

## Salesforce Case Study

# SalesCrunch + Salesforce: Making CRM Magic Happen

SalesCrunch elevates sales from an art to science by providing a single platform that combines sales delivery, analytics, training, and collaboration. As a customer-focused organization, SalesCrunch lives in Salesforce. More importantly, so do its customers.

## The Promise of CRM

Using CRM is necessary for any organization these days. Gone are the days when salespeople track their calls and meetings on notepads—today, sales teams need to share and apply their best practices with each other, ensuring that the team can sell in a repeatable, scalable way. CRM improves productivity by tracking leads, opportunities, and sales; provides everyone in the company with a complete view of customer interactions; and allows management to forecast revenue. Most importantly, CRM increases close rates by allowing the company to capture insight into how and why a sale was closed.

## The Challenge of CRM

CRM comes with its own set of challenges that make it difficult to capture a 360-degree view of customers:

- **Data entry** - Every CRM system requires manual data entry, and most salespeople avoid administrative work like the plague in favor of spending more time closing deals. As a result, most executive sales leaders manage their field-level CRM input as if they were SWAT team members called to a prison break.
- **Data quality** - CRM systems are only as good as the information that salespeople put into it. At worst, many salespeople don't enter data at all, and at best, the level and quality of data can vary greatly from salesperson to salesperson. One salesperson may be meticulous about entering meetings into the system, while another may set up a presentation with a prospect and forget to enter in their contact information, making follow-up almost impossible.

## The Solution: Integrating CRM with Presentations, Demos and Email Pitches

With Salesforce being the CRM of choice for SalesCrunch and its customers, SalesCrunch knew that integrating its meeting and presentation platform [CrunchConnect](#) with Salesforce was the perfect opportunity to radically reduce data entry for salespeople while increasing data accuracy for entire companies. Knowing that it is impossible to measure what works for salespeople if it isn't captured in the first place, SalesCrunch set out to harness data that could be used to increase sales and customer satisfaction.

SalesCrunch immediately started testing its CrunchConnect integration with Salesforce on itself and saw an immediate reduction in the need for tedious data entry after meetings and emailed presentations. When anyone in the company initiates a meeting through CrunchConnect, the web-based software populates Salesforce with new leads and contact information from the meeting attendees' information. Data includes their names, email, and even what numbers they used to call into the meeting. The meetings, presentations, and demos themselves are logged automatically in Salesforce as activity with the prospects and customers, with a link included to a summary page of the meeting and a recording.

*"In my experience, the best sales pros don't get out of bed looking forward to another exciting day of Salesforce data entry. CrunchConnect's integration with Salesforce eliminates a huge burden. Another day without Salesforce data entry? Yes, please!"* said Andrew Quinn, Head of Sales Training at marketing automation company HubSpot.

Outside of meetings, the SalesCrunch sales team also sends presentations via email to prospects in CrunchConnect. These presentations are logged through CrunchConnect as activity so that anyone within the company can track which presentations are sent and who opened and read them—valuable information for qualifying prospects.

*"Momentum is the key to achieving success in sales. Few things frustrate me more than having to spend time logging meetings and contacts into Salesforce after a great call. Now I don't have to!"* said Gene Plotin, Customer Success Manager at SalesCrunch.

The Salesforce integration works two ways: contact information already in Salesforce populates SalesCrunch Connect automatically. This makes sending presentations or meeting invitations a snap; all the salesperson has to do is upload the deck to send, then start typing in the recipients' names. CrunchConnect pulls data from Salesforce so that the salesperson can just select the right person, then send.

SalesCrunch took the data entry and data quality headaches that so many organizations experience out of Salesforce with the CrunchConnect integration. Within its own organization, SalesCrunch found that the data that now populates its Salesforce system is much more consistent and

provides a much better view of the customer—invaluable to customer service and sales.

*“Using CrunchConnect to automate Salesforce data entry makes salespeople happier and more productive and customer data more reliable. It’s a no-brainer for any organization trying to realize the true promise of CRM,”* said Sean Black, SalesCrunch’s Founder and CEO.

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