6 Ways to build your Lead Machine with Salesforce

Managing inbound leads is one of the areas where Salesforce shines brightest. But for small and medium businesses (SMBs), sometimes all the options and marketing software add-ons can seem overwhelming -- too much money or too much work for your small team.

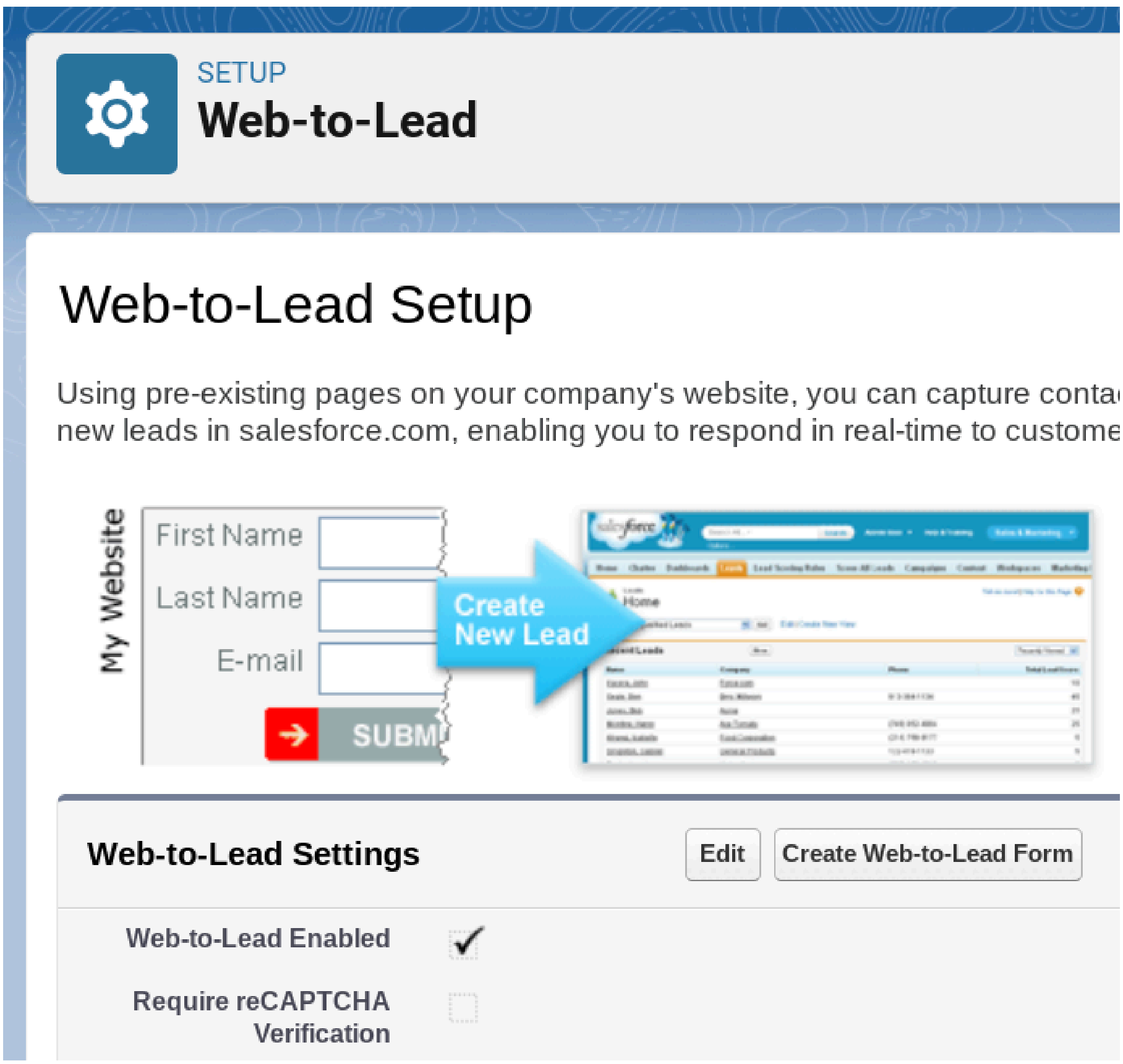
The good news is that you can build your very own “lead machine,” to improve conversion rates and grow your revenue, using tools that are already part of the Salesforce subscription you have (Sales Cloud). You don’t need to implement Marketing Cloud (see our Marketing on Salesforce without Marketing Cloud guide for more on that) or invest in outside marketing systems.

Getting these six lead management basics in place is not difficult, and can have an immediate impact on your bottom line. Here’s how to do it.

1. Establish a Lead Process

The first step to creating your lead machine is to establish a process for handling leads. We recommend writing this down in a short document, and making sure everyone in your organization agrees to the definitions and a common process. Even in a small team, it is common for different people to have varying opinions based on their personalities and prior experience, so it is best to get on the same page and have a written plan to refer to.

- Who is your target customer?
- What are the characteristics of a qualified lead?
- When and how do you follow up with leads?
- Who is responsible for following up with different types of leads?
- When do you convert a Lead to an Account, Contact and Opportunity?



2. Use Web-to-Lead Forms

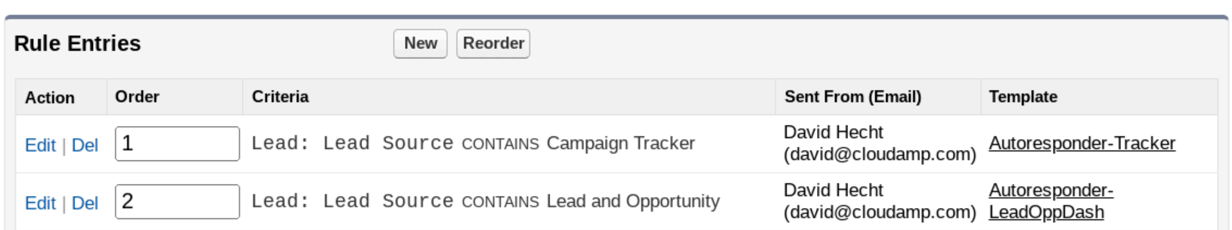
We are always amazed at how many Salesforce customers have a number of email addresses instead of a form on their “contact us” page or landing pages. If you have made an investment in Salesforce, make the change to your processes to funnel more inquiries through forms -- otherwise you have a major “slip through the cracks” moment right at the start of your lead management process.

Email addresses are acceptable in some cases, such as for existing customers to contact customer service (especially if you have implemented Salesforce email-to-case). But otherwise you are likely losing data, and missing out on possible automation we’ll talk about next.

Salesforce’s Web-to-Lead form technology is easy to implement, and leads go directly into your Salesforce organization, with no data entry required or danger of being lost in someone’s email box. Just go to the Web-to-Lead area of Salesforce setup, and do the following:

1. Choose the fields you want to include in your form (keep it short!)
2. Click a button to generate the HTML code
3. Have your web designer style it to make it presentable
4. Submit a test lead or three to make sure it works

For more information, see our [The Ultimate Guide to Salesforce Web-to-Lead Forms](#).


Rule Entries New Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit | Del	1	Lead: Lead Source CONTAINS Campaign Tracker	David Hecht (david@cloudamp.com)	Autoresponder-Tracker
Edit | Del	2	Lead: Lead Source CONTAINS Lead and Opportunity	David Hecht (david@cloudamp.com)	Autoresponder-LeadOppDash

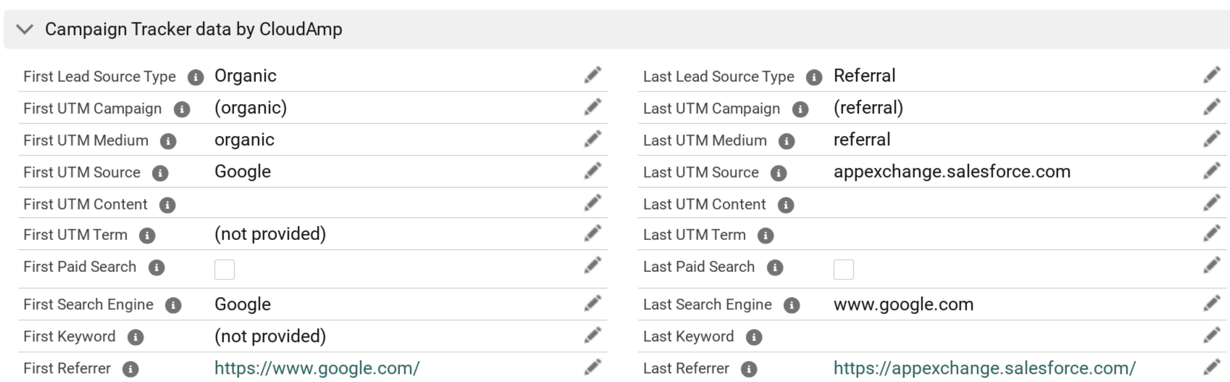
3. Use Salesforce Lead Automation

Salesforce has some advanced tools for processing and organizing incoming leads -- start using them if you are not already. Even if you just have 1 or 2 sales people, you can easily set up a Queue to own incoming leads. Then create some assignment rules that give ownership of some or all of the new leads to the Queue. You can either manually assign/claim leads from the queue, or even automate assignment of some leads to users instead of the queue, depending on the variety of leads you receive.

Since you will now be using the Web-to-Lead forms, you can also have hidden fields with pre-populated values in them which define a lead source or campaign, or indicate which form on your web site(s) a lead submitted. Those values can be very useful in driving automated actions once the leads arrive in Salesforce. Create some email templates for auto-responder emails, and have tailored auto-responses sent to the leads depending on the values they have or how they are assigned when they come in.

- Set up a lead Queue, assignment rules, and auto-response emails
- Add more information about leads and forms with hidden form fields

For more on automatic campaign assignment and lead sources, see our article [Which Form or Web Page did a Salesforce lead come from?]



Campaign Tracker data by CloudAmp

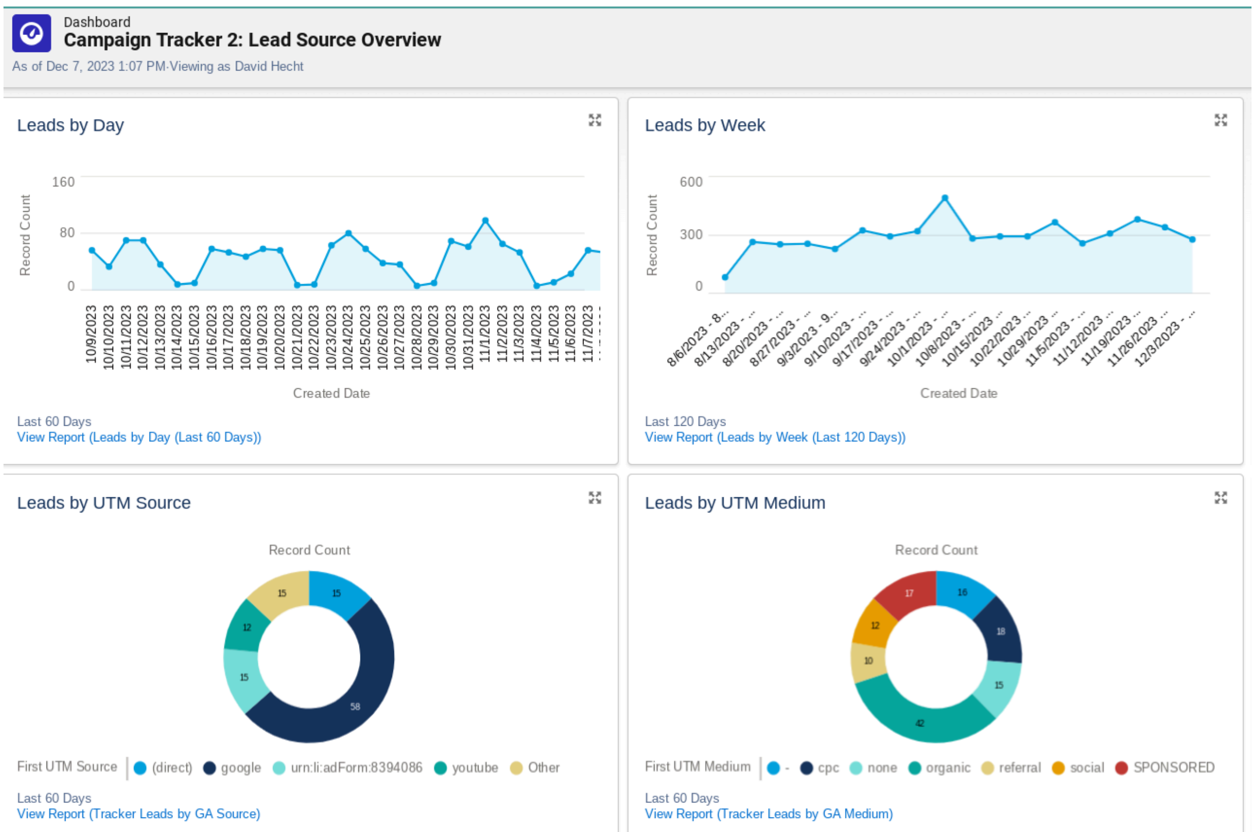
First Lead Source Type	Organic	Last Lead Source Type	Referral
First UTM Campaign	(organic)	Last UTM Campaign	(referral)
First UTM Medium	organic	Last UTM Medium	referral
First UTM Source	Google	Last UTM Source	appexchange.salesforce.com
First UTM Content		Last UTM Content	
First UTM Term	(not provided)	Last UTM Term	
First Paid Search		Last Paid Search	
First Search Engine	Google	Last Search Engine	www.google.com
First Keyword	(not provided)	Last Keyword	
First Referrer	https://www.google.com/	Last Referrer	https://appexchange.salesforce.com/

4. Track the Sources of Your Leads

Branching out from the core Salesforce functionality, set up a tracking application that can provide additional information about where a lead came from. This is especially critical if you are spending money on Google Ads or other online marketing, since you will want to know which advertising produced the best quality leads.

- Where are your best leads coming from?
- Which advertising is a waste of money?
- What keywords are your leads searching for to find you?
- What unexpected sources are delivering leads -- social, blogs, partners?

Tracking the source of your leads requires a separate app, as well as a small tracking code that needs to be placed on your web site. There are a variety of tracking apps available on the AppExchange, from the CloudAmp [Campaign Tracker] that we make to tracking capabilities in larger marketing software like Salesforce's [Pardot] (now known as Marketing Cloud Account Engagement).



5. Set up Dashboards

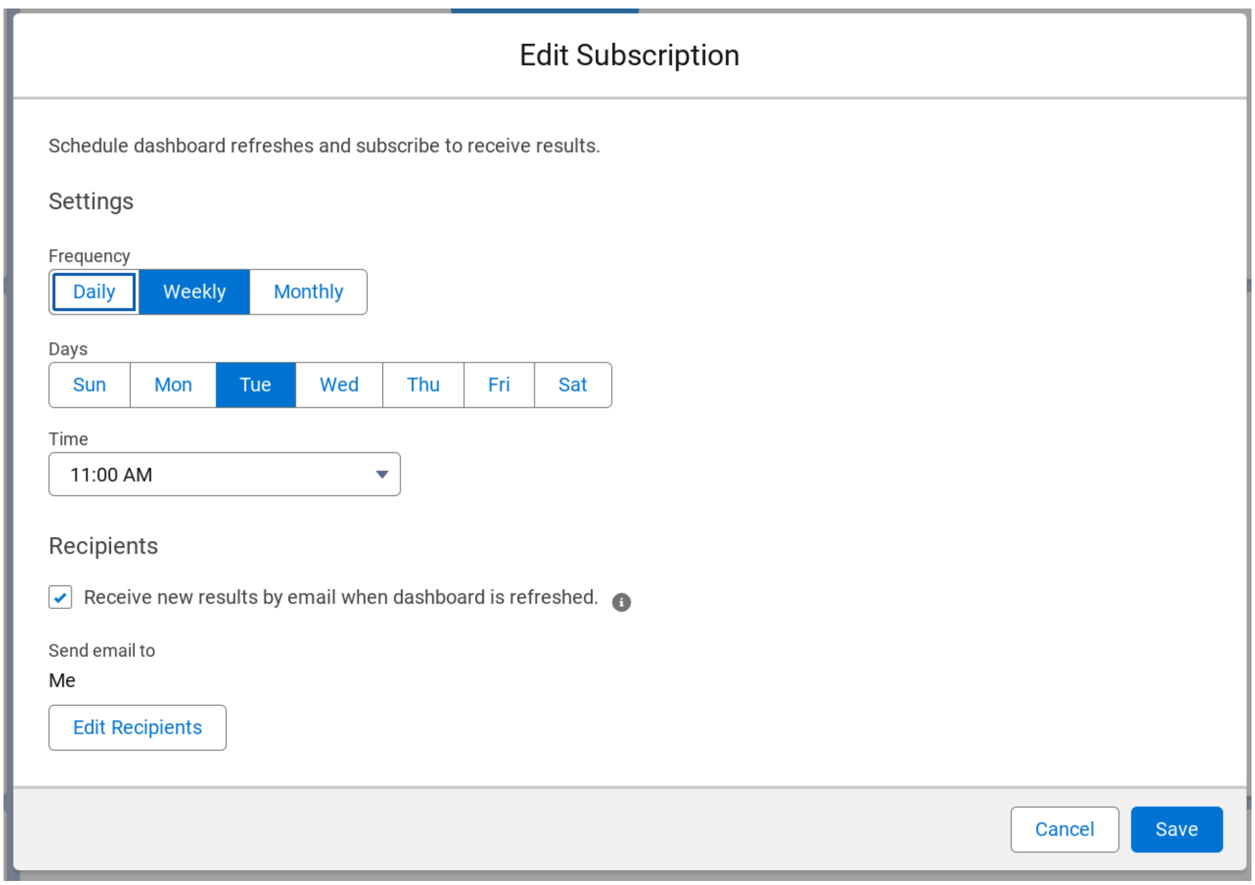
Once you have your leads coming in via web-to-lead, being tracked, assigned and having auto-responses sent out, it is time to get visibility into your lead totals and trends with one of our favorite Salesforce features, Dashboards. Having one or more lead dashboards in Salesforce can make it easier to visualize data, spot problems or successes, and quickly understand how your demand generation efforts are working at a high level.

Best of all, you don't have to start from scratch - there are a variety of free dashboards available for download on the Salesforce AppExchange that you can use as a starting point. Just install, “Save as” the dashboards and underlying reports when you are customizing them, so you retain the originals for reference.

- CloudAmp Lead & Opportunity Dashboards
- Salesforce Labs Lead and Opportunity Management Dashboards

For Enterprise Edition of Salesforce and above, you can Subscribe to dashboards, which means scheduling them to be refreshed and emailed to you on a daily, weekly or monthly basis, for added visibility into your newly created Salesforce lead machine.

Dashboards can also be valuable for raising visibility with executives or other team members who may not log into Salesforce daily, as well as a good way to personally check your lead machine status on a regular basis from in your inbox with a cup of coffee.



6. Develop an Email Program

After your initial auto-response Email from Salesforce when a lead comes in, consider putting an Email marketing program in place to cultivate your newly received leads. What type of email marketing program should be part of your Salesforce lead machine will vary widely depending on your target market and sales cycle.

If you are selling to technical buyers who are marketing averse, or your average sale takes just a week or two from lead to closed deal, you may not need much of an email marketing program at all. On the other hand, if your average sales cycle is 6 months, or your target audience is expecting to be educated about the need for your product, then a structured email marketing campaign over time is likely to be essential.

There are a variety of tools available for email newsletters, drip email campaigns, and more. From affordable and simple to more expensive and full featured, some popular options are:

- Mass Email Leads / Contacts feature in Salesforce
- Email marketing applications like Campaign Monitor
- Marketing automation applications like Salesforce's Pardot or Marketo

So there you have it, a complete demand generation and lead management machine in 6 easy steps, using out of the box Salesforce. There are plenty of other options to explore, such as lead scoring, web analytics integration, and more, but these 6 basic areas should get you on the road to a better process, more converted leads, and ultimately more closed sales.

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Feb 20, 2014 By David Hecht in Featured, Sales, Small Business

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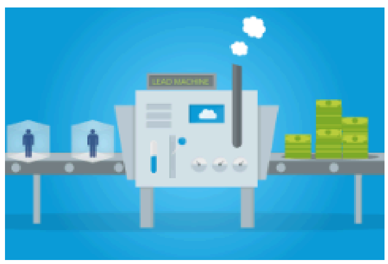

The good news is that you can build your very own "lead machine," to improve conversion rates and grow your revenue, using tools that are mostly available already in Salesforce. Getting these lead management basics in place is not difficult, and can have an immediate impact on your bottom line. Here's how to do it:

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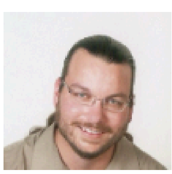
So there you have it, a complete demand generation and lead management machine in 6 easy steps. There are plenty of other options to explore, such as integrating data from web analytics or chat systems, lead scoring, and more, but these 6 basic areas should get you on the road to less chaos, more converted leads, and ultimately more closed sales.

About the Author



*David Hecht is the Founder of CloudAmp, a developer of Salesforce apps including the **Campaign Tracker** for tracking leads from Google Adwords and other sources, and **CloudAmp Analytics Dashboards** for seeing the top of your marketing funnel from Google Analytics (web site traffic and visitor metrics) inside Salesforce dashboards. He has been using Salesforce to optimize online marketing and increase sales since 2002. Learn more at **http://www.CloudAmp.com***

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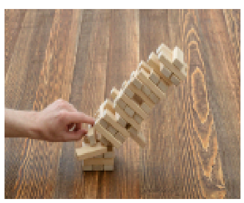

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