

8 KEY PLAYS FOR SALES SUCCESS

Transforming your business with Salesforce



8 key plays for sales success: transforming your business with Salesforce

Contents

Introduction.....	2
#1: Sell as a team.....	2
Case study: Kelly Services.....	2
#2: Go mobile.....	3
Case study: Santander Consumer USA.....	3
#3: Make smarter decisions.....	3
Case study: Dr Pepper Snapple Group.....	4
#4: Find key influencers faster.....	4
Case study: Lenovo.....	4
#5: Win more with social selling	5
Case study: H&R Block	5
#6: Find the best files.....	5
Case study: NBCUniversal	6
#7: Drive your sales process.....	6
Case study: Fireclay Tile.....	6
#8: Leverage the open cloud platform	7
Case study: Qvidian Corporation.....	7
Conclusion.....	8

Introduction

In today's fast-paced world of mobile applications and globe-spanning social networks, your sales application should work the way you do—always connected, always responsive, always evolving. Just as these ground-breaking technologies are transforming the way business is done from Boston to Singapore, your sales application must adapt as well. Having a 360-degree view of your customers and centralized data isn't enough—you need data that talks to you in real time, end-to-end visibility from a mobile device, and an open cloud platform that scales along with your business while meeting enterprise-class security and privacy standards.

In the same way that the Internet boom separated winning companies from those behind the curve, the rise of social and mobile technologies is determining a new generation of industry leaders. Businesses that embrace new tools and technologies are leapfrogging their competitors, seizing market share, and setting new standards for efficient operation. Their executives are equipping their sales forces with smart phones and tablets, and celebrating collaboration as the most effective approach to close any deal.

Pull ahead of your competition by learning best practices for incorporating these new technologies into your daily operations. This white paper will explore how you can close more deals and save hours each week by taking advantage of the social, mobile, and open technologies that are built right into the Sales Cloud, the world's #1 sales application.

Welcome to 8 key plays for sales success.

#1: Sell as a team

Collaborate faster to win more business

Even the most talented sales reps struggle to stay on top of all the people, documents, and apps they need to close a deal. It can be difficult to connect with the right people in your own company—coworkers in marketing, engineering, legal, and finance—and even more challenging to identify the most suitable contact at a prospect. Then there's the hassle of tracking down the latest data in multiple apps and finding the most up-to-date documents in email, file servers, and intranets. These problems have plagued organizations for years, but a solution is finally in reach. With an application like Salesforce Chatter, a private and secure social network built right into the Sales Cloud, you can follow the people and data that are most relevant to you and get alerts automatically pushed to you in real time. Available on popular business devices like the BlackBerry, iPad, and iPhone, Chatter is especially suited to mobile teams. Barriers between departments are broken down and information silos are dismantled as reps effortlessly collaborate with colleagues and managers gain full visibility into their teams.



Case study: Kelly Services

Kelly Services, a global leader in workforce solutions, wanted to transform a successful Salesforce implementation into an engine for driving the social enterprise. The company rolled out Salesforce Chatter to more than 9,000 employees in more than 35 countries. Adoption was spontaneous as employees across departments and geographies began communicating and collaborating in real time. They formed Chatter groups to more effectively engage blue-chip sales prospects by sharing files, marketing ideas, sales presentations, and more. They also began incorporating Chatter into strategic reviews—adding breadth and depth to the discussion as people from around the company contributed insights about how to make particular accounts more successful. As a result, sales teams now have up-to-the minute information on lead and opportunity status and employees across departments and geographies can collaborate more efficiently.

“Chatter has been transformational for our sales effort.”

Joe Drouin, CIO, Kelly Services

#2: Go mobile

Stay productive on the road with CRM on your favorite mobile device

It's never been more important to stay on top of business, whether you're in the office moving between meetings or out of the office moving between geographies. Selling happens all the time, and the most effective salespeople make sure they always have everything they need to close a deal. Salesforce Mobile lets salespeople see all their data—accounts, cases, contacts, events, leads, opportunities, price books, products, and tasks—while on the road. No matter where you are, you can log calls, respond to leads, access information about accounts, and see the latest reports and dashboards, ensuring you never miss a beat. Meanwhile, Chatter Mobile takes collaboration to the next level: Find, edit, and publish content from any mobile device while receiving instant updates on the data and people who matter most. Just imagine being able to see late-breaking information about an account seconds before heading into a meeting with that customer. And because Salesforce and Chatter Mobile are both private and secure, they are safeguarded from unauthorized use, so you don't have to worry about security breaches that plague popular social networks for consumers.



Case study: Santander Consumer USA

Santander Consumer USA, a branch of the global Banco Santander, specializes in auto financing for dealers and consumers. The bank decided to replace a fragmented CRM system based on Outlook and Microsoft Access with the Sales Cloud. After an initial 3-week roll out, the bank began to realize multiple benefits, particularly from mobile access. Among them: Newly hired reps are able to get up to speed in just 1 week versus 6 weeks before the Sales Cloud. By using the system to automatically convert voicemails to text and attach them to an account record, reps cut the time it takes to respond to dealer questions from 1 hour to about 15 minutes and slashed the time to look up information on a specific loan application from 1 hour to 30 seconds. Chatter makes it even easier to stay on top of customer-related information.

By 2010, the average follow-up time on a loan application had decreased from roughly 24 hours to roughly 2 hours. By saving reps an hour a day, Santander estimates that the Sales Cloud is saving the company \$1,080,000 per year.

“The mobile app makes us more productive.”

Will Stacy IV, Director of Marketing, Santander Consumer USA

#3: Make smarter decisions

Share and collaborate on analytics in real time

Forget everything you've heard about content being king. When it comes to business, data rules. After all, if you can't measure your company's performance, how can you improve it? With collaborative analytics, you can ensure you measure your business and make smarter decisions based on timely business data. In the past, it sometimes took months to get a report from traditional analytics solutions because they required specialized IT resources. By the time a report was generated, it was frequently outdated. With Salesforce analytics, everyone in an organization is empowered to create reports and dashboards based on real-time data so everyone gets the insights they need to be effective. For management, this capability means updates made across the organization are captured in real time so the pipeline being reported is accurate—right now. Plus, it's easy to gain visibility into



what the sales team and individual reps are doing. Having real-time access to productivity reports helps managers improve the efficacy of their teams whether they're local or on the other side of globe. Reps can delve into numbers that matter to them: untouched accounts, pending large deals, or competitive leader boards. And with Chatter, important information is never overlooked. Anyone can add a dashboard to a Chatter feed and set it to broadcast status updates automatically, keeping everyone up to speed and making smarter decisions.

Case study: Dr Pepper Snapple Group

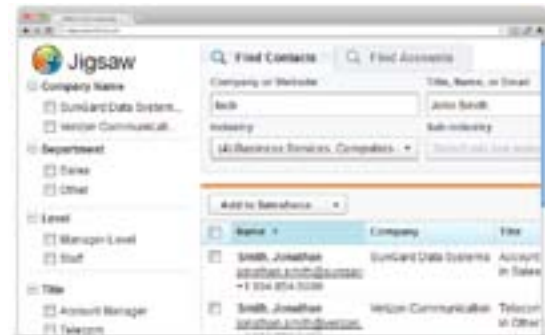
Dr Pepper Snapple Group, a leading beverage company, bottles and distributes sodas in North America. The juice-and-soda king wanted to replace an aging field sales contact manager with a more robust CRM solution. It had been using Excel to compile sales reports on more than 50 beverages for corporate review, but the manual process of entering the data could take up to 6 weeks and detracted from sales efforts. After deploying the Sales Cloud across the Fountain Food Service Division, Dr Pepper Snapple Group was able to automate tracking and measurement of field sales activities for more than 10,000 accounts. With the Sales Cloud, the company streamlined data entry, forecasting, and reporting. Managers now verify key performance indicators (KPIs), monitor sales calls, and check sales volume at a glance. Reports and dashboards provide immediate access to business data and analysis, delivering an annual ROI of 56 percent.

#4: Find key influencers fast

Drive quality pipeline with the right customer contacts

Successful deals often depend on a salesperson connecting with the right decision maker. So it's no surprise that clean, accurate data is critical to a successful CRM implementation. But most organizations struggle to maintain a single, up-to-date source of valid customer and prospect data. Some industry analysts report that as much as 70 percent of CRM data can become outdated in just 12 months. Meanwhile, the cost of bad data rises quickly: 12 calls to bad contacts per day can waste as much as 20 hours per month.

With Jigsaw, fresh, clean account and contact data is built right into the Sales Cloud. Continuously updated by a community of more than 1.8 million professionals, Jigsaw provides access to 26+ million contacts and 4+ million accounts, perpetually infusing your pipeline with valid leads and lavishing marketing with fantastic data for lists and segmentation. For sales, that means the peace of mind of knowing that contact information for the key decision maker who can help close a million-dollar deal is already in the Sales Cloud.



Case study: Lenovo

Lenovo, China's largest PC maker, established operations in the United States after it acquired IBM's PC operations in 2004. The combined company turned to Jigsaw to help improve sales and marketing data quality. The flexibility of the solution and out-of-box integration with Salesforce made Jigsaw particularly well-suited for Lenovo's U.S. business environment. Sales and marketing managers quickly saw powerful results. Using accurate contact lists from Jigsaw helped reduce bounce rates for email campaigns and decreased return rates for direct mail campaigns. Productivity rose because employees spent less time searching through multiple sources to find contacts. And, with access to the right contacts, sales reps are able to penetrate accounts 3 times faster and close more deals.

“Jigsaw immediately increased our sales velocity.”

Scott Ottman, Executive Director, Lenovo

#5: Win more with social selling

Use social media to your advantage

To be successful in today's sales environment, reps need a true 360-degree view into their prospects. They need to be aware of everything from breaking company news, to social conversations on networks like Twitter and Facebook, to relationships described by the social graph. Social selling is not just a buzzword, but a critical component of sales that your savviest competitors are busy mastering—today. With social media poised to grow exponentially in the coming years, the challenge facing businesses is how to collect and deliver the social intelligence that will maximize their sales efforts. Two of the most effective tools are Radian6 and the Sales Cloud, the leader in social media monitoring paired with the powerful data of your CRM solution. Radian6 lets you listen to what's top of mind for your prospects and customers, and the Sales Cloud provides the engine for organizing that information and putting it to work. Together, Radian6 and the Sales Cloud give you the insights you need to close more deals than ever before, while building lasting relationships with satisfied customers.



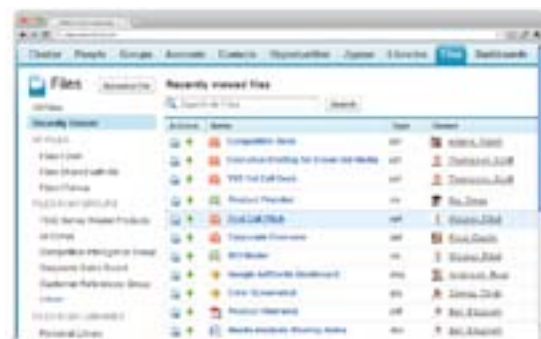
Case study: H&R Block

H&R Block, the world's largest tax-preparation business with more than 10,000 employees, launched a social media program in 2007 as an extension of its traditional marketing efforts. As the company became more engaged with social channels, the focus of the program shifted from customer acquisition and lead generation to customer service. Goals of the program included responding to inquiries about the company and its products and contributing expertise and advice to online discussions about tax preparation. As part of this strategy, the four-member team, which is housed in the corporate communications department, manages a company-sponsored community called "Get It Right" and monitors the stream of conversations on the social Web. With the Radian6 Engagement Console, the team is able to tag, assign, and respond to questions and comments quickly. The console also makes it easy for the executive team to review the conversations at any time. The effort drives new business by proactively answering tax-related questions from potential customers and improves brand awareness, reputation, and loyalty.

#6: Find the best files

Win more deals with the right content at your fingertips

In 2010, *Wired* magazine reported that the amount of stored electronic data around the world would surpass a zettabyte, or 1 billion terabytes, by 2012—that's the equivalent of a stack of DVDs reaching to the moon and back. But it was hardly news to businesses, which have been drowning in data for years. The explosion of digital data presents a significant challenge for sales organizations. Forced to sift through a mountain of online documents from multiple sources, reps can't be effective if the right sales material and documents aren't at their fingertips. One way to avoid burying your sales organization in information is with a feature like "files," built into the Sales Cloud. With everything in one place, reps no longer waste time hunting through mazes of folders and digging through email to find the best collateral and presentations. Files uses the most useful Web 2.0 features like tagging, search, subscriptions, and popularity rankings so that finding and collaborating around the right content is a snap. And with Chatter, you can post a file and get feedback from colleagues in real time, share a file privately with a select group, or even follow a file so you're notified when a new version has been posted.



Case study: NBCUniversal

NBCUniversal, a media conglomerate owned by Comcast and GE, wanted to transform its advertising sales business. But first it needed to replace existing technology solutions with a single, integrated CRM and content management solution that could be quickly deployed and easily updated. With help from salesforce.com consulting, NBCUniversal deployed the Sales Cloud in just 2 months. Core to the success of its implementation is how the company uses the files feature to help its reps sell more. Today, NBCUniversal generates significant advertising revenue from product placements in its shows. To sell more placements, it uses files to manage video clips from its lineup so sales reps can show prospects how their products will be displayed. It's a world of difference from the traditional method of providing prospects with demographic data about viewers. Now, NBCUniversal can actually show a video of how a product will be placed and link that video to the account in Salesforce. Since the Salesforce implementation, NBCUniversal has made its reps more successful and increased its pipeline by 400 percent.

“Salesforce has become the key information portal for our sales and marketing teams – account info, content, analytics – it's all there.”

Eric A. Johnson, Vice President, NBCUniversal

#7: Drive your sales process

Automate your methodologies and best practices

Most CRM solutions make you align your processes to their system. But with the Sales Cloud, it's easy to define and map your sales strategy and then reflect this process in your Salesforce app. Why is this ability so important to a successful CRM implementation? According to a recent study by CSO Insights, the more advanced and automated your sales process, the closer your relationships with your customers. One way to increase automation is to use the app to reflect your sales organization's different sales stages, and then map your sales stages to the corresponding forecast categories. This approach gives managers a more accurate picture of the business and provides reps with the consistency needed to drive effectiveness, higher win rates, and faster sales cycles. There are many other ways to streamline your process and build in automation—from designing your page layouts, to incorporating deal support and training, to adding quotes. With all reps aligned to your sales methodologies and best practices, you should see dramatic improvements in your business.



Case study: Fireclay Tile

Fireclay Tile, a sustainable tile manufacturer, wanted a sales application that would automate multiple business functions from ordering to manufacturing, shipping, and customer service. Goals for the new system included end-to-end visibility across the business, improved customer service, higher productivity, elimination of double data entry, and a reduction in overall IT costs. After choosing the Sales Cloud, Fireclay Tile set up email triggers and workflow to automate customer service functions such as order confirmations, follow-up customer satisfaction surveys, responses to Web-to-lead forms, shipping notifications, and post-order follow up. Results included a dramatic increase in customer satisfaction from measurable ratings of average to excellent within 8 months. In addition, the completion rate for on-time orders doubled, new leads quadrupled, and accounting overhead fell by 95 percent.

“We made transformative improvements in almost every aspect of our business by adopting the Sales Cloud.”

Eric Edelson, VP & Owner, Fireclay Tile

#8: Leverage the open cloud platform

Tailor CRM to fit your business

No two businesses work exactly alike, and the best CRM software doesn't force them to. Depending on your specific type of business—from retailer to manufacturer—you can customize the Sales Cloud to meet your exact business needs. Change the look and feel of the user interface, add built-in automation with workflow and approval rules, or extend the functionality of the Sales Cloud with pre-integrated applications from the AppExchange. On the AppExchange, you'll find hundreds of applications to add functionality such as events management, HR management, and professional services. And you won't need developers to install these apps—they automatically snap into place.

In fact, Salesforce's open platform lets customers integrate to any third-party application or external Web service, from Oracle and SAP back-end systems to Amazon EC2 or Facebook. And if you decide to switch services, data migration tools make it just as easy to take data out of Salesforce as it was to put in. Plus, Salesforce is also pre-integrated with Outlook 2010/2007 and Gmail, so your business can use your email application of choice while still capturing all customer interactions in one place.

You can also build your own cloud apps and websites quickly and easily using the Force.com platform. It requires no hardware or software; it's social, so you can add collaboration features to every app; and it's mobile, so you can run your apps on any platform or device. Customers have found they can build apps 5 times faster and at about half the cost using Force.com, the platform as a service that is 100 percent cloud.



Case study: Qvidian Corporation

Qvidian, a leading provider of sales playbook and proposal automation applications, was created with the merger of Sant Corporation and Kadient. Seeking a better way for sales and support teams to manage customer information, Qvidian deployed Salesforce in just 4 days. It added ClickTools, a survey app from the AppExchange, and integrated with Marketo's marketing automation software and Microsoft Outlook. Using the Force.com cloud platform, Qvidian also built custom apps for event planning, IT management, professional services management, and trials and pilots. Among the benefits Qvidian realized: Revenues increased 83 percent and IT gained the equivalent of 4 days per month. Plus, visibility and productivity increased, customer service scores improved, and marketing became more effective. According to Nucleus Research, Qvidian's initial implementation delivered an ROI of 1,291 percent in just 1 month and an average annual savings of \$603,203.

“We customized salesforce.com to automate several processes without involving our IT staff.”

Brian Vass, VP Marketing, Qvidian Corporation

Conclusion

As with previous technological revolutions, early adopters of applications, devices, and platforms that are social, mobile, and open will take the lead, while the naysayers will get left behind.

Just like companies featured in the case studies, you can use the 8 key plays for sales success to move ahead of your competition. As you look at ways to incorporate social, mobile, and open practices into your daily operations, consider Salesforce as a key component in the transformation of your business. With Salesforce, all apps are social, mobile, and open. Whether you use products like Chatter or Jigsaw—or build your own apps on Force.com—you'll be able to seamlessly share data and tap into the same underlying Chatter collaboration capabilities.

Salesforce is the proven, low-risk, highly innovative solution with an amazingly quick time to value. There's no hardware or software to install or upgrade. No lengthy training. And no unexpected costs. And with the Force.com platform, you can develop and deploy your own cloud solutions—without first having to build a technology infrastructure.

Salesforce.com is committed to making your transformation as easy as clicking your keyboard. With Salesforce, you can say goodbye to your cubicle, to endless piles of paper, and to software that makes you want to tear your hair out. The social, mobile, and open future is here.

Salesforce.com has already done the hard work for you. You're free to focus on your success.

For a free 30-day trial, go to www.salesforce.com/form/signup/freetrial.jsp

Contact us at 1-800-NO-SOFTWARE or info@salesforce.com



For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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