



CONFIGURATIONS THAT DRIVE  
VALUE FROM SALESFORCE

# CONTACT MANAGEMENT STRATEGIES

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*Helps sales reps to manage  
and track their accounts  
and contacts*

# CONTACT STRATEGIES

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# CREATE CUSTOM FIELDS TO CAPTURE ADDITIONAL CONTACT INFORMATION

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A software company may use Salesforce to manage their customer contacts. By creating custom fields to capture additional contact information, such as the customer's social media profiles or preferred communication channels, they can gain a more complete understanding of their customers and provide a more personalized experience.



One benefit of creating custom fields in this case is that it allows the software company to better tailor their communications and marketing efforts to individual customers. For example, if a customer prefers to receive communication via social media, the software company can use that information to target their messaging to that channel, rather than sending emails or phone calls that may not be as effective.

Another benefit is that it can help to improve customer service. By capturing additional contact information, such as the customer's location or time zone, the software company can ensure that they are communicating with the customer at a convenient time and in a way that is relevant to their specific needs.

Overall, creating custom fields in Salesforce can help the software company to improve their marketing and communications efforts, provide better customer service, and ultimately increase customer satisfaction and loyalty. It can also help them to gain a more complete understanding of their customers, which can inform their business decisions and product development efforts.

# USE VALIDATION RULES TO ENFORCE DATA ACCURACY

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A real-world example of using Salesforce validation rules to enforce data accuracy could be a sales team using Salesforce to manage their leads and opportunities. In this scenario, the sales team relies on accurate data to make informed decisions about which leads to pursue and which opportunities are most likely to result in a sale.

To ensure that the data in Salesforce remains accurate and consistent, the business could use validation rules to enforce certain data requirements. For example, they could create a validation rule that requires a lead's phone number to be in a specific format or that an opportunity's stage is updated before it can be closed.



By enforcing these data accuracy requirements through validation rules, the business can benefit in several ways:

- **Improved decision-making:** With accurate data, the sales team can make informed decisions about which leads to pursue and which opportunities to prioritize.
- **Increased productivity:** When data is accurate and consistent, the sales team can spend less time fixing errors and more time selling.
- **Better forecasting:** Accurate data can help the business forecast sales and revenue more accurately, leading to more informed business decisions.
- **Enhanced customer experience:** When data is accurate, the sales team can provide a better customer experience by having up-to-date information about each customer's needs and preferences.

Overall, using validation rules to enforce data accuracy can lead to more efficient and effective sales processes, resulting in improved business outcomes.

# CREATE CUSTOM PAGE LAYOUTS TO DISPLAY RELEVANT INFORMATION

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A real-world example of using Salesforce to create custom page layouts to display relevant information could be a customer service team using Salesforce to manage customer inquiries and support requests. In this scenario, the customer service team relies on having access to relevant information about each customer to provide a personalized and efficient service.

By creating custom page layouts in Salesforce, the business can tailor the information displayed on each page to the specific needs of the customer service team. For example, they could create a custom page layout that displays the customer's purchase history, contact information, and support tickets all in one place.



By providing the customer service team with a comprehensive view of each customer, the business can benefit in several ways:

- **Improved customer satisfaction:** With access to relevant customer information, the customer service team can provide a more personalized and efficient service, leading to increased customer satisfaction.
- **Increased productivity:** When customer information is displayed in a clear and organized way, the customer service team can spend less time searching for information and more time helping customers.
- **Enhanced collaboration:** By creating custom page layouts, the business can ensure that all members of the customer service team have access to the same information, leading to better collaboration and more effective problem-solving.
- **Better data management:** By tailoring the information displayed on each page to the specific needs of the customer service team, the business can ensure that data is entered consistently and accurately, leading to better data management overall.

Overall, creating custom page layouts in Salesforce can lead to a more efficient and effective customer service process, resulting in improved business outcomes such as increased customer satisfaction and productivity.



# SET UP LEAD CONVERSION TO AUTOMATICALLY CREATE CONTACTS

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A real-world example of using Salesforce to set up lead conversion to automatically create contacts could be a marketing team using Salesforce to manage their lead generation and qualification process. In this scenario, the marketing team relies on Salesforce to track and manage their leads, which are then passed on to the sales team for further qualification and follow-up.

By setting up lead conversion in Salesforce to automatically create contacts, the business can benefit in several ways:

- **Improved data accuracy:** By automatically creating contacts from leads, the business can ensure that data is entered consistently and accurately, reducing the risk of errors and duplicate entries.
- **Increased efficiency:** When contacts are automatically created from leads, the sales team can spend less time manually creating contacts and more time following up with qualified leads.
- **Better lead management:** By automating the lead conversion process, the marketing team can ensure that leads are properly qualified before they are passed on to the sales team, resulting in a more efficient and effective lead management process.
- **Enhanced reporting:** With contacts automatically created from leads, the business can generate more accurate reports on their lead generation and qualification process, allowing them to make data-driven decisions about their marketing and sales strategies.

Overall, setting up lead conversion in Salesforce to automatically create contacts can lead to a more efficient and effective lead management process, resulting in improved business outcomes such as increased data accuracy, efficiency, and better reporting.



# USE WORKFLOWS TO AUTOMATE CONTACT FOLLOW-UPS

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A real-world example of using Salesforce workflows to automate contact follow-ups could be a sales team using Salesforce to manage their sales pipeline. In this scenario, the sales team relies on following up with contacts in a timely and consistent manner to move them through the sales funnel and close deals.

By using workflows in Salesforce to automate contact follow-ups, the business can benefit in several ways:

- **Increased efficiency:** By automating contact follow-ups, the sales team can spend less time manually following up with contacts and more time on other important sales activities, such as prospecting and closing deals.
- **Improved consistency:** With automated workflows, the business can ensure that contacts are consistently followed up with in a timely manner, reducing the risk of missed opportunities and improving the overall sales process.
- **Enhanced customer experience:** By automating contact follow-ups, the sales team can provide a more personalized and efficient service, leading to increased customer satisfaction and loyalty.
- **Better data management:** With workflows in place, the business can ensure that all contact interactions are accurately tracked and recorded in Salesforce, leading to better data management and reporting.

Overall, using workflows in Salesforce to automate contact follow-ups can lead to a more efficient and effective sales process, resulting in improved business outcomes such as increased efficiency, consistency, customer satisfaction, and better data management.



# CREATE CUSTOM EMAIL TEMPLATES FOR CONTACTING CONTACTS

"Let's say that a company wants to improve their outreach to potential customers by sending personalized emails to their contacts. However, their sales team is currently manually drafting each email, which is time-consuming and can lead to inconsistencies in messaging.

To address this, a Salesforce Admin could create custom email templates that include personalized fields such as the recipient's name, company, and recent activities. The templates can be easily accessed by the sales team when they're composing their outreach emails.

The benefits of creating custom email templates in Salesforce for the business include:

- **Consistency in messaging:** Custom email templates ensure that each sales rep is using the same messaging and language, which helps to create a consistent brand voice and a more professional image for the company.
- **Time-saving:** Custom email templates save the sales team a significant amount of time, as they no longer need to draft each email from scratch. This allows them to focus on other tasks that require more attention and thought.
- **Personalization:** Custom email templates can include personalized fields that make each email feel tailored to the recipient. This can increase the chances of a response and ultimately lead to more sales.
- **Data tracking:** With custom email templates, it's easier to track which templates are being used and how effective they are at generating responses. This information can be used to further refine the templates and improve their effectiveness.



Overall, creating custom email templates in Salesforce can greatly benefit a business by improving outreach efforts, saving time, and increasing the chances of closing sales."



# USE WEB-TO-LEAD FORMS TO CAPTURE CONTACT INFORMATION FROM YOUR WEBSITE

A real-world example of using Salesforce to set up web-to-lead forms to capture contact information from a website could be a B2B company using Salesforce to generate leads through their website. In this scenario, the company relies on their website to attract and capture leads, which are then passed on to the sales team for further qualification and follow-up.



By setting up web-to-lead forms in Salesforce to capture contact information from their website, the business can benefit in several ways:

- **Increased lead generation:** By making it easy for website visitors to submit their contact information, the business can increase lead generation and attract more potential customers.
- **Improved data accuracy:** By automatically capturing contact information through web-to-lead forms, the business can ensure that data is entered consistently and accurately, reducing the risk of errors and duplicate entries.
- **Enhanced lead management:** With web-to-lead forms in place, the business can capture leads directly in Salesforce, allowing for better lead management and tracking throughout the sales process.
- **Improved marketing and sales alignment:** By using web-to-lead forms to capture contact information, the marketing team can provide qualified leads directly to the sales team, resulting in a more efficient and effective sales process.

Overall, using web-to-lead forms in Salesforce to capture contact information from a website can lead to increased lead generation, improved data accuracy, better lead management, and enhanced marketing and sales alignment.

# USE WEB-TO-CASE FORMS TO CREATE CONTACTS FROM CUSTOMER SUPPORT REQUESTS

A real-world example of using Salesforce to set up web-to-case forms to create contacts from customer support requests could be a customer service team using Salesforce to manage customer support requests. In this scenario, the customer service team relies on having accurate and up-to-date customer information to provide efficient and effective support.

By setting up web-to-case forms in Salesforce to create contacts from customer support requests, the business can benefit in several ways:

- **Improved customer service:** By automatically creating contacts from customer support requests, the business can ensure that customer information is accurate and up-to-date, leading to better and more efficient support.
- **Increased efficiency:** With web-to-case forms in place, the customer service team can quickly and easily create contacts from support requests, reducing the time and effort required for manual data entry.
- **Better data management:** With contacts automatically created from web-to-case forms, the business can ensure that all customer interactions are accurately tracked and recorded in Salesforce, leading to better data management and reporting.
- **Enhanced marketing and sales alignment:** By using web-to-case forms to create contacts, the business can provide valuable customer data to the marketing and sales teams, resulting in more targeted and effective outreach.



Overall, using web-to-case forms in Salesforce to create contacts from customer support requests can lead to improved customer service, increased efficiency, better data management, and enhanced marketing and sales alignment.

# CREATE CUSTOM REPORTS AND DASHBOARDS TO TRACK CONTACT ACTIVITY

A real-world example of using Salesforce to create custom reports and dashboards to track contact activity could be a sales team using Salesforce to manage their sales pipeline. In this scenario, the sales team relies on having accurate and up-to-date information about their contacts and their activity to make informed decisions and drive revenue.

By creating custom reports and dashboards in Salesforce to track contact activity, the business can benefit in several ways:

- **Improved visibility:** With custom reports and dashboards, the sales team can easily see and track contact activity, allowing them to identify trends and make informed decisions.
- **Increased efficiency:** With quick and easy access to relevant contact data, the sales team can save time and effort and focus on more productive activities.
- **Enhanced collaboration:** With custom reports and dashboards, the sales team can share valuable insights and data with other teams, such as marketing and customer service, leading to enhanced collaboration and improved business outcomes.
- **Better data management:** With accurate and up-to-date data in custom reports and dashboards, the business can ensure that all customer interactions are accurately tracked and recorded, leading to better data management and reporting.



Overall, creating custom reports and dashboards in Salesforce to track contact activity can lead to improved visibility, increased efficiency, enhanced collaboration, and better data management, resulting in more informed decision-making and better business outcomes.

# USE SALESFORCE MOBILE APP TO ACCESS CONTACT INFORMATION ON THE GO

A real-world example of using Salesforce Mobile App to access contact information on the go could be a sales representative who frequently travels and needs access to contact information while on the road. In this scenario, the sales representative relies on having access to accurate and up-to-date contact information to conduct business efficiently.



By using Salesforce Mobile App to access contact information on the go, the business can benefit in several ways:

- **Increased productivity:** With access to contact information on their mobile device, the sales representative can work more efficiently and make better use of their time while traveling.
- **Improved customer service:** With access to accurate and up-to-date contact information, the sales representative can provide better and more efficient customer service, leading to increased customer satisfaction.
- **Better data management:** With contact information accessible through Salesforce Mobile App, the business can ensure that all customer interactions are accurately tracked and recorded, leading to better data management and reporting.
- **Enhanced collaboration:** With Salesforce Mobile App, the sales representative can easily share customer information with other teams, such as marketing and customer service, leading to enhanced collaboration and improved business outcomes.

Overall, using Salesforce Mobile App to access contact information on the go can lead to increased productivity, improved customer service, better data management, and enhanced collaboration, resulting in better business outcomes for the organization.

# QUESTIONS?

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US**



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