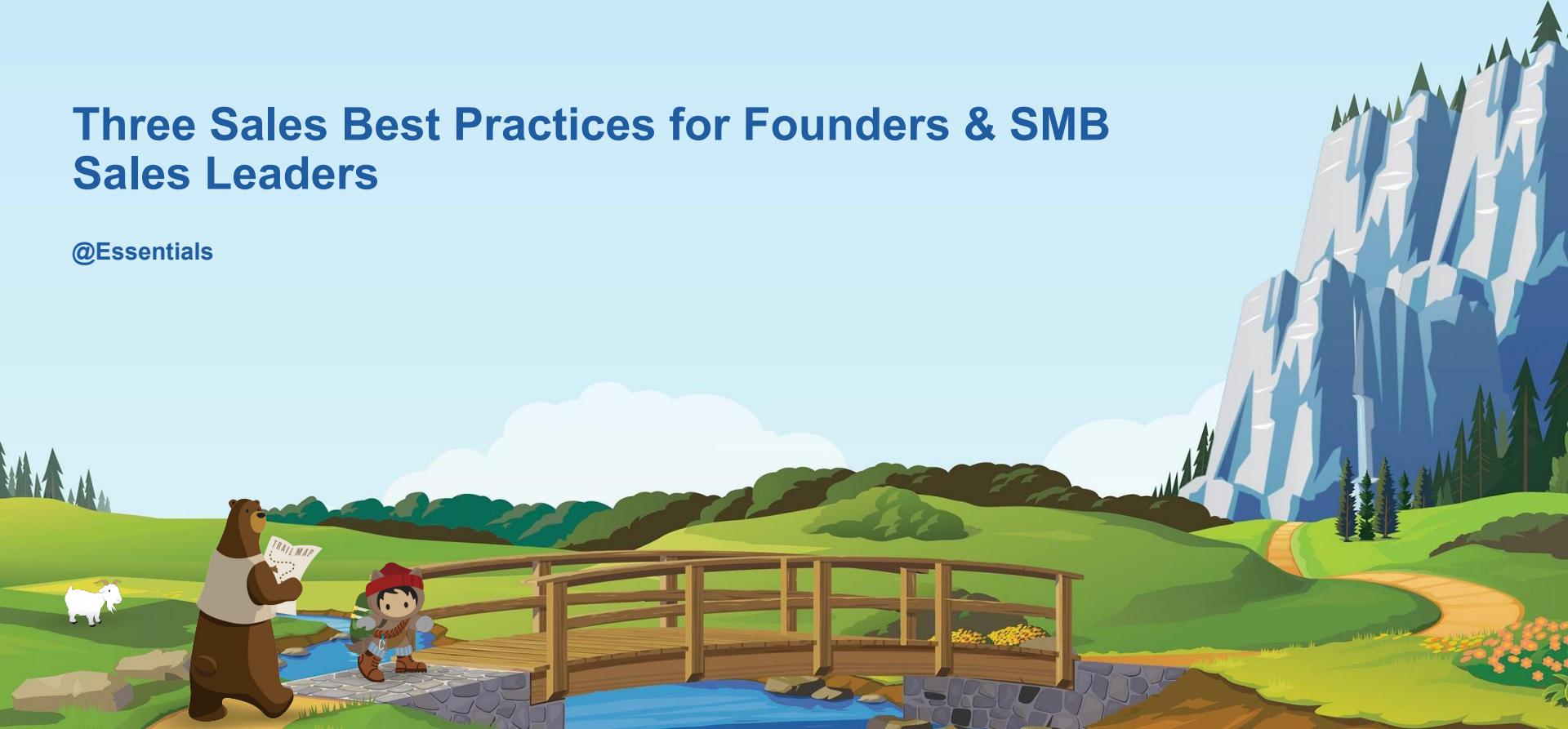


# Three Sales Best Practices for Founders & SMB Sales Leaders

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# Forward-Looking Statement

## Statement under the Private Securities Litigation Reform Act of 1995



This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

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# Today's Speakers



**Reneé Selanders**

SMB Product  
Marketing Manager,  
Salesforce



**Alessandro Chesser**

VP of Sales,  
Carta

# Session Agenda

- Challenges Facing Small Business Owners & Startup Founders
- 3 Successful Tips for SMB Owners & Founders
- Demo
- Customer Story
- Q&A



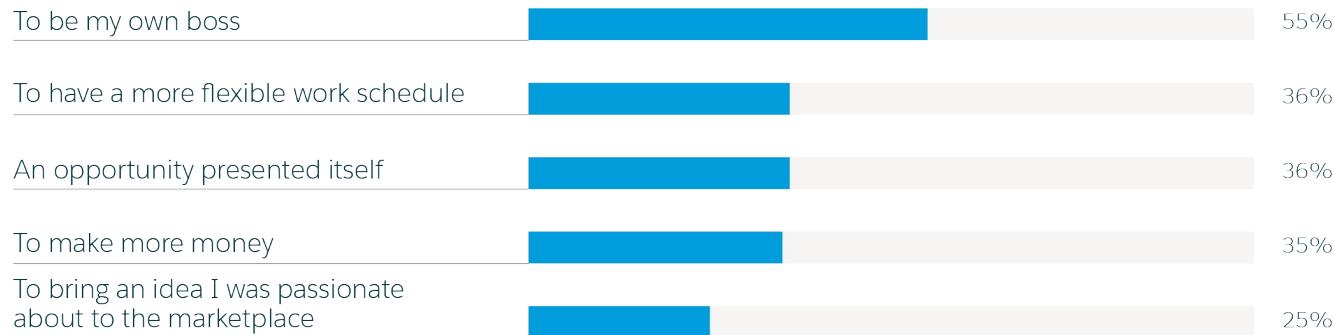
How many of you are founders  
and also run the Sales function?



# Common Drivers for Becoming an Entrepreneur



## Reasons for Starting a Business\*



\* Multiple responses accepted for this question.

Salesforce Research



# But, the Entrepreneurship Path is Riddled with Challenges



## Small businesses (2-20 employees)

- 1 Acquiring new customers
- 2 Access to investment capital
- 3 Not enough time



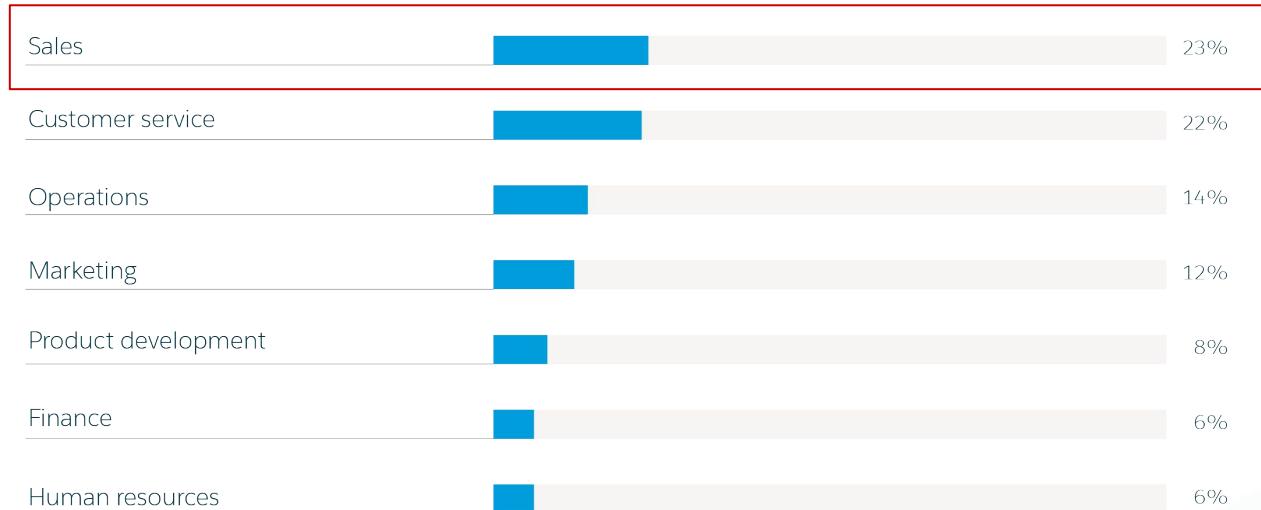
## Medium-sized businesses (21-200 employees)

- 1 Acquiring new customers
- 2 Achieving work-life balance
- 3 Not enough time

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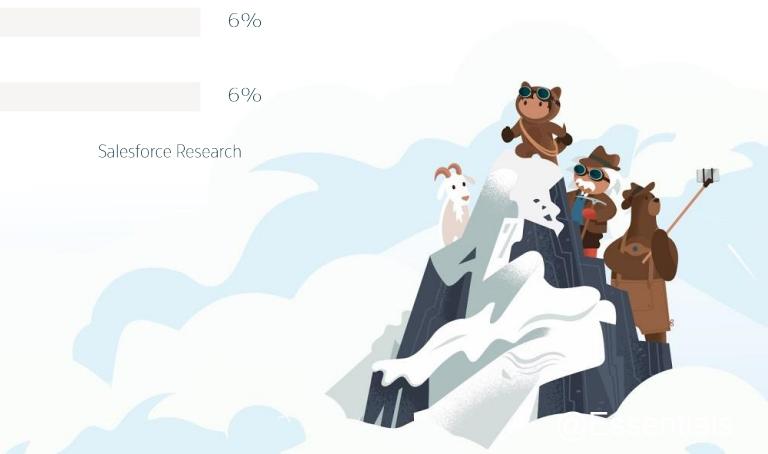
@Essentials

# And, Sales is the Most Crucial Role to Your Success



\* Multiple responses accepted for this question.

Salesforce Research



# Technology Can Help with the Critical Challenges



- 1** Customer relationship management (CRM) system (31%)
- 2** Financial software (31%)
- 3** Hardware (28%)

\* Multiple responses accepted for this question.

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# 3 Sales Tips for Founders

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Working Leads  
Efficiently



Understanding your  
Sales Process



Boosting Rep  
Productivity



# 3 Sales Tips for Founders



Working Leads  
Efficiently



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Productivity



# Crushing Your Revenue Goals Starts with a Good Lead Process



- 1 Develop a concrete definition of a lead and make sure all employees understand it.
- 2 Install an effective Customer Relationship Management (CRM) Tool.
- 3 Track the source.
- 4 Distribute your leads quickly.
- 5 Nurture your leads and get your Sales team excited about every prospect.
- 6 Treat your prospects like customers.
- 7 Measure everything you do.
- 8 Hold regular meetings with your sales staff and anyone else involved in the sales process.



# 3 Sales Tips for Founders



Working Leads  
Efficiently



Understanding your  
Sales Process

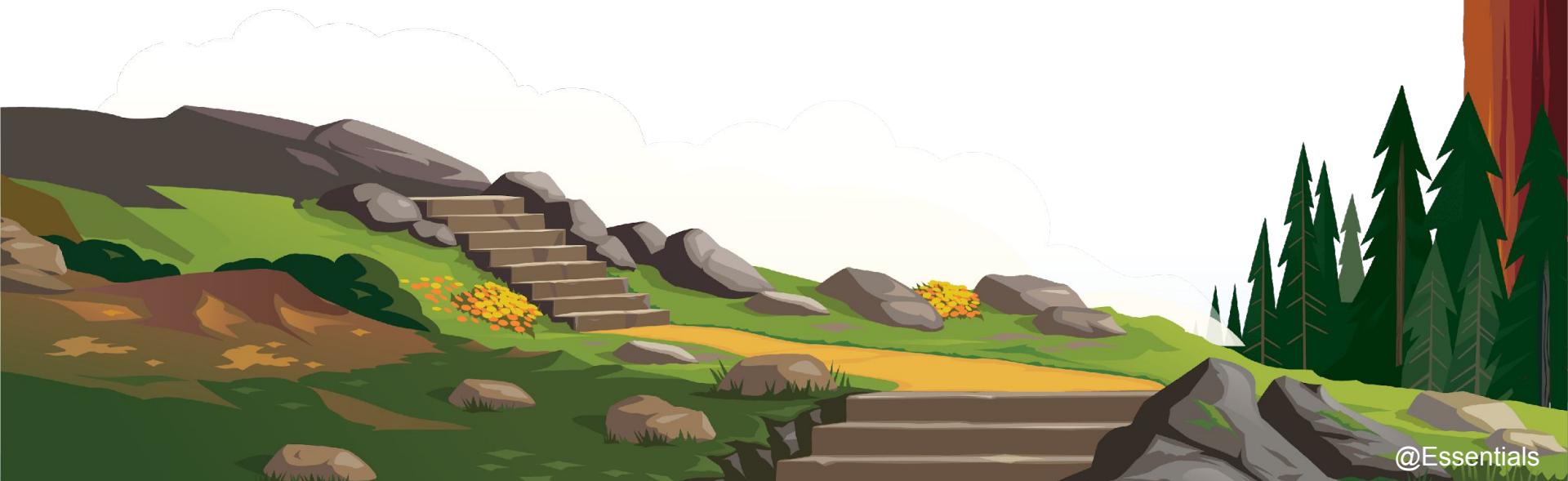


Boosting Rep  
Productivity



Businesses with a standardized sales process see up to  
**a 28% increase in revenue vs. those that do not.**

Source: HBS Survey, 2018



# Organized Sales Process is Key to Sustaining Small Business



- 1 A consistent schedule:** You should know when and how often you are going to be performing your sales activities.
- 2 A strong message.** You should know what you are going to say and at what point in the process you are going to say it.
- 3 Mixed media plan.** Use multiple channels to convey your message and mix it up – emails and phone calls are the most common, but perhaps it's appropriate to reach your potential customers on a favorite social channel.



# 3 Sales Tips for Founders



Working Leads  
Efficiently



Understanding your  
Sales Process



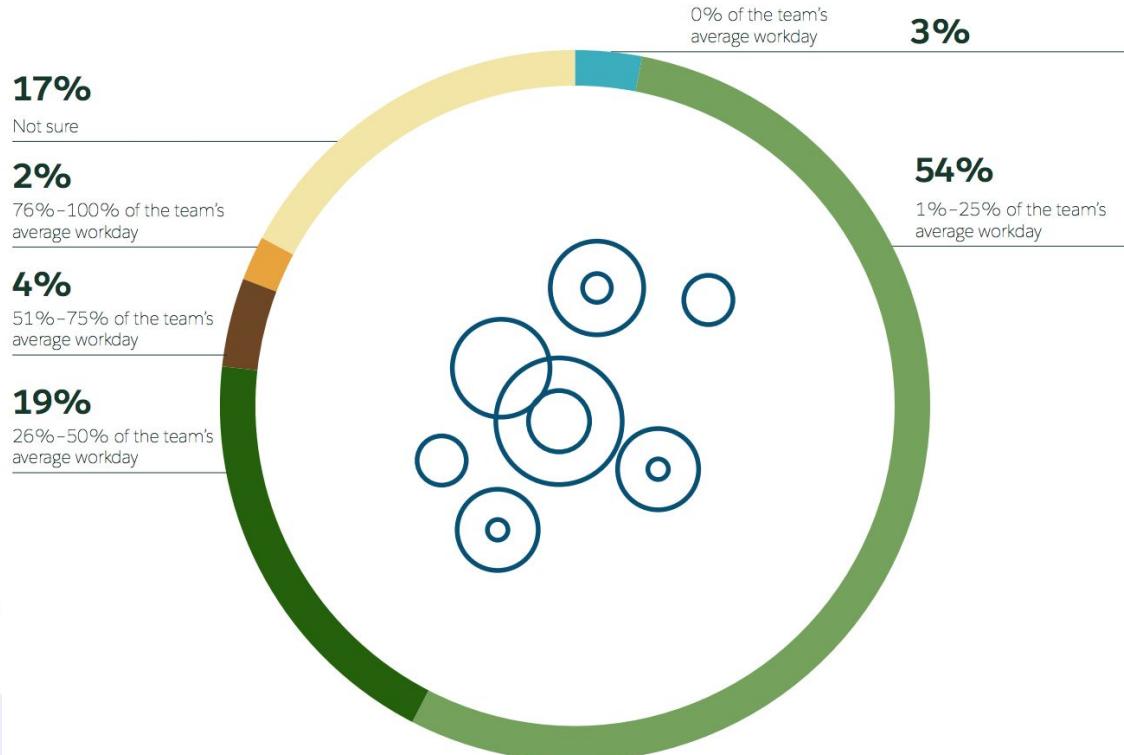
Boosting Rep  
Productivity



# Startups Spend Too Much Time on Manual Data Entry



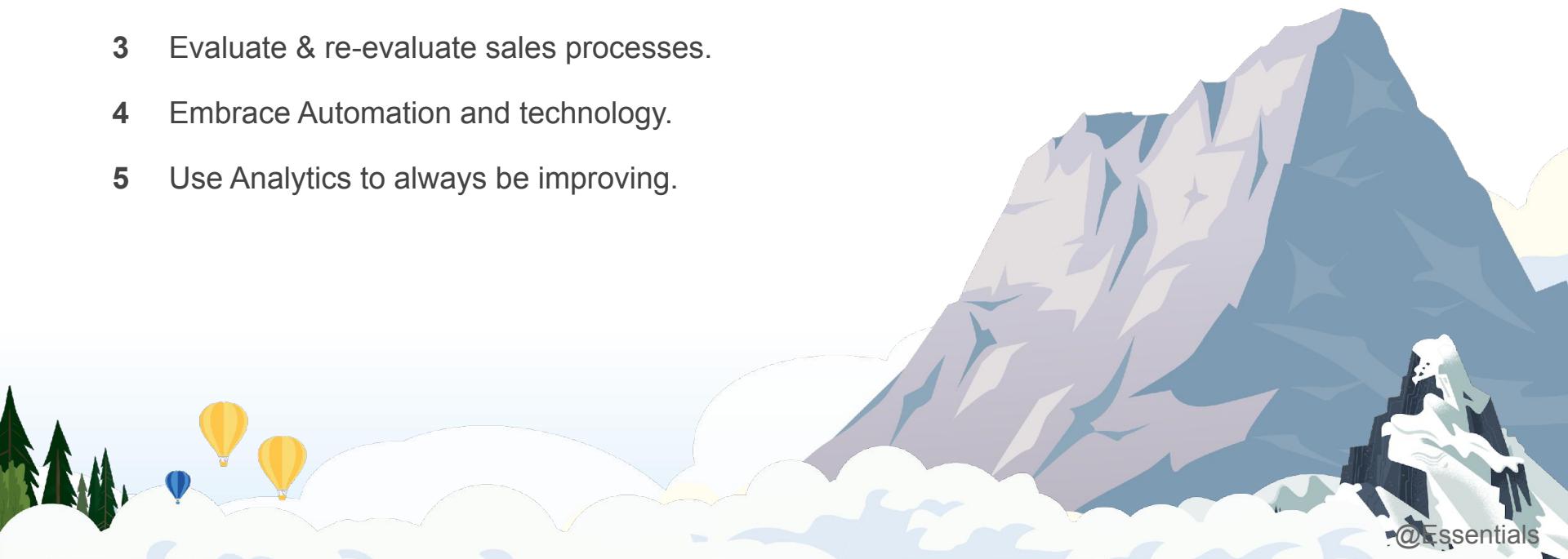
Approximately what percentage of your team's average workday is spent **inputting manual data?**



# Productive Sales Team = Higher Revenue Growth



- 1 Make ongoing sales coaching a priority.
- 2 Advance prospects faster with Value.
- 3 Evaluate & re-evaluate sales processes.
- 4 Embrace Automation and technology.
- 5 Use Analytics to always be improving.



# A Good CRM can Help You Get There Faster

Salesforce Essentials: Sell and Support Faster from a Single App for \$25/month



## Start Instantly

Get up and running in minutes with step by step guided setup and live in-app support from coaches



## Sell Smarter & Faster

Bring all customer & sales data into one place, automatically capture customer emails & meetings and sell on the go



## Deliver Standout Customer Support

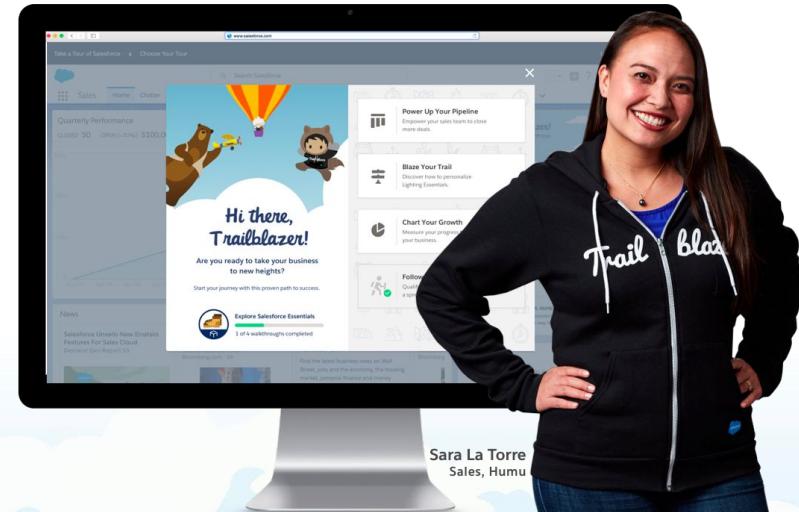
Respond to customers on any channel, automate repetitive support tasks and provide branded self-service help



## Scale as you Grow

Grow on the Customer Success Platform with pre-built integrations & real-time reports + dashboards

Built on the #1 CRM



@Essentials



Try for free, and when you're ready to embark on the path to success, get **50% off**.

[salesforce.com/svbeentials](https://salesforce.com/svbeentials)



# Helpful Resources



## Salesforce Essentials Video Demos & Tutorials:

- Salesforce Essentials in-depth demo: <https://bit.ly/2M0wFVZ>
- Connect your email into your account: <https://bit.ly/2HJAWIf>
- Importing your data into your account: <https://bit.ly/2I4FFrv>
- Activating your trial and adding your colleagues: <https://bit.ly/2P5LrMS>

AppExchange Integrations with Essentials: <https://sforce.co/2RA3q0d>



# thank you

