

Title: Should you be integrating Salesforce with every step of the sales process?

Subtitle: Automatically syncing your data offers multiple benefits for a sales team

Title: 3 Ways You Should be Integrating Your Sales Data with Salesforce

Subtitle: Huge benefits come from automatically syncing your tools with a sales engagement platform.

Title: The Incredible Power of Automating Data Input with Salesforce

Subtitle: Linking your key work processes to Salesforce is a game-changer for a sales team.



Good, reliable data is the lifeblood of sales.

When you are able to combine your most useful data with a world class interface for managing it, then you have a distinct advantage over the competition, and a tool that can turbo-charge growth in any organization.

But getting data into Salesforce, and integrating it properly with the tools you use is not as easy as it should be. It needs to be done in a thoughtful, sustainable way.

The key is to integrate and automate your everyday work practices with the sales engagement platform you use. More often than not, teams that have been asked to change their tried-and-tested working methods in order to accommodate a new process often get frustrated, make mistakes, and quickly abandon the new workflow.

Ultimately, they end up going back to how they were working before, and you're left with "Shelfware", software which you have purchased that just 'sits on the shelf'.

Change is hard, and people resist it without a compelling roadmap and a reason to change.

You need to try and seamlessly integrate new steps into the workflow and provide compelling reasons why they need to be there. If they get results, the sales team will embrace them.

There are a number of Issues which are hot-button dislikes for sales teams. Having to switch between the CRM and other applications in order to manually input data, then having to verify that data, are frustrating and time-consuming that turn people off software.

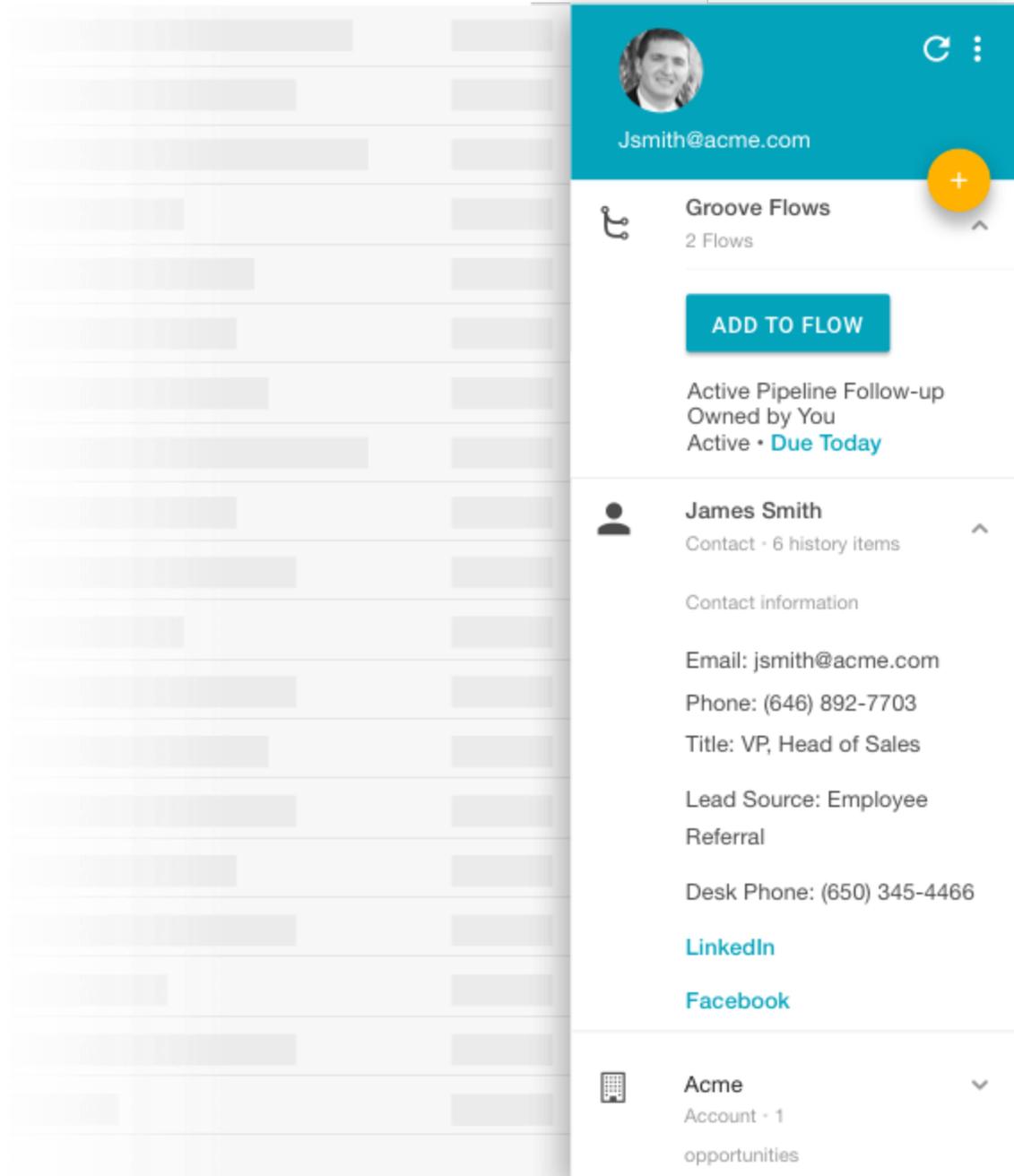
Manual input is an extremely unreliable method of capturing data, and is the primary reason for most of the errors that creep into your data. An automatic sync with the SEP is the ideal solution for inputting data. It doesn't take you out of the task you are working on, and provides real-time, up-to-the minute data that you can work with.

INTEGRATE YOUR EVERYDAY TOOLS

There's a good chance that if you're working in sales, then the primary tools you use for business are email, calendar, social media and phone calls. Almost all the data you need to capture and input into Salesforce will all come from those four communication tools.

A little effort to set up automation and integrate your sales intelligence will save you so much time later down the line, while improving the quality of the data you capture and the speed with which you can access it.

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The image shows a Salesforce contact record for James Smith. The record is displayed in a right-hand pane, with a list of other contacts visible in the background. The contact's profile picture is a woman, and the email address is jsmith@acme.com. The record is categorized under 'Groove Flows' and includes a '2 Flows' indicator. A prominent blue button labeled 'ADD TO FLOW' is visible. Below this, the contact's details are listed, including their title 'VP, Head of Sales', phone numbers, and lead source 'Employee Referral'. Social media links for LinkedIn and Facebook are also present. The record is associated with the 'Acme' account, which has 1 opportunity.

James Smith
Contact · 6 history items

Contact information

Email: jsmith@acme.com
Phone: (646) 892-7703
Title: VP, Head of Sales
Lead Source: Employee Referral
Desk Phone: (650) 345-4466

[LinkedIn](#)
[Facebook](#)

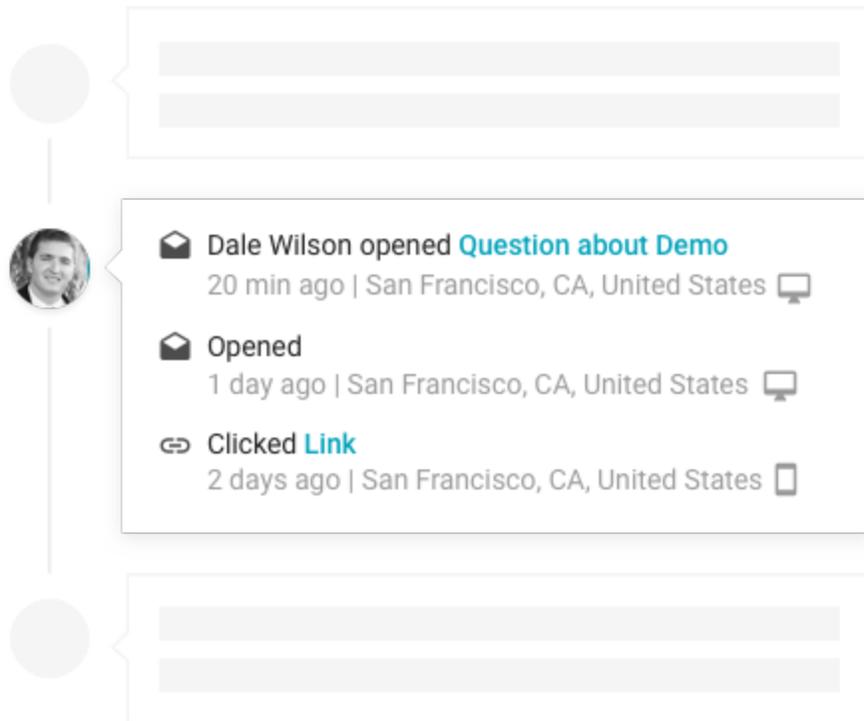
Acme
Account · 1 opportunities

EMAIL SYNC

Syncing your emails with Salesforce offers a few key advantages. Right from the beginning you should decide whether you want all emails synced or if you would prefer reps to decide which emails qualify.

Syncing your mail leads to a dramatic reduction in errors, and an improved ability to track email activity by user and record.

Salesforce integration provides you these option, speeds up your responses and helps you schedule follow-ups time accordingly.

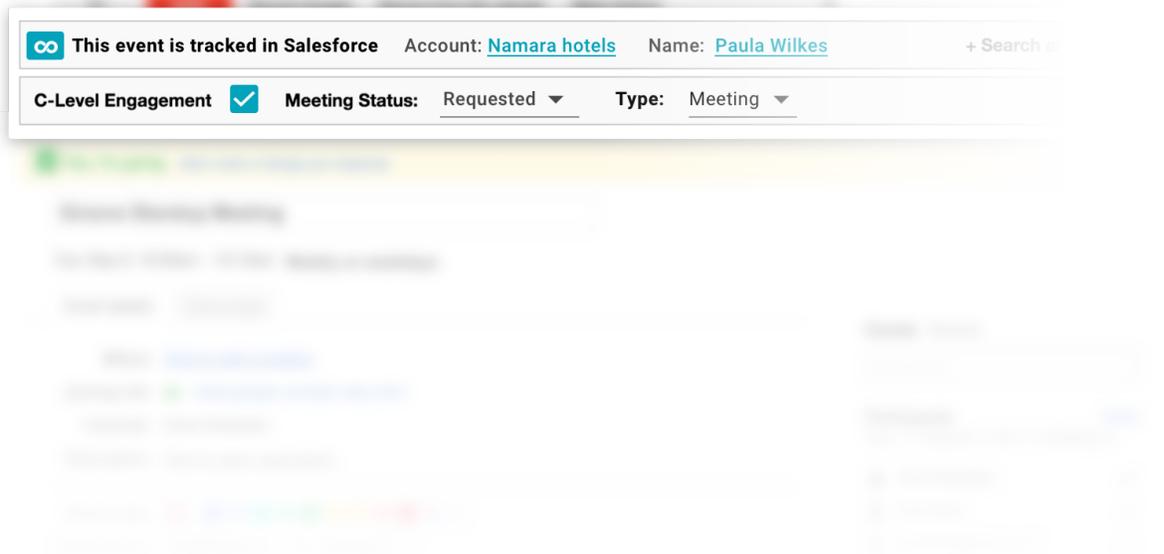


By integrating Groove with Gmail, you can:

- Update and add new fields
- Gather updated information about a client
- Create a follow-up reminder
- Track the history of your sales interactions

All of this functionality is achieved without ever having to leave your email interface.

CALENDAR SYNC



A key pillar of the sales funnel is setting the next action on your way to the sale. Scheduling requires a flexible, shareable calendar application that synchronizes the Google calendars with Salesforce. Meetings, timelines and schedules are captured and recorded in Salesforce, and you don't have to leave your calendar to achieve this.

As with your email, you can decide whether every appointment should be pushed to Salesforce automatically, or whether individuals can decide to move the data on their own.

Setting meetings has never been easier. Groove allows you to offer a number of appointment times that are convenient for you to the customer, who then responds with the time that best suits their needs.

SOCIAL INTELLIGENCE

When you are able to route social media posts into Salesforce, you are able to build a far more complete and nuanced picture of your customer, their patterns of social media use and the technologies they are using. This information should shape your approach to them.

The ability to track real-time campaigns and customer interactions across multiple platforms is a powerful tool for a sales operation. Relationships are deepened, patterns emerge and consumer sentiment comes into plain view through the effective monitoring of social media in a sales context.

By using the right tools to sync your email, calendar, and social media with Salesforce, you unlock a whole new world of insight and engagement with potential customers that should lead you towards hitting your targets.

SOURCES: [1](#),[2](#),[3](#),[4](#)

<http://www.cio.com/article/3120807/business-analytics/what-is-a-sales-engagement-platform-anyway.html>

<https://hbr.org/2016/11/84-of-b2b-sales-start-with-a-referral-not-a-salesperson>

<http://www.groove.co/salesforce-integration/>

<http://overview.groove.co/lp/tool-of-the-week-by-smart-selling-tools>