Connected Small Business.

Your Guide to Faster,
Smarter Business Processes.

salesforce

Contents

The new face of Small Business

One thing has become increasingly clear over the past few years: businesses that are prepared to navigate unexpected disruption will be the ones that thrive. And while the old business playbook has been thrown out the window in an age of lockdown measures, remote working, digital-first experiences and sky-high customer expectations, a new blueprint is being created.

Today's small business needs to be agile, resilient and able to meet their customer on any platform, whenever and wherever they choose. They not only require a 360-degree view of the customer; they need to be able to leverage data to empower the workforce and make business-critical decisions. In other words, today's small business needs to be faster, smarter and better connected than ever before. Yet in an increasingly competitive landscape, many SMEs are still struggling with how to connect their business processes and reach their full potential.

This eBook will explain why connecting business processes is crucial for navigating disruption, give you a real-life example of an SME that's thriving through connected processes, and provide some helpful tips for getting started.

Chapter 1

A customer-first climate demands better connections

The state of the connected business

A Planview survey reveals that 80% of business teams collaborate across functions and **the average team wastes more than 20 hours per month due to siloed tools and processes**: that's six lost workweeks per year. And a McKinsey report shows that **45% of business processes could already be automated with existing technologies** – including 20% of a CEO's tasks.

Additionally, nine out of ten IT leaders report that siloed data is presenting business challenges. This is costly for SMEs, as one of their most valuable resources is not only being wasted, but may be negatively affecting productivity, increasing IT and labour costs, and leading to poor employee and customer experiences.

Taking all these challenges into account, the blueprint for the new small business becomes clearer. *Enable collaboration. Streamline and automate processes. Smash siloes. Unite data. Connect everything.* And as more and more SMEs move to address these concerns, perhaps the question that the remaining businesses need to ask themselves is not whether they can afford to connect their processes, but whether they can afford not to.

Enable collaboration.

Streamline and automate processes.

Smash siloes.

Unite data.

Connect everything.

45%

45% of business processes could already be automated with existing technologies

SMEs have always depended on making connections, but never have communication, collaboration and information been so important. The sheer rate and scale of change is putting many businesses under pressure, but this pressure can lead to transformative opportunities.

The good news for small businesses is that it's never been easier to keep up with their larger counterparts. In fact, with a simple mobile phone, SMEs can reach more customers than huge businesses could with expensive billboards and TV ads decades ago. Smaller organisations are more agile, putting them in a better position to innovate and pivot when needed. And when it comes to game-changing technologies, the barrier to access has never been lower. Today's SME can choose from an array of cost-effective tools to drive productivity, connect business processes, engage the customer and turbocharge the workforce.

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While many SMEs are being proactive when it comes to keeping up with the pace of change, they still may be struggling to keep up with their customers, as expectations for exceptional service have grown exponentially.
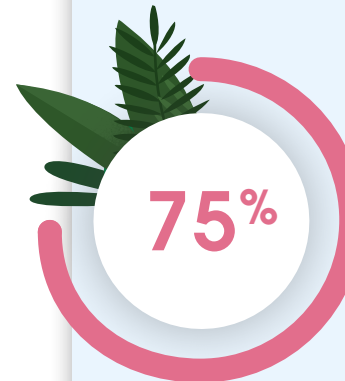
The **Small & Medium Business Trends Report** shows that:

70%

Nearly three-quarters of SMEs have increased their online presence since the COVID-19 pandemic began.

Over 70% of growing SMEs say that they survived the pandemic because of digitisation.

Tech investment has accelerated across the board, with collaboration tools seeing the largest increase in adoption.

75%

75% of SMEs say that they'll see long-term benefits from the business changes they've made over the past year.

The State of the Connected Customer report reveals that:

76%

of customers expect consistent interactions across departments.

52%

of customers describe service interactions as fragmented.

82%

of customers – and 85% of business buyers – say that the experience a company provides is as important as its product or service.

91%

of customers say that there's a moderate or major need for businesses to improve their service and support.

84%

of business buyers say that they're more likely to buy from companies that understand their unique business needs.

To meet the new standards of service, SMEs need to provide personalised experiences. They need to be able to see all customer interactions across departments. And they need to have the right data, at the right time, to understand customers' unique pain points and engage with empathy.

But, despite the clear benefits of connecting business processes to improve service, many organisations are still struggling to do so. The Connected Customer report reveals a notable discrepancy between what customers expect from companies, and what they're actually getting from them.

68%
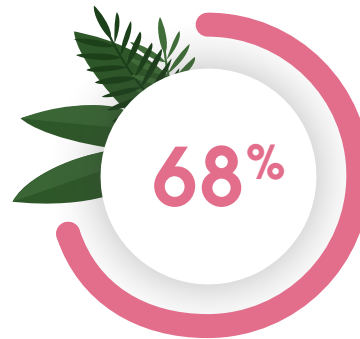
68% of customers expect brands to demonstrate empathy, but only 37% feel that brands generally do so.

66% of customers expect brands to understand their unique needs and expectations, but only 34% say that companies treat customers as individuals.

66%

Providing better, more personalised service is becoming an imperative. And creating better customer experiences is just one of the benefits of improving process management. So why is there a gap between what SMEs should be doing, and what they actually *are* doing? And why exactly are so many SMEs still operating in a slower, less connected world?

What's standing in the way of better business process management?

We're firmly in the age of the customer, but many businesses are still on a slow road towards digitisation. Those in the fast lane are positioning their organisations to not only navigate disruption, but be powerful agents of change.

However, SMEs that have yet to connect their processes are operating in a less productive world of departmental siloes where it's difficult to see the bigger picture. These businesses may know they need to step on the digital accelerator but are wary of failure or limited by tight budgets. Indeed, fear of the unknown is one of the stumbling blocks to building a more connected business – but it's not the only one.

We're firmly in the age of the customer

Other things that may be discouraging SMEs from connecting their business processes include:

- Short term thinking.
- Having no blueprint to work from.
- A concern over the required investment of people and capital.
- A belief that digitisation and connected processes are concerns for larger companies.
- A lack of clarity around business goals and the benefits of integrated processes.
- Process debt from legacy systems.
- A 'don't rock the boat' mentality focused on traditional ways of doing business.
- A lack of robust IT support – and a belief that it's necessary.
- Organisational inertia, with no plans for identifying and capitalising on new strategic opportunities, and no plans for integrating business capabilities.
- An underestimation of the rapidly changing marketplace and what it takes to remain competitive.

The good news is that many of these challenges can be easily overcome, while others aren't roadblocks at all. Let's look at some of the benefits that SMEs can unlock by integrating business capabilities, and then see how they can best connect processes to reach their peak potential.

The benefits of connecting business processes

How SMEs can unlock big rewards by getting connected

Today's SME has a lot on its plate, including how to best use its budget. Connecting business processes is one of the most impactful and cost-effective ways to unlock benefits across the value chain.

Here are just a few ways that SMEs can benefit from connected business processes.

Decrease ambiguity and improve the quality of data.

If SMEs have fragmented, ambiguous data, they can't rely on it when making business-critical decisions. And if data is siloed, it can only provide a single piece of a bigger puzzle. By uniting data and connecting processes, all teams will have shared access to trustworthy, real-time data, empowering them to make choices based on superior business intelligence. SMEs without robust analytical capabilities may find it difficult to keep up with the customer and their competitors.

Improve customer satisfaction by offering teams a complete view of the customer and providing insights for next-best actions.

Without a complete view of their customer, businesses will struggle to meet their needs and new expectations. Having a 360-view across departments will not only enable sales and service teams to better address their customer's needs; it will provide them with better opportunities to cross-sell and upsell. According to ForbesInsights, 54% of executives at sales leaders say that a great Customer Experience drives revenue growth, and 65% say that Customer Experience will be among their top 5 priorities over the next 3 years.

> Connecting business processes is one of the most impactful and cost-effective ways to unlock benefits across the value chain.

Improve CX by connecting customer-facing departments, negating the need for customers to repeat their requests at different points of contact.

Today's customers expect to engage with someone immediately when contacting a company. Moreover, **they don't want to have to repeat themselves across different points of contact. By connecting business processes, SMEs can gain an overview of all the customer's previous interactions, leading to a more efficient and fluid customer experience**. And if there's one thing that's non-negotiable in the new climate, it's providing a good customer experience.

Find the right balance between safeguarding data to ensure proper governance and leveraging it to meet business goals.

When leveraged correctly data is the great enabler, but when it's a disorganised, free-floating byproduct of disconnected processes, its value is limited or even damaging. By connecting processes and centralising data, SMEs can create a blueprint for data management that eliminates rogue data and helps to ensure regulatory and institutional compliance. Just as importantly, they can better leverage that data to meet their business objectives.

Boost data literacy to create a more data-centric culture.

SMEs need to put their data to work. Unfortunately, an Accenture report shows that only 1/3 of businesses trusted their data enough to properly use it, and a large portion of an enterprise's data goes unused towards analytics. It's nearly impossible to create a data-driven culture when data remains siloed, incomplete and untrustworthy. In fact, if an enterprise's data is not accurate, it can reduce productivity rather than drive it, with some employees actively trying to avoid data-related tasks.

Increase efficiency.

One of the biggest benefits of connecting processes is the resulting increase in productivity. Employee's waste much of their time on information-gathering and low-value tasks, but by connecting business processes and creating custom dashboards, organisations can enable their teams to see more, know more and do more. And by offering the ability to work both online and offline, SMEs can offer their workers the flexibility to collaborate more effectively. This is beneficial in any climate, but is especially critical in a time of remote and hybrid working.

> Only 1/3 of businesses trusted their data enough to properly use it

Improve EX (Employee Experience)

According to a [Gartner study](#), only 13% of employees are happy with the EX their organisation offers, and businesses that actively shape their employee experience are more likely to have high-performing employees. Connecting processes can help improve EX by providing more accurate information when dealing with customers, but it can also help businesses make better decisions about their own workplace. By removing siloes, SMEs can view their employee experience more holistically and evaluate it across the entire value chain.

Nurture dependable knowledge management.

Data is the fuel that's driving many of today's SMEs, but raw data needs to be turned into information to be useful. To go further, this information needs to be stored, evaluated and shared in order to provide intelligent insights. Dependable knowledge management can help SMEs create a more open, transparent environment while fully harnessing their organisational knowledge. In a time when everyone is an information worker to some degree, this is no small concern. But dependable knowledge management is difficult to achieve without integration.

Create a more agile workforce, better prepared to work across functions.

One of the most unexpected benefits of the challenging climate – and SMEs quick pivoting – is the diffusion of skills. Many team members have found themselves having to take on new roles, helping across functions or departments where needed. And although many roles have been redefined nearly overnight, many of these changes have long-term implications. Connecting business processes will help SMEs provide their workforce with better visibility across functions or departments. When paired with a training programme, this is a great way to create an agile, future-proof workforce that can work wherever they're needed. Think of it as Workforce 2.0.

Customer story - how Audioboom is writing a new chapter with Salesforce

If you love a good story, then you might already be familiar with Audioboom, an innovative platform that helps podcasters host, distribute and monestise their work. Business for Audioboom, is, well, booming, as the company has grown its revenue from $11.7m in 2018 to $60.3m in 2021, and now delivers over 90 million downloads to 26 million users a month. It's an impressive feat for an organisation that once managed its sales, bookings and billings in an unwieldy spreadsheet nicknamed "The Excel That Ate Manhattan".

When it became clear that Audioboom needed a more robust solution for finding and collating data, it turned to Salesforce in 2018.

"Salesforce helped us automate out the grunt work, so our lean team of 40 can handle higher volumes of work efficiently and accurately," says Lance Paterson, VP of Research at Audioboom. "We're experiencing 93% year-on-year growth – outperforming the wider industry, and with a vastly smaller team than many of our competitors. With better processes, we can deliver better pricing and better service."

Audioboom used Salesforce Platform to create LIRICAL, a centralised storehouse that enables its teams to access advertisers' records, real-time listening figures and podcasters' preferences for adverts. Just as importantly, it helps Audioboom better leverage data to match creators with advertisers, optimise rates and decide where to invest.

In addition to Salesforce Platform, Audioboom implemented Sales Cloud to generate invoices and streamline billing processes that were once complex and inefficient. The result: the time for average customer payment has dropped from five months to 87 days, leading to improved cashflow and better relationships with its partners and customers.

> Everyone who works with Salesforce – and almost every process we have in the business – has seen a change for the better. Grind jobs have almost vanished; workflows really flow. All the information we need about partners and clients is at our fingertips. Don't be afraid of making the change.
>
> **Lance Paterson,**
> VP of Research, Audioboom

"It now takes under an hour to generate all our invoices for the month, rather than each one taking hours, and we don't need to spend time resolving issues because customers can be prompted by an automatic workflow when payments are due," Paterson explains.

While Audioboom has come incredibly far in a short period of time, it's not taking its foot off the accelerator. It's already built a companion to LIRICAL, which is designed to handle booking endorsements for radio and digital channels. Up next is a marketplace built on Experience Cloud, which will offer better self-service options to agencies and provide sales teams with fully qualified leads.

"We can now easily scale up into the future, and will be able to handle billions more impressions and more valuable deals without adding staff or other costs. We've future-proofed the biggest part of our business," Paterson says.

By connecting processes, integrating scalable solutions and unleashing the full power of its data, Audioboom is redefining the podcasting space, both for its employees and its partners. You can read more about Audioboom's journey to growth here.

12 steps for connecting business processes

A new blueprint for the connected small business

SMEs who are concerned about not having a blueprint to work from when connecting processes can look at that as a positive. Every business transformation should be tailored – and every solution should be aimed towards achieving specific business objectives.

That being said, there are still some best practices to consider when connecting business processes. Here are 12 tips for making better connections.

12 tips for making better connections.

1. Create a SSOT (Single Source of Truth).

A Single Source of Truth refers to a data source that can be accessed by an entire organisation, providing everyone with the same view of the same information at the same time. By creating a SSOT, SMEs can ensure that the data they're using is not outdated, incorrect or fragmented. Just as importantly, they can enable better collaboration across functions and departments, helping to future-proof the workforce as traditional roles change and evolve.

2. Establish real-time reporting and instant updates.

Organisations should ensure that the SSOT they're creating can offer real-time reporting and instant updates and is accessible from anywhere on the planet. Too many businesses have been working with data that's been 'hidden', whether that's in disconnected datastores, personal inboxes, desktops, cloud folders or Word docs. By forming a Single Source of Truth with instant updates, SMEs won't have to worry about version control, crucial data getting lost or teams working from conflicting sources.

3. Get everyone on the same page.

When connecting business practices, think about connecting people as well. Plan regular cross-functional meetings, whether in-office or virtually, to increase alignment, boost morale and create teams that are invested in the whole business, not just their department. Sales and service reps are often extroverts who thrive on human contact, so some team members may feel isolated if working remotely. By keeping their teams connected, SME leaders can drive engagement while focusing on the wellbeing of the workforce.

12 tips for making better connections.

4. Streamline business tools, practices and processes.

Some businesses simply suffer from 'TMT', or Too Many Tools. This occurs when businesses keep adding new tools to their existing infrastructure without considering how everything fits together. This legacy debt is passed on to the workforce, who are forced to navigate a handful of burdensome tools that aren't integrated and haven't been designed to function together. Creating an integrated infrastructure by centralising data from legacy systems will enable SMEs to streamline processes and practices, boosting efficiency and employee satisfaction.

5. Share new insights on internal operations.

One of the key benefits of connecting business processes is increased transparency, so SMEs should put this transparency to good use. Shared KPIs (Key Performance Indicators) may make sense for some organisations, as working towards a common goal is a great way to unite teams. It's also important to share insights on internal operations and establish trust with the stakeholders. In fact, many employees and CEO's report an active distrust in their business's data. By working with the same data in real time, teams will know they're using the most up-to-date information from a trustworthy source.

6. Document and map new processes.

An important aspect of uniting business capabilities is creating a sum that's bigger than its individual parts. In other words, SMEs will want to focus on an integration that makes them as powerful as possible. This will be hard to accomplish without a proper blueprint in place, so a template should be created to answer one simple question: **Where can value be added?**

7. Gather feedback from stakeholders.

Any large-scale business transformation requires a cultural transformation to reach its full potential. Change is difficult for some people, so businesses will want to focus on getting the stakeholders on board. Getting feedback and suggestions from stakeholders is a valuable way to identify frustrations, problems and productivity bottlenecks that could be addressed in the process blueprint, while also discovering how they can be empowered to meet their personal goals.

8. Empower teams to create solutions.

Reimagining legacy infrastructure and connecting processes is an excellent way to empower teams, and businesses can go one step further by encouraging workers to become developers. It's never been easier for teams to use no-code and low-code platforms to create apps with no coding knowledge. Workers can simply drag and drop components to create bespoke solutions and become their own IT department.

9. Look at long-term business goals and see how connected processes can be leveraged to address them.

Just like digital transformation, connecting business processes works best when it's squarely aimed at a goal. So before getting to work on that connection blueprint, organisations should evaluate their long-term goals and see how connected processes can best address them. For instance, if a business's objective is to drive growth, it can look at how connecting marketing and sales can help identify gaps in the market to create better products and services.

12 tips for making better connections.

10. Offer cross-skilling programmes so that the workforce can become more data-literate, as well as learn new roles and responsibilities.

An upskilled workforce not only helps a business pivot when needed, it drives employee loyalty and leads to better long-term relationships. This boosts employee satisfaction and reduces churn rate, which can be quite costly for SMEs. Creating a workforce that's happier, better prepared for the future and able to work wherever needed is easier than ever, thanks to the rise in on-demand digital training platforms.

11. Use workflow automation.

One of the easiest and most effective ways to empower the workforce is to introduce AI tools. And while there's been much talk of automation leading to technological unemployment, the truth is that AI can be best used to help workers, rather than replace them. By automating mundane, routine tasks, small businesses can free their workers to focus on more creative and rewarding work. And by leveraging analytical tools, workers will have better business intelligence to work with.

12. Keep optimising new processes.

Everything is a learning journey. Connecting processes can unlock some surprising benefits, and it's important to seize opportunities as they present themselves. SMESs can solicit feedback from stakeholders about how they're adjusting. They can find out what's working and what can be improved, then tweak, evaluate, repeat. And as their connection journey continues, they can make adjustments and optimise processes to become the strongest, most agile and most resilient organisation they can be.

Integrate business capabilities and unlock your competitive advantage

The motto of the connected business could be 'stronger together than apart'. After all, the purpose of connecting processes is for businesses to reach their full potential.

If expertise remains hidden, information stays siloed, team members don't feel like they're part of the bigger picture, and customer relationships are viewed as being purely transactional, businesses will struggle to keep up in the new climate.

If, on the other hand, SMEs harness their data to fuel intelligent decision making, power up the workforce with new skills and tools, respond to the customer's unique needs and expectations, and focus on creating a culture of innovation, they'll be well positioned to make the most of this transformative time.

The future is more information, from more sources, all analysed, integrated and directed at business objectives. The future is in delivering impactful personal experiences to consumers who are not just customers, but brand advocates. The future is workers who are skilled in multiple disciplines, all working from a single source of truth and empowered with data-driven insights. The future is artificial intelligence, deployed to free the workforce from low-value, productivity-killing tasks.

For organisations that have not yet integrated their business capabilities, the time is now.

Useful resources

To see how small businesses are adapting to change – and where they may be headed next – check out the Small and Medium Business Trends Report here.

Here are some further resources for building better connections.

Sales Cloud demo

Enjoy a free 30-day trial of Sales Cloud to see how it can help your business convert more leads and close more deals.

SEE MORE

Customer Stories

Find inspiration in the stories of our customers and partners, who are blazing new trails towards business success.

READ THE STORIES

Salesforce Resource Centre

Explore our range of free business resources, with blogs, guides, videos, thought leadership and more. It's the perfect one-stop shop for business success.

SEE MORE

MyTrailhead

Check out our on-demand learning platform to see how creating custom learning journeys can help small businesses create a better skilled, more agile workforce.

LEARN MORE