

# WIN YOUR DEALS FASTER & RETAIN YOUR CUSTOMERS ON SALESFORCE WITH ZERO CODING

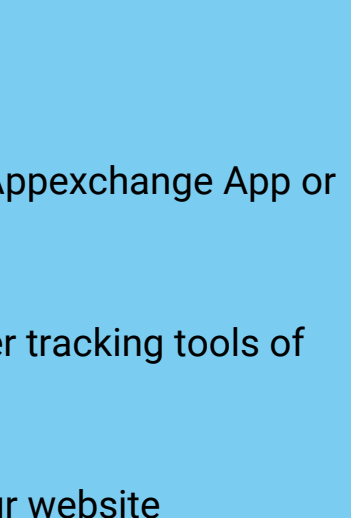
This checklist provides you with the key tasks you can do right now to improve your B2B Sales and Marketing speed without requiring any fancy development.

**Check out the list below.**

## TOP TIPS FOR MARKETING

### Foundational Tasks for your Marketing team.

Use a dedicated marketing tool to identify and score leads, serving them with the right messaging at the right time to move them along the buyer journey towards working with you. Smooth the marketing to sales handover process or recycle leads back into the marketing system to maximise the opportunities for conversion.

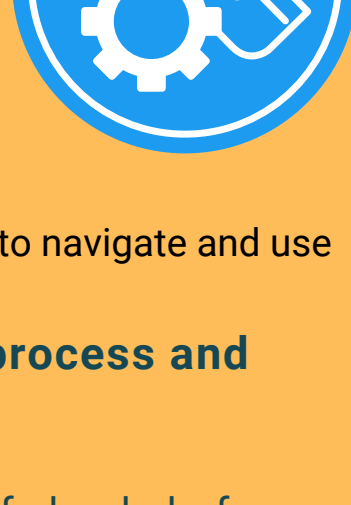


- Integrate your marketing tool with Salesforce using an Appexchange App or out of the box integration apps
- Connect your Marketing tool to Google Analytics or other tracking tools of your choice
- Embed your marketing automation tracking code on your website
- Brainstorm a lead scoring and lead grading system

## TOP TIPS FOR SALES

### Foundational Tasks for your Sales team

Salesforce Sales Cloud can help you find better leads and close more deals. What are the basics we need to look at first? We need to work on improving the user experience to ensure adoption.



- Ensure your Salesforce Application is clean and simple to navigate and use

### Lead Management - Optimising your Lead process and convert them faster

Create a dedicated CRM and automatically qualify leads before assigning them to an appropriate sales rep, enabling your sales team to focus on the highest probability leads. Throughout this stage, you'll be able to nurture your leads along a standardised path that maximises new business, expansion, and renewal opportunities.

- Ensure that your lead score is clearly visible on your lead page
- Simplify your lead stages
- Add your lead stage guidance path
- Set up process builder automation to auto-update the lead stages based on Lead Score
- Set up automatic lead routing to a salesperson
- Create and name the list views specific to a segment eg region
- Add Validation rules in combination with lead paths to ensure sales reps are capturing the right information at the correct stages
- Capture reasons for rejected leads
- Build dynamic lists based on the reason for rejecting leads for more lead nurturing
- Set up progressive data capture on your website
- Connect your Salesforce and Email using Salesforce Lightning Connect

### Opportunity Management - Optimise your Sales process and close your deals quicker

Simplify the proposal and quoting process, giving your sales team the tools they need to manage the process of getting new business across the line or to flow back to marketing. Each salesperson will be made more effective through key deal insights, guided selling, and enhanced quote approval logic.

- Ensure that you have different page layouts for your various types of Opportunity like New Business, Expansion, Renewal
- Simplify your opportunity stages
- Review your forecast categories
- Ensure your probability % is based on your opportunity stages vs free typing
- Add sales stage guided path
- Capture key financial information earliest - Reducing the risk of forgetting, and sending incomplete information to Sales operations or order processing team

### Quote Management - Send quote faster without admin work

Ensure that cash flow stays healthy by integrating your financial management system with Salesforce and automated processes to give your finance team a more accurate and comprehensive picture of all they need to know. Easily track contracts, invoicing, and payments, and keep your business running smoothly.

- Simplify your list of products you have in Salesforce
  - Cleansing may be needed
- Install a eSign tool for quote processing

### Discount Management - Process your discounts faster & seal the deal

- Define who should be approving the discount
- Build in an automatic approval process to approve any discount  
Example:
  - <=10% is auto-approved
  - >10% goes to Head of Sales
  - > 50% goes to CEO

### Opportunity Approval - Make it easier for your Sales Operations & Accounts Team

- Build validation rules to ensure all necessary information are captured
- Build in a simple approval process to allow the sales rep to submit the opportunity with the order to be processed by an order processing and revenue recognition
- Lock opportunity amendments after order are processed

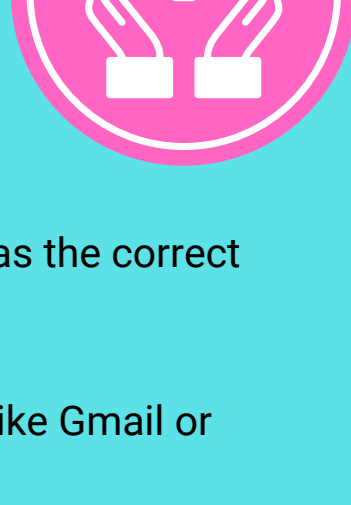
### Renewal Management - Don't lose your clients

- Use process builder to automatically create a new opportunity using all details from the recently closed opportunity but with a new future close date
  - Example: 1 month before the contract expires
- Use process builder to automatically create a task to remind the sales rep to ensure the renewal happens

## TOP TIPS FOR IT

### Some of the easy things your IT Team can do to improve adoption for your Sales team

- Activate Salesforce Lightning
- Activate Einstein Search
- Review roles and profiles to ensure the right users has the correct permissions
- Add a Salesforce side panel within your email tools like Gmail or Office365

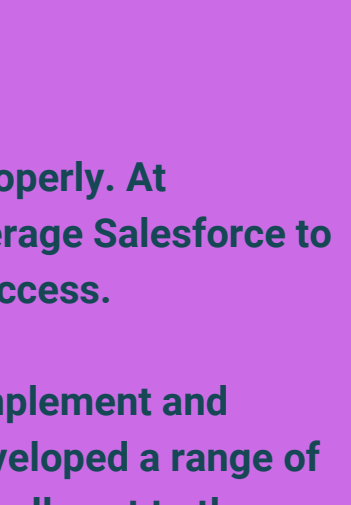


## GET HELP

### We are here to support you

If at any point you feel stuck, we have a lot of resources available to you.

Our #AwesomeConsultants are waiting to help



### What's Next?

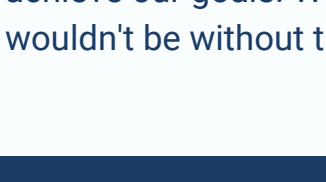
**Salesforce is a powerful tool – but only if it's used properly. At Smplicity our mission is to support our clients to leverage Salesforce to enable the best customer experience and revenue success.**

**To achieve that, we need to do more than help you implement and support Salesforce technology. This is why we've developed a range of strategic services that go beyond the technical and really get to the heart of your business needs.**

**Whether you need help with a migration project or want ongoing support to stay up to date with the latest business solutions, talk to us about how we can help you develop the right processes to make the most of what Salesforce can offer.**

[Book A Free Salesforce Assessment Now](#)

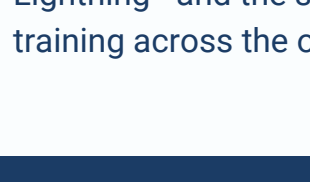
## What Our Customers Say



Proudly delivering for the NHS

**One of my best decisions**  
Business Development Director

"They spend time thinking about our business strategy and suggesting Salesforce based solutions that will help us to achieve our goals. We really wouldn't be without them..."



**Fantastic Support**  
Global Marketing Director

"Smplicity have been fundamental in helping us launch Pardot, integrate it more closely with Salesforce - as well as helping to manage the roll-out of Lightning - and the subsequent training across the organisation..."



**PARTNER**

