



Supporting Black-Owned Businesses

The Importance of Having a CRM Strategy to Scale



www.esorcg.com

Welcome



Upcoming Webinars

Every Thursday of February

Feb. 11th

Black in Nonprofit | bit.ly/ecgnonprofits

Feb. 18th



Supporting K-12 Administrators | bit.ly/ecgk12schools

Feb. 25th

Supporting Black Schools | bit.ly/ecgblackschools

Esor Consulting Group Team





 /Renaldo-DaSilva
 @/RenaldoMDaSilva

Renaldo DaSilva

Esor Consulting Group, President

Renaldo has over 18 years of technical corporate sales experience. Over his career he has gained a specialized understanding of direct sales and alliance building techniques while working with both startups and multinational corporations. Through this experience he developed a passion for creating and managing partner teams in order to help companies achieve their corporate goals and maximize outcomes.



 /TheTiffanySpencer
 @TheTiffSpencer



Tiffany Spencer

Esor Consulting Group, COO | Founder of HBCUforce

Tiffany Spencer is a 7x certified, Salesforce MVP and Co-Leader of the Orlando Salesforce User Group. She has more than a decade of working with companies to implement Salesforce.com solutions. Tiffany has worked across several industries, including finance, technology, real estate and nonprofit. In the community, she serves as president for Black Orlando Tech and a mentor with The Greatest Investment Girls Empowerment Program.

Our Panelists





 /tonivmartin
 @tonivallentine

Toni V. Martin

Founder of Systems To Success

A seasoned Salesforce Business Analyst, Toni is a veteran of Fortune 500 and 100 organizations with enterprise level implementations of Salesforce. Systems To Success is a Registered Partner of Salesforce.com focused on helping small businesses succeed with optimization and automation of their business processes.



 /mdfelix
 @iammikelifelix

Mike Felix

Launch Coach + Sales Geek + Business Developer

Mike is a Digital Sales Coach possessing a passion for scaling small businesses, solopreneur ventures, and non-profits through leveraging technology, social media and business development tactics.

What is a CRM and why do you need it?

01

Organizing Customer Data

02

How to automate business functions to help scale

03

Reporting and Data Visualization

04

We want to learn from you!

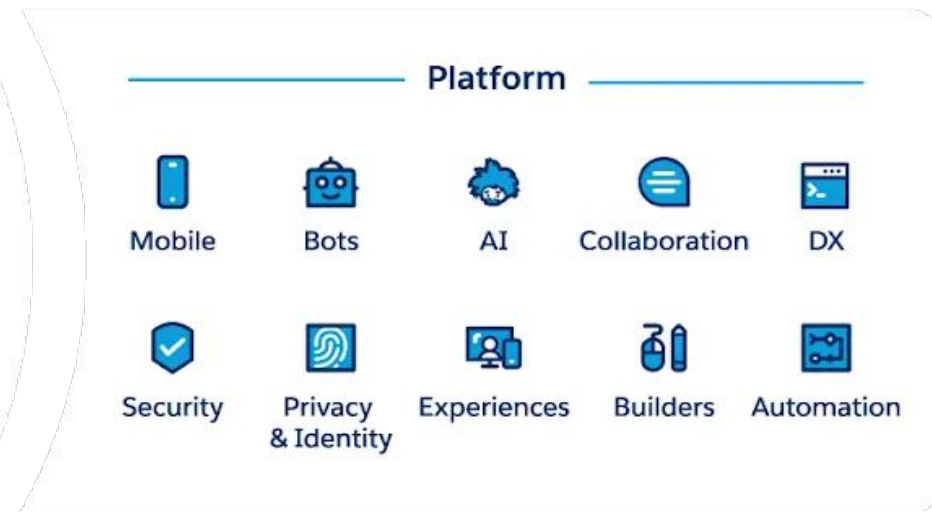
05

What is a CRM and why do you need it?

CRM 101

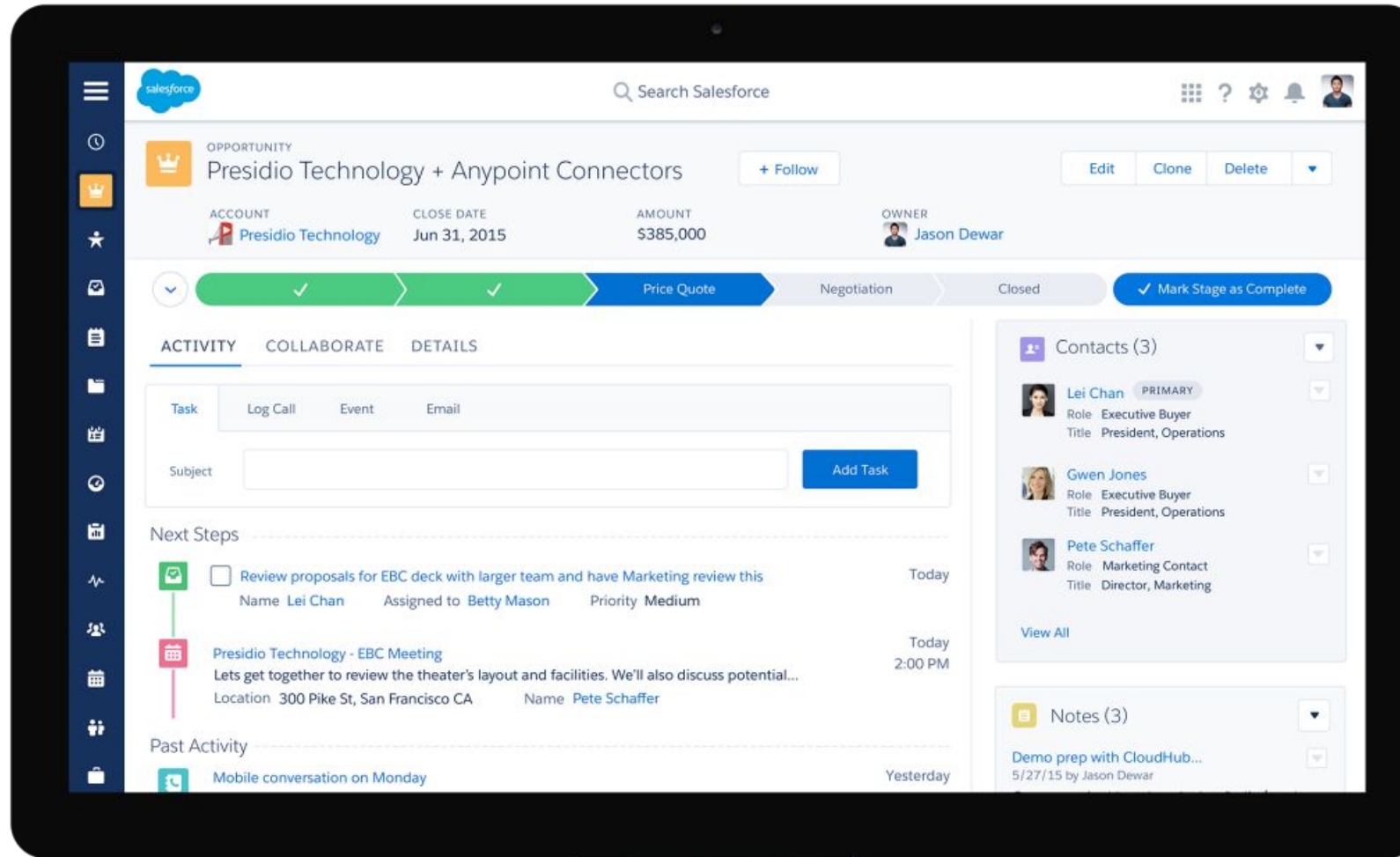


Organize Customer Data to Build Data Transparency



Organizing Customer Data

Single-Source of Truth Data



How to automate business functions to help scale

Automate Everyday Business Functions

Journey Builder | Journeys | Entry Sources | History | Templates | Feedback | Northern Trails Outfitters | Welcome Blake Miller

< Birthday Journey with ... | Version 1 | Enter a description... | Status: Draft | Save | Test | Activate

Builder

ENTRY SOURCES

- Data Extension
- API Event
- Audience
- CloudPages
- Salesforce Data
- Event

ACTIVITIES

Messages

- Send SMS
- Send Push
- Send Email

Advertising

- Ad Audiences

Flow Control

- Decision
- Random
- Engagement

Journey Plan Duration: 5 days | Show | Labels

Event → Happy Birthday → 3 days → Decision Split → 1 Join → Offer Redemption (1 day) → Decision Split → Join → Offer Reminder (1 day) → Exit on day 4

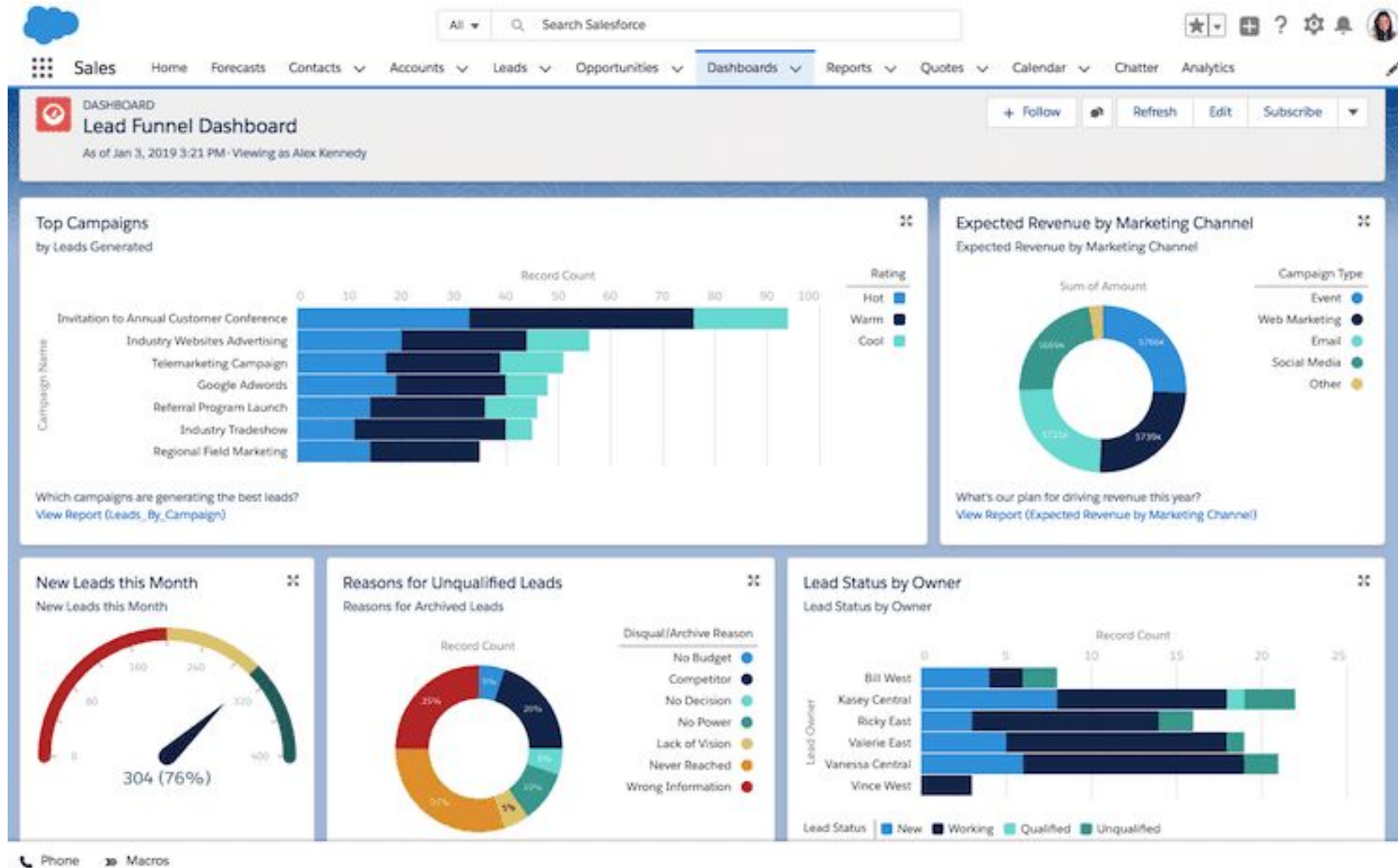
What do you want to say?

Best Practice Recommendation
Send your well wishes for the customer's happy day! Provide an offer or celebration coupon, including details about expiration or limitations.

More Information
[Send Email Activity](#)

Reporting and Data Visualization

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