salesforce sales cloud

# 7 PRACTICAL SALES TIPS

How to Get More Out of **Your Salesforce CRM**

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**It's all about productivity.** Making good sales reps great. Closing bigger deals, faster. In this ebook you'll learn basic strategies to help you make the biggest impact on your sales productivity in the shortest time.


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# Introduction

A few quick sales tips you can use anywhere, any time.

These days, nobody goes it alone. We all need a helping hand, a few words of encouragement, or a new technique to help us close a tough deal. That's where this ebook can help.

This ebook outlines key sales strategies and gives you the resources you need to put them into action. Some recommendations are simple. Others require thoughtful business decisions. But they're all hand-picked to guarantee an immediate and long-lasting impact on your sales organization. So keep this ebook handy and check back whenever you need another tip, trick, tool, or tab to boost your team's productivity.

1

# Stop doing data entry

Less time managing data is **more time making sales.**

> Our sales reps save hours each week with **Data.com.**”
>
> > **Lindsey Nelson,** VP of Sales Productivity, CareerBuilder

Think about it: If one sales rep eliminates 2 hours of data entry and contact hunting every week, they gain 2½ more weeks per year to make sales. Multiply that by your entire sales team and … well, you get the picture.

But if reps don't do the dirty work, how do you get the prospecting data you need into Salesforce? The answer is **Data.com.** Turn it on and productivity spikes. Easy-to-use data checking and cleaning tools refresh outdated records. And with more contacts at every account, you can build bigger deals. Data.com is the most complete source of business data unified in one place.

It's as easy to use as 1,2,3:

1. Access millions of account records from D&B, the gold standard for company profiles
2. Choose from tens of millions of crowd-sourced contacts, all complete with name, title, company, business address, phone, and email
3. Done! Add the complete records into your Salesforce CRM at the click of a button

Stop typing and start selling with **Data.com.**

# 2 Start being social

Your social transformation is your **road to success.**

For sales teams, the takeaway is pretty simple: It's time to turn on Social Contacts.

Your customers are more connected and social than ever before, so you need to be too. That's why Salesforce ties you into popular social media sites—Facebook, Twitter, LinkedIn, YouTube, and Klout—for valuable insight into customers and prospects, like:

- Who influences them?
- What are they thinking—right now?
- How are their needs changing?
- How do you start a conversation with them?

When social customers and companies share what they like, what they think, and who they know, it gives you the context you need to forge stronger connections and make bigger sales. Salesforce finds the social intelligence you need and puts it right inside your sales processes along with account detail, cases, activities, opportunities, and contacts. It's no longer just who you know—it's how well you know them.

Turn on, tune in, with Social Accounts, Leads, and Contacts in Salesforce.

3

# Let Chatter bring updates to you

You know it as well as we do —
**sometimes making a big sale is all about timing.**

> "Chatter gives us real-time information and a sense of community."
>
> > **Mark Brennan,** Sr. Director IT, Pandora

Want to keep your sales reps on their toes and in the know? We've got one word for you: Chatter.

You probably know Chatter is a great collaborative tool but did you know it can also help you win business by sending you an alert the instant your account or contact records are updated?

**Here's an example:**

Let's say your customer Bob gets a big promotion, and just like that, his purchasing responsibilities double. Chatter sends you an alert about Bob's new title the moment it's updated in Data.com. You immediately give Bob a phone call to wish him heartfelt congratulations. And, oh yeah, before you hang up, you beat your competitors to the punch by snapping up Bob's new business.

Remember, change means opportunity, and the sooner you know about it the faster you can take advantage. Customize Chatter alerts on any type of record—contacts, accounts, or anything else in your Salesforce CRM—and you'll always know when actionable information is available. Quickly pursue cross-sell and up-sell opportunities. Offer new deals when bundles become available. And stay connected without missing a beat whenever an address, phone number, or email changes.

Discover more with Chatter

# 4 Make territory planning painless

If you have a handful of sales reps, assigning territories can be tricky.
**If you have 100 or 1,000 reps, it can be a downright nightmare.**

What's the best way to crank every drop of growth out of your market without the hassle of manual territory assignments? First, map out a perfect assignment plan. Then use Salesforce to implement the rules in a workflow that automatically makes assignments. Sounds great, right?

But how do you get there? Don't worry, Salesforce can help every step of the way:

- Begin by using Salesforce analytics to report on where you've closed deals
- Next, use those reports to understand where your core business is, and where you're growing
- Then decide how you want to assign your teams—by vertical, geo, employee count, or some combination of classifications

Don't have enough data to properly analyze your sales and determine the best assignment plan? Not a problem. Data.com Clean can autofill missing account detail and add revenue, employee count, parent company, and up to 6 industry codes. Once your territory plan is perfected, build it into your Salesforce workflow, and the rest is taken care of with automatic territory assignments to maintain your new rules.

Start plotting the perfect territory plan.

5

# Plan on making a big deal

The best way to score a big deal? **Plan on it from the start.**

Want to consistently land and maintain bigger deals? Then account planning is an absolute must. Planning not only helps you prepare for the initial sale, but also gives you the comprehensive look into a company you'll need to maintain a highly profitable long-term relationship.

To build a successful plan, start by discovering everything you can about the customer:

- Their size and revenue
- Where they're doing business
- Their breakdown of entities and office locations
- What their strategic plans are
- How much they can potentially spend with you

Keep in mind that developing in-depth plans for a smaller number of prime accounts is often more impactful than creating a plan for every account. So, use your initial discovery to look for accounts that mirror your most lucrative customers, and then focus your planning to maximize your efforts. With a little practice, you'll soon be able to pick out profitable targets faster and build smarter plans that close bigger deals.

Get the **7 Secrets to Account Planning guide.**

6

# Lead the way to more opportunities

Use Salesforce Leads to **make the most of every growth opportunity.**

"With a **360 degree view** of our customers, the sky is the limit..."

> **Austin Zoutis,** CIO, eBioscience

By systematically managing leads in a structured way, you can gain a truer view of your pipeline, generate more leads, and increase the number of leads you convert.

Here are 5 ways Salesforce Leads can pump up your pipeline, point you in more-profitable directions, and help you track the sales and marketing efforts that work best:

1. **Align sales and marketing:** Work together to decide the best way to score leads, how to define a qualified lead, and how to make sure no lead sources are being wasted

2. **Capture more leads:** With Salesforce CRM you can import leads, enter them manually, and even capture them automatically from your website and social media

3. **Keep data clean:** Clean and dedupe lead data, and use validation rules that prevent leads from being converted if information is incomplete

4. **Work leads efficiently:** Prioritize leads with scoring—automatically route hot leads to sales and send developing leads to marketing for nurturing

5. **Track lead-generation efforts:** Identify your most productive lead sources using the campaigns hierarchy, track ROI, and use lead history to analyze revenue and pipeline

Get up-to-speed on the power of Salesforce Leads.

# 7 Gain insight with dashboards

Your sales reps are having a great year.
**Where could they do even better?**

> “With **Data.com** and **Salesforce** together, all of it is right here in dashboards and reports, and it’s seamless.”
>
> > **Paul Leary,** President and Partner, The Bespoke Collection

You think you’re on track. But how do you know for sure without a clear view of your sales team’s activities, opportunities, pipeline, and productivity? And how do you find and address issues you can’t see?

A Salesforce dashboard gives you real-time business analytics on demand. It draws from in-depth reports, so you can visualize critical trends over time.

And it accesses all your sales and marketing data in the cloud, so you can also see what’s happening right now and share it with key stakeholders.

Even better, your dashboards are customizable, so it’s easy to get the exact information you need. First, you decide what you want your dashboard to show you. Then you define the data to build the reports that will feed the dashboard. Which reports are most useful separately—or for building out a comprehensive executive dashboard? We asked some dashboard enthusiasts at Dreamforce 2012 and here are their top recommendations:

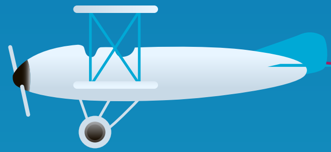
- Lead-to-close funnel
- Big deal alert
- Competitor comparison
- Sales mix by product
- Sales rep leader board

# 7 Practical Sales Tips

It wasn't easy, but we've condensed our key action items onto one page. Here are our top tips and the best resources to get you going.

| TIPS | RESOURCE |
|---|---|
| **1. Stop doing data entry** and use Data.com for complete, up-to-date business data.* | **Data.com Quick Start:** http://bit.ly/DataDotComGetStarted |
| **2. Start being social** and turn on Social Contacts right inside your Salesforce CRM. | **Enabling and Configuring Social Accounts and Contacts:** http://bit.ly/TurnOnSocial |
| **3. Get real-time Chatter alerts** and beat the competition to the punch. | **Chatter Learning Center:** http://bit.ly/ChatterLearnMore |
| **4. Make territory planning painless** with Salesforce automation. | **Deploying Territory Management:** http://bit.ly/TerritoryMapping |
| **5. Plan on making a big deal** and maximize profit from every account. | **7 Secrets to Account Planning:** http://bit.ly/AccountPlanningEbook |
| **6. Lead the way to more opportunities** with the Salesforce Leads object. | **Working with Leads to Drive New Business:** http://bit.ly/WorkLeads |
| **7. Gain insight with dashboards** that show real-time analytics. | **Reports & Dashboards Training:** http://bit.ly/BuildReports |

*Requires additional license.



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