficiency

The more efficient a business’s processes and workflows are, the more cost-effective it will be. And when it comes to creating streamlined, efficient processes, digitization is key. CRM systems can help eliminate ineffective or redundant tasks, and help identify which activities really impact the bottom line and customer satisfaction.

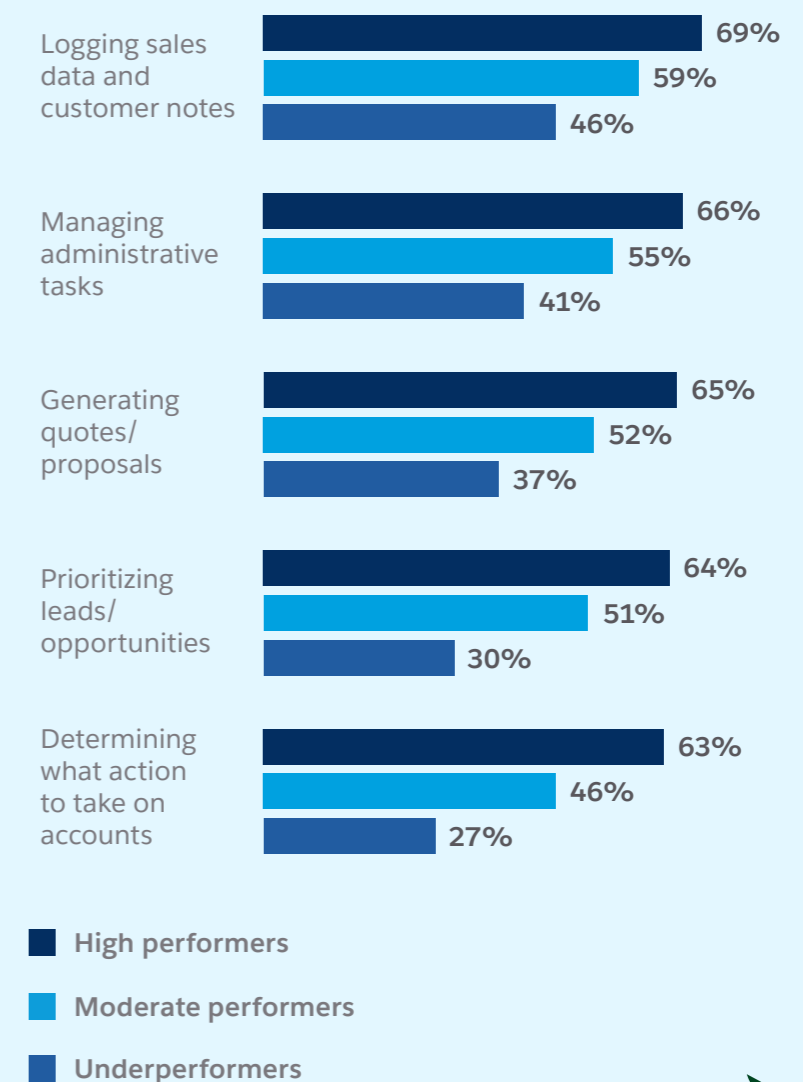
In many cases, businesses don’t need to hire more staff in order to get more done, they just need to become more efficient. For example, if a business has 10 workers, and each saves 30 minutes per day just by streamlining workflows, the business has saved 5 hours each day. That’s 5 hours each day that can be used to focus on tackling current business challenges, building better customer relationships, hunting for new opportunities or developing long-term strategies.

Increased efficiency doesn’t just benefit the bottom line; it has a positive impact on employees as well. According to Salesforce’s [Automation & Wellbeing report](#), 83% of automation-using employees say that the time they save enables them to take on new, challenging projects. And, 89% feel more satisfied with their job as a result of automation in the workplace.

One of the most telling gaps between high-performing sales teams and underperforming ones is in their approach to using automation to improve efficiency, as shown in the [State of Sales chart](#) to the right.

Top Performers Automate Repetitive Tasks

Companies where the following is automated



Source: 4th Ed. State of Sales, Salesforce



It's no big surprise that successful sales teams are the ones that free up their reps to focus on their customers, but what might be surprising is just how within reach these tools are for small businesses. Here are some ways that SMBs can use CRM to become more efficient and keep up with their competitors.

6 tips for using CRM to eliminate inefficiencies, automate actions, and reach your peak potential

01 **Ensure complete, quality data is used.**

Businesses need to be data-driven to succeed, but there's a crucial caveat to that sentiment: they must use the right data. Using incomplete or outdated information cannot only be counter-productive; it can be actively harmful. Make sure to cleanse any old or unreliable data and contact information from the CRM at regular intervals, and make sure that no shadow IT processes are keeping valuable data locked down in informational siloes.

02 **Assign user permission levels.**

Clarify who has access to what data, and assign access roles to optimize the CRM. Who will monitor security and compliance? Who will be responsible for updating accounts and contacts? Often, a business will have a CRM manager whose sole duty is to maintain the CRM for maximum benefits, but we're seeing an increase in micro roles, with responsibilities spread throughout the workforce. This helps create a more data-centric culture, as well as space for creative and more granular thinking.



03 Take advantage of easy-to-use integrations.

If you're using a CRM at the same time as other legacy systems, you may still have a problem with informational siloes. And if you've integrated outside solutions with your CRM, make sure that they make sense, i.e., they aren't requiring duplicate user actions, creating additional complexity, and frustrating the workforce. Salesforce's [AppExchange](#) offers no-code or low-code solutions that are perfect for your business, or just browse the marketplace for pre-built apps that fit your integration needs.

04 Use labels and filters to access important information quickly.

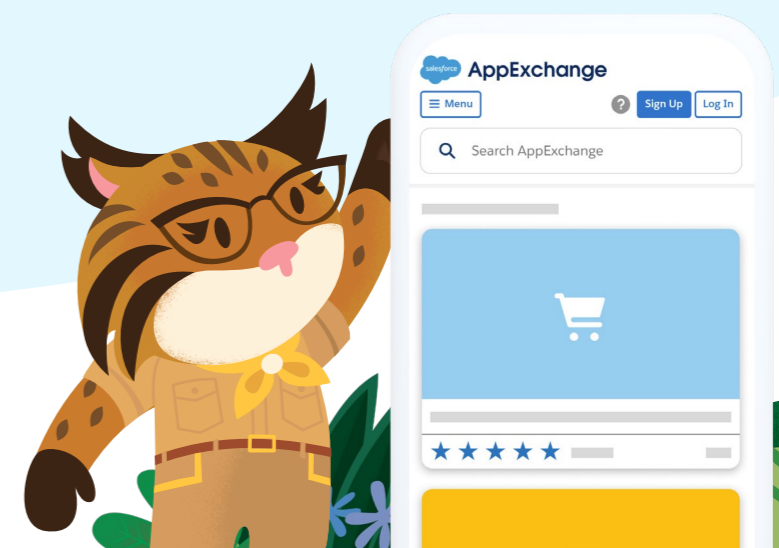
Organize your information so that it's easy to identify patterns and take group actions. For instance, you may want to tag lost deals, deals that are owned by a particular salesperson, or any information that's older than three months. Not having to sift through mountains of unorganized information will help improve efficiency – as well as allow the workforce to breathe a sigh of relief.

05 Provide a 360-degree customer view to all your team members.

By centralizing data in a CRM, you can get a complete overview of all customer interactions and information on a single screen. This means agents won't have to navigate between systems or toggle between screens to chase down valuable information when supporting a customer. This improves employee efficiency while increasing customer satisfaction.

06 Create automatic actions to trigger workflows.

CRM platforms are great for providing teams with the information they need to make smarter and more efficient decisions, but they can also be helpful in removing burdensome tasks altogether. By creating automated flows, you can streamline your task management and free up the workforce.



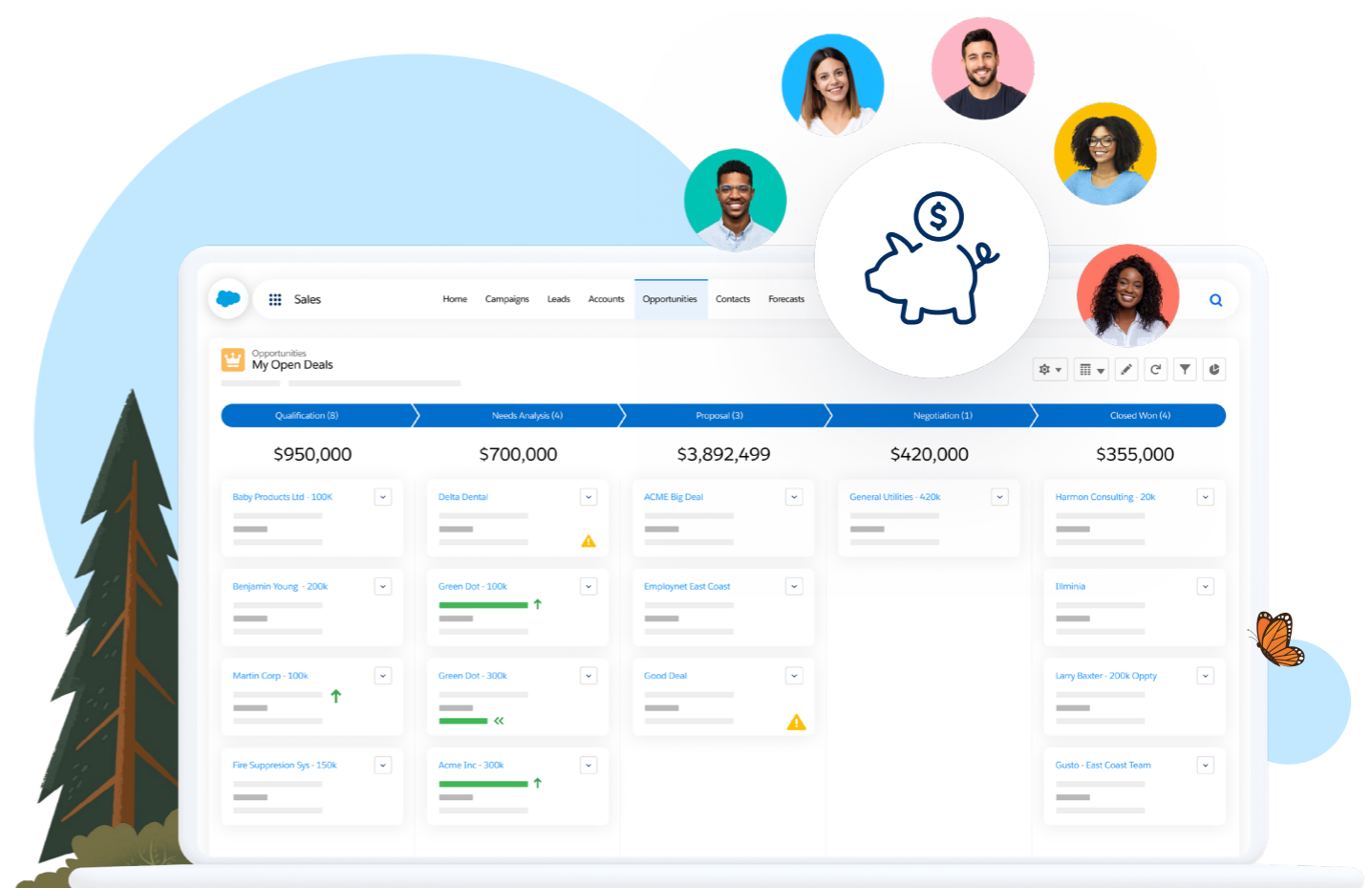
04

Reduce Costs

With a laptop and a good CRM platform, today's small business can reach a bigger audience than huge companies could a few decades ago. Data has been the great leveler, and the democratization of data has been a win/win for both businesses and their customers, who can benefit from more relevant communications, faster service, and tailored offers.

With all the savings associated with improved productivity and efficiency, perhaps CRM's biggest impact on the bottom line is in its ability to bring businesses and customers around the world together. Today, customer expectations for personalized experiences have created a new paradigm for SMBs. Businesses that are not leveraging their data to provide an exceptional customer experience risk falling behind those that do, as the bar for customer expectations has been raised.

Fortunately, CRM systems make it easy to store, manage, and leverage data, enabling businesses to segment customers, analyze customer sentiment, recommend relevant products, and optimize prices. This helps to cut marketing costs, provide sales teams with better leads, and increase ROI throughout the value chain.



Here are some of the ways that a CRM can help businesses reduce costs and drive profits.

5 tips for reducing costs and improving the bottom line with CRM

01 Focus on your most significant customers.

Use your centralized data to identify the most critical customers in your pipeline. Ensure that your most valuable leads are being routed to your best reps and that you aren't wasting significant time and valuable resources on outdated prospects or one-time customers who have moved on. You can use a CRM to automatically evaluate your pipeline, saving your sales reps valuable time.

02 Use a CRM as a springboard for creating highly targeted marketing campaigns.

By delivering relevant communications to the right audience, you can lower marketing costs and increase the impact of your messaging. Analytical tools have an impressive ROI, and by delivering highly tailored experiences, you can see a short-term boost in sales and a long-term increase in customer retention.

03 Use purchase history data to identify better upselling and cross-selling opportunities.

Often, the difference between successfully promoting a product or service and offering intrusive ads is relevance. CRM platforms use historical data to understand your customers' goals and habits and suggest cross-selling opportunities to salespeople. CRM tools can even offer visualized selling tips, making it easier than ever to match the right product with the right customer.

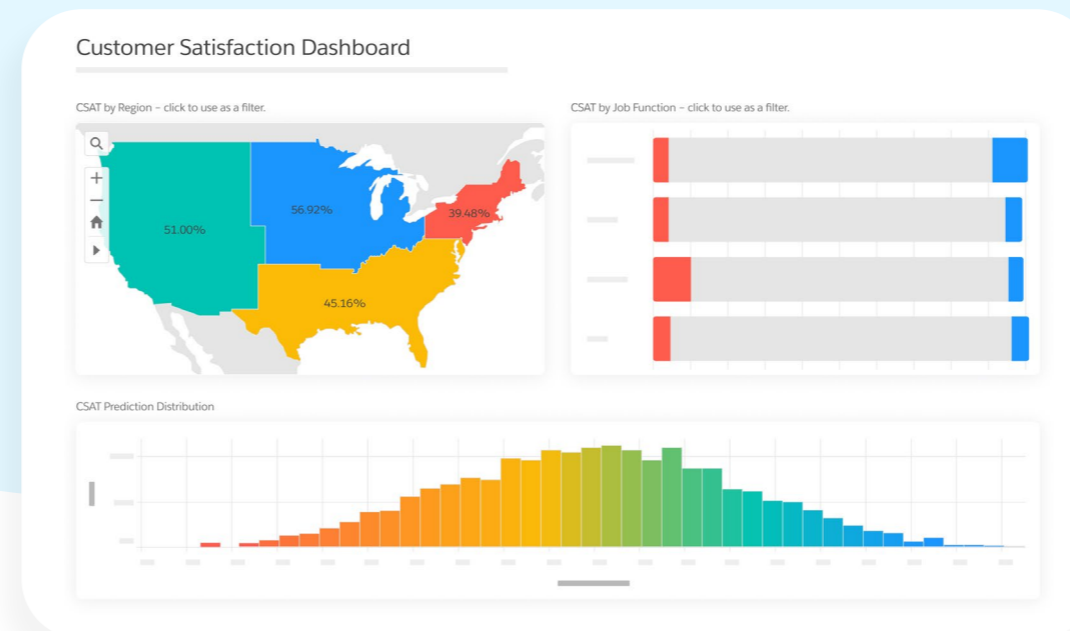


04 Leverage your data to improve products and develop new offerings.

One of the best uses of CRM is for market research. By logging customer sentiment, or even deploying surveys and questionnaires to high-value customers, you can gain insights into what your customers are looking for. Once a product is developed, you can use CRM to manage demos and interact with your audience, then make tweaks based on feedback. CRM tools can even identify likely early adopters, helping you reach these potential advocates with the right messaging – then reward them for spreading the word.

05 Learn from lost deals.

You can sometimes learn more from things that didn't happen than from things that did. For example, you can indicate in a CRM why you believe a deal was lost. Look for patterns. Which customers aren't responding? Can you try A/B messaging to measure variables in engagement? What can you do better? Let the data guide you to where you can make tweaks and improvements.



Looking to get started?

Here's how to find the right CRM in 4 easy steps

If your business doesn't have a CRM system, there's no better time to get started than the present. But in order to find the perfect CRM for your needs, there are a few things you'll need to consider. Here are four steps for finding the best CRM for your business.

Step 1: Determine the top problem you need to solve.

CRM systems can benefit businesses in many ways, but when choosing a CRM, it's a good idea to look at your biggest business need. Do you have issues with rogue, decentralized data, or perhaps with data compliance? Do you need to drive productivity in the workforce? Are you looking to turbocharge your marketing campaigns, improve sales forecasting or enable remote working? Whatever your top pain point is, you'll want to make sure that you choose a CRM that addresses it.

Step 2: Get a CRM system that supports your size and growth plans.

Where does your business currently stand, and where do you want to be? Look at the gap and see how a CRM can help you get there. You'll want to choose a tool that's right for your current business needs, but you also want to look for a CRM system that can scale up as your business grows. This means considering things like integrations and future-proof features. CRM systems that can be integrated with technologies like Voice and AI will help you reach emerging audiences on new platforms.

Step 3: Research and compare different solutions.

There are many different types of CRM systems and providers out there, so do a bit of research and see which tools fit your unique needs and your price point. It's worth researching the vendor as well as the technology, as it's always helpful to find a strategic ally who can understand your pain points and goals, rather than just be a provider of technology.

Step 4: Test your top choices with a free trial.

Once you've narrowed down your choices of CRM tools, take a look and see if any of them offer free trials. Familiarizing yourself with the different features and usability aspects of a CRM system will help you decide which tools feel right. After all, a CRM system will be with your business for the long haul, so you'll want to make sure that you feel comfortable using it.

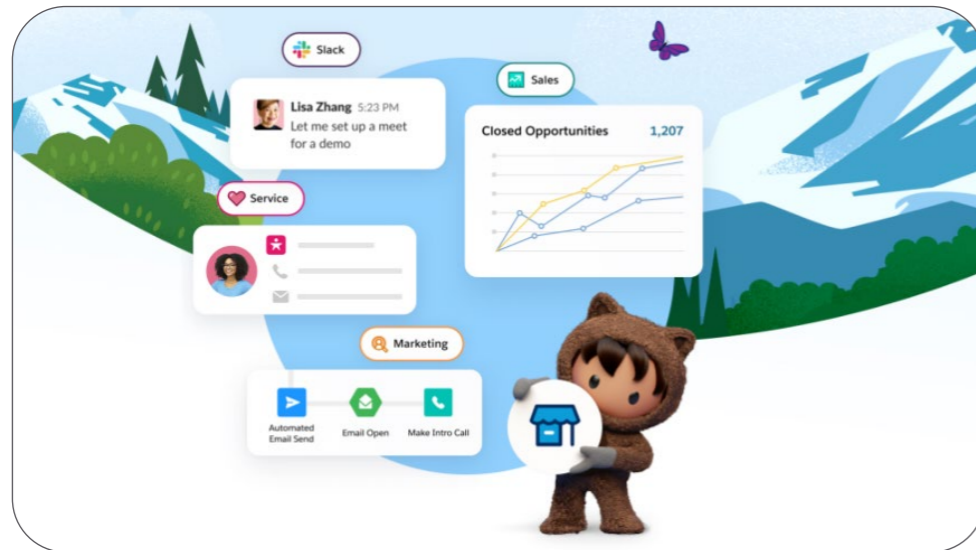
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