Leads Best Practice:
Lead Generation, Management & Performance

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Best Practice: Leads

- Business Driver

- Best Practice Overview

- Best Practice: Leads

  - Marketing Effectiveness

  - Lead Generation and Integration

  - Lead Management

  - Lead Performance Management

- Tools & Resources/Additional Information

Business Driver

- Leads are important to any business. They signify opportunities for new business or to cross-sell and up-sell products to existing or former customers. Given the importance of Leads to generating new or incremental business to an organization, it is important to understand Lead Management best practices using Salesforce.

Best Practice Overview

- Understand the tools available to help you align and integrate your Marketing and Lead strategies

- Utilize best practices to enable an effective and efficient Lead Management process within your organization

- Capitalize on key configuration and process principles in order to track the Lead to Cash process

Marketing Effectiveness

Marketing Challenges
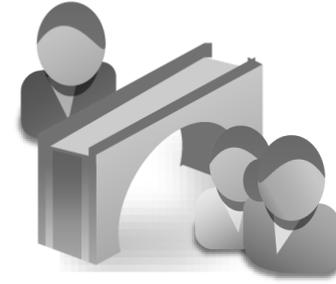*Driving value from Marketing efforts and spend*

1

Insufficient Lead Generation

" How do I generate more leads to drive growth? "

2

Poor Alignment with Sales

" What's happening to the leads I'm passing to Sales? "

3

Measuring Marketing ROI

" What's my return on the money I'm spending on marketing programs? "
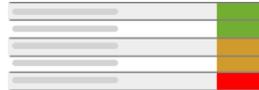
Achieving Marketing Success

Principals to overcoming obstacles

1 Generate Leads and Integrate with Salesforce

Plan and execute marketing campaigns that generate demand for your product or service.
Capture those leads through a variety of channels including your Web site and track them in Salesforce.
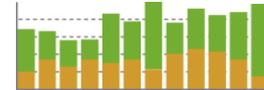
Campaign ROI   **Top Search Terms**   **Leads by Source**   **Lead Quality**

2 Optimize Lead Flow

Create a closed-loop follow-up process so leads don't slip though the cracks.
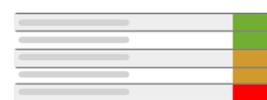Establish a lead qualification process to make sure all sales reps use the same consistent methodology.

Lead by Status   **Lead Conversion %**   **Converted Leads by Month**   **Top Sales Reps**

3 Track and Trend your Performance

Track your performance relative to your various Marketing initiatives in order to measure campaign effectiveness.
Use data such as Campaign Influence, Primary Campaign Source, and Lead Source to measure your opportunities resulting from campaigns.

Top 10 Deals   **Month-to-Date Trending**   **Closed Business by Campaign**   **Top Campaigns**
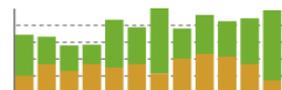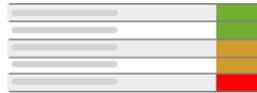
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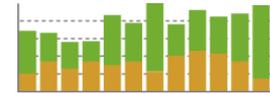
Campaign ROI   **Top Search Terms**   **Leads by Source**   **Lead Quality**

Lead Generation & Integration

Getting Started
Ensure alignment in objectives and strategy

- Sales & Marketing should collaborate to:

  - Establish a common definition of a Lead

  - Agree on the definition or event that defines a "Qualified" Lead

  - Determine the appropriate Lead Status to track and monitor the lead process

  - Identify the various sources of Leads

  - Collaborate during ongoing meetings to discuss Lead quality and performance

  - Consider configuring lead scoring or rating based on your business rules and priorities

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Generating Leads

Examples of lead generation tools and activities

Website Integration

Integrate with your primary marketing vehicle – your website

Trade Shows/Conventions

Meet new customers and demo your products

Stronger Pipeline

Higher Productivity

Increased ROI

E-mail Campaigns

Execute & monitor e-mail campaigns from within Salesforce.com

Search Engine Optimization

Optimize your SEM spend

Matt Troy, Director

"Salesforce has given us incredible insight into our marketing and sales operations. **We're now able to see which of our lead generation programs are most successful** and know where to focus our efforts for the best return."

Integrating Lead Data

Native tools for bringing valuable lead data into your Salesforce org

Web-to-Lead

Capture lead information from your website and pass to Salesforce real-time

Data Loader

Import lead information from various file sources

Google AdWords

Capture leads generated as a result of search engine optimization initiatives

Email Tracking

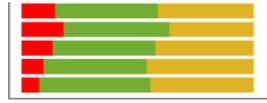Use email integrated response tracking to monitor recipient email activities

② Optimize Lead Flow

Create a closed-loop follow-up process so leads don't slip though the cracks.
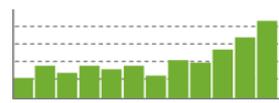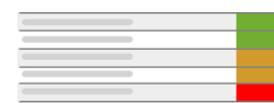Establish a lead qualification process to make sure all sales reps use the same consistent methodology.

Lead by Status   **Lead Conversion %**   **Converted Leads by Month**   **Top Sales Reps**

Lead Management

Lead Management Defined

Effectively managing leads within your organization

- Lead management is a business process which should:

  - Map to your customers' buying process

  - Be documented to ensure alignment and understanding across cross functional teams

  - Be reviewed regularly to ensure the process is effective

  - Adjust as necessary

- Lead management encompasses:

  - Data cleansing

  - Lead assignment and distribution

  - Lead scoring, prioritization and qualification

  - Analyzing the value of your marketing efforts

Lead Management – Data Cleansing
De-duplicating incoming leads

- Duplicate Leads in Salesforce can occur due to:

  – Customers or prospects responding to multiple campaigns

  – Customers or prospect activity on your website, i.e. downloading a white paper, completing a web form, etc.

  – Sales Representative overlap

  – Interfacing with customers or prospects at trade shows and events whereby their contact information is collected in various forms

  – 3rd party purchased lists

TIP: *Maintaining quality data should be of utmost concern and priority for your organization. Utilize a de-duping strategy to clean up bad data.*

SOFTWARE

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Lead Management – Data Cleansing
Suggestions for managing duplicate Lead data

Utilize either Salesforce or partner solutions to maintain high quality Lead data

Find Duplicates Button
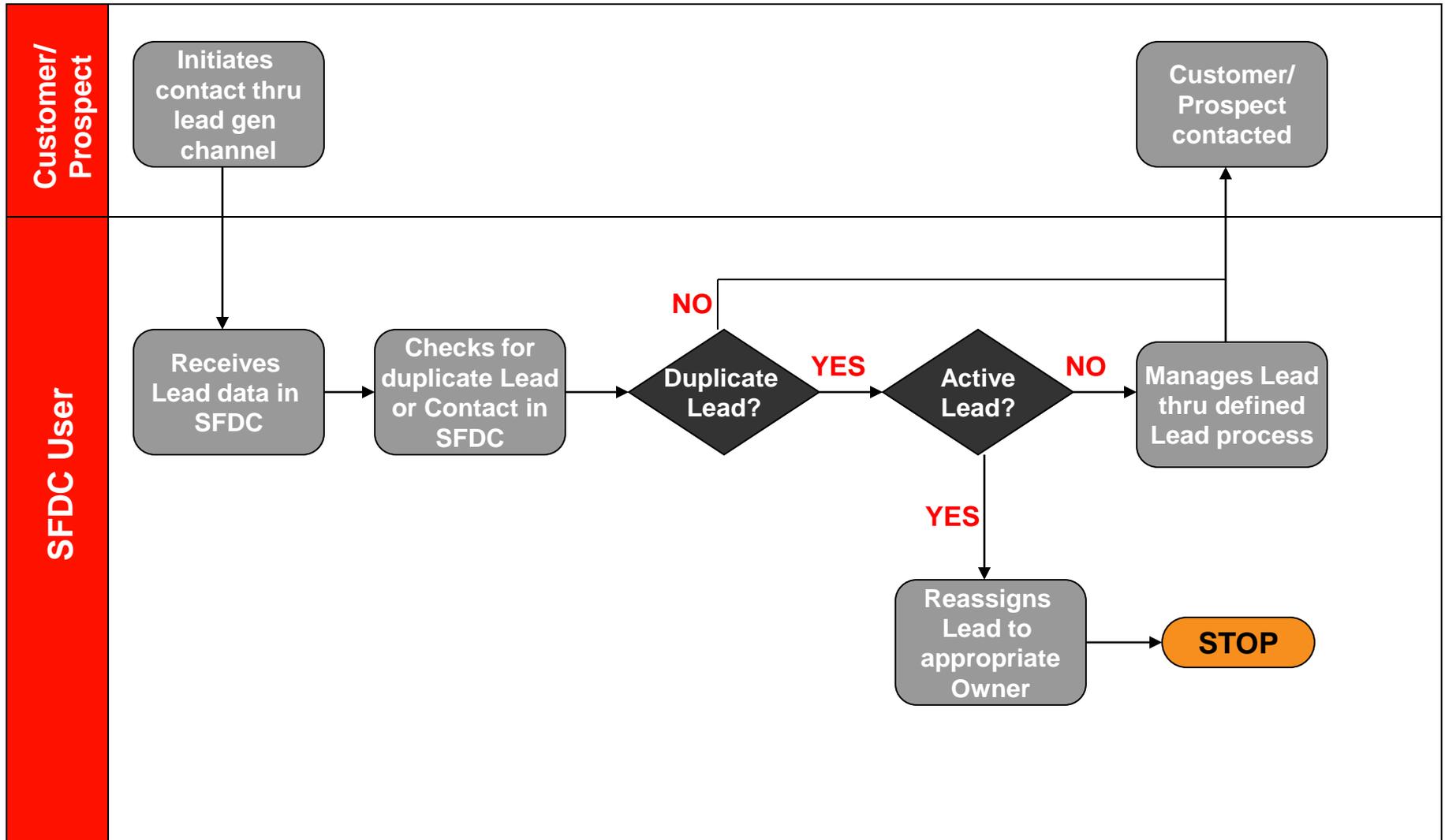

TIP: *Create a report to identify duplicate Lead records and share the data with your Users to educate them on the importance of their role in maintaining high data quality.*

Consider Partner Solutions
(list not all encompassing)

Ringlead Declone

Informatica

Demand Tools

Lead Management – Data Cleansing

Sample Lead de-duplication process flow

Lead Management – Assignment & Distribution
Tools for appropriately assigning Leads

Lead Assignment Rules – Automate the assignment of Leads to your users or queues. Create assignment rules based on pre-specified criteria, i.e. Industry, Number of Employees, State, Zip Code, etc.

TIP: *The ability to quickly and effectively assign leads to the correct reps can greatly impact your Reps ability to close new business. Utilize a well defined process to assign Leads to the right reps the first time.*

Lead Import Wizard – Import and assign up to 50k Leads directly into Salesforce using a CSV file.

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Lead Management – Assignment & Distribution
Tools for appropriately assigning Leads

Data Loader – Add a column to your import spreadsheet to assign the Lead to the correct Rep User ID

Queues – Assign Leads to a queue and allow your Users to select the most relevant Leads to process

Single or Mass Assignment – Manually assign a single or multiple Leads to reps
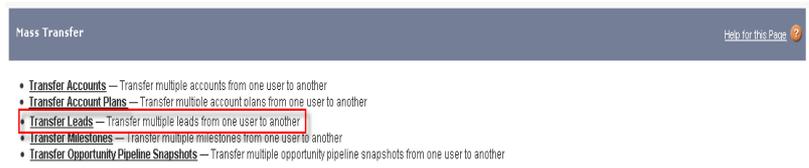
Lead Management – Conversion
Process the Lead and turn it into ca$h!

Opportunities generate more revenue for the business that can be attributed to marketing success

Closed business ties back to leads

Leads tie to marketing campaigns

CAMPAIGN → **LEAD** → **OPPORTUNITY**

TIP: *Be sure and capture the Lead Source on every Lead entered/received in Salesforce so you can close the loop between your Marketing and Sales efforts.*

③ Track and Trend your Performance

Track your performance relative to your various Marketing initiatives in order to measure campaign effectiveness.
Use data such as Campaign Influence, Primary Campaign Source, and Lead Source to measure your opportunities resulting from campaigns.
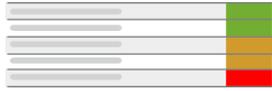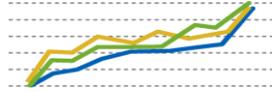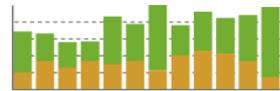
Top 10 Deals   **Month-to-Date Trending**   **Closed Business by Campaign**   **Top Campaigns**

Lead Performance Management

Lead Performance Management
Analyzing the value of your Marketing efforts

- Create some basic reports & dashboards to analyze key metrics such as:

    - Where are your best/worst leads coming from (Lead Source)

    - Where are your leads getting stuck (Lead Status)

    - How many Leads are converted to Opportunities (Lead Conversion)

TIP: *Capitalize on the standard out of the box reports available and free Lead dashboards available on the Appexchange.*

Tools & Resources

Tools & Resources

What else is out there that I can use?

- Partner applications on the Appexchange

    – E-mail Marketing Vendors

    – Marketing Automation Vendors

    – Sales Intelligence Vendors

    – Data Quality Vendors

- Marketing Professionals on Community

    – http://www.salesforce.com/community/crm-best-practices/marketing-professionals/

- Salesforce.com Marketing Blog

    – http://blogs.salesforce.com/marketing

- Sales and Marketing process maps and additional best practice information in the Salesforce.com Community

    – http://www.salesforce.com/community/crm-best-practices/sales-professionals/sales-process-and-methodology/sales-mktg-process-map.jsp

http://www.salesforce.com/appexchange

Tools & Resources
What else is out there that I can use?

- Lead Cultivation:

  http://www.salesforce.com/community/crm-best-practices/marketing-professionals/demand-generation/lead-management/detail99.jsp

- Round Robin & Lead Scoring:

  http://blogs.salesforce.com/features/2006/03/custom_formula_.html

- Lead Management 101:

  http://www.salesforce.com/community/crm-best-practices/marketing-professionals/demand-generation/lead-management/2008-mktg-exec-lead-mgmt-101.jsp

- Best Practices Lead Management:

  http://www.salesforce.com/community/crm-best-practices/marketing-professionals/demand-generation/lead-management/detail91.jsp

Sales and Marketing: Tools and Terminology

Below you'll find the tools and terminology used in the application and online training. For more information visit the Salesforce.com Community. You can search the site, browse around, and see what the community is interested in.

Campaigns

A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.

Accounts

Accounts are your organization's customers, competitors, and partners. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.

Google AdWords

Google AdWords™ is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers advertise online with Google AdWords as a mechanism to generate leads.

Contacts

Contacts are all of the individuals associated with your business accounts that you need to track in Salesforce. You can store various information for a contact, such as phone numbers, addresses, titles, and roles in a deal.

Web-to-Lead Form

With Web-to-Lead, you can gather information from your company's website and automatically generate leads. Web-to-Lead form can be used for contact me requests, registration pages, or campaign landing pages.

Opportunities

Opportunities are the sales and pending deals that you want to track. By adding opportunities, you are also building your "pipeline," which will contribute to your forecast. You can also link opportunities to campaigns to help measure the ROI of your marketing programs.

Leads

A lead is a prospect or potential opportunity - a person you met at a conference who expressed interest, or someone who filled out a form on your company's website.

Products

Products are the individual items that you sell on your opportunities. You can create a product and associate it with a price in a price book. Each product can exist in many different price books with many different prices. A product that is listed in a price book with an associated price is called a price book entry.

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Forecasts

A forecast is your best estimate of how much revenue you can generate in a quarter. This amount is divided between Commit Amount - the amount you can confidently close - and Best Case Amount - the total amount of revenue you might possibly generate. A manager's forecast should include the amount of revenue the entire team can generate together.

Contracts

A contract is a written agreement between two or more parties. Many companies use contracts to define the terms for doing business with other companies. Track the contract through your organization's approval process and use workflow alerts to notify yourself when to initiate contract renewals.

Documents

A document library is a place to store files without attaching them to accounts, contacts, opportunities, or other records. Each document in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

Calendar Events

Group calendaring will helps you better collaborate as a team, and arrange meetings with prospects and customers.

Task

Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user.

Activities

Maintain a historical record of all activities related to an account, contact, or opportunity. Your activity history includes emails, call notes, and calendar events, so everyone is on the same page.

Reports

Reports are lists, summaries, and analyses of your data, which you can display or print. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the Reports tab. You can also create new custom reports to access exactly the information you need. You can subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.

Dashboards

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard.

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Search

Make searching data and interacting with the results of your searches simple, smooth, and highly effective. Inline paging and sorting features simplify the task of working with large sets of search results. Powerful filtering and scoping functions narrow searches and results. Customization options enable users to design search results layouts that are tailored for the way they work.

Connect Outlook

Outlook users enjoy high levels of productivity with Apex Connect Outlook—formerly called Outlook Edition—which makes it easy to synchronize important customer data between two commonly used applications. With Connect Outlook 3.0 in Spring '07, productivity for Outlook users gets another boost with several enhancements. Users can add emails with attachments, create contacts and leads directly in Outlook, and create relationships between calendar events and associated objects such as accounts and opportunities.

Web-to-Lead Form

You can set up a Web-to-Lead form to capture contact me requests from your company's website. With a lead de-dupe solution you can automatically route those requests to the person who owns the account.

CTI Integration

With computer-telephony integration (CTI) capabilities, you can directly integrate your telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of CTI and the new Salesforce Console, salesforce.com delivers unlimited productivity to your call centers.

Email Templates

With Salesforce you can create email templates for common emails such as web-to-lead responses, sales prospecting, announcements, and internal workflow. You can even personalize parts of the email with information from the contact or account record.

Mass Email

Plan and execute email campaigns targeted at prospects and customers. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.

Email Tracking

Evaluate the success of email campaigns with integrated response tracking and easy monitoring of key campaign metrics, such as whether recipients open the messages, and more.

Import Wizard

The ability to easily import data into Salesforce is one of the application's key benefits. Import excel worksheets or CSV (comma separated value) files. Map the information to leads, contacts, accounts, solutions, and custom objects. Search Import Tools on Successforce.com for more information.

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