**CONFIGURATIONS THAT DRIVE
VALUE FROM SALESFORCE**

LEAD MANAGEMENT STRATEGIES

CloudROI

Automate aspects of lead management throughout the entire sales process

LEAD STRATEGIES

1 Create custom lead capture forms and embed them on your website

2 Set up Salesforce Lead Duplication Management to avoid duplicate leads

3 Use Salesforce Data.com to supplement lead data with third-party data

4 Set up Salesforce Lead Scoring to prioritize leads based on criteria

5 Use Salesforce email campaigns to nurture leads through email marketing

6 Set up Salesforce Automated Lead Assignment to distribute leads to sales reps

7 Use Salesforce Chatter to collaborate on leads within your team

8 Set up Salesforce Lead Conversion to convert leads to opportunities

9 Use Salesforce Opportunity Stage Tracking to track sales progress

10 Set up Salesforce Lead Source Tracking to analyze lead sources

CREATE CUSTOM LEAD CAPTURE FORMS AND EMBED THEM ON YOUR WEBSITE

One example of Salesforce configuration for creating custom lead capture forms and embedding them on a website is a business that sells software as a service (SaaS) and wants to generate more leads for their sales team. The business can use Salesforce to create custom lead capture forms that capture potential customers' contact information and any other relevant data that the business wants to collect.

Once the lead capture forms are created, the business can then embed them on their website's landing pages or contact pages to encourage visitors to fill them out. By doing this, the business can effectively capture leads from website visitors who are interested in their products or services.

The benefits of this Salesforce configuration for the business include:

- **Increased lead generation:** By embedding custom lead capture forms on their website, the business can generate more leads than they would have otherwise.

- **Improved lead quality:** With custom lead capture forms, the business can ask specific questions that allow them to qualify leads and prioritize follow-up accordingly.

- **Enhanced customer experience:** Custom lead capture forms can be designed to align with the business's branding and website design, providing a seamless and professional customer experience.

- **Increased sales productivity:** By automating the lead capture process and capturing relevant data, sales reps can spend more time engaging with qualified leads and less time collecting basic contact information.

Overall, creating custom lead capture forms and embedding them on a website using Salesforce can help businesses increase their lead generation and improve the efficiency of their sales processes.

SET UP SALESFORCE LEAD DUPLICATION MANAGEMENT TO AVOID DUPLICATE LEADS

Let's say that ABC Company uses Salesforce as its customer relationship management (CRM) system. The sales team at ABC Company generates leads through various channels such as website forms, events, and referrals. However, sometimes leads are accidentally entered more than once into the Salesforce system, resulting in duplicates.

To prevent this from happening, ABC Company can use Salesforce's Lead Duplication Management feature. They can set up rules that prevent leads with the same email address or phone number from being created more than once. They can also set up matching rules to identify and merge existing duplicate leads.

For example, they might set up a rule that says, "If a lead is created with the same email address as an existing lead, do not create a new lead and instead merge the new lead with the existing lead." This ensures that ABC Company has a complete and accurate view of their leads and prevents duplicate communications and wasted resources.
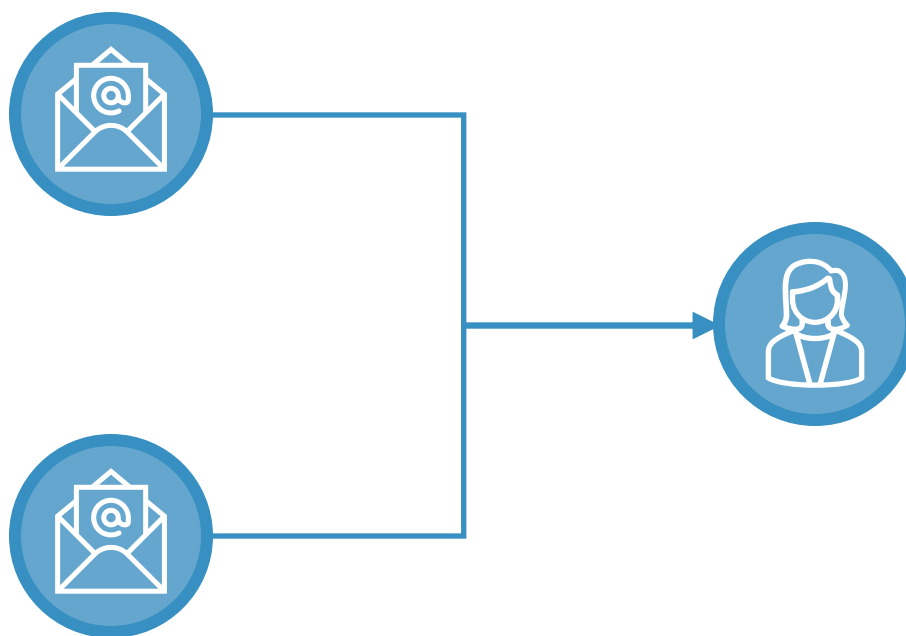
Overall, by setting up Salesforce Lead Duplication Management, ABC Company can ensure that their sales team is working with the most up-to-date and accurate lead data, which can help them close more deals and drive revenue growth.

# USE SALESFORCE DATA.COM TO SUPPLEMENT LEAD DATA WITH THIRD-PARTY DATA

Let's say that you are a sales manager at a software company that sells a customer relationship management (CRM) solution. Your team generates a high volume of leads, but you've noticed that the quality of the leads could be improved. Specifically, you're finding that many of the leads are missing key pieces of information, such as phone numbers or job titles. This makes it difficult for your sales reps to effectively target and engage with these leads.

To address this issue, you decide to use Salesforce Data.com to supplement your lead data with third-party data. Data.com is a data management solution that integrates with Salesforce and provides access to a database of over 30 million verified company and contact records.

Using Data.com, you can easily enrich your existing lead records with additional information, such as phone numbers, job titles, company size, and industry. This helps your sales reps to better understand their prospects and tailor their messaging accordingly.

For example, let's say that one of your sales reps is trying to reach out to a lead at a small manufacturing company. By using Data.com to supplement the lead data, the sales rep can quickly see that the company has recently expanded and now employs over 100 people. Armed with this information, the sales rep can adjust their messaging to focus on the company's growth and how your CRM solution can help them scale their operations.

By using Salesforce Data.com to supplement lead data with third-party data, you can improve the quality of your leads and give your sales reps the information they need to engage with prospects more effectively.
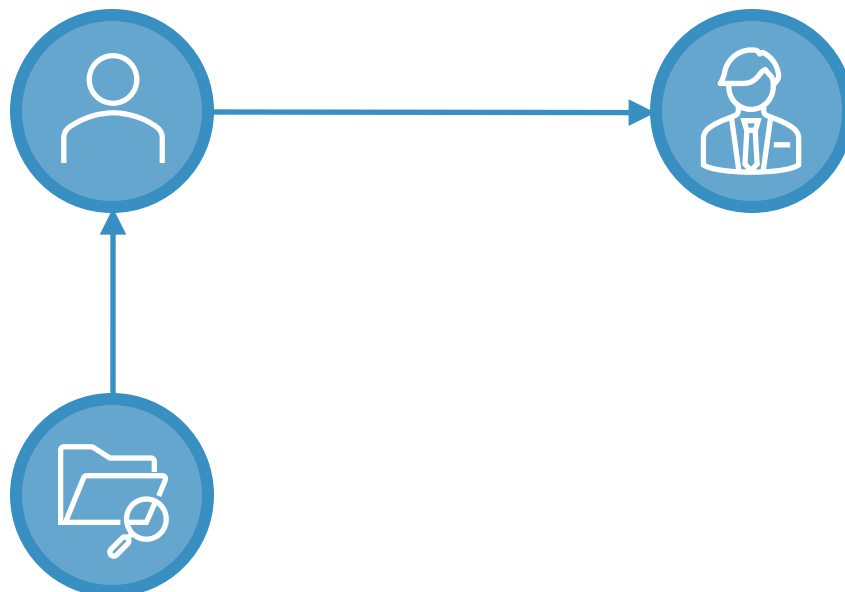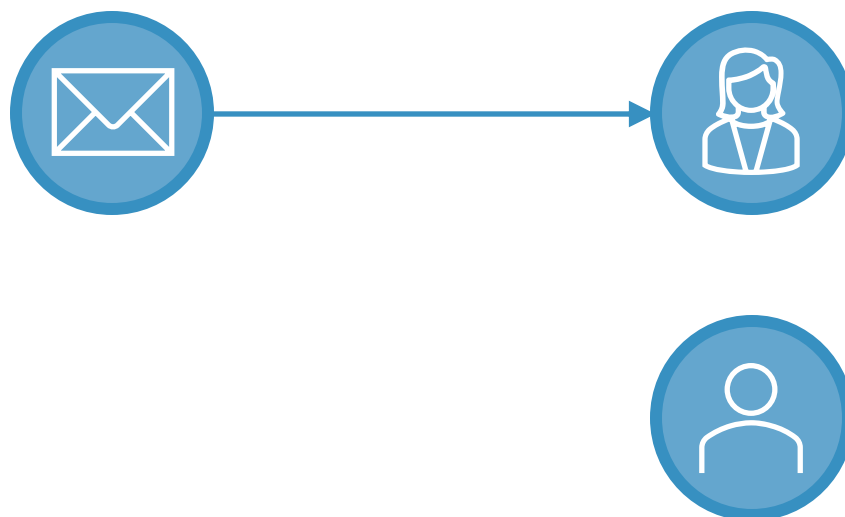
SET UP SALESFORCE LEAD SCORING TO PRIORITIZE LEADS BASED ON CRITERIA

Let's say you are a sales representative for a software company that sells marketing automation software. You want to prioritize leads who have a high likelihood of purchasing your software, based on their behavior and demographics.

First, you need to define the criteria for a "high-quality lead". In this case, you might look at lead behavior (e.g., engagement with marketing emails, website visits, and content downloads) and demographics (e.g., company size and industry).

Once you have defined the criteria, you can use Salesforce's Lead Scoring feature to assign a score to each lead based on their behavior and demographics. For example, a lead who has engaged with multiple marketing emails, visited your website several times, and works for a company in your target industry might receive a higher score than a lead who has only opened one email and works for a smaller company.

You can then set up workflows in Salesforce to prioritize leads with higher scores. For example, you might create a rule that assigns leads with scores above a certain threshold to a specific sales representative or team, or automatically sends them a personalized email or other marketing materials.

By using Salesforce Lead Scoring to prioritize leads based on criteria, you can focus your sales efforts on the most promising leads and increase your chances of closing more deals.

# USE SALESFORCE EMAIL CAMPAIGNS TO NURTURE LEADS THROUGH EMAIL MARKETING

Let's say you are a B2B company selling software solutions to other businesses. You have a database of leads that you have collected through various channels such as trade shows, webinars, and website forms.

You want to nurture these leads and move them through your sales funnel. You decide to create an email campaign in Salesforce to send targeted and personalized emails to your leads.

Here's how you could configure Salesforce Email Campaigns to achieve this:

- **Create a campaign:** In Salesforce, you create a new campaign and name it "Software Solutions Email Campaign."

- **Define the audience:** You create a dynamic list of leads that meet specific criteria, such as job title, company size, or industry. This ensures that your emails are targeted and relevant to the recipient.

- **Create email templates:** You create a series of email templates that align with your sales funnel. For example, you might create an email that introduces your company and products, another email that highlights your features and benefits, and a third email that offers a demo or free trial.

- **Set up email sends:** You configure the campaign to send these emails at specific intervals, such as once a week or every other day. This ensures that your leads receive a steady stream of content and remain engaged with your company.

- **Track and analyze results:** You use Salesforce's reporting and analytics tools to track the effectiveness of your campaign. You can see which emails are being opened and clicked, which leads are engaging with your content, and which leads are moving further down the funnel.

By using Salesforce Email Campaigns to nurture your leads through email marketing, you can increase engagement, build trust, and ultimately convert more leads into customers.
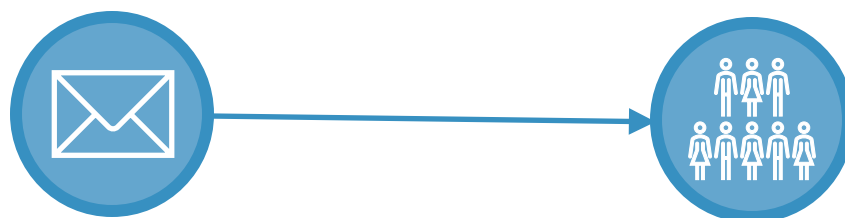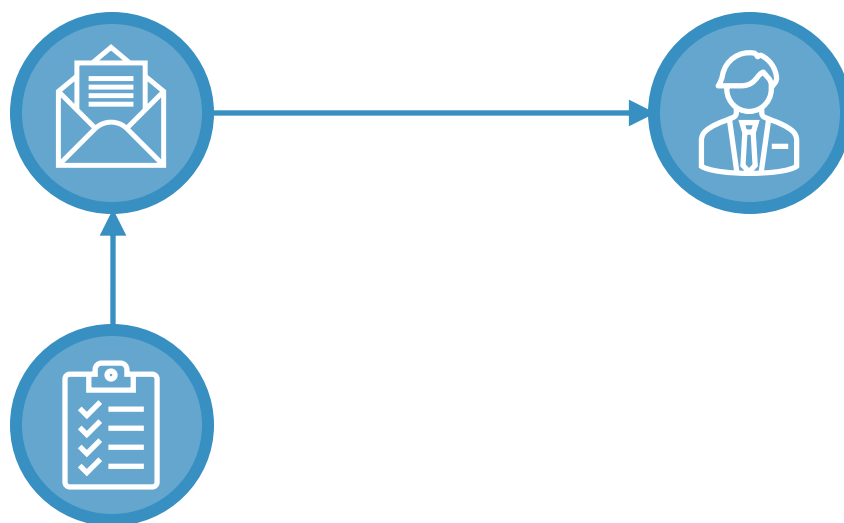
SET UP SALESFORCE AUTOMATED LEAD ASSIGNMENT TO DISTRIBUTE LEADS TO SALES REPS

Let's say you work for a software company that sells CRM software to businesses. Your sales team is divided into three regions: *East*, *West*, and *Central*. Each has multiple sales reps assigned to it.

To ensure that leads are distributed fairly and quickly, you can set up Salesforce Automated Lead Assignment. Here's how it might work:

- **Create a lead assignment rule:** You'll create a lead assignment rule that assigns leads based on the region of the lead. For example, if the lead is located in the East, the rule will assign it to a sales rep in the East region.

- **Define the criteria:** You'll define the criteria for the lead assignment rule. For example, the rule might be set up to assign leads based on the state or country of the lead.

- **Set up the assignment rule:** Once you've defined the criteria, you'll set up the rule itself in Salesforce. This involves selecting the appropriate sales reps for each region and specifying any additional criteria for lead assignment.

- **Test the rule:** Before putting the rule into production, you'll want to test it to ensure that it's working as intended. This might involve creating test leads and verifying that they're being assigned correctly.

- **Put the rule into production:** Once you're confident that the rule is working properly, you'll put it into production. From this point on, any new leads that come in will be automatically assigned to the appropriate sales rep based on the region.

By setting up Salesforce Automated Lead Assignment, you can ensure that your sales team is able to quickly follow up on leads and close deals, without worrying about leads getting lost in the shuffle or not being assigned to the right sales rep.

USE SALESFORCE CHATTER TO COLLABORATE ON LEADS WITHIN YOUR TEAM

Let's say that you work for a software company that sells marketing automation software to other businesses. As a sales representative, you are responsible for identifying and following up on leads that are interested in your product.

When you log into Salesforce, you can see a list of leads that have been assigned to you. You notice that one of the leads is from a large marketing agency that you've been trying to get in touch with for months.

You're excited about this lead, but you're not sure where to start. So, you decide to use Salesforce Chatter to collaborate with your team.

You create a Chatter post that says something like, "Hey team, I just got a lead from ABC Marketing Agency. Has anyone worked with them before? Any tips or advice?"

Your post is visible to everyone on your team, and within a few minutes, a colleague responds to your post. They say that they've worked with ABC Marketing Agency before and that they know the best way to approach them.

You thank your colleague and follow their advice. You send an email to the lead, and within a few days, you have a call scheduled with them.

Without Salesforce Chatter, you might not have known that your colleague had experience with this lead, and you might have missed out on an opportunity to close the deal. But with Chatter, you were able to collaborate with your team and get the information you needed to move the lead forward.

SET UP SALESFORCE LEAD CONVERSION TO CONVERT LEADS TO OPPORTUNITIES

Let's say you work for a company that sells software and you use Salesforce to manage your sales process. You have a sales team that generates leads by attending conferences and webinars and through online advertising campaigns.

To set up Salesforce Lead Conversion to convert leads to opportunities, you would follow these steps:

- **Customize your lead conversion settings:** In Salesforce, you can customize your lead conversion settings to match your sales process. You can define which fields should be required when converting a lead to an opportunity, which fields should be mapped to the opportunity record, and which fields should be cleared when a lead is converted.

- **Identify your sales stages:** In Salesforce, you can set up sales stages to track the progress of each opportunity. You can customize the sales stages to match your sales process and the way your team sells software. For example, you might have sales stages like "Qualification", "Needs Analysis", "Proposal/Price Quote", "Negotiation/Review", and "Closed/Won".

- **Convert your leads:** When a lead is ready to be converted to an opportunity, your sales team can use the "Convert Lead" button in Salesforce. This will create a new opportunity record and populate it with the relevant data from the lead record. Your sales team can then update the opportunity record with additional information about the prospect, such as their budget and timeline for purchasing the software.

- **Track your sales pipeline:** As your sales team works on the opportunity, they can update the sales stage and other key fields in Salesforce. This will help you track the progress of each opportunity and identify potential bottlenecks in your sales process.

By setting up Salesforce Lead Conversion to convert leads to opportunities, you can streamline your sales process and make it easier for your team to manage their sales pipeline. This will help you close more deals and grow your business.
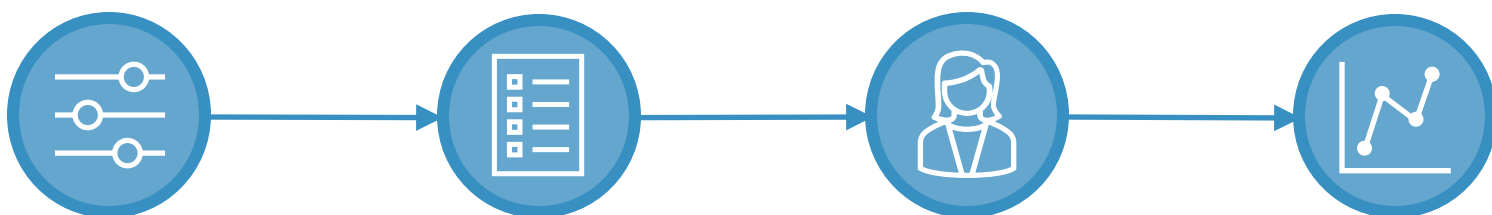
USE SALESFORCE OPPORTUNITY STAGE TRACKING TO TRACK SALES PROGRESS

Let's say that you are the sales manager for a retail company that sells sporting goods online. Your sales team is responsible for selling new products to potential customers, and you want to keep track of their progress through the sales pipeline. Using Salesforce Opportunity Stage Tracking, you can create an opportunity for each potential customer and assign it a stage, such as:

- **Prospecting:** The sales rep has identified a potential customer and is making initial contact.
- **Qualification:** The sales rep has determined that the potential customer is a good fit for the product and is working to schedule a demo.
- **Needs Analysis:** The sales rep has completed a demo with the potential customer and is now gathering more information about their specific needs.
- **Proposal/Price Quote:** The sales rep provided a proposal or price quote to the potential customer.
- **Negotiation/Review:** The sales rep and potential customer are negotiating the terms of the deal or reviewing the proposal.
- **Closed Won:** The deal has been closed and the customer has purchased the product.
- **Closed Lost:** The deal has been lost and the customer decided not to purchase the product.

By using Opportunity Stage Tracking, you can easily see which opportunities are in each stage of the sales process, how long they've been there, and which deals are likely to close soon. This allows you to focus your efforts on the opportunities that are most likely to result in a sale and to identify potential roadblocks in the sales process. Benefits include:

- **Improved sales forecasting:** By tracking the progress of each opportunity, you can gain a more accurate picture of your sales pipeline and forecast future sales with greater precision.
- **More efficient sales processes:** By tracking the progress of each opportunity, you can identify bottlenecks and areas for improvement in your sales processes. This can help you to streamline your workflows and close deals more efficiently.
- **Better sales performance:** By using Opportunity Stage Tracking, your sales team can easily see which opportunities are in progress and which ones require attention."

SET UP SALESFORCE LEAD SOURCE TRACKING TO ANALYZE LEAD SOURCES

Let's say a company, XYZ Corp, spends a significant amount of money on different marketing campaigns, such as email blasts, Google Ads, and social media ads, to generate leads. Without tracking the source of leads, XYZ Corp cannot determine which campaigns are most effective in generating leads, or which channels provide the highest return on investment (ROI).

By configuring Salesforce Lead Source Tracking, XYZ Corp can capture the source of each lead that comes into the system and analyze the data to determine which marketing campaigns are generating the most leads and which channels provide the highest ROI. This information can help the business make informed decisions on how to allocate their marketing budget, optimize their campaigns, and focus their efforts on the channels that generate the best results.

For instance, if XYZ Corp discovers that their email campaigns are generating more leads than their social media ads, they can invest more in email campaigns or adjust their social media strategy to improve performance. Similarly, if they find that their website referrals are generating more leads than their paid advertising campaigns, they may choose to reduce their advertising budget and focus more on improving their website content and SEO.
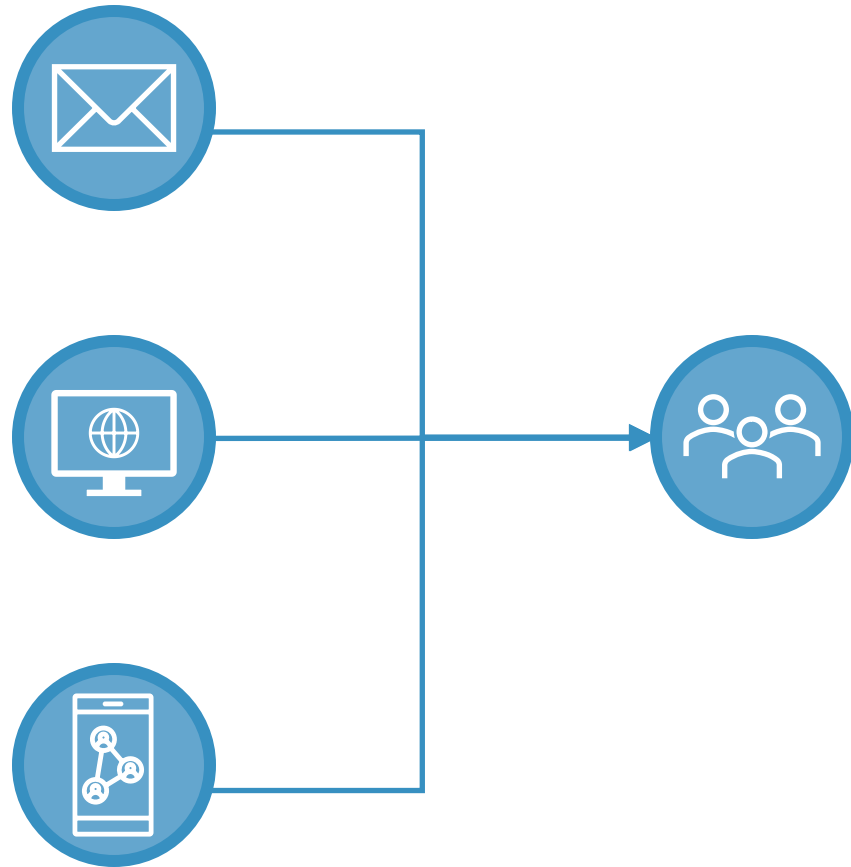
QUESTIONS?

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