

Introduction to Salesforce

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Objectives

Salesforce

It is our chosen Customer Relationship Management system for managing relationships and interactions with customers and potential customers.

By the end of today, you should understand:

- The benefits and capability of Salesforce
- What is available in Salesforce
- How you will use Salesforce in your day to day, and the starting date

Agenda

1.00-2.00: **Aligned Salesforce vision & opportunity pipeline**

- Salesforce Benefits as CRM & How we are using it
- Opportunity pipeline & lead conversion process
- Live Demo – Lead conversion to opportunity walkthrough

2.00-2.10: **Break**

2.10-3.00: **Salesforce – Now & future**

- Agreement on how to work collaboratively on Salesforce
- Terminology, SOP, starting date
- Next session: Dashboard & analytics



Lead to Opportunity

