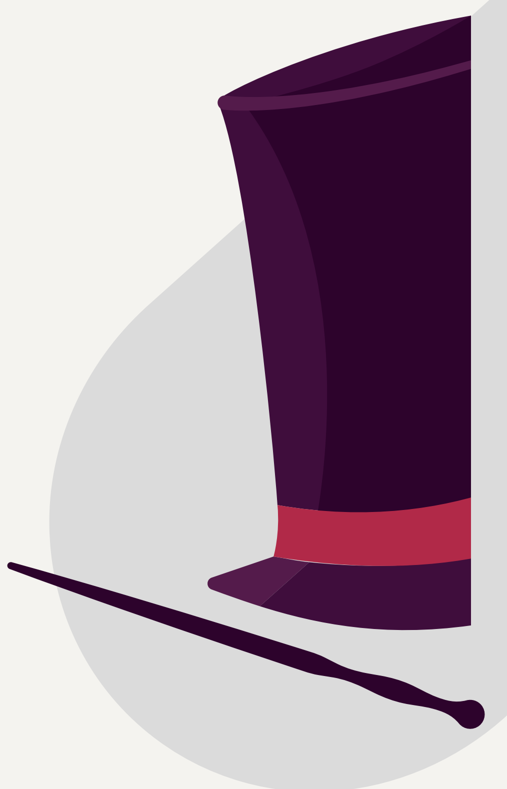
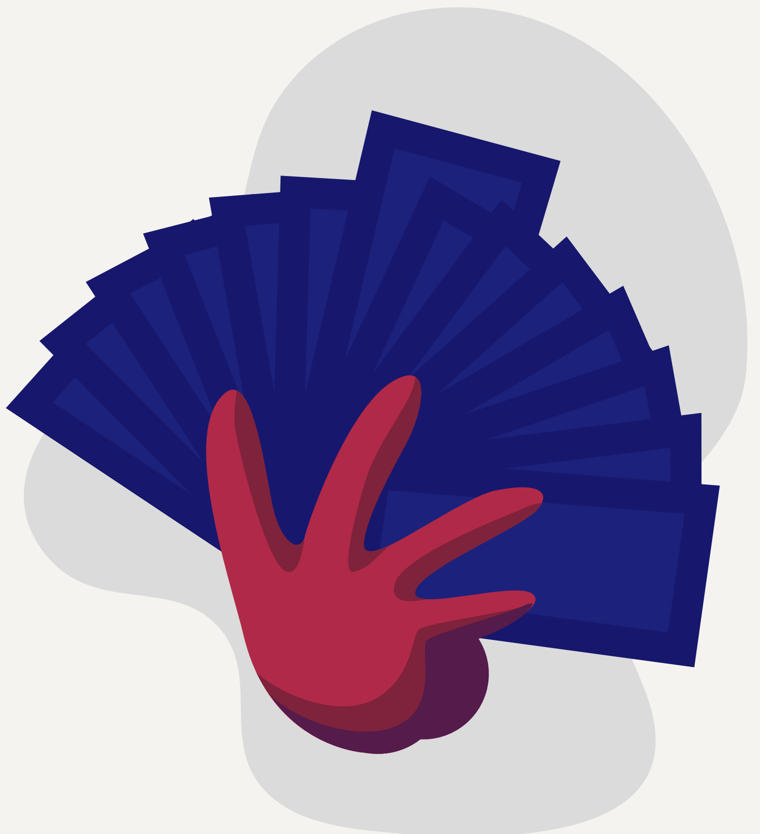


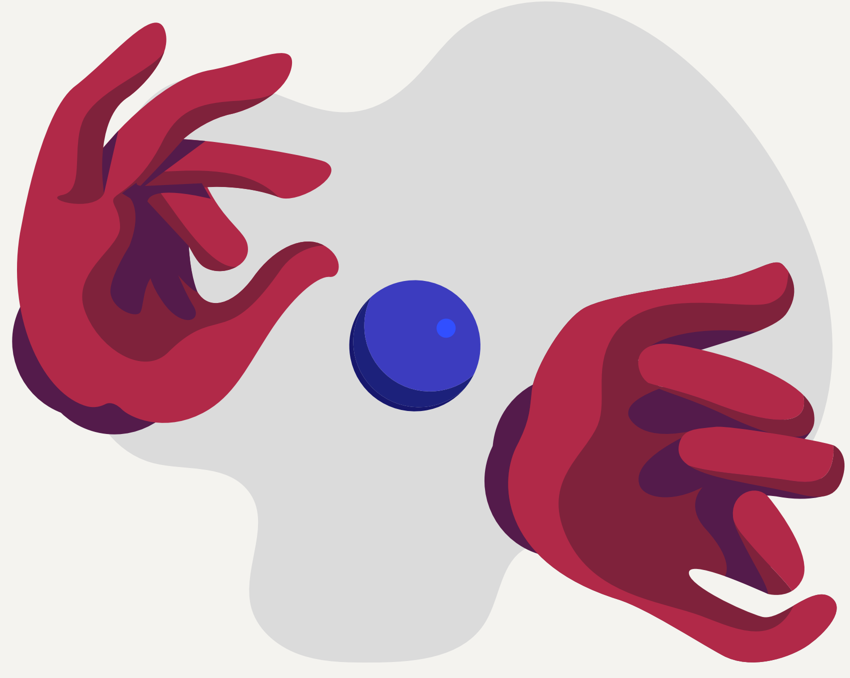
5 CRM Hacks Every Salesperson Needs to Know to Win More Deals

1 Qualify a Lead and create an Opportunity, automatically



The first step to winning a deal is knowing you have one. For that, your deals should reside in your sales pipeline where you can track, monitor and prioritize each, visually. So would you rather qualify a lead, create an opportunity, and lather, rinse, repeat, or automate this sequence in your CRM? That's right! Ain't nobody got time for manual work. Qualify leads and instantly add the opportunities to your sales pipeline and make life easier.

2 Move deals across stages and pipeline with workflow automation

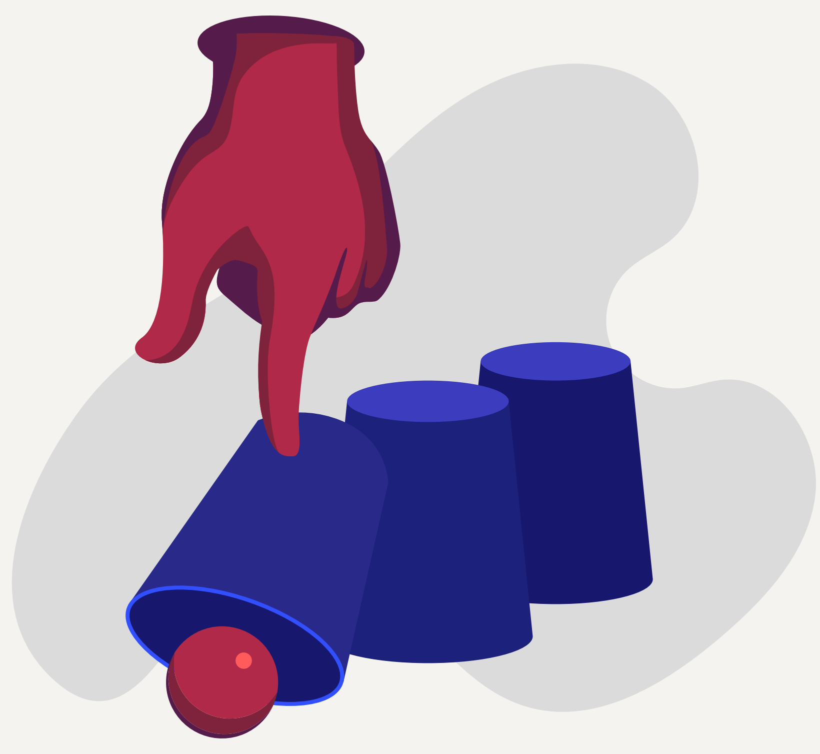


Little drops make the mighty ocean, and routine tasks take up a lot of your time. Effectively negotiated that deal? Mark it "won" and celebrate, but with a workflow. Use your CRM to move deals across stages and pipelines based on the outcomes of your tasks. Keep the cycle moving without you having to pedal. Focus on your customers and boost your sales productivity.

3 Don't go looking for your peers, collaborate out of your CRM

Cross collaboration is a challenge—the back-and-forth calls, multiple email threads, attachments, long wait times—all while trying to work deals out. Fix this problem by collaborating with members on a deal where your work happens, i.e. the CRM. Integration with a collaborative tool enables you to have real-time, context-driven conversations with other teams right within your CRM.

4 Store your files exactly where you need them



The average salesperson spends 6.5 hours a week searching for documents to send to prospects. Say whaaat! That's more than 70% of a regular workday, and far from productive. What if you could store your sales files in the CRM where you can quickly attach them in your emails to prospects? Upload files from your computer, Google Drive, and Dropbox to the CRM, and stop wasting time on file search.

5 Mind your business. Ermm, focus on your deals

Looking at your entire team's deals in the sales pipeline can be distracting. So shift the focus to the deals that need your attention and drive them to close. But, how? Would it help if you have a view of just your deals in the CRM? Sure, it would. Shine the spotlight on your deals to get a glance on the progress of each deal by switching to your own pipeline. Identify bottlenecks and move your deals forward.

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