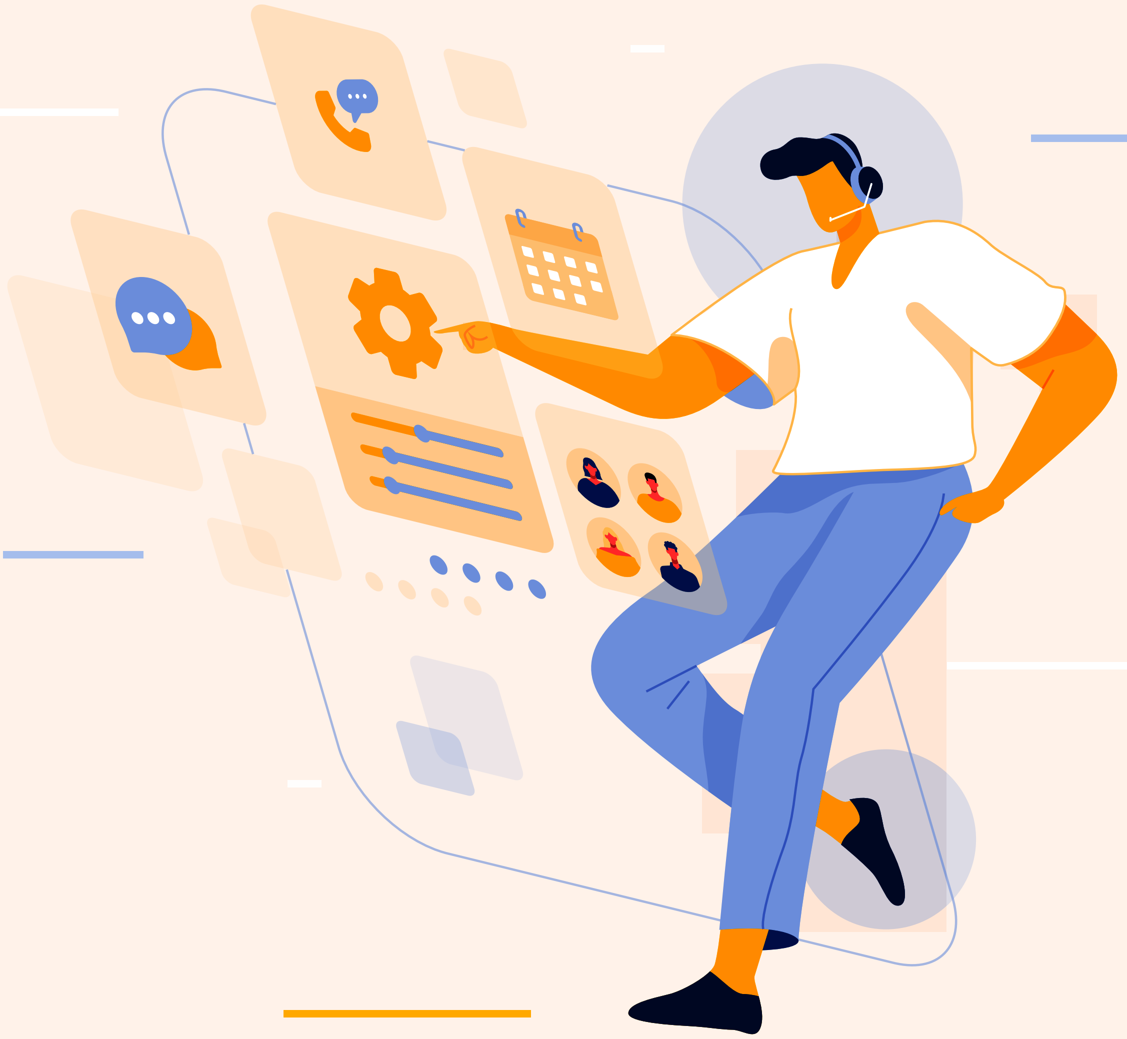
freshworks CRM

SALES SOFTWARE BUYER'S GUIDE



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01 Introduction

Thank you for downloading this eBook. We hope this would be a great place to start your sales software purchase journey.

Managing a sales team is not easy. There are so many activities that your salespeople perform that you need to streamline and track them all from a convenient place.

This is where a sales software steps in, and the right one can help you track your salespeople's activities and provides actionable data that you can leverage to optimize your sales process.

On the other hand, it can help your salespeople be more productive and guide customers right from start to finish by assisting them to solve their challenges.

Use this ebook as a guide to choose the right sales software vendor for your business and sales process.

02 What is sales software?

Sales software is a combination of tools that helps sales managers and sales reps handle and manage their sales process.

For a salesperson, sales software provides crucial insights such as comparing emails sent versus received, deal insights, call duration metrics, and more.

Viewing these insights in a single place can help you optimize your sales process.

Here are some examples of sales software:

- CRM software
- Reporting software
- Sales forecast tools
- Cloud telephony solution
- Live chat software
- Sales email software

Sales software vs. CRM

Sales software and a CRM are alike in many ways, which can confuse you in choosing the one that fits your business.

While a CRM helps manage all your customer data in a single system, sales software is provided in separate packages and performs monotone functions.

CRM	Sales Software
They are used for centralized contact management. This provides seamless visibility into customer information to sales, marketing, and even support teams.	They are used for handling each function of a sales process with separate tools and is primarily used by salespeople.
Leverages powerful artificial intelligence functionalities to provide insights into the customer information, such as prioritizing prospects with lead scoring, predicting whether a deal is likely to close with deal insights, and detecting whether prospects are out-of-office.	Helps sales managers track daily tasks, workflows, outcomes and even organize meetings for salespeople.
Allows sales and marketing emails to be sent right from the CRM and also syncs inboxes.	Allows integration with a contact management software to truly benefit your sales process as it requires data from various departments within the company.
CRM allows users to create simple and advanced reports to measure sales effectiveness or ROI from marketing campaigns.	Allows you to create in-depth sales reports from data pulled from a deal management software via integration.
With a CRM, users can schedule tasks and appointments and stay on top of them through timely reminders and notifications.	Even though a CRM has all these functionalities in one form or another, it consists of additional capabilities since each sales software serves a specific purpose.

While sales software is primarily used for purely sales-related functionalities, a CRM is useful for sales, marketing, and even customer service departments.

03 How do you start the buying process?

a. Start your groundwork

Begin an extensive research process to learn more about the different kinds of sales software and the challenges they solve.

For example, one of your challenges could be to forecast sales every month. Search for sales software that does this well. Or, another challenge of yours could be to handle calls effectively on the field and on-premise. In this case, you could search for a cloud telephony solution that works well both on the go and on a desktop system.

Next, it's essential to list the goals and challenges you're trying to solve from the sales software.

Do you want to improve customer conversion? List it down. Do you want to reduce customer churn? List that down.

Here are some examples of goals or challenges that you may be looking to solve with a sales software:

- **Improve productivity**
- **Optimize sales process to overtake competitors**
- **Analyze sales data**
- **Go through calls to understand how salespeople can improve**
- **Remove manual entry of call logs and customer information**

It also makes sense to quantify these goals for better results. For example, you may want to increase your productivity by 50% or reduce customer churn by 25%. Keep these in mind and share them with your vendors while evaluating.

b. Take a deep dive into the features you need

Manage leads and contacts easily

Make this one of your top priorities. Choose a sales software that captures all data regarding your prospect and contact information. This enables your sales team to get full context into data such as the company they work for, the kind of deciding authority they have, and if they've purchased in the past, and how long it took to convert them. Having this sales software in place also helps your salespeople to have conversations with full context depending on the prospect or the contact's requirements.

Engage with contacts effortlessly

Look out for a sales software that helps you quickly engage with prospects right from your website. This can help you proactively message them at the right time based on their behavior, past purchases, and more. You can also personalize these conversations and provide them with intuitive messaging that nudges them towards the right actions such as purchase, adopt features, and more.

Easier task and event scheduling

Help your salespeople focus on what matters most, selling, and choose a sales software that helps easily schedule tasks and events. If your prospect is out-of-office, the sales software can help quickly reschedule the meeting at a later convenient time.

Generate advanced sales and marketing reports

Forecasting sales growth and keeping a track of your team's performance is a part of your day-to-day activities. Choose a sales software that makes report generation easy so you can track revenue metrics, forecast sales, and gain better insights into deals.

Pipeline management done visually

Select a sales software that helps you visualize your entire sales process, predict deal performance, and forecast revenue. This can help you stay on top of all your deals and make better decisions. What's more, a pipeline management sales software allows you to create deals and link them to a respective prospect automatically.

Telephony access in a single click

Consider this factor while choosing a sales software for your business. An integrated cloud telephony solution that automatically records your salespeople's conversations, allows you to buy local phone numbers, and allows your salespeople to get full context into the prospect's information and requirements before calling them is important.

c. List out the features that are important to you

Once you're aware of all the features offered in a sales software, make a list of what YOU need.

Map all these features against your sales goals and systematically rank them according to what is important to you.

For example, you can create a table with one column reading "must-have features" and the other column "good-to-have features." This can help you narrow down the right vendor based on what they offer. If vendor A provides you with three must-have features and five good-to-have ones, you need to ask yourself if that is the right vendor to proceed with.

Alternatively, you can go with the vendor that provides you with more must-have features.

d. Take budgetary factors into account

Ask yourself these five questions once you have a few vendors narrowed down.

- **Will you be able to afford the solution at a monthly rate?**
- **How many licenses can you buy?**
- **Is the annual plan better compared to a monthly one in terms of ROI?**
- **If the solution is a little over budget, can you overcome all your challenges to make a decent ROI?**
- **What do you need to do from your end to achieve your sales goals?**

e. Get buy-in from your team and implement

Select a few people from your sales team to evaluate the sales software and make them responsible for ensuring that the rest of your sales team also uses it once you implement it.

You can also make these salespeople responsible for training your sales team to use the software.

Once this is done, consult with your IT department and see if the new sales software fits well with your tech stack and discuss with them to figure out a timeline to begin the rollout process. Once you have a timeline fixed, start the process and implement the sales software org-wide.

04 Freshworks CRM

Freshworks CRM helps you attract, engage, nurture, and close deals easily within a single solution.

a. Attract

Get 360° visibility into the sales and marketing funnel
View communication data with your prospects, how they engage with your website, responsiveness to emails and more, to maximize conversions. Additionally, sales and marketing folks don't have to worry about data inconsistencies and silos. Freshworks CRM stores all marketing and sales prospect information in one place for hassle-free access. This ensures that all teams have the same information about the customer and helps deliver personalized experiences.

Capture prospects efficiently with webforms
Convert website visitors into prospects with webforms. You have the choice of designing them from scratch and deploying them on your website or capture prospects from existing ones. As soon as the prospects enter your system, their details are automatically enriched with information on how they have navigated your website and their social media details. Leverage this to start a contextual conversation with them seamlessly.

b. Engage

Engage in full context with your prospects
Set up triggered or targeted live chat capabilities and engage with your prospects at the right time. Or, set up a triggered chat message to pop-up when your

prospect views the pricing page to help them choose the best plan. You can also target a specific prospect at the right time with a relevant offer and nudge them into making a purchase decision.

Integrated phone with powerful features
You don't have to switch to another app with an integrated phone and lose access to crucial information. It's all in one place. Monitor your team's calls, voicemails, transfer calls quickly to another salesperson without losing context, and even purchase numbers from various countries to deliver a localized call experience. You can also set up automatic call recording to analyze their efficiency and optimize them.

c. Nurture

Send sales and marketing emails easily
Nurture your prospects and contacts regardless of the journey they are in. Send automatic emails from time to time or on special occasions to show them you care about them. Also, show your contacts that you have not forgotten about them by sending them feature updates or alerts after purchase!

d. Close

Run a systematic sales process with powerful analytics
Quickly analyze and predict your team's performance with sales reports. With analytics, you can understand which territory, salesperson, or even campaign brings you the most revenue, compares it with those that fare lesser, and optimizes your sales process. Drill deeper and understand how your sales cycle is faring by identifying where your salespeople face challenges and increasing conversions.

Manage deals and forecast sales efficiently with Pipeline 2.0
Completely visualize and track all your deals in one place with Pipeline Management 2.0 from Freshworks CRM. Create multiple pipelines, move them to different stages, pair products to respective deals, identify growth areas, well-performing territories, and more, with sales goals.

Boost team efficiency with task management
Freshworks CRM allows you to create tasks, reminders, and appointments easily. It also helps you reschedule meetings by automatically detecting if your contact is out-of-office. You also get a complete overview of all your upcoming tasks and activities on the dashboard and avoid opportunities slipping through the cracks.

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About Freshworks

Freshworks Inc. offers a comprehensive suite of Software-as-a-Service (SaaS) products that's ready to go, easy to setup and use, and requires minimal customization.

The Freshworks' suite of products makes it easy for personnel in the support, sales and marketing departments in businesses of all sizes to deliver moments of wow.

Founded in 2010, Freshworks Inc. is backed by Accel, Tiger Global Management, CapitalG, and Sequoia Capital India. Freshworks is a 3000+ team headquartered in San Mateo, California, with global offices in India, the UK, Australia, and Germany. The company's cloud-based suite of products is widely used by 150,000+ businesses worldwide, including NHS, Honda, Rightmove, Hugo Boss, Citizens Advice, Toshiba, Cisco, and Sotheby's.

For more information, please visit **www.freshworks.com**