13 reasons sales reps love Salesforce CRM

What's the main reason CRM projects fail? According to experts, the most common problem is insufficient user adoption. One of the built-in advantages of Salesforce CRM is that the user experience is intuitive and delivers features that make a sales rep's life easier. It's these benefits that make Salesforce CRM a sales effectiveness tool for your reps.

Abstract

Regular use of Salesforce CRM is important to driving full adoption. To achieve this goal, sales reps need to know how the application benefits them, day after day. The bottom line: Salesforce CRM is not just a tracking tool—it's a sales effectiveness tool.

By Matt Jadhav

People naturally resist change, however, so you'll find it helpful to communicate early and often with your users, to tell them what's in it for them. Also, be sure to listen. By incorporating the feedback from your users, you can get a great head start on adoption.

Here's what reps get with Salesforce CRM:

1. **Better visibility into customer information** – Reps can see all their accounts, contacts, opportunities, tasks, and events in a single place. It means convenience, always being organized, and a 360-degree view of the customer. It means no more paper folders, Excel spreadsheets, or sticky notes—it's all in Salesforce CRM.
2. **Easy account planning** – Reps can do their own account planning. Because reps can see their customers' history, they can develop an account strategy and an action plan, complete with to-do tasks. Reps can also create reminders of follow-up activities on specific dates. Finally, they can see the amount of time committed to each account and the outcome of their efforts.
3. **Better time management** – Reps can better prioritize their days and manage their activities. They can see their calendars and upcoming tasks on their home pages. And by checking the Opportunities view in Salesforce CRM, they can focus on and prioritize current opportunities.
4. **Reports** – Reps can run their own reports, including the following:
    - Accounts they haven't visited in a while
    - Opportunities in the pipeline, including won opportunities and lost opportunities
    - Products they've sold
    - Activities and tasks they've completed
5. **Dashboards** – Reps can create their own dashboards to see how they're doing**—**at a glance. With dashboards, they can see the information that's critical to them, in various graph formats. They can also designate red, yellow, and green thresholds to show progress toward their goals.
6. **Trending analyses** – Reps can see selling trends and use this information to generate more sales. With trending analysis, it's possible to calculate the win/loss ratio on opportunities, see monthly trends with opportunities in the pipeline, see the types of activities the rep does most, and see the number of closed deals versus quota.

Best practice

7. **Opportunity forecasts** – Because all opportunities are updated in Salesforce CRM, reps can see where sales are coming in, what they forecast for previous periods, and where they can sell more. They no longer have to update Excel spreadsheets and mail their forecasts to their managers. Their managers will be happy as well—they can edit the forecasts without needing additional spreadsheets.
8. **Email templates** – Reps can communicate more easily and consistently with their customers. Salesforce CRM provides standard email templates—such as Introductory Sales Call, Welcome Customer, and Thank You for Your Business—that can be easily edited and sent to multiple contacts.
9. **Easy data updates –** With the click of a button, reps can request that their contacts update their contact information. As with other email templates, it's easy to customize this "stay-in-touch" email. When the contact responds, reps can decide whether to accept the updated information.
10. **Easy collaboration** – Reps can share information with their team members easily through Salesforce Chatter. That makes it easy to communicate about changes such as territory realignment, information needs to be passed to the next account owner, or anything else. Reps can add team members to either accounts or opportunities.
11. **Built-in record search and create** – Reps can quickly create or search for the records they need. They can also add new leads, accounts, contacts, and opportunities with a single click.
12. **Outlook integration –** Being able to synchronize contacts, tasks, and calendar events between Microsoft Outlook and Salesforce CRM is a huge boon to productivity. Reps no longer have to send emails twice. Emails sent from Outlook can also be added as a record in Salesforce CRM, and Salesforce CRM can be accessed from Outlook folders.
13. **No more micromanagement –** Because managers can easily see histories, they can look in the application for pipeline information instead of constantly asking their reps. Also, accountability issues are easily resolved because reps always know what is assigned to them.

For more information

Contact your account executive to learn how we can help you accelerate your CRM success.

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