# 2021
CLOSE MORE
DEALS **FASTER**

with

CUSTOMER RELATIONSHIP MANAGEMENT

Veloxy
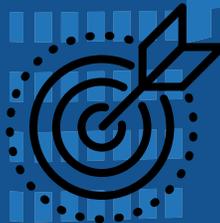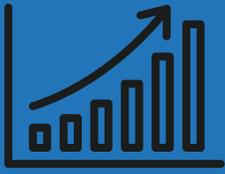
Get the latest tips and research on automating and optimizing CRM activities so you can spend more time growing revenue.

The Tortoise, The Hare, and CRM.

The lack of CRM adoption does not discriminate by company size. Enterprise companies *rapidly* invest and deploy with inconsistent gains, while SMBs and SMEs *slowly* progress but fail to scale with CRM. There's a better way to CRM...

THE FEW.
THE PROUD.
THE EARLY ADOPTERS.

Ever sit back and wonder, "Where did all the time go?"

Sometimes it seems that regardless of how efficient you are there are just not enough hours in the day to get everything done. Trust us…you're not alone. In fact, most studies show that even the most effective sales reps spend almost 2/3 of their time in non-selling support activities. If you think about it, that's a massive amount of time not directly focused on actually selling.

So what's a sales rep to do? For starters, take a good look at the things you find yourself doing the most when you're not actually selling. If you're like most sales reps, we'd venture to suggest that a good portion (32%) of your time is spent searching for missing data and entering it into Salesforce.

Managing your data and your CRM. It's frustrating. It's time-consuming. And since it's so often done after the fact, it's fraught with errors. Now ask yourself, "Are you one of the few, the proud, the Early Adopters?" There's always an element of risk venturing out of your comfort zone to try new products. But the key to increased productivity could be as simple as downloading a new app onto your mobile device. Of course, we have one you should try.

Veloxy automatically updates Salesforce so your pipeline data is true and up-to-date. So you can spend more of your valuable time actually selling.

But there's more. Artificial Intelligence is now a **competitive advantage** worth fighting for, and companies are looking to integrate it into anything and everything. In addition to AI being native in Salesforce, sales applications like Veloxy use AI to automate and make sense of the sales activities and data being processed in Salesforce every minute of every day. And **best of all**, Veloxy's Artificial Intelligence isn't just for the larger enterprise level companies who can afford it—it's priced for everyone from startups to SMBs and SMEs.

Please continue reading to learn more about today's adoption of modern customer relationship management.

Samir Majumdar
CEO & Cofounder

VELOXY IS YOUR 10X MULTIPLIER

- ◆ 10X Sales Productivity
- ◆ 10X Sales Enablement
- ◆ 10X Salesforce Adoption
- ◆ 10X Sales Engagement

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WHY CUSTOMER RELATIONSHIP MANAGEMENT ADOPTION IS SO LOW

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According to studies by Gartner Group, the worldwide Customer Relationship Management (CRM) market grew 13.7% from $18B in 2012 to $20.4B in 2013 and is projected to be worth $26.5B by 2017. However, research has also shown that CRM adoption is less than 50%. That means ~$10 Billion worth of CRM investments in 2013 alone faces a questionable outcome.

What's more startling is the fact that sales people often spend less than 35 percent of their time in selling. Companies using CRM software had 17% more revenue. Traditional CRM is a repository of sales data and it can organize the sales process but it doesn't necessarily accelerate the sales process.

Sales reps are really busy. One of their main goals (heck, it is their only goal!) is to sell and close more deals. Their compensation depends on how much they sell. One of the biggest issues sales reps are having with CRM is that it takes too much time. Why is it like that? Isn't most CRM systems designed specifically to help sales reps make more sales.

Here is the sad truth. Most of the CRM systems are built for sales executives and managers who make purchasing decisions. They are not built for sales reps. These CRM systems have fancy dashboards, charts and KPIs. However, if sales reps are not entering data into these CRM systems (because it's a major pain), all these dashboards and charts will be empty.

How do you ensure that sales reps enter data (correct data, not junk) into the CRM system? One option is to give the reps some incentive to go through this painful process of data entry. This is not a sustainable

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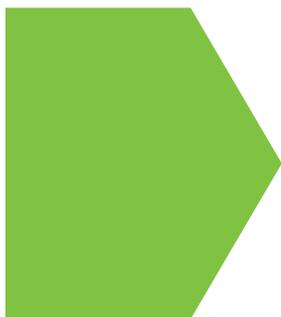
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Why CRM Adoption is so Low

option. Other option is to build the next generation CRM system that is built for sales reps. Of course it needs to have all those so called fancy charts and dashboards for sales executives and managements.

When sales reps spend time X to enter data into a CRM system, they should get 5-10X worth of benefit from the CRM system or the system as a whole. What does that mean?

The next generation CRM system should be more than a CRM system, it should be a **Customer360 system**. It should be a system that integrates information from CRM system, emails, calendars, tasks, notes, product issue system, bug tracking system, document management system, marketing system and more. This uber system should be able to send contextual and intelligent alerts/notifications to the users (sales reps, sales executives, etc.) when they need it. Sales reps should be able to find all relevant information about a customer, an account or a deal from this one system. They shouldn't have to log in to many different systems to search and gather information which is a significant wastage of time. Above all, they should be able to do all of these things while they are on the road using their smartphone or wearable like smart watch.

This next generation CRM system should automate as many things as possible for sales reps so that they can spend more time selling. Despite the low rate of adoption, about 70-80 percent of businesses will keep using their existing CRM. This is because there are no 10X better alternatives out there. It is also because they already spent a lot of money in their existing CRM.

While CRM has done a fairly good job in offering a location for customer data, the data needs some context, which many CRM systems don't offer.

Also, CRM system is just one of the sources of information. Equally valuable information is scattered across many other systems. In order to improve CRM adoption among sales reps, it is absolutely critical to do information aggregation, synthesis, enrichment, and contextualization. Equally important is the simple yet elegant presentation and ability of manipulation of the information via mobile and wearable devices.

What do you think?
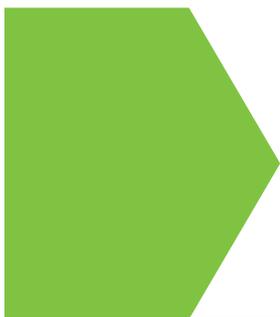
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TOP 5 CUSTOMER RELATIONSHIP MANAGEMENT MYTHS THAT ARE SIMPLY NOT TRUE

Customer Relationship Management software is nothing new. What started as a simple Rolodex to organize data decades ago is now the single most important tool in the sales process. That's why companies with a growth-oriented mindset always have a reliable CRM integrated into the entire business process.

For Veloxy, it took years of research looking for the ideal CRM to build our Add-on around. We're glad we went with Salesforce which is currently the market leader. But during our research phase, we came across all sorts of myths and reasons why some businesses don't like using CRM software. These misconceptions may have seemed harmless at first, but they've grown and proliferated immensely over the years.

Just like disease or infection, it turns out that myths are contagious and very hazardous; especially to a person's intelligence. Sales CRM tools seem to have spawned a heck of a lot more myths than other processes for some reason. Maybe it's because of entrenched working habits that make people more resistant to change. Alternatively, it could be the added visibility which is enough to put anyone on edge.

Whatever it may be, most of these CRM myths are little more than lazy excuses. Excuses that not only keep your sales team rooted in the stone age, but could also damage your business substantially. But hey, if you'd rather keep your business in the dark age with a ton of paperwork, spreadsheets and unreliable mental notes, then by all means – heed the baseless myths. But if you want to stay head and shoulders above the competition by selling smarter, you're in the right place. Here are the most common CRM myths and misconceptions that need to die today.

Myth #1: CRM is only for the big boys (too expensive)

This is the number one myth and first reason business owners give for not having a CRM. Back in the 90's, CRMs may have been a bit costly meaning that only large companies and enterprises could afford them. As a result, CRM software was considered a luxury back then.

However, this is certainly not the case today. You can easily find CRMs with just the right features and price range for your business. In fact, CRMs like Salesforce are designed with scalability of small businesses in mind. What's more, research actually shows that small and midsized businesses benefit more after implementing CRM software when it comes to growth. That's because virtually all processes of small businesses can be easily regulated and enhanced with efficient CRM.

This myth also goes hand in hand with the misconception that CRM is expensive. Again, many options today are extremely affordable. Even the most basic CRM with standard functionality will bring a lot of value to your business. It's all about finding the right CRM that addresses all your concerns and scales along with your business.

Myth #2: One CRM is just as good as the next

This is absolutely false. Just like no two companies are the same, CRMs are also extremely different and diverse. CRM software is not as general as other programs and applications. There is no such thing as one size fits all when it comes to these types of software. That's why going for the most popular option or choosing a CRM because your associates are using it is never a good idea.
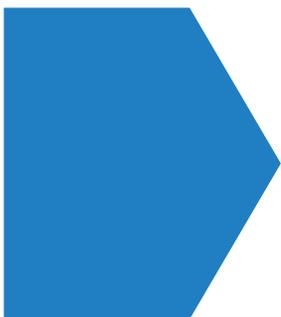
But while no single CRM will truly be a one stop solution for every type of business, there's a reason why some of them excel more than others. For example, Salesforce makes a legitimate attempt to solve the most common and widespread problems for different types of companies. However, you have to understand all the main problems you need to solve for your business. Only then can you pick the right CRM.

Myth #3: CRMs are just for spying on employees

Well, there's an iota of truth behind this myth because at their core, CRMs are built to track user activities, update records, and give details of the sales process in real time. That's actually one of their major selling points for business owners! But you trust your employees, right? So why bother spying on them all day?

What you're missing here is that intelligent CRMs like Salesforce do so much more than just track sales activities and offer visibility. They can also use this information to analyze where mistakes were made and even show details of how to resolve these issues. This way, everyone can actively learn from their failures and successes for the good of the company. That's right, well meaning micromanagement can happen. It doesn't have to be misconstrued as spying.

So while CRM software still offers all the visibility and accountability that managers need, it also provides your employees with additional insight and assistance making it an invaluable asset to all the cogs involved in running your company.
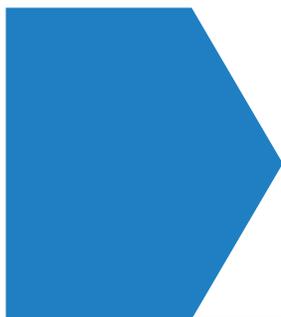
Myth #4: CRMs are too constraining

Even with all the technology advancements currently at hand, some cheap CRMs are only available at a closed network or singular desktop at the workplace. If these are the kinds of CRM you know, it's no wonder that the constraining myth lives on strong.

Needless to say, many sales people spend a lot of time in the field. As such, a CRM that's available only in one place means they spend more time going back and forth entering data at the office when they could be selling. Similarly, meeting details and pitches could get lost or forgotten in transit. In this case, your implementation of CRM software could prove an Achilles heel to the sales process.

However, intelligent CRMs like Salesforce incorporate as much compatibility with modern technology as possible. Thanks to mobile applications, cloud based services, virtual assistance, and Add-ons like Veloxy, sales teams can access and enter data no matter where they are. This ability to access CRM instantly renders matters of latency a thing of the past.

Myth #5: Anyone can steal data from your CRM

Well, if you bought a cheap CRM from a shady guy in a dark alleyway, chances are that the security is lacking and your data will definitely get stolen (along with your wallet). This could include leads to sales or sensitive customer information.

However, advanced CRM suppliers understand the importance of
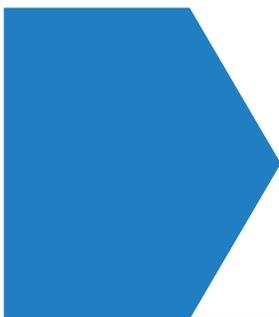
security and business data integrity. For instance, Salesforce CRM is constantly engaged in evolving its security by performing data backups, providing highly stable connections, storing data in highly secure environments as well as using top line firewalls and intruder detection systems. With such a CRM, you can rest easy knowing that only you and your team has access to business data.

CRM Myths Debunked! Long live the truth.

Knowing email marketing works is one thing but leveraging it to the max is quite another. Small business owners tend to make certain mistakes that sabotage their overall marketing strategy. To stand out, you need to handle your email marketing campaigns differently.

Here's what to do. Write clear, enticing subject lines. Also, make sure to display compelling email snippets. Don't stop there; automate your email marketing. In addition, make sure to send out laser-focused emails with only one clear CTA. And remember to A/B test your email templates. Likewise, study your email marketing data closely and tweak your campaigns accordingly. And finally, you'll need the right tools for the job. The best tool saves you time, helps you minimize mistakes, and enables you design stunning campaigns. Using email templates typically makes more sense.

Now that we've put the common misconceptions around CRM software to rest, you can finally make an educated, well informed decision that will benefit your company. Of course, no CRM will turn your business to a global phenomenon overnight. But it will put you on the fast track to getting there.
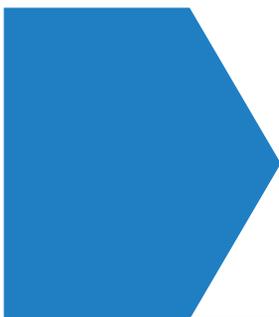
3

SIMPLIFY DATA ENTRY
AND MAKE MORE SALES

Sales is about forging strong relationships and providing solutions to problems. As important as those two variables are, they would be nothing without information. Information about the problem that a client faces. Information about the solution to said problem. Information about the challenges each client faces. Information about a client's likes and dislikes. Information, information, and information.

But in the field, where the bulk of a salesperson's information gathering occurs, it's all too easy to record incomplete, or even incorrect data. Many reps still use notebooks to gather the salient information and then transfer it to digital via Salesforce or some other sales suite. And while there's nothing wrong with pen and paper, it's all too easy to make mistakes, either in the recording or in the transferring.

Without the correct information, then, forging strong relationships, providing solutions to problems, and making successful sales is an even bigger uphill battle than it already is. That's where advanced predictive sales enablement platforms like Veloxy become so important.

Data entry made easy

Manual systems for recording field information and creating new prospects can be complex and cumbersome. Even computer-based mobile solutions can be less than user-friendly. For example, the Salesforce1 mobile app is not being adopted by reps because it's just too complicated and it doesn't fit well into their workflow.

That's where Veloxy fits in. Veloxy is fully integrated with the Salesforce platform and provides an easily-accessible, easy-to-use data entry portal between the salesperson and the Salesforce software. Veloxy even takes

it one giant step further by incorporating predictive sales enablement. Taken together, Veloxy combines the power of many apps into one and provides the user with a streamlined data entry process that gets the important information into your Salesforce database quicker than ever before.

Veloxy then aggregates this data and combines it with data from other internal and external sources such as corporate websites, geo-location, social media, and third-party CRM software. Veloxy also presents that information contextually with a single click of the mouse or tap of the finger.

Veloxy can then use all that information to act as your own mobile personal assistant. It can provide notifications on what needs to be done when based on all your important sources of data: email, schedules, team members, websites, notes, and meetings…even your geo-location and the geo-location of everyone in your pipeline and on your salesforce. Imagine the coordination you could have when you use this type of technology to manage you important information. No more missed opportunities, dropped sales, or mistakes in the process. Veloxy can smooth your information gathering like never before.

So don't let faulty data entry be the chink in your sales armor. Whether you're an individual salesperson, part of a team, or a team manager, you can get the most accurate information possible from every source possible with predictive sales enablement software like Veloxy. Let the software do the heavy lifting so that you can concentrate on the important part of the sales process: forging strong relationships and providing solutions to your client's problems.

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Exceed Your Quota Faster:
Simplify Data Entry and Make More Sales

4

USE CUSTOMER RELATIONSHIP MANAGEMENT TECHNOLOGY TO MAXIMIZE SALES

Technology is the great equalizer. Don't believe me? Consider this: The technology available to the sales sector today makes it possible for one person to accomplish the same amount of work that would have occupied multiple individuals just a decade ago.

Mobile and cloud-based solutions literally put the necessary tools in the palm of your hand. Information once stored on reams and reams of paper and only accessible in the office is now available at the touch of a button, 24-hours a day, anywhere in the world.

Customer relationship management (CRM) software is the embodiment of this sales sea change. But how can you, as a salesperson, use this technology to increase efficiency and productivity? How can you use it to maximize sales?

Let's answer that question by examining a few of the components that go into a good CRM suite.

Contacts

The heart of any good sales software suite is the contact manager. Gone are the days of the Rolodex and the paper file folder. Modern contact management brings everything together in one, easy-to-access place.

But there's more to it than availability. Good contact management software should be about improving productivity and efficiency. It should be intuitive, easy to use, and provide all the details you're looking for in just one or two clicks. That way, you can focus on selling rather than hunting for information.

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Use CRM Technology to Maximize Sales

Follow-up

A good CRM software suite is more than just a digital address book. The real power of CRM software lies in its ability to track what needs to be done—and what has already been done. What's more, good CRM suites offer automation tools that can shave minutes, if not hours, off your follow-up process.

No more reading through pages and pages to see what's been done and what hasn't. CRM software corrals everything you need in to one, easy-to-read screen.

Collaboration

Working together can sometimes feel like a tug-of-war. CRM software incorporates collaboration features that put both individuals (and groups) on the same side so they can pull together. These features keep all communication on a given topic (or between a given group) in one place and maintain a running history of all information discussed.

And if follow-up between salesperson and client is important, follow-up between work groups may be more important. Some CRM suites automate the follow-up process between work groups to further facilitate working together to maximize sales.

Messaging

A good messaging center is flexible and allows for the transmission of a variety of different formats. The best suites make it possible to send not

just text-based emails and SMS, but audio and video messages as well.

So whether you're messaging your supervisor, your sales force, or your client, the process should be both simple and powerful and give you the power to stay in touch. CRM software does that.

Mobility

Mobility is one of the most important aspects of 21st-century technology. Cloud computing in particular has done much to cut costs and improve productivity across the board. Maintaining servers and ensuring access was once a costly endeavor but businesses can now pay a fraction of what was once required to host data on professionally maintained servers. This new mobility provides round-the-clock access without the cost and labor involved in doing it yourself.

Putting it all together

Never before has the opportunity to improve and maximize sales been greater. No longer are you tied to one location and dependent on the files and computer hardware there. Modern CRM software puts everything you need exactly where you need it—wherever you are.

Veloxy's CRM software can help you maximize sales with a powerful suite of tools that will have you working efficiently like never before. Don't let another day go by without getting the most out of the technology available.
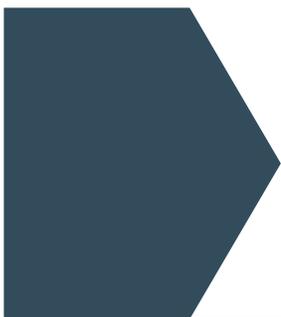
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HOW SALESFORCE ESSENTIALS AND VELOXY WORK TOGETHER TO MEET YOUR BUSINESS NEEDS

Adapting Customer Relation Management (CRM) software that dots all the I's is no easy feat. Not only does it have to be easy to use and affordable, it also has to be built to scale and able to play well with others.

These aren't just ungrounded opinions. Research shows that over 65% of CEOs and business leaders are personally responsible for up to 3 areas in their company. A large number of those carrying out complex tasks like manual data management on an ad-hoc basis. On the flip side, leaders that attempted to pare back their responsibilities found that there was no one to both introduce and manage new tech solutions.

It's for this very reason that Salesforce Essentials was created. Fast, edgy, and intuitive, SE takes the worlds #1 CRM and tailors it to both the budget and operational requirements of SME's. The flexible app based structure gives users a complete overview of service operations and sales which translates to an improved ability to tap into Salesforce in a way that is scalable and makes sense. So, how does Salesforce Essentials work to fit into your business model?

How Salesforce Essentials Meets Your Business's Needs

I. User friendly

One of the most frequently asked questions from SMEs is how they can integrate new CRM into their daily operations without disrupting processes that are already running. In fact, over 93% of SMEs say that easy set up and low maintenance are some of the selling points they look for when evaluating any new tech for their companies.

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Exceed Your Quota Faster:
How Salesforce Essentials & Veloxy Work Together
to Meet Your Business Needs

To ensure seamless integration and prevent these businesses from defaulting back to their original settings (i.e. spreadsheets), Salesforce Essentials makes things easier to use and faster to ramp up. For instance, it allows users to completely skip the tedious steps associated with data entry. Instead, users can directly upload required data from email, spreadsheets, calendar and more right into Essentials.

II: Compatible with most modern apps

In addition to being user friendly, a great CRM has to be compatible with most of today's apps and devices. CRMs that play well with others not only allow intersystem communication, they also make the lives of business owners that much easier.

Salesforce Essentials (SE) integrates seamlessly with a variety of platforms such as Google Cloud's G Suite which lets users connect their calendar, email, and any other data. And if your current needs extend beyond Google, you can make use of AppExchange and plug in systems like Veloxy Mobile to help harness the power of the entire ecosystem by customizing and personalizing your CRM.

III: Effortless to onboard employees

Did you know that almost 75% of all mid-sized companies and SMEs don't bother to keep in-house IT staff? This means that most ventures are completely flying solo and unassisted when it comes to implementing new tech on the daily.

Not only does SE make use of a simple setup assistant built right into their products, they also provide detailed answers to questions on a fun
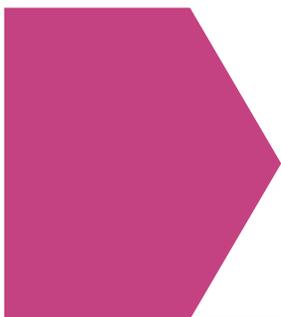
and interactive knowledge trove known as Trailhead (https://trailhead. salesforce.com/). It explains everything from how CRMs work to detailed specifics on SE's functionality. With Trailhead, SMEs can learn about broad topics like fostering innovation and take their knowledge to the next level.

IV: Smarter decision making thanks to AI enhancements

Here's another quick fact – SMEs spend around 25% of an average workday manually entering data into the system. Needless to say, this is a massive waste of time and effort. With Salesforce Essentials and the built in Einstein AI, companies can now work smarter by automating basic sales activities.

This tech automation keeps your customers' records up to date without the unnecessary and tedious data entry process. It just syncs the user's calendar and email while helping prioritize your inbox under different criteria. Not only does this save time, but businesses can now identify new opportunities and close deals faster. And since there's no such thing as too much AI, Veloxy also provides AI capabilities such as feeding your teams with the right information at the right time for their next task depending on several factors such as their context and location.

V: Routine and effortless Tri-annual upgrade

As with any good software or system, routine upgrades and maintenance are necessary for long term sustainability. Salesforce Essentials is no different; they automatically update their products every four months to keep their customers on the leading edge of CRM tech.

The best part is that all data is left safe and intact even after the updates. Yes, this also includes all your system settings and data on Veloxy.

VI: Grows with you

For most SMEs, growth is usually the leading business objective. This means that scalability is a key objective that will always be at the forefront of any business owner's agenda. As such, you'll want to apply technology solutions that allow for scalability.

Salesforce Essentials lets users upgrade to service CRM or full scale Sales when their businesses start making the push out of the SME category. And all this added functionality in just a few easy clicks. As for your tools, plugins and data, there's no need to worry because everything remains intact even when you achieve full scalability.

Conclusion

With effortless integration and levels of functionality that hit an all time high, it's no wonder numerous SMEs view Essentials as Salesforce's best innovation yet. If you're the type of business owner that values convenience, due diligence, and the latest in CRM AI, make sure you grab Veloxy – the best add-on for Salesforce.

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Exceed Your Quota Faster:
How Salesforce Essentials & Veloxy Work Together
to Meet Your Business Needs