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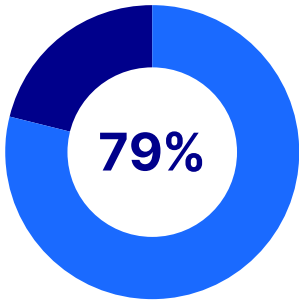# Best practices to empower sales and service teams

Think outside the box with Salesforce CRM integrations and a 360-degree customer view

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79%

Did you know?

79% of sales reps have had to quickly adapt to new ways of selling to stay agile in an uncertain world with unpredictable buying behaviors.[1]

QUICK TIP

Save storage costs and avoid errors, wasted time and lost information by automating the lifecycle of mission-critical documents.

Introduction

The current economic climate demands that midsize organizations find ways to balance growth objectives with limited resources. Sales teams need a complete, 360-degree view of all customer information to sell faster and smarter, even when faced with shrinking budgets and resources.

Sales operations have changed dramatically, forcing organizations to adapt to:

- Workforce disruption and remote work requiring connected, responsive systems that scale.
- Rising employee and customer expectations that content be available when and where they need it.
- Customer expectations that data be used ethically and governed by evolving regulations.
- The increasing need to develop trust between salespeople and customers.
- Digital transformation of business processes, including the imperative of managing business content for CRMs.
- A world in which everyone is less willing to spend time searching and executing repetitive tasks.

Top sales performers are those who get a competitive advantage and find new ways to boost sales by accessing all relevant customer data, both unstructured and structured, including transactions, outbound communications and purchase history. This means going beyond traditional CRMs, which deliver only structured data, to integrated systems that can surface relevant content that is often difficult to find.

Sales excellence depends on collaboration with other departments on everything from contracts and account status to customer purchase history and product inventory levels. With data silos and disconnected systems preventing access, sales teams can easily miss out on insights that drive superior customer experiences and reveal new revenue opportunities.

Enhanced information management fuels processes, connects touchpoints and improves customer interactions. CRM integrations that connect people, content and business processes deliver smarter information that drives productivity through a 360-degree customer view.

Power superhuman sales and service teams with a 360-degree customer view

A 360-degree customer view must include CRM data, but also related content. By enhancing such a view with artificial intelligence (AI), employees gain insights to 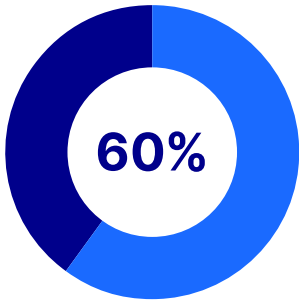make better, informed decisions. Sales and service teams no longer waste valuable time hunting across systems for the right version of a customer document. A consolidated view of the customer improves sales processes and drives deeper insights that help surface more opportunities, increase customer loyalty and build better relationships.

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60%

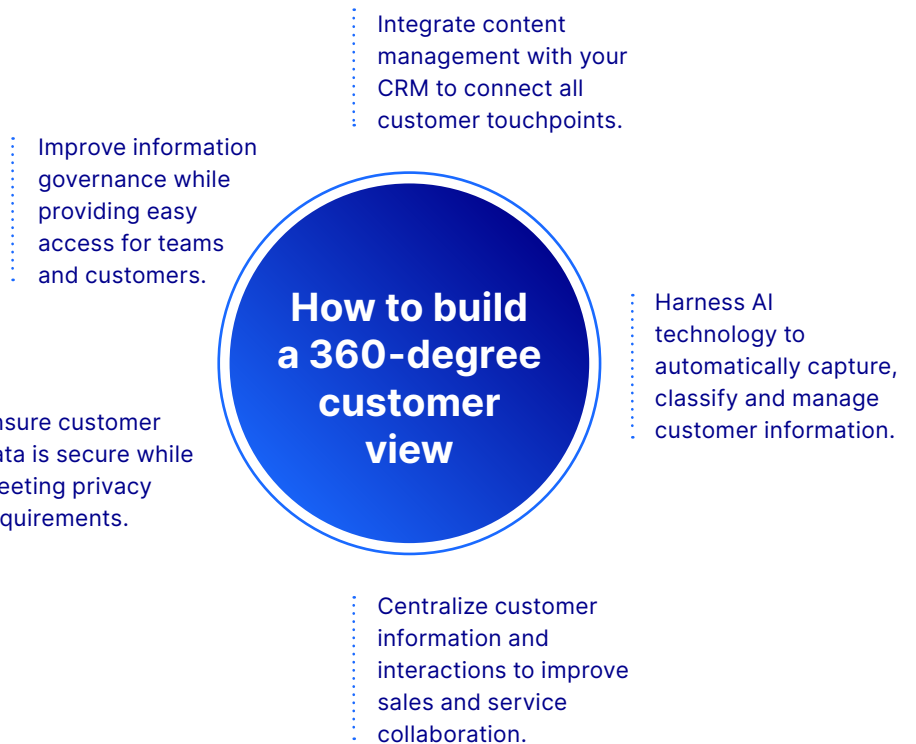## Did you know?

Almost 60% of customers say it generally feels like they are communicating with separate departments, not one company.[2]

When integrating Content Services to CRM, take time to evaluate how users will find the information they need. A single global search facility across structured CRM data and the content repository is a huge time saver.

1 Meet your sales team where they are already working

Siloed departments with siloed information cause disconnected customer experiences. While 79 percent of customers expect consistent interactions across departments, the majority are not getting them.[3] This can be disastrous for sales and service teams, affecting their ability to forge trusted relationships and personalize experiences.

To empower sales and service teams, organizations must provide an integrated infrastructure that drives productivity through better-connected people, content and systems. That starts with a solution that can connect everything and provide a 360-degree customer view.

Integrate content management with your CRM to connect all customer touchpoints.

Improve information governance while providing easy access for teams and customers.

How to build a 360-degree customer view

Harness AI technology to automatically capture, classify and manage customer information.

Ensure customer data is secure while meeting privacy requirements.

Centralize customer information and interactions to improve sales and service collaboration.

Create a connected ecosystem through deep integrations with key systems and applications for sales teams, such as SAP®, Salesforce®, Microsoft® and Google Workspace™.

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2 Salesforce Research, State of the Connected Customer, 5th Edition. (2022)

3 Ibid.

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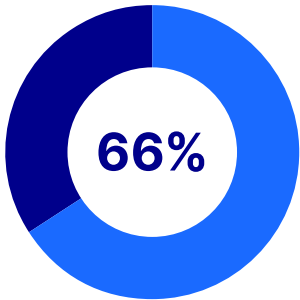
Did you know?

66% of SMBs will increase investments in automation and digital tools.[4]

QUICK TIP

Adopt AI-powered technology and analytical tools to uncover and address common oversights or risks within documents, such as sales contracts, which would usually go unnoticed.

2 **Automate repetitive tasks to give sales teams more time to sell**

Salespeople and customers are both looking to reduce paper-based selling and repetitive tasks. Seventy-two percent of sales reps' average week is spent on non-selling tasks, such as manually entering customer and sales information.[5] Organizations are beginning to adopt AI to automate many sales-related tasks and deliver wide-ranging insights so sales reps can spend more time selling.

7 ways organizations win with automation

- Reduce paper-based selling processes to remove bottlenecks and improve sustainability.
- Improve employee experiences and increase margins.
- Free up time to prioritize excellent customer experiences and revenue-generating activities.
- Deliver incoming communications quickly and efficiently to reduce misinformation and fractured customer interactions.
- Track customer interactions and address their needs faster.
- Construct better RFx responses and better deals.
- Seize more opportunities to upsell based on intelligent insights, such as customer history and trends.

4 IDC, FutureScape: Worldwide Small and Medium-Sized Business and Digital-Native Business 2023 Predictions. Oct 2022 | Doc #US49772322

5 Salesforce, State of Service, 5th Edition. (2022)

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💡 **QUICK TIP**

Consider employees' working environment and the technology available to them. Distributed sales and service agents are more likely to interact via a mobile device or tablet, significantly increasing the need for cloud-based solutions that support access anywhere, anytime, from any device.

3 **Prioritize secure collaboration and easy access to information**

Top sales performers are 1.5 times more likely to monitor customer communication histories, 2.4 times more likely to pay attention to purchase history and 4.5 times more likely to keep track of customer staffing changes than their lower performing counterparts.[5]

With content not automatically shared or synched, salespeople don't have access to the most up-to-date and relevant information. Outdated, inconsistent or conflicting customer information leads to interactions that could erode customer trust, such as incorrect product recommendations, slow problem resolution or extended delivery times. Sales and service teams need access to a complete and accurate customer profile to seize opportunities for meaningful engagement.

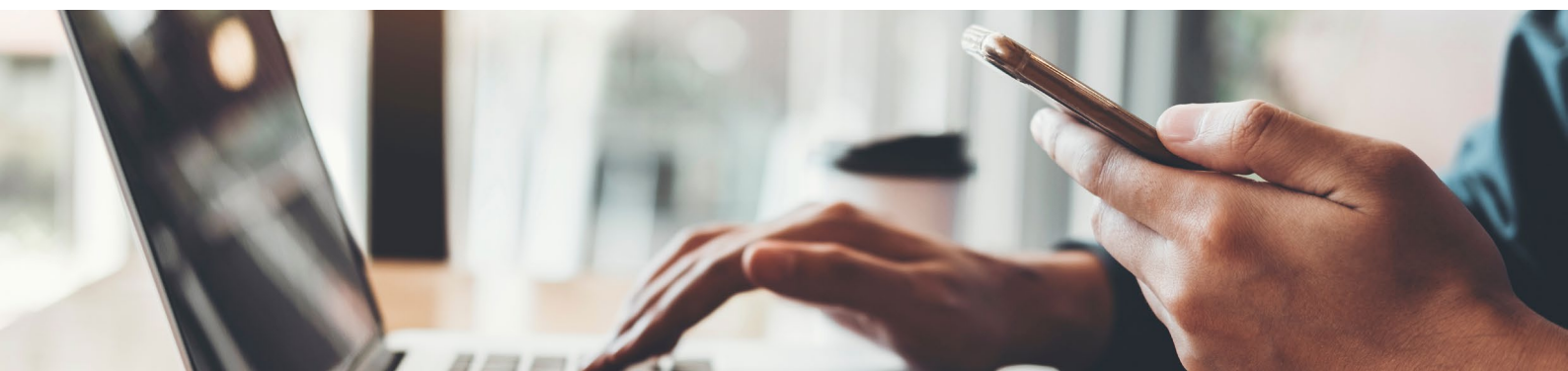When it comes to secure collaboration, organizations face other challenges including:

- Workforce disruptions and remote work demand connected systems that scale to support customer growth.
- Longer support cycles due to the inability to effectively resolve customer interactions across multiple channels.
- Poor customer experiences due to the inability to quickly access all customer correspondence history.
- Missed account insights that could have ensured a superior customer experience and revealed new revenue opportunities.
- The lack of user-friendly collaboration tools within the CRM for document authoring and changes, including version control.
- Poor searchability that prevents using all of the data contained in CRMs.

By equipping salespeople with current transactional, behavioral and demographic data and insights, organizations can deliver the personalized and consistent experiences that their customers deserve.

Don't forget—collaboration does not end with internal teams. Self-service tools that allow customers to quickly and easily submit and upload required documents, such as order forms and identity proofs, improve processes like onboarding to make them more efficient and enjoyable for both sides.

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💡 **QUICK TIP**

When evaluating compliance, considering the data within documents is just as important as assessing the information contained in the CRM. Inbound documents and generated communications are likely to include sensitive information about individuals, such as personally identifiable information (PII).

4 Secure information to meet growing privacy and security requirements

Eighty-eight percent of customers believe trust becomes more important in times of change according to Salesforce research.[7] Organizations must nurture trust and take critical steps to avoid reputational harm. For sales teams, this means handling customer data, which often contains personal and sensitive information, with care and according to the latest data privacy laws, such as General Data Protection Regulation (GDPR).

Today's customers expect data to be used ethically and governed according to evolving regulations. It must be handled in a way that avoids leaks and aligns with both rules of consent and lawful use. This is especially crucial for organizations operating in highly regulated industries, such as Finance and Healthcare. Organizations must demonstrate that they govern data securely and accurately and are prepared to meet audit requirements.

Solutions that boost collaboration by improving data access must deliver without impacting proper governance of information. Organizations need to adopt new tools with the highest global security standards and regulations in mind, regardless of their existing size or intentions to scale. These solutions must reduce compliance risks by identifying potential issues, providing the level of governance needed to maintain daily operations and offering flexibility to adapt to evolving mandates and guidelines.

Spend more time selling and less time searching for customer information with SaaS content management and Salesforce CRM integration.

Think outside the box with Salesforce CRM integration

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7 Salesforce Research, State of Sales, 4th Edition. (2020)