



CONFIGURATIONS THAT DRIVE
VALUE FROM SALESFORCE

ACCOUNT MANAGEMENT STRATEGIES

Helps sales reps to manage and track their accounts and contacts

ACCOUNT STRATEGIES

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CREATE CUSTOM FIELDS ON THE ACCOUNT OBJECT TO CAPTURE UNIQUE DATA POINTS RELEVANT TO YOUR BUSINESS

1

Let's say that a company provides financial services to clients. In order to better serve its clients, the company needs to capture additional data points that are unique to its business. For example, it needs to capture the number of credit cards a client holds, the current balances on those cards, and the interest rates associated with them.

By creating custom fields on the Account object in Salesforce, the company can capture this additional data and store it alongside the standard data that Salesforce tracks for accounts (such as name, address, and industry). This enables the company to better understand its clients' financial situations and provide more targeted services to them.



The benefits of using custom fields on the Account object in this scenario are numerous. First, it enables the company to capture data points that are unique to its business. This can help the company better understand its clients and provide more targeted services to them.

Second, it enables the company to store this data in Salesforce, alongside the standard data that Salesforce tracks for accounts. This can help to ensure that all client data is stored in one place and can be easily accessed by anyone in the company who needs it.

Third, it enables the company to report on this data. By using Salesforce's reporting and analytics tools, the company can analyze the data it has captured and identify trends and opportunities for improvement.

Overall, the use of custom fields on the Account object in Salesforce can help businesses capture unique data points that are relevant to their business, store that data in a central location, and analyze that data to make more informed business decisions.

SET UP LEAD CONVERSION TO AUTOMATICALLY CREATE ACCOUNTS AND RELATED RECORDS WHEN A LEAD IS CONVERTED

Let's say that a company sells software to other businesses. The company generates a lot of leads through its website and marketing campaigns, and it needs an efficient way to convert those leads into customers.

By setting up lead conversion in Salesforce, the company can automate the process of creating accounts and related records when a lead is converted. This means that when a lead is qualified and ready to become a customer, the company can easily convert the lead into an account, contact, and opportunity record, all with just a few clicks.

The benefits of using lead conversion in this scenario are numerous. First, it enables the company to save time and reduce errors by automating the process of creating accounts and related records. This means that the company's sales team can focus on selling instead of administrative tasks like data entry.



Second, it enables the company to capture all the relevant information about the lead and transfer it to the new account and related records. This can help to ensure that all the data the sales team needs is available in one place, making it easier for them to close deals.

Third, it provides a clear and standardized process for lead conversion. By using Salesforce's lead conversion process, the company can ensure that all leads are converted in the same way, with the same fields and data points being captured.

Overall, the use of lead conversion in Salesforce can help businesses streamline their sales process, reduce errors, and ensure that all relevant data is captured and transferred to the new account and related records.

USE ACCOUNT HIERARCHY TO LINK PARENT AND CHILD ACCOUNTS TOGETHER FOR BETTER VISIBILITY AND ORGANIZATION

Let's say that a company has many subsidiaries, each with its own sales team and set of accounts. The company wants to be able to see all accounts in one place and see the relationships between the accounts (for example, which accounts belong to which subsidiaries).

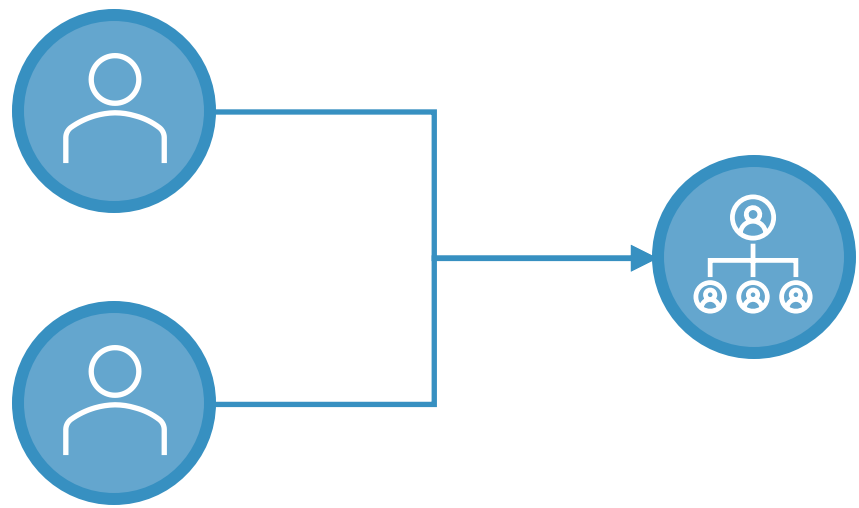
By using account hierarchy in Salesforce, the company can link parent and child accounts together, creating a hierarchical structure that reflects the relationships between the accounts. This means that the company can easily see all of its accounts in one place and see the relationships between those accounts.

The benefits of using account hierarchy in this scenario are numerous. First, it enables the company to better organize its accounts. By creating a hierarchical structure, the company can more easily navigate its accounts and understand the relationships between them.

Second, it enables the company to see all of its accounts in one place. This can help the company to better understand its overall customer base and identify opportunities for cross-selling and upselling.

Third, it enables the company to see the relationships between the accounts. This can help the company to better understand the structure of its organization and identify areas where it can improve efficiency and collaboration.

Overall, the use of account hierarchy in Salesforce can help businesses better organize their accounts, see all of their accounts in one place, and understand the relationships between those accounts. This can lead to improved efficiency, better collaboration, and increased revenue opportunities.



SET UP ACCOUNT TEAMS TO SHARE ACCOUNT INFORMATION AND COLLABORATE ON SALES EFFORTS

Let's say that a company has a large and complex sales organization, with multiple sales reps, managers, and support staff all working together to close deals. The company wants to be able to share information about accounts and collaborate more effectively to close more deals.

By using account teams in Salesforce, the company can create a team of individuals who are responsible for managing a particular account. This team can include sales reps, account managers, customer service representatives, and other stakeholders who are involved in the sales process.

The benefits of using account teams in this scenario are numerous. First, it enables the company to better collaborate on sales efforts. By having a team of individuals working together on a particular account, the company can leverage the expertise of each team member to close more deals.



Second, it enables the company to share information about accounts more effectively. By having a dedicated team responsible for managing each account, the company can ensure that all relevant information about the account is captured and shared among team members.

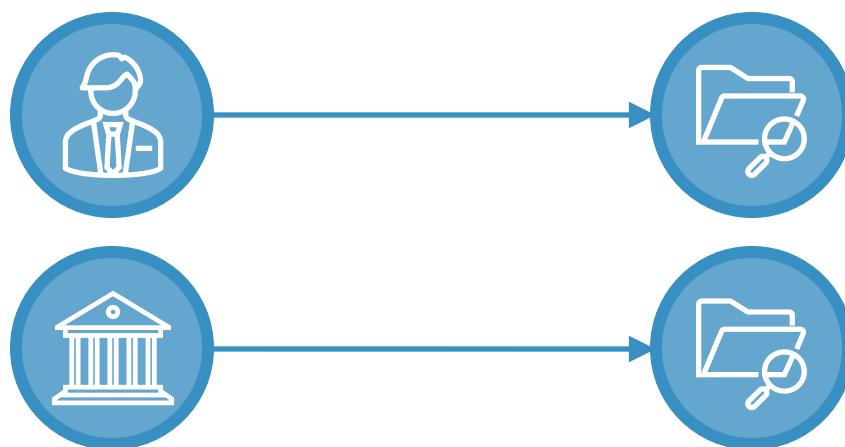
Third, it enables the company to better manage account relationships. By having a team of individuals responsible for managing each account, the company can ensure that there is always someone available to answer customer questions, provide support, and address any concerns.

Overall, the use of account teams in Salesforce can help businesses collaborate more effectively on sales efforts, share information about accounts more efficiently, and better manage account relationships. This can lead to increased efficiency, improved customer satisfaction, and increased revenue opportunities.

USE ACCOUNT RECORD TYPES TO DIFFERENTIATE BETWEEN DIFFERENT TYPES OF ACCOUNTS (E.G., ENTERPRISE VS. SMB)

Let's say that a company sells to both enterprise and SMB customers. The company wants to be able to differentiate between these two types of customers and track different information for each type of customer.

By using account record types in Salesforce, the company can create two different types of account records: one for enterprise customers and one for SMB customers. Each type of account record can have different fields, page layouts, and business processes associated with it, allowing the company to track different information and manage the sales process differently for each type of customer.



The benefits of using account record types in this scenario are numerous. First, it enables the company to differentiate between different types of customers. By creating different types of account records, the company can easily identify whether a customer is an enterprise or an SMB customer and can tailor its sales approach accordingly.

Second, it enables the company to track different information for each type of customer. By creating different fields and page layouts for each type of account record, the company can capture and track different types of information for each type of customer, enabling it to better understand the needs and preferences of each type of customer.

Third, it enables the company to manage the sales process differently for each type of customer. By creating different business processes for each type of account record, the company can manage the sales process differently for each type of customer, ensuring that each type of customer receives the attention and support it needs to close deals and drive revenue.

Overall, the use of account record types in Salesforce can help businesses differentiate between.

CREATE CUSTOM PAGE LAYOUTS FOR DIFFERENT USER PROFILES TO SHOW RELEVANT INFORMATION

Let's say that a company has sales reps, account managers, and customer service representatives, each with different roles and responsibilities within the sales process. The company wants to be able to tailor the information displayed in Salesforce to each user's specific needs.

By using custom page layouts in Salesforce, the company can create different layouts for each user profile. Each layout can include different fields, related lists, and sections of information, tailored to the specific needs of each user.

For example, a sales rep may need to see information about leads and opportunities, while an account manager may need to see information about customer accounts and contacts. By creating custom page layouts for each user profile, the company can ensure that each user sees only the information that is relevant to their role and responsibilities.

The benefits of using custom page layouts in this scenario are numerous. First, it enables the company to tailor the information displayed in Salesforce to each user's specific needs. By showing only the information that is relevant to each user, the company can improve productivity and reduce information overload.

Second, it enables the company to improve user adoption of Salesforce. By creating custom page layouts that are tailored to each user's needs, the company can make Salesforce more user-friendly and easier to use, increasing user adoption and engagement.

Third, it enables the company to improve data quality in Salesforce. By showing only the information that is relevant to each user, the company can reduce the likelihood of errors and inconsistencies in the data entered into Salesforce, improving data quality and accuracy.

Overall, the use of custom page layouts in Salesforce can help businesses tailor the information displayed in Salesforce to each user's specific needs, improve user adoption and engagement, and improve data quality and accuracy. This can lead to increased efficiency, improved productivity, and increased revenue opportunities.



USE ACCOUNT TRIGGERS TO AUTOMATE CERTAIN PROCESSES OR NOTIFICATIONS

Let's say that a company wants to automate the process of notifying account managers when an account becomes inactive. In this scenario, an account is considered inactive if there has been no activity on the account in the past 90 days.

By using an account trigger in Salesforce, the company can automate this process. The trigger can be set up to run a check on each account in Salesforce every day. If an account is found to be inactive, the trigger can send a notification to the account manager responsible for that account.



The benefits of using account triggers in this scenario are numerous. First, it enables the company to automate a time-consuming and repetitive process. By automating the process of checking for inactive accounts and notifying account managers, the company can save time and reduce the risk of errors or omissions.

Second, it enables the company to improve the customer experience. By identifying and addressing inactive accounts more quickly, the company can improve the customer experience and reduce the risk of losing customers due to inactivity.

Third, it enables the company to improve data quality in Salesforce. By automating the process of checking for inactive accounts and notifying account managers, the company can reduce the likelihood of errors and inconsistencies in the data entered into Salesforce, improving data quality and accuracy.

Overall, the use of account triggers in Salesforce can help businesses automate certain processes or notifications, improve the customer experience, and improve data quality and accuracy. This can lead to increased efficiency, improved productivity, and increased revenue opportunities.

USE ACCOUNT SHARING RULES TO CONTROL ACCESS TO SPECIFIC ACCOUNTS FOR DIFFERENT USERS OR TEAMS

Let's say that a company has multiple sales teams that each focus on different regions or markets. In this scenario, the company wants to ensure that each sales team only has access to the accounts that are relevant to their region or market.

By using account sharing rules in Salesforce, the company can control access to specific accounts for different users or teams. The sharing rules can be set up to automatically grant access to certain accounts based on specific criteria, such as the account's region or market.



For example, if a sales team is responsible for the Northeast region, the sharing rules can be set up to grant access to all accounts in that region. This ensures that each sales team only has access to the accounts that are relevant to their region or market.

The benefits of using account sharing rules in this scenario are numerous. First, it enables the company to control access to sensitive or confidential information. By ensuring that each sales team only has access to the accounts that are relevant to their region or market, the company can reduce the risk of data breaches or unauthorized access.

Second, it enables the company to improve productivity and efficiency. By granting access to relevant accounts, sales teams can focus on their specific region or market and avoid wasting time on accounts that are not relevant to their area of responsibility.

Third, it enables the company to improve collaboration and communication between teams. By granting access to relevant accounts, sales teams can collaborate more effectively and share information about accounts that are relevant to their region or market.

Overall, the use of account sharing rules in Salesforce can help businesses control access to specific accounts for different users or teams, improve productivity and efficiency, and improve collaboration and communication between teams. This can lead to increased revenue opportunities, improved customer satisfaction, and better data security.

SET UP ACCOUNT ASSIGNMENT RULES TO AUTOMATICALLY ASSIGN ACCOUNTS TO SPECIFIC SALES REPS OR TEAMS

Let's say that a company has many accounts and a sales team that consists of multiple reps. In this scenario, the company wants to ensure that each sales rep is assigned a fair and manageable number of accounts.

By using account assignment rules in Salesforce, the company can automate the process of assigning accounts to specific sales reps or teams. The assignment rules can be set up to automatically assign accounts based on specific criteria, such as the account's region, industry, or size.

For example, if a sales rep is responsible for the Northeast region, the assignment rules can be set up to assign all accounts in that region to that sales rep. This ensures that each sales rep is assigned a fair and manageable number of accounts, and that they are all accounts that are relevant to their area of responsibility.

The benefits of using account assignment rules in this scenario are numerous. First, it enables the company to ensure that accounts are assigned fairly and evenly across the sales team. This can help to improve morale and reduce the risk of burnout or turnover.

Second, it enables the company to improve productivity and efficiency. By automating the process of assigning accounts, sales reps can spend more time on selling and less time on administrative tasks.

Third, it enables the company to improve customer satisfaction. By assigning accounts based on specific criteria, sales reps can focus on accounts that are a good fit for their expertise and experience. This can help to build better relationships with customers and improve the overall customer experience.



Overall, the use of account assignment rules in Salesforce can help businesses automate the process of assigning accounts to specific sales reps or teams, improve productivity and efficiency, and improve customer satisfaction. This can lead to increased revenue opportunities, improved customer retention, and a more effective and efficient sales team."

USE ACCOUNT FEED TRACKING TO MONITOR CHANGES AND UPDATES MADE TO ACCOUNT RECORDS

Let's say that a company has many accounts and multiple people within the organization have access to view and edit account records. In this scenario, it's important for the company to have visibility into any changes or updates made to the accounts.

By using account feed tracking in Salesforce, the company can monitor changes and updates made to account records in real-time. The account feed displays a log of all activity related to an account, including changes to fields, comments, and posts.

For example, if a sales rep updates the status of an account from "prospect" to "customer," the account feed will show this change, along with the date and time it was made. If another member of the team adds a comment to the account record, the account feed will also display this activity.

The benefits of using account feed tracking in this scenario are numerous. First, it enables the company to maintain visibility into changes made to account records. This can help to prevent errors or mistakes and ensure that all team members are aware of any updates or changes to an account.

Second, it enables the company to improve collaboration and communication. By using the account feed to post comments and updates, team members can communicate more effectively and efficiently. This can help to improve productivity and reduce the risk of miscommunication.

Third, it enables the company to improve data quality. By monitoring changes to account records, the company can identify areas where data may be incomplete or inaccurate. This can help to ensure that the data in Salesforce is accurate and up-to-date, which can improve decision-making and reporting.

Overall, the use of account feed tracking in Salesforce can help businesses monitor changes and updates made to account records, improve collaboration and communication, and improve data quality. This can lead to improved efficiency and productivity, better decision-making, and a more effective and efficient sales team.



QUESTIONS?

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