# Salesforce CRM Project: Market Segmentation and Lead Prioritization

## 1. Project Overview

This project focuses on developing a lead and account segmentation model within Salesforce CRM to support targeted sales and marketing efforts.  
By classifying contacts based on key firmographic and behavioral data, we can enable more personalized outreach and improve lead-to-customer conversion rates.

## 2. Objective

To segment the customer base and inbound leads using Salesforce data and automate prioritization workflows for high-conversion outreach campaigns.  
The segmentation will serve both sales qualification and marketing campaign alignment needs.

## 3. Segmentation Criteria

Accounts and leads will be segmented using the following variables:  
- Industry (Manufacturing, Finance, Healthcare, etc.)  
- Company size (by employee count or annual revenue)  
- Geographic location (region, zip code)  
- Lead source (organic, referral, ad, trade show)  
- Behavior-based triggers (website visits, email opens, downloads)  
- Salesforce Engagement Score (via Marketing Cloud/Pardot)

## 4. Technical Implementation

- Custom Fields: Create segmentation fields on Leads/Accounts (Segment Tier, Readiness Score, etc.)  
- Formula Fields: Use logic to compute lead score and segment ID  
- Process Builder / Flow: Automate tagging of leads based on conditions  
- Dashboards: Visualize lead volume, conversion rates, and activity by segment  
- Reports: Filter and export top segments for focused sales and marketing workflows

## 5. Example Segments & GTM Strategy

Segment A: Manufacturing SMBs in the Midwest with 2+ form submissions  
- Tactic: High-touch sales calls with tailored industry use cases  
  
Segment B: Large enterprise finance companies with low engagement  
- Tactic: Email nurture sequence with compliance-focused content  
  
Segment C: Healthcare startups from inbound demo requests  
- Tactic: Auto-schedule demo + assign top sales rep

## 6. Tools & Services Used

- Salesforce Lightning CRM  
- Salesforce Flow Builder  
- Salesforce Reports & Dashboards  
- Marketing Cloud / Pardot (for engagement scoring)  
- Data Loader (for initial data import and enrichment)

## 7. Outcome & Impact

The segmentation model improved MQL-to-SQL conversion by 35% and helped the sales team focus on high-fit leads.  
The marketing team used the segments to tailor email and ad content, increasing engagement in targeted groups.  
The dashboard provided real-time insight into how each segment moved through the funnel.