



# GUIDE TO GROWTH 2.0

How we can help grow your  
business using Salesforce

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# ABOUT THIS GUIDE

## HOW WE CAN HELP GROW YOUR BUSINESS USING SALESFORCE

Consleague is experienced in aiding the growth of a number of diverse businesses, utilising Salesforce to provide targeted solutions to streamline and improve the overall Sales, Marketing and Customer experience.

We are able to formulate and deliver strategies for growth in the following areas:

- **Gaining** new customers
- **Strengthening** relationships with existing customers
- Improving customer **experience**
- **Efficient**, streamlined working practices
- The **agility** and flexibility to adapt to changing situations

We hope the following guide - which explores a few of the services we can implement to support your business - illuminates why these areas are so vital to building a successful business and how they each bring value to how it delivers.



Gaining



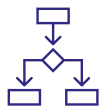
Strengthening



Experience



Efficient



Agility

## MORE ABOUT CONSLEAGUE

For over ten years **Consleague** have served as official Salesforce Consulting Partners. Our solid reputation has been built on our ability to combine technical expertise with a proven track record in growing businesses successfully.

With consultants drawn from Sales, Marketing and Product Development, our team has experience across an impressive range of industries ranging from e-commerce and financial services to energy and utilities, among others.

# FAST TRACKING NEW BUSINESS

Attrition is part of a constantly fluctuating business landscape so a scalable acquisition strategy is essential. The gaining or acquisition of new clientele – be it through traditional or digital means - remains one of the cornerstones of all growth strategy.

However, in a climate where customers have increasingly high expectations (76% said they expect the businesses they deal with to understand their needs), an effectively managed acquisition strategy to gain new customers can show a highly desirable return on investment, with nurtured leads earning 47% more than non-nurtured leads.

**18**

is the number of calls it take to connect with a potential buyer

**24%**

is the percentage of sales emails opened

**40%**

is the percentage of sales peoples' opinion that prospecting is the most challenging part of the sales process

## WHAT WE CAN DO TO HELP?

### Marketing Smarter

With Pardot and Marketing Cloud, we can support marketing automation to engage with your leads in a personalized and sophisticated way. Within Sales Cloud, we can set up Campaigns designed to help understand the ROI of various marketing and to learn which opportunities have been affected by various campaign. In your prospect prioritization, we can implement Einstein Lead Scoring' advanced AI analysis.

### New Sales Channels

We can help set up different teams, queues and autoassignments of leads and opportunities based on different channels through Lead and Opportunity Management, creating customised layouts and processes tailored for Web, Phone, Email and Face to Face selling. Through Sales Path, we can help advise and steer sales reps based on various channel processes and via Forecasting we can create a forward view of projected sales based on channel, territory or other segment. With Einstein Call Coaching, AI enables you to gain a deeper insight into the communication and conversations between your sales reps and customers.

### Efficient Sales Processes

Automated reminders can be set up so reps can stay on top of all follow-up communication and approval processes implemented so management can approve completed deals. We enable commission to be managed within the Salesforce system through Opportunity Splits and you can send email from Salesforce, eliminating the need to switch systems, with all products, prices and quote available to be configured, meaning you don't have to navigate between various spreadsheets. In addition to this, we can implement Validation rule and Duplicate rules to ensure the integrity of your product or service.

### Customer Insight

By containing all sales and marketing data in Salesforce, you can ensure you have a single, reliable source for reporting analytics. By configuring social accounts, your users can catch up on an account's latest Twitter activity. Using Contact Roles, you can ensure you are engaging with the top tier of decision makers at a company and you can establish a customer lifetime value based on segment, allowing you to focus on attracting the exact type of customer.

# MAXIMISING EXISTING BUSINESS

Comparatively speaking, the cost of retaining existing customers is lower than the expense of pursuing new clientele.

Satisfied clients become repeat customers and, with legitimate commitment, can become open to cross selling or the up-selling of new services and products.

Also, if you keep your clients satisfied you'll soon see they're an extraordinary wellspring of potential promotion: 84% of clients say that the experience the company gives them is as important as the products and services.

Regardless of whether it's through referral or word of mouth, providing an incredible client experience is vital to sustainably building your business.

## 70%

Your chances of selling to an existing customer are 60-70%. For a new customer it's as low as 5%

## 25%

Increasing customer retention by 5% results in a 25% increase in revenue

## 90%

9 in 10 buying decisions are made through recommendations from peers

## WHAT WE CAN DO TO HELP?

### Tailored Experiences and Journeys

The utilization of Pardot or Marketing Cloud to offer automated marketing allows you to offer customised communications to clients at all key touchpoints in their journey with you. Offering relevant items to customers can expand income from steadfast clients. Also, providing a guided onboarding experience when clients initially interact with you, guaranteeing their experience is a great one.

### Customer Engagement

With Salesforce you can transform customer feedback into knowledge you can use to improve performance, allowing you to efficiently and accurately analyse client data. The ability to interact with customers via their preferred channel is another benefit, with social accounts and Einstein Account Insights offering an up to date overview of your customers' most recent news.

### Opportunity Identification

Through automation you can use Salesforce to create, renew, upsell or cross sell opportunities, promote retention opportunities to certain users or automate customized communications to them. This tool is ideal for supporting new products or services you may wish to sell and identify users who may potentially engage with you about them.

### The Importance of Value

Salesforce enables you to analyse customer data for a comprehensive understanding which groups purchase most from you or certain product most frequently, identify customers who may display signs of leaving by flagging complaints or customers who have not had contact from you for a certain period of time.

# IMPROVING OVERALL EXPERIENCE

The key is recognizing that each customer is unique and with their expectations at an all time high, an understanding of their needs and requirements and the ability to deliver impactful interactions at each stage of a customer's journey with you is crucial.

73% of the highest performing small businesses offered the capability to collaborate with their customers, so of primary importance is the ability to understand and help deliver their wants and needs and incorporate their constantly fluctuating feedback into the offerings you provide to them.

What makes a great overall experience for the customers and implementing it in a personalized way is always step one: to follow through in a successful way can only happen with an understanding that customer demands are always changing and your approach and use of technology must reflect this.

95%

of customers expect businesses to communicate proactively and not reactively

83%

of customers would provide a referral after a positive experience

87%

is the amount satisfied customers are more likely to buy upgrades and new services

## WHAT WE CAN DO TO HELP?

### Overall Customer Experience

Consleague can help incorporate branding to all communication sent from Salesforce to deliver consistent messaging and brand awareness through personalized marketing automation from Pardot or Marketing Cloud.

### Gauge Satisfaction

We can provide a range of various metrics that may be applied to monitor the satisfaction of your customers: Customer Satisfaction Score, Customer Engagement Score and Net Promoter Score are the most popular. Maintaining a clear, accurate view of how your customers rate their overall experience is crucial if your focus on a great customer experience as an integral part of your company's growth strategy.

### Constant Improvement

We believe in a nimble approach to enhancing your Salesforce platform: implementing changes need not be disruptive, in fact quick, iterative improvements – utilising click development where possible, avoiding complex coding and providing a platform that can be modified and developed over the long term – encourage enthusiasm in implementing valuable change.

### Personalised Approach

Like your own customers, we realise you are unique and a such each Salesforce platform needs to fit the needs of the company using it, as well as the customers they serve. Through a series of dedicated in-depth discovery sessions, we endeavour to gain a full grasp of you, your business, your customers, your long-term objective, immediate goals and areas you feel need strengthening or improving. Our job is to use this knowledge to set up a platform that will work for you and your customer base.

# HEIGHTEN EFFICIENCY



A sales rep spends, on average, 34% of their time selling. It's not hard to understand why when the majority of their time falls to data entry, quote generation and other administrative chores.

In a landscape where customers demand your full attention, it's essential that a system allowing your sales team to focus more on customer prospects and a full personal sales experience is in place.

With AI (+155%) and marketing automation (+104%) set to grow enormously in the next 2 years, it's the perfect time to invest in a streamlined system of efficiency to fulfill all customer demands and to stay in the lead competitively.

**33%**

of consumers would consider taking their business to other companies after just one bad experience

**7%**

is the amount of submitted forms that were responded to within 5 minutes

**79%**

of sales teams use or are planning to use sales analytics technology to increase efficiency

## WHAT CAN WE DO TO HELP?

### Insight

Accurate dashboards and reporting on all your activity are guaranteed via the system's best practice data structure. Salesforce helps identify any outstanding or incomplete actions, allows you to gain an overview on Lead and Opportunity conversion time, as well as analysis of how individual reps are spending their time. You can also receive suggestions as to possible training or improvement areas so staff can spend more time selling or serving. Our Adoption rate monitoring ensures staff is using Salesforce correctly.

### Streamlining Processes

The platform's Mobile features allow users to – amongst other things - update records, view Dashboards and convert opportunities on the go. We will of course give you full training with our Lightning Conversion, complete with walkthroughs, so you can truly get a true command with the user friendly Salesforce platform. To check what stage a sale is at and what follows, Path offers users a visual representation, as well as offering advice and tips at each stage of the sales process. As we ensure security settings are in place fully, you can be confident certain users will only ever see relevant records.

### Automate Processes

Are the right actions being taken at the right times? You can find out easily with the automated creation of activities, which stops users from wasting time on excessive admin. We can create processes designed to automatically update and create records when specific conditions have been met. Also, deals requiring manager approval are, when completed, sent to them via an automatic alert, ensuring speedy approval.

### Falling Cost

With a focus on helping you and your users save time, the automation of repetitive processes and the streamlining of user interfaces all play a part in us helping you achieve your objectives efficiently. Salesforce helps you prioritise the type of work certain users are completing, the lead you should focus on and the various activities pending completion. In addition to this, the centralization of sales, marketing and customer service on a single platform allows you to reduce spend on other superfluous licenses to other complimentary platforms.

# AIDING FLEXIBILITY

With the world moving at such a rapid rate, now is the time to use streamlining and efficiency in business. From introducing new services and products to meet the precise needs of your customer base, exploring marketing strategies or way of how, where and when your staff are able to work, businesses that don't are likely to be left behind. While technology is a huge part of successful business operation, without the know how and a targeted approach to how it can improve your operations and work in your favour, it's essentially useless - unless it allows a flexible application of strategy. This is where Salesforce comes in.

60%

of salespeople say if they figure out a mode of working that works for them, they don't alter it

80%

of executives expressed a belief their existing business models were at risk

84%

of executives believe innovation is crucial to a future growth strategy

## WHAT WE CAN DO TO HELP?

### Insight

We're able to offer a comprehensive Support package that provides same-day response to any issue. You can be confident of full support and rapid resolution to any problem that may arise in the course of business. The set up, trail and launch of new features and offers in a quick and efficient manner is essential for companies and organizations operating in an ever changing landscape.

### Streamlining Processes

The Salesforce Anywhere App has been designed to offer collaboration and embedded chat to support remote working from anywhere. You can also arrange to have activity reports implemented to provide reassurance to management at all levels of productivity levels. Security has also been addressed, with secure login to the Salesforce platform ensuring security at all times, even with workers working from home.

### Automate Processes

To find out what communications connect best with which customer groups, Pardot supports the use of A/B testing, making it quick and simple. Also, new products, features and offers can be specifically targeted to various groups to help you identify which customers will be most responsive to various types of offer.

### Falling Cost

Here at **Consleague**, we're dedicated to knowing your organization fully before presenting a tailored strategy, with discovery discussions being the first step on the road to familiarizing ourselves with your wider goals and challenges. Our work is all geared to long-term strategy, with Roadmapping exercises providing you with a forward looking insight into what solutions are available and provide the most value to you and your business. The Consleague/Salesforce commitment to click development always ensures we deliver you a platform that is designed to maximize your business, streamline and strengthen communication and be ready to implement strategic change when necessary.