Marketing on Salesforce for Beginners

New to Salesforce? Here's 8 things for marketers to get started.

Are you new to Salesforce and responsible for Marketing at a small company or nonprofit?

Do you need to figure out Salesforce and how to manage leads from Google Ads and other campaigns at the same time?

Well, you are not alone. For more than a decade, CloudAmp has specialized in helping marketers at small or mid-sized organizations figure out how to use Salesforce to manage their marketing and leads. People like you!

Here are our **top 8 recommendations** to get you oriented with Salesforce and tracking your leads:

1. Understand Salesforce Basics

- Familiarize yourself with Salesforce's core objects: **Leads, Contacts, Accounts**, and **Opportunities**
  - Understand how a single Lead record is converted to become an Account with a related Contact (and optionally an Opportunity)
  - If there are Sales people in your company, try to find out any processes they are using for their work in Salesforce (good luck!)

- Explore the **Salesforce App Launcher**, and check out some different apps

- Check out **Salesforce Reports** to get a sense of your existing data. Save a few as Favorites (click the star top right) to easily return to.

2. Get Learning with Trailhead

- Try to set aside 2-3 hours per week for Trailhead, Salesforce's free learning platform
  - Trails are groups of Trailhead modules for guided learning paths
  - Earn badges as you progress through Trailhead

- Some **Trailhead Trails/Modules** to get you started:
  - Salesforce Basics
  - Lead and Opportunity Management
  - Reports & Dashboards for Lightning Experience
  - Create Reports and Dashboards for Sales and Marketing Managers

- Join **Groups** and ask **Questions** in the Salesforce Community

NOTE: Many trailhead modules for marketers will reference Account Engagement or Marketing Cloud, which are add-on products and unnecessary for most SMB marketers. This is an unfortunate source of confusion in Trailhead, which is otherwise excellent. Focus on Salesforce Sales Cloud basics to get started.

3. Set Up Web-to-Lead Forms

- Salesforce's **Web-to-Lead** functionality is an included feature that captures form submissions from your website directly to Salesforce leads

- Create custom fields for your business (if needed), and add them to unique forms if needed

- Learn more with our [Ultimate Guide to Salesforce Web-to-Lead Forms]

4. Customize Your Lead Management

- **Update Lead Page Layouts** to show the standard and custom fields you need, while hiding unused fields. You can also have different page layouts for different user roles.

- **Automate Lead Assignment** by setting up assignment rules to route leads to the right sales reps or queues.
    - Set up customized email replies to new leads with **Lead Auto-Response Rules** and Email templates.

- Customize your **Lead Source** field values to make common sources selectable.
    - Note that your web-to-lead forms can create leads with any Lead Source value, whether or not it is listed as a drop down field value.

5. Understand Email Options

- Salesforce has **Email Templates** that are sent by system automations like the Lead Auto-Responses referred to in the previous section, and they can also be sent by your sales and service users.

- You can receive **email notifications** for important events in Salesforce, such as a new lead coming in from a campaign (and CloudAmp can help with this!)

- Salesforce has a number of **Email Integrations**, including connections with email platforms like Outlook and Gmail, which allow users to work with Salesforce records directly from their email.
    - Salesforce **Email-to-Salesforce** gives you an email address that will automatically log inbound emails directly to Salesforce records, attaching emails to leads or contacts automatically. A similar feature for Service, Email-to-Case, creates support Cases from emails.

6. Leverage Reports and Dashboards

- **Understand Existing Leads**:
    - Check out how "Lead Source" is populated for your existing leads, and what views / queues are currently in use to understand leads

- See what reports exist already or create your own reports to understand lead volume, stages, and conversion rates.

- **Build a Dashboard**:
  - Create a new dashboard to include your favorite reports on. Dashboards are a great way to understand trends and update multiple graphs at the click of a button
  - Include key metrics like lead volume, conversion rates, and campaign ROI.

7. Set Up Campaign Tracking

- **Use UTM Parameters**:
  - Tag Google Ads URLs with UTM values to capture campaign data in Salesforce.

    Use a tool like the CloudAmp Campaign Tracker to capture UTM information for new leads so they have their UTM Campaign, Medium, Source and keywords automatically associated.

- **Use Salesforce Campaigns**:
  - Link Leads and Contacts to Salesforce Campaigns representing your various marketing efforts for response tracking and ROI analysis.

8. Connect Salesforce and Google Ads

- **Integrate Salesforce with Google Ads**:
  - Use Google Ads' built-in Salesforce integration to sync Salesforce leads, converted leads, and opportunities (also known as offline conversions) to Google for ad optimization and bidding automation.

  - Learn more in our guide How to Connect Salesforce and Google Ads

That's it for our top 8 items Salesforce beginners who are responsible for marketing should consider. Of course, there are tons more capabilities in Salesforce, as well as add-on apps like CloudAmp and others.

But by following these steps, you should be able to get a good understanding of Salesforce, and set your organization up for marketing success with the basic marketing building blocks in place.

Questions? Don't hesitate to reach out!