Powering clients to a future shaped by growth

A Frost & Sullivan White Paper

Empower Sales Ops to Connect CRM with Other Business Apps to Boost Sales Productivity

Create Great Customer Experiences by Allowing Sales Teams to Access Critical Data from Anywhere

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Today's sales operations teams are laser-focused on removing sales roadblocks, automating their workflows, and enabling reps to sell more. To continue driving growth in this new environment, they also need to strike a new, hybrid balance between the processes in place before COVID-19 hit, and the ones we've all been living with since the pandemic.

Having access to data is a cornerstone of that effort. Sales teams shouldn't have to search for critical information—it should be available right from within the applications they use every day, even if the data itself resides elsewhere. They should have automated connections to other relevant applications, including billing, inventory, service, and development tools—and those users should have access to sales information, too.

The goal: data orchestration across the entire sales ecosystem, allowing information to pass among marketing, contracts, fulfillment, invoicing, service, and support.

Yet in a world in which businesses use multiple sales, marketing, customer support, and communications applications, it can feel like it's impossible to share data across the organization. That's because it can take weeks or months for IT to enable the kinds of integrations needed to support an end-to-end data sharing initiative—and sales ops teams are not coders, so they cannot integrate the data and automate processes themselves.

Luckily, there is a solution.

Integration Empowers Sales Ops in a Hybrid World

What if your sales teams could import leads automatically into the CRM system, pass off order details to various departments to kick-start the order-to-cash process, or build a single source of truth from account information to invoicing data? You'd make it easy for them to tap all your business information to accurately develop their sales, planning, and forecasting strategies based on real-time information—not guesswork.

By integrating sales data with other back-office applications, companies can streamline key processes, increase operational efficiency, and speed up automation throughout the sales pipeline.

Imagine being able to automatically create error-free invoices using the most up-to-date account, contact, and pricing data from your CRM and ERP systems. Or how about automatically notifying account teams and sales managers when actual orders or revenue are less than what was initially forecasted? You'd save time, reduce lost opportunity costs, boost productivity, and ensure that everyone is more proactive.

What if your back-office teams could automatically communicate order updates to relevant teams, including sales and billing, with popular communication tools such as Slack? How much time would your teams save if they could automatically update customer contacts and pricing data from spreadsheets right into your CRM database? What if they could do that immediately during conferences or meetings, without waiting days before the lead gets stale?

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And how much more productive could you be if you could trigger downstream activities like faster order processing by handing off customer, account, and product SKUs from CRM to another system, or create new, immediate opportunities to upsell based on real-time information across the company?

Together, these capabilities lead to powerful business outcomes, including fewer errors, higher customer satisfaction, and reduced time to payment, which lets the company recognize revenue and monetize innovation faster.

Create Integrations Faster for Better Outcomes

The best way to ensure that your front- and back-office sales teams have the information they need to do all this is to enable integration across all your strategic applications, including ERP systems, customer care solutions, internal communications platforms, and business tools for accounting, data analytics, inventory management, and document storage.

But connecting applications typically requires coding, which in turn requires significant time and resources on the part of IT—a department that is likely already overburdened, juggling strategic planning, routine maintenance work, and emergencies. The alternative: let sales ops build out the integrations themselves, using intuitive tools that don’t require coding skills.

For many companies, just integrating two or more instances of the same CRM app can be a daunting task—in the wake of mergers and acquisitions, for instance, or when two geographic regions deploy the same tools in different ways and at different times. As a result, many companies never make deeper integration happen; instead, they rely on siloed, duplicate, and out-of-date data that impacts how they serve the customer. And they’re losing out on significant productivity benefits as a result.

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Furthermore, the people best positioned to understand exactly what integrations will impact their business immediately are not in IT. Rather, they're the end users in the line-of-business units that use the software and data every day. And those employees are ready and willing to help. According to Salesforce, 76 percent of line-of-business users are or want to be involved in enhancing internal digital services. But more than half of those same users are frustrated by how difficult it is to merge disparate systems to make seamless data sharing a reality.

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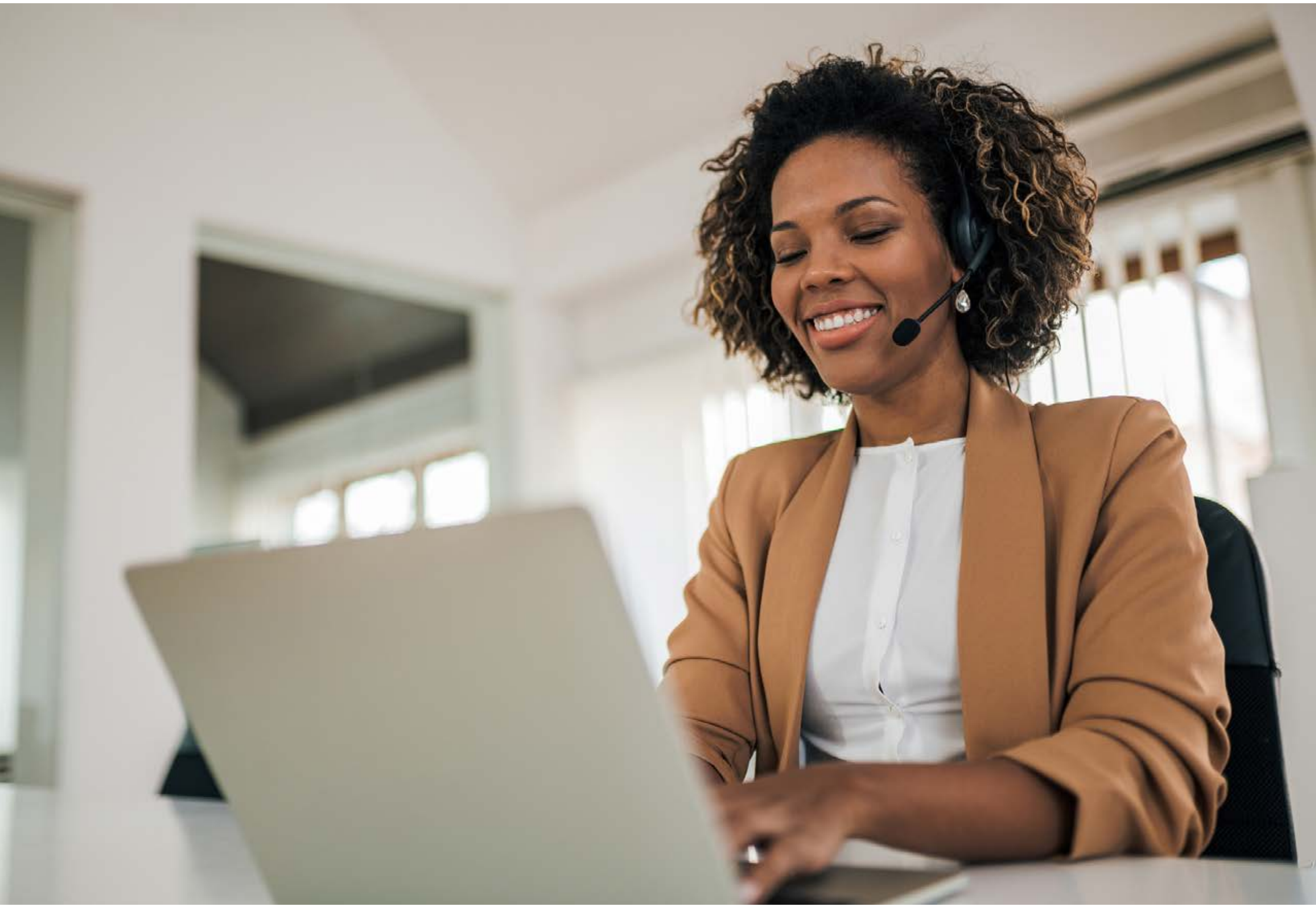
The solution is easy-to-use software that lets business users create their own integrations and automations as needed, with a simple series of mouse clicks—from right inside the app they use every day. A library of connectors can make it even easier for sales users to identify what they need most and then enable the right connectivity in a matter of minutes, without any help from IT. All they have to do is drag their mouse over dropdown menus, choose the connections they want, and set their trigger parameters: the software will deliver the integrations in an instant.

Not all solutions offer this kind of easy end-user toolset. So as you look to upgrade or standardize on a CRM system across the organization, make sure to invest in one that will let your salespeople make the connections they need—without any training or coding skills—so that they can benefit from the value of integration every time they use their business applications.



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