Introduction

Once thought of as only relevant for enterprises, CRM technology is increasingly being used by small and medium businesses across industries. Even the smallest organizations recognize the value of using a CRM solution to manage interactions with customers, clients and sales prospects.

Just as small businesses come in many varieties, CRM solutions span the spectrum from contact management capabilities all the way to full-featured customer relationship management, customized to meet business type and growth. In fact, online or SaaS-based solutions are proving extremely popular with growing businesses, since they alleviate the issues associated with installing and upgrading infrastructure to keep pace with changing needs.

As you evaluate your options, you need to determine which solution will best meet your organization's marketing, sales and business needs in the present and as it grows. The following are the top 10 features small and medium businesses should look for in a CRM solution.

> **CRM UPTAKE IS ON THE RISE**
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> "THE SOFTWARE-AS-A-SERVICE CUSTOMER RELATIONSHIP MANAGEMENT (SAAS CRM) MARKET — ALREADY REPRESENTING 570,000 U.S. SMB FIRMS — IS SET TO UNDERGO DOUBLE-DIGIT YEAR-OVER-YEAR GROWTH IN THE NEXT FIVE YEARS. DURING THIS PERIOD, SPENDING ON SAAS CRM WILL OUTPACE ON-PREMISES CRM BY A MARGIN OF NEARLY FOUR TO ONE."[1]

#1. Access everything you need in a single centralized solution

It can be a nightmare entering, tracking and updating contact and customer data, especially when it's captured and stored in disparate systems. The right CRM solution delivers everything your business needs to track and manage contacts and interactions, pursue and close new deals, and cultivate and maintain existing customer relationships. At the same time, it makes it easy for managers to keep their finger on the pulse of all these activities.

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[1] 2011 U.S. SMB STATE OF THE CLOUD MARKET OVERVIEW, AMI PARTNERS

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The beauty of such a solution is that it unites the bits of information about your customers that are currently spread across multiple dispersed applications or different devices in various locations. That means you'll no longer need to duplicate the information to see the entire picture; instead, you can access all needed information from one central spot. Plus, when employees leave your company, they don't take their knowledge out the door.

#2. Manage the full customer life cycle

It's not enough to attract prospective customers through marketing campaigns and engage them to win the deal. You need a solution that helps you manage relationships over the long term, so you and your customers get the most possible value. The best CRM will make it easy for you to stay in touch and interact with customers at every stage of the process. In other words, with the right solution, you can capture prospects, accompany them through the sales cycle and close the deal. Just as important, you can track and support them once they are customers. As a result, you can create meaningful experiences that help you build future business through customer enthusiasm and referrals.

#3. Tap into additional capabilities on the fly

You've outgrown spreadsheets as a way to track and manage contacts and customers. But as a growing business, you don't want to spend money on expanding your infrastructure to support changing needs if you can avoid it. The last thing you want to worry about is having enough IT resources, buying more equipment and wasting staff time deploying hardware and software. Instead, you want to trust this to people who manage a robust, adaptable CRM solution for a living so you can spend your money on more salespeople or marketing and other activities that further grow your business.

Look for a CRM solution that runs in the cloud and scales with your business, eliminating the need to install, maintain and upgrade hardware and software while providing access to a range of applications and features as you need them. Make sure it supports everything from managing contacts, contracts and expenses to generating analytics and statistics.

#4. Work the way you like to work

One of the biggest reasons to adopt CRM technology is to establish consistency so your marketing and sales teams can focus on doing their jobs. The ideal solution makes it possible to set up tasks and reminders, and automatically send emails after an action such as a tracked call. It also makes it easy for managers to monitor and approve actions.

Plus, it should be easy to access data from your existing tools, such as Microsoft Outlook and Gmail. Look for a solution that integrates with your favorite tools so you can continue working the way you already work with the added benefit of capturing all communications associated with a contact so everyone has access for context. That means everyone on the team can easily view and harness the information from existing tools in a CRM system. As a result, they can easily report and act on this information to grow the business.

#5. Make smarter decisions as a team

They say there's power in numbers, and nothing could be truer when it comes to making smart choices about your sales processes and team. A complete CRM solution provides analytics and reporting that enable business intelligence. This makes it easy to measure, share and collaborate on the data and metrics that matter to your sales execs,

including managing, updating and tracking forecasts. Plus, the best solutions make it easy for everyone to get the information they need at a glance, in an easy-to-understand graphical format. That means you can slice and dice data to gain the exact view you want, not the view the software company has decided upon. Look for a solution that gathers data in real time and allows you to generate reports simply by dragging and dropping.
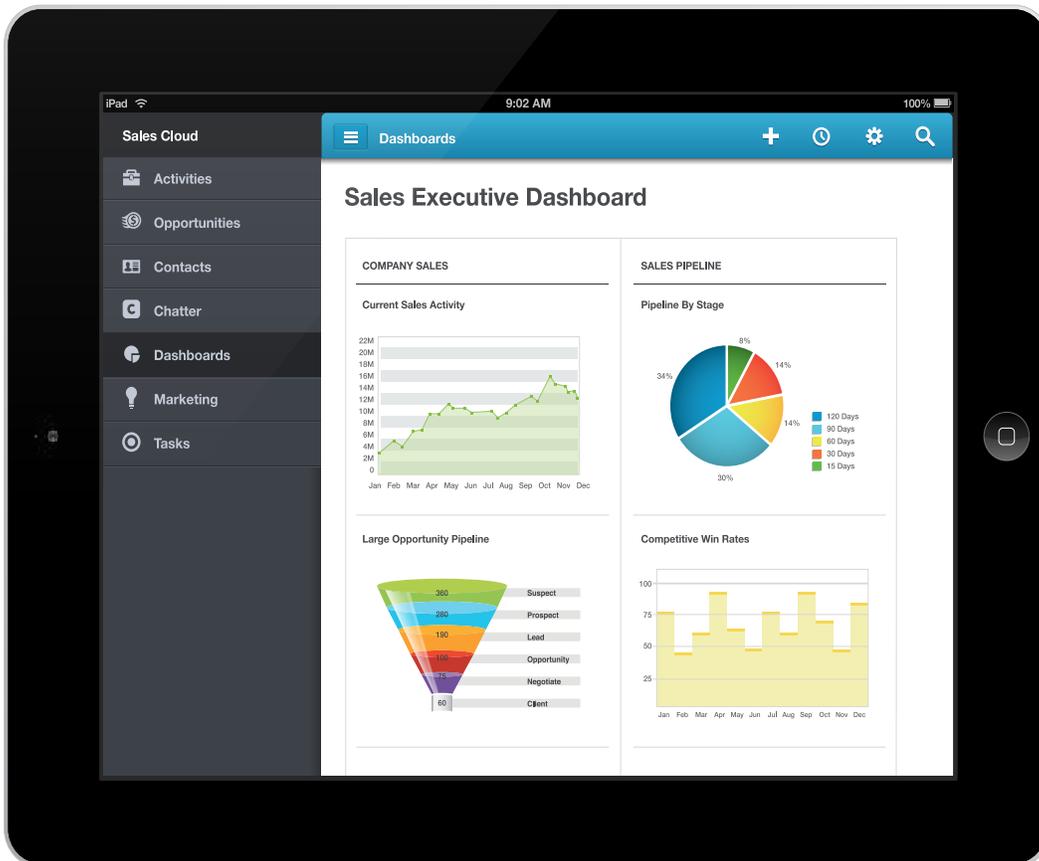
#6.   Empower marketing to gauge and improve effectiveness
The best CRM solutions don't just make life better for sales – they empower marketing too. Seek a solution that connects to your website so you can easily:
• Execute and track marketing campaigns
• Auto-deliver emails after transactions or sign-ups
• Import, score and route leads to sales when the time is right
• Effectively see and show where marketing dollars are working

By using a solution that integrates with all your marketing systems, your marketing team gains visibility from lead capture to deal close. Specifically, they can easily see which emails triggered the most opens and which ones generated the most sales. That means they can make smart decisions and allocate future dollars to activities truly driving business.

#7. Keep sales reps productive on the road

You need a versatile CRM that supports salespeople by automating and mobilizing the way they work while away from the office. When it's easy for sales to access CRM, they will use it regularly, leading to more collaboration, better visibility, better forecasting and overall improvements in productivity and closed deals.

The ideal solution connects reps to all the people and information they need while on the road, so they can collaborate with partners and employees in real time and sell from anywhere. That means your sales reps can interact with other people in the office to get questions answered as they're working on the road. They can also update contact records immediately after a customer visit.

#8. Find the right customers faster

Your sales reps can't afford to waste time chasing the wrong customers, or trying to identify relationships between companies or the right people to call within a company. The more you can empower sales with instant access to data, the less time they waste searching for the next opportunity and the more time they spend closing deals.
The best technology helps you find new companies that map to your criteria, uncovers relationships between different companies and provides relevant information about contacts – even as their roles change or they move to another company. With instant access to new names and contact information, you can quickly run an email campaign or pick up the phone and call prospective customers.

#9. Get social: be more targeted and relevant

Succeeding today in business requires you to be relevant to your target audience. The key is to find out what your prospects and customers are doing and speaking about online.

Look for a CRM solution that allows you to tap into social media monitoring to identify new market needs, listen and respond to customers, uncover new accounts and contacts, and get an edge on your competition. Advanced solutions let you keep track of what prospects are doing, speaking about and paying attention to in social media channels, including LinkedIn, Facebook, Twitter and YouTube. You should even be able to see who and what influences them and who they influence.

Having access to this social information allows you to be relevant, whether in a marketing campaign or a sales interaction.

#10. Easily extend and customize to your needs

Increasingly, businesses of all sizes are seeking to customize their CRM solutions. Small and medium businesses often do so by one of three means: pre-built third-party applications, such as those supporting UPS delivery or marketing automation; custom application development or integration to existing systems.

In essence, these avenues offer ways for businesses to extend their applications to go beyond simple tracking of contacts in a single location. For example, you could add accounting functionality that makes it possible to invoice and collect payment from customers. A common customization is the addition of inventory management allowing all employees to see product availability before closing a deal. Ensuring there is an easy to use programmable

interface for customizing CRM eliminates the need to make a major investment in application development and allows you to have a 360 degree view of all customer interactions across all systems. In addition to augmenting your current capabilities, look for an app marketplace where you can simply select and install an application and start using it. No matter how you want to extend your CRM, look for a solution that 1) easily enables you to pull all information together and 2) has a track record for being efficient for development.

Summary

Growing businesses face the same challenges as large enterprises: They need to efficiently manage interactions with prospects, clients and customers to ensure long-term success. More and more small and medium businesses are turning to SaaS-based CRM solutions to address their unique requirements both now and in the future. These solutions provide access to all the functionality needed to transform a business, while making it easy to tap into additional capabilities as required – without additional IT resources. But not all solutions are created equal. By looking for a solution designed to address their unique needs, small and medium businesses can set themselves on the path to success.

Learn more about how small and medium businesses are using Salesforce to achieve their goals by visiting **www.salesforce.com/smallbusiness.** Or sign up today for a free trial of the world's most popular CRM application by visiting http://www.salesforce.com/ or calling 1-800-NO-SOFTWARE (1-800-667-6389).

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