

salesforce

How 5 Small Businesses Chose the Right CRM for Growth

Get tips on selecting a complete CRM you'll never outgrow.



Introduction

You need a CRM that's fast and easy — but scalable, too.

That leaves you with a dilemma:

Do you optimize for speed? Or scale?

This is a false dilemma.

You can do both. You can hit the ground running while also building for the long term.

"I shudder to think about my days in sales before CRM," said Travis Whitaker, CEO of medical device shipping company MedLogiq. "It's the first thing I log into in the morning. It's how I put the customer in the center of my day."

Small and medium-sized businesses like his use customer relationship management (CRM) software to create a single source of truth for every customer, gain insights more quickly, and make smarter decisions. It's the driving force behind their success.

With so many CRMs out there, the question becomes how to choose the right one. Here are five growing companies who found the answer in a CRM that was built for both speed and scale. Learn how they overcame disconnected data, tech bloat, and sales inefficiencies, and set a foundation for growth — while also starting fast.

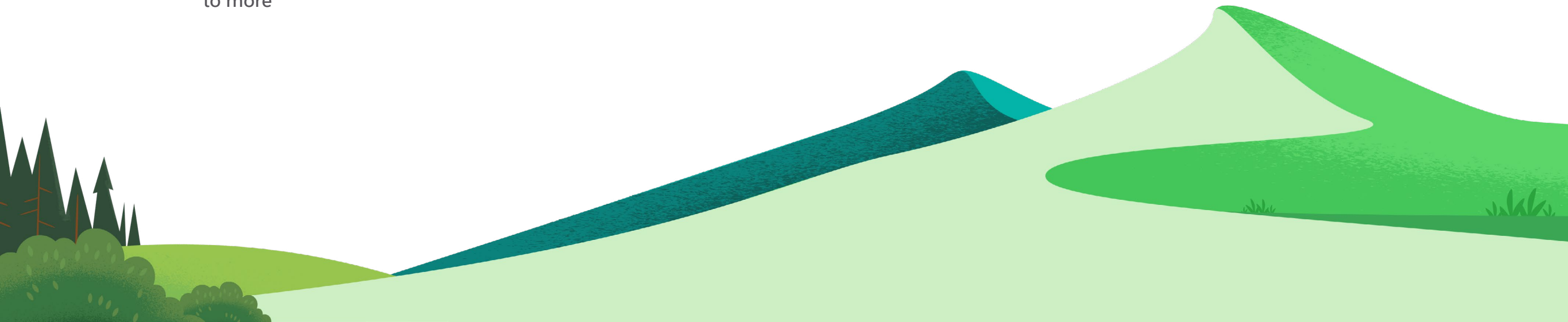


5 tips from small and medium businesses for choosing complete and flexible CRM.



- 1 Choose a flexible solution that will scale with you as you grow.**
Decimal considered the sales features it would need in the future, and changed CRMs for the last time.
- 2 Make sellers more productive with built-in AI.**
BACA Systems helped reps speed up the sales process with easy-to-use generative AI, giving it an edge over the competition.
- 3 Easily integrate customer data with industry and third-party apps to solve new challenges as they come.**
KCH transportation chose a CRM that could break down data silos between its apps and easily connect to more

- 4 Get critical insights you can act on with preloaded reports and dashboards.**
Gift platform Thnks used reports and dashboards to gain visibility into sales performance, guiding strategy across the business.
- 5 Simplify selling with an out-of-the-box suite of tools for marketing, service, and sales.**
Microbiome research company Nucliq found a solution that worked on Day One, with the flexibility to handle new use cases as they came.



Choose a flexible solution that will scale with you as you grow.

Decimal considered the sales features it would need in the future, and changed CRMs for the last time.

About Decimal:

Decimal provides simplified bookkeeping and tax services for its customers, automating back-office tasks like payroll, bill pay, and invoicing.

Challenge:

After nearly three years of steep growth, Decimal realized it had outgrown the lightweight CRM it chose when it launched in 2020. “Looking back, I wish we had made our decision based on cost, not price,” said Decimal CEO Matt Tait. “The CRM we went with was cheaper, but it cost us more in the long run when we had to add single-purpose tools to get the functionality we needed as we grew.”

Tait had to take a step back and consider the additional sales use cases he’d continue to add as his company matured. He began by outlining his one-year plan, and then considered his five-year vision of where the company was headed. He’d need advanced sales features like sales forecasting, pipeline management, and billing. His CRM would never be able to keep up.



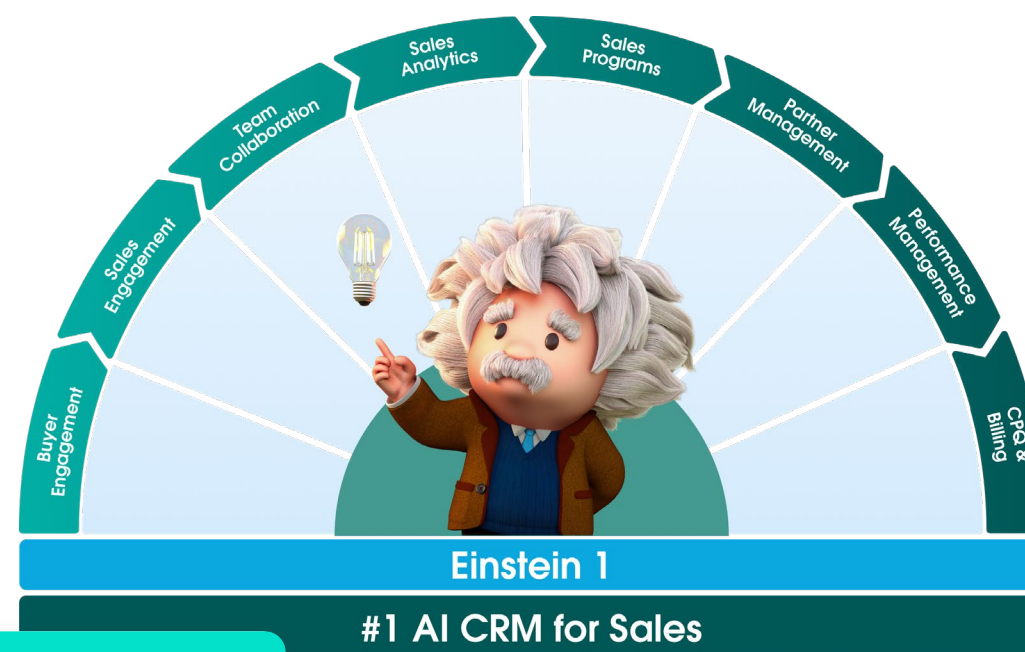
Solution:



Tait switched to [Sales Cloud](#) because “it’s the only system with the full capability to let you grow up through it.” His long-range business planning had exposed gaps in future-thinking use cases.

Tait knew some of those business challenges could be solved with AppExchange integrations. But his fundamental task growing from a small business to an enterprise on one CRM required advanced sales features that could be easily added with native upgrades.

Sales Cloud gave him the green light to keep moving. “The nice thing about Salesforce is that if you’re using it right, you’re always improving it. You’re always evolving together.”



Salesforce supports you at every stage of growth.

Decimal



Matt Tait

Co-founder and CEO, Decimal

“At some point every company makes the decision. Do I think I’m going to grow? Do I think I’m going to grow big? If yes to both, go to Salesforce immediately.”

Make sellers more productive with built-in AI.

BACA Systems helped reps speed up the sales process with easy-to-use generative AI, giving it an edge over the competition.

About BACA Systems:

BACA Systems provides manufacturing systems and sawing solutions that help customers edge and polish stone materials like countertops.

Challenge:

Sales reps at BACA Systems were spending hours a day just on writing emails, whether cold emails to leads or follow-up emails to prospects. “These reps got into sales because they love people and building relationships. Instead, they were spending all their time in their inboxes,” said Andrew Russo, Salesforce Architect at BACA Systems.

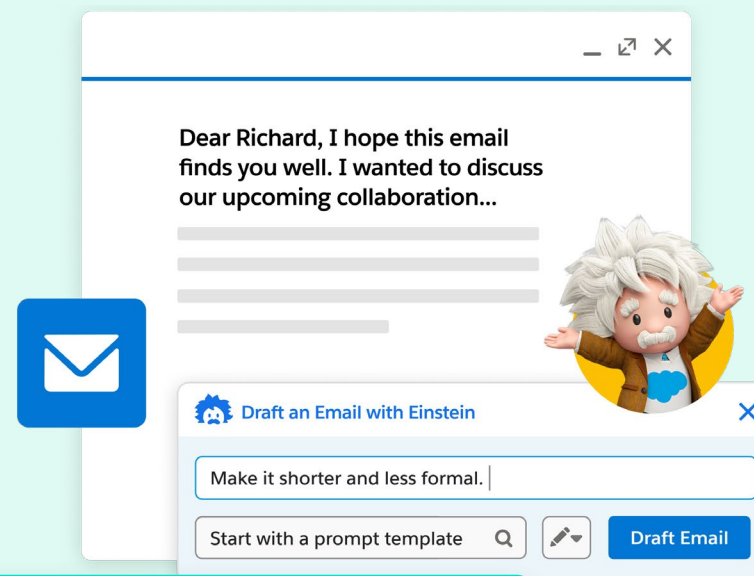


Solution:



The BACA Systems sales team now uses [Einstein](#) – the AI platform native to Salesforce – to write emails, freeing up more of its reps’ time to sell. Reps can go to their email inbox like before, but instead of writing an email from scratch, they simply select an email type (for example, “follow-up email”) and a customer record. In seconds, Einstein drafts an email, personalized with customer data.

But the customization is where Einstein really shines. The rep can provide prompts to ask Einstein to make tweaks and send the email when it’s ready. The result is not just less time spent on writing emails. The emails are also more effective: Reps at BACA Systems found that AI-generated subject lines had higher open rates, contributing to a 2x increase in sales productivity overall.



Sales Emails from Sales Cloud Einstein autogenerates personalized emails and lets you request changes with simple prompts.

BACA



Andrew Russo

Salesforce Architect, BACA Systems

“We’ve been using Einstein to generate sales emails, which allows our sales teams to skip these repetitive tasks so they can focus their time on our customers.”

Easily integrate customer data with industry and third-party apps to solve new challenges as they come.

KCH Transportation chose a CRM that could break down data silos between its apps and easily connect to more as it grew.

About KCH Transportation:

KCH Transportation makes shipping easier. Its mission is to handle all the moving parts (literally), from cross-border shipping to air freight, ports, and rails.

Challenge:

KCH had a data integration problem. Like many companies in the industry, KCH used a transportation management system (TMS) to track operations. Meanwhile, the sales team used a lightweight CRM to track customer relationships. But the CRM didn't have the ability to integrate with the TMS.

"We had one set of contacts over there in the TMS, another over here in the CRM, and a gap in between," said Austin Wallin, Assistant Vice President of Technology Innovations at KCH Transportation. For example, one team couldn't tell when the other had reached out to a customer.



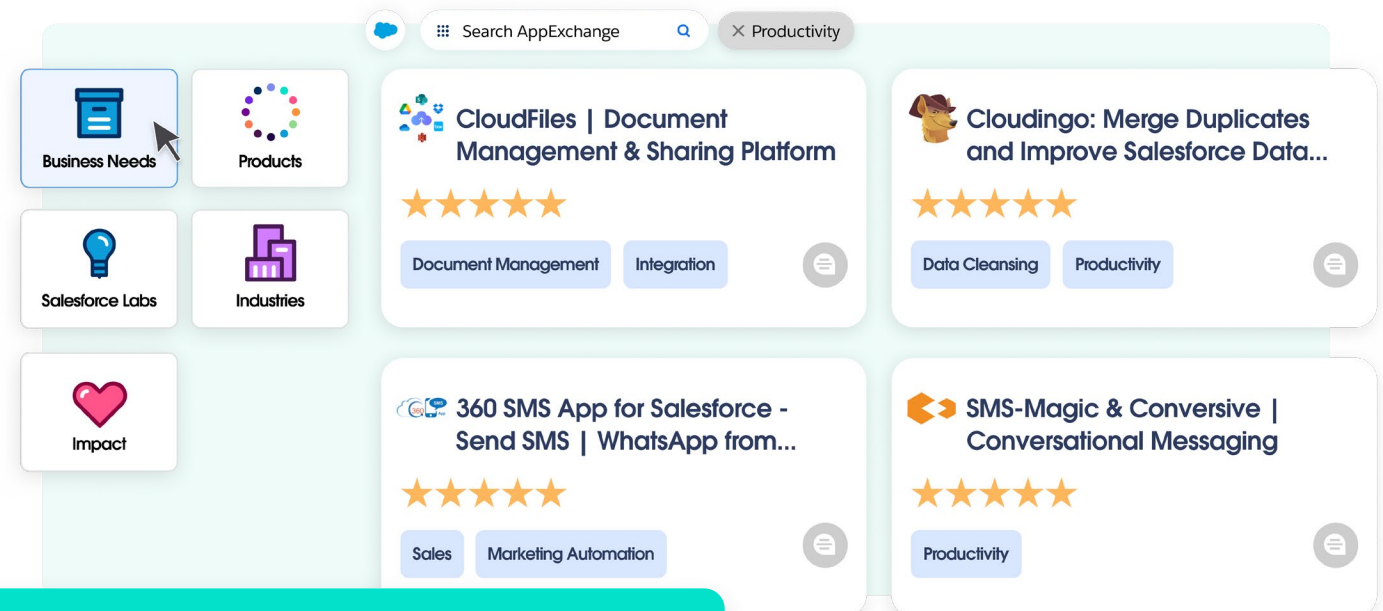
Solution:



KCH chose Sales Cloud Enterprise Edition and tapped into [AppExchange](#), a library of thousands of applications that can be easily integrated with the CRM. The apps on AppExchange allowed KCH to seamlessly integrate with apps specific to the transportation industry.

KCH also used AppExchange to integrate with apps that helped the company automate and scale its business more broadly, such as an accounting app to help with bookkeeping.

As KCH continues to integrate with apps to optimize every corner of the business, the Salesforce ecosystem ensures that data remains centralized and secure in one place for a full view of customers and interactions.



AppExchange from Salesforce lets you easily augment the power of CRM with integrations.



Austin Wallin

Assistant Vice President of Technology Innovations, KCH Transportation

"The AppExchange ecosystem gives us our choice of over 5,000 apps, with thousands of peer reviews to help find the best matches."

Get critical insights you can act on with preloaded reports and dashboards.

Thnks, a platform for sharing gratitude and appreciation in the business world, used reports and dashboards to gain visibility into sales performance, guiding strategy across the business.

About Thnks:

Brendan Kamm co-founded Thnks to help businesses grow by harnessing the power of gratitude. Companies use Thnks to show appreciation through timely, personalized gestures – supporting prospecting, building client loyalty, and improving customer engagement.

Challenge:

Thnks purchased a lightweight CRM in its early days. But as it began to scale, the company quickly outgrew its reporting capabilities, making it more difficult to measure sales KPIs, identify top accounts based on prospect engagement, and create sales forecasts.

“We were wasting time updating both our old CRM and Excel with the same information because they weren’t connected,” said Kamm. “Our sales leaders were coming to me every day, frustrated that they couldn’t get their reporting right. As a result, we had to configure hacks and workarounds to make the old solution work for us.”

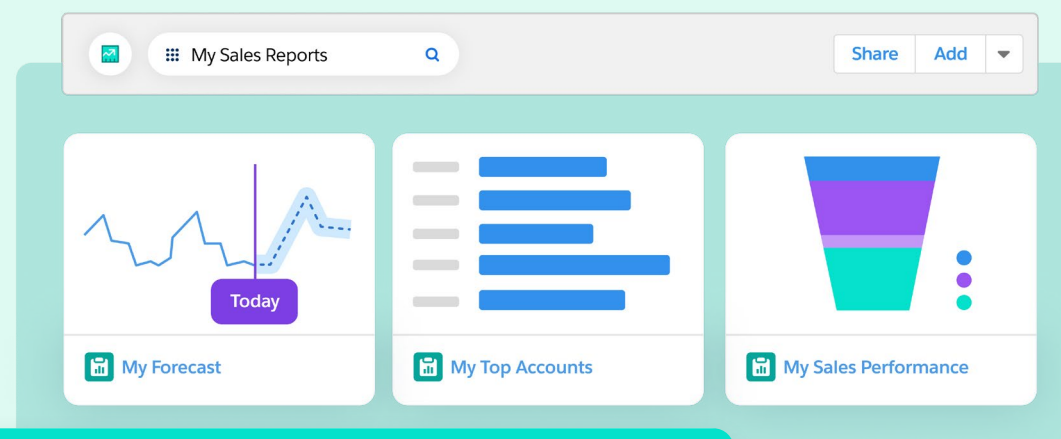


Solution:



Thnks switched from its previous CRM point solution to [Sales Cloud](#), which provides advanced and customizable reporting such as forecasting. The same day the company loaded its data – as fast and easy as uploading a file to a computer – Kamm and his team could view reports and dashboards for their pipeline and revenue, and see forecasts for the coming month, quarter, and year.

“The data integration is so huge for us,” Kamm said. “It helps us keep pace with our expanding customer base, and it gives us visibility into what is and isn’t working, so we can continue to improve the customer experience.”



Sales Insights from Sales Cloud gives you ready-to-use reports and dashboards for a real-time view of sales KPIs and business health.



Brendan Kamm

Co-founder and CEO, Thnks

“The out-of-the-box reporting functionality in Sales Cloud is powerful. It allowed us to ditch our spreadsheets and measure our sales KPIs in the flow of work.”

Simplify selling with an out-of-the-box suite of tools for marketing, service, and sales.

Microbiome research company Nucliq found a solution that worked on day one, with the flexibility to handle new use cases as they came.

About Nucliq:

They're a group of scientists who are working to diagnose and treat gut health.

Challenge:

Nucliq started out selling their Gut Check devices directly to consumers. But as they entered the business-to-business space, selling to health clinics, their deals were becoming more complicated.

"We reached a turning point where we realized we needed a CRM," said Patrick Bégin, their business development officer. "We were losing track of deals, getting lost in manual email logs, and switching between spreadsheets to try to find customer information. It was a nightmare."

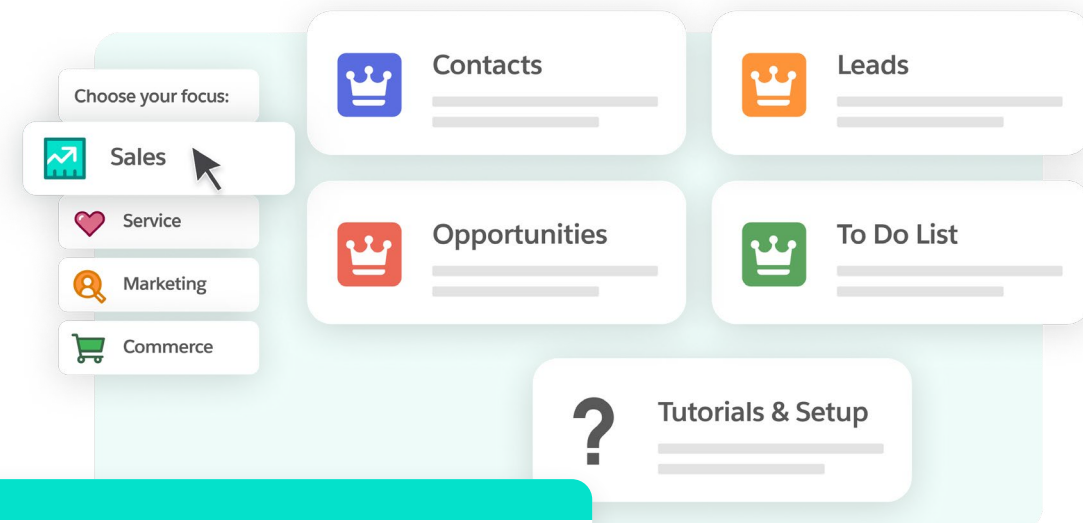


Solution:



Nucliq chose [Salesforce Pro Suite](#) – a complete suite of tools for sales, marketing, and service – tackling their most immediate need first: streamlining sales. The same day they signed up, Pro Suite was connecting customer data into a single source of truth to track their deals. This customer view also helped them plan ahead. "We assemble and ship our devices in-house. Our CRM analyzes our pipeline and spins up forecasts that help our supply chain team know when production needs are going to peak in the future."

What's next for Nucliq? "We're excited to extend into our marketing and service," Bégin said. "We've just gotten started running marketing campaigns with pre-built campaigns. We're also planning to integrate with our ecommerce store, and we'll manage customer service tickets using the Pro Suite case management tool."



Homepage from Pro Suite gives you a daily digest of to-dos across sales, service, marketing, and commerce.

NUCLIQ



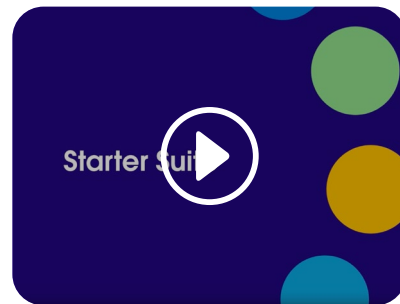
Patrick Bégin

Business Development Officer, Nucliq

"We had a short-term need to manage our sales. And a long-term vision to manage our business from a single source of truth. We found a CRM that could do both."

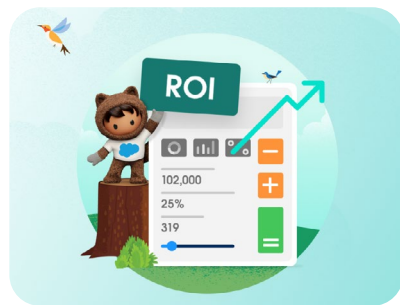
Take the next step on your CRM journey.

Now that you've seen how Salesforce can help now and in the future, dive into the resources below.



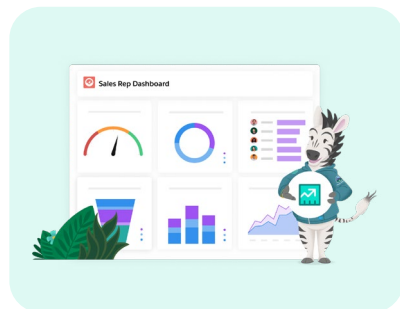
See how Salesforce helps small businesses grow.

You'll discover how to find leads and close deals with the power of data, AI, and CRM together.

[WATCH DEMO](#)

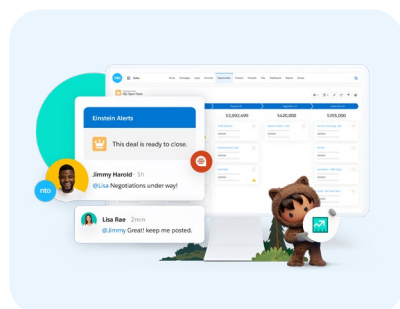
Use our ROI calculator to see potential revenue growth.

Sales Cloud customers grow revenue by 28% on average. Try our calculator to see how much you can grow too.

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Start your free 30-day trial of Salesforce Starter – a simplified suite for sales, service, marketing, and commerce together in one easy-to-use CRM.

[START MY FREE TRIAL](#)



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