



It's no mistake that the most successful companies have a strong focus on their sales and marketing process aimed at generating targeted leads. In today's environment, it's no doubt that these companies have streamlined this strategy by automating their processes within Salesforce. The thinking is the more you can automate, the more time your team will have to focus on driving growth and developing relationships.

Consequently, our goal is to help organizations customize Salesforce to maximize business process efficiencies. We accomplish this by leveraging cloud technologies with solution accelerators to rapidly build and integrate solutions that drive profitability and growth.

## **Below are the top five areas we repeatedly see successful organizations focusing on:**

### **1. Optimizing Lead Generation**

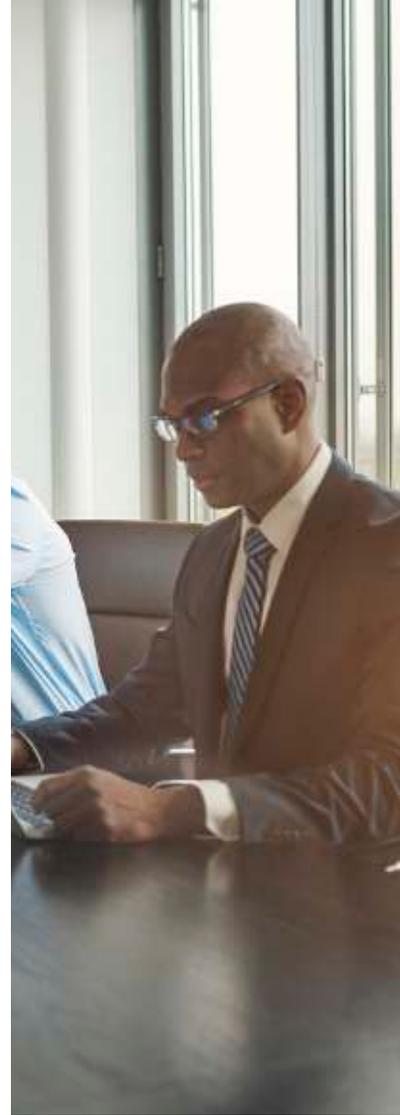
Driving new leads and finding people who are interested in your product and service is critical. They're the lifeblood of any business and converting leads into loyal customers is what will help you beat your competition. One way to get more from your marketing efforts at a lower cost is to meet your customers where they are—on the Internet.

- **Know your target audience:** Before creating your Web-to-lead form, think about what information you want to collect during the initial contact. This will allow you to reengage using your other marketing channels with the right message.
- **Keep your web-to-lead forms simple:** Customers are busy and do not like to spend time entering lots of information. Capture only the information you need to engage them in the next conversation.
- **Use the Social Cloud:** Be ready to take advantage of the latest trend in marketing using Salesforce social networking tools to help you capture leads. For example, check out AppExchange apps that help you promote your product through Twitter, Facebook and LinkedIn.
- **SEO for Salesforce:** Look for apps that will enhance your marketing and sales efforts. For example, the free edition of the app SEO for Salesforce AppExchange that automatically connects to intelligence data through Google Analytics. Use this information to track lead origins and report by search engine, search type, keyword, and campaign through your entire sales cycle.

## 2. Use of Effective Lead Management

By managing your leads in a systematic and structured way, you can increase both the number of leads you generate and how many of those leads you convert. With Salesforce CRM, you can automatically capture leads when people find your site and fill out your web forms. You can then route those leads to your reps for immediate follow up.

- Standardize your sales process: Creating a standard process with the same stages, activities and success metrics will drive best practices for selling your products or services. This will also allow you to accurately measure and identify your best sales reps.
- Capture more qualified leads: It is important to capture high value leads and score them so your sales reps are spending their time working the hottest leads first.
- Automate your lead intake process: Using Salesforce web-to-lead with downstream rep assignments will save you time and make the conversion process more efficient. We recommend that clients implement lead escalation reminders as your immediate response is critical to closing more deals.
- Accurate measurement of marketing and sales effectiveness: The value of your efforts should be based on the pipeline generated, not the volume of leads. For example, measure marketing based on pipeline with the products that have the highest margin so your reps are working smarter not harder. Include the highest margin products on your lead form as 'Product Interest' so you can score and work on those first.
- Use salesforce campaigns to track & measure the best lead sources. This will allow you to focus future dollars on the best lead sources.



## 3. Usage of the proper Salesforce AppExchange Apps

You will need to evaluate the ROI and decide whether to build vs buy based on the number of users who will be using the application. In most cases small to mid-sized companies will get better value from a prebuilt application. Below are our top 5 picks:

### **Conga Composer:**

Conga Composer was released by Conga in November 2009. With this app users can easily use Word, PowerPoint, Excel, HTML email, and PDF forms to create and deliver fully customizable output, such as proposals, account plans, invoices, quotes and contracts. This application also allows for flexible delivery options including automatic delivery via email, download locally, store in Salesforce, Google, or SpringCM. You can also send for eSignature with DocuSign, EchoSign or Sertifi. Reviewed by 646 users, Conga Composer has received 4.9 stars on the AppExchange.



## **Adobe EchoSign**

Ranked #1 on the AppExchange, as the global electronic signature service that allows users to obtain document signatures wherever they are, and on any mobile device. Users can create branded emails and signature experiences with company logos. This product is easy to install and will transition the headaches of your paper process into a modern electronic world. It was named the Customer Choice Award winner for 5 years running, reviewed by over 3000 users, Conga Composer has received 4.9 stars on the AppExchange.



## **Cirrus Insight Email Integration:**

This app was released in December 2011. Cirrus Insight is designed to integrate and sync Salesforce with Gmail, Google Apps, Office 365, Outlook 2013, Outlook Web App, iPad, iPhone, and Android. Users can instantly view, update, and create leads, contacts, activities, cases, opportunities and more right in Gmail. Likewise, users may save emails and attachments from Gmail to Salesforce with a simple click and relate to any standard or custom object in Salesforce. Reviewed by over 1670 users, Cirrus Insight has received 4.9 stars on the AppExchange. There are many of these applications on AppExchange (Groove, Ebsta, Yesware, etc) and some would argue that others are better but it will really depend on your email platform and specific use case. We can help advise you for free you need assistance.



## **Informatica Cloud Integration:**

Released by Informatica Corp. in June 2010, the Informatica Cloud Integration app has been rated as the #1 Integration Solution on the AppExchange for 5 years running. Designed to meet the data integration needs of all users, this allows organizations to easily integrate Salesforce with ERP (SAP, JDE, Oracle) apps, databases, files, and social sources. This app is designed to work "out of the box" to integrate Salesforce CRM and Force.com data with prebuilt connectors. Informatica Cloud requires some training to set up and administer.



## **DemandTools:**

Data quality is the key to accurate pipeline reporting. DemandTools was published in 2006 and has been the leader in data clean-up. DemandTools is an enterprise capable suite of data quality modules to control, standardize, verify, de-duplicate, import & generally manipulate Salesforce data. It is easy to install and once you have it setup you can automate the de-duplication process. We can't say enough good things about this application.



## 4. Use Salesforce Communities

Today, more than ever, companies need to be well connected with their customers and partners. The popularity of crowd sourcing in social communities, the level of engagement on social media platforms like Facebook and Twitter, and the increase in connected mobile devices have all combined to create a new generation of customers and partners who have high expectations for how they engage with a company.

### ***Here are five benefits of connecting with customers through communities:***

**Save Time:** By creating a community platform for customers to share, you give your customers access to not only your knowledge base but also to others in the community. You will provide easy access to your employees and partners, offering the ability to combine your existing resources with crowdsourcing tips for much faster customer service outcomes.

**Save Money:** By connecting your customers with other highly engaged customers, you'll decrease the amount of tough questions coming into your customer service center. Customers will answer each other's questions. You can add FAQ's to your community the customers to find answers to the most common questions.

**Enhance Products:** Include product developers with engaged customers for product ideation, feedback and beta testing. Enable "Ideas" for clients to enter new features and products that can grow your business.

**Drive Sales:** Being connected is about switching from offering services to offering solutions. A stronger connection with a potential customer involves knowing more about them, their wants, their needs, their past purchases and their likely next purchases. You'll be offering them solutions tailor-made to their needs so closing deals is more frequent.

## 5. Sales Gamification

We love this one because when your sales reps compete you win! Sales reps are competitive by nature and this application tracks and scores business critical activities so your executive team can reward the leaders. We recommend LevelEleven which is a sales activity management system that generates immediate ROI by getting more out of your significant investment in Salesforce and your sales team. This application will immediately provide focus on the behaviors that drive more sales.

### ***Customer Proclaimed ROI:***

- **Symantec:** 412% increase in qualified sales opportunities
- **Procore:** 400% increase in YoY sales pipeline
- **Dun & Bradstreet:** 60% growth in new sales pipeline
- **Ryerson:** 60% increase in existing account win-backs per month
- **Staples:** 180% more calls & 2x sales opportunities created
- **Veritas:** 105% more proposals sent & 8x meetings scheduled

## Two Bonus Picks:

### ***1. Quote to Cash automation:***

We like Steebrick and Apttus CPQ tools to help automate your quote to cash process. These apps allow companies with more complex pricing to quickly and easily create accurate, professional looking quotes in Salesforce.

### ***2. Sales Data automation:***

SalesforceIQ is a great tool that automatically manages the details of every customer and prospect interaction for you. With information automatically logged from emails, calendar, marketing automation systems, and many other data sources. This is a huge time saver. Note, if you use this you will not need the Cirrus Insight Email Integration tool recommended above.

- Provides Email integration with automatic follow-up reminders
- Integrates with your marketing apps such as Pardot, Desk, Hubspot and MailChimp
- Strong out-of-the-box reporting to drive your business
- Mobile ready! Supported on iOS, Android and Chrome



For more information on these recommendation or any other questions you have based on your unique business please contact us at [info@cirriussolutions.com](mailto:info@cirriussolutions.com) or on the web at [www.cirriussolutions.com/contact](http://www.cirriussolutions.com/contact).