

Introduction to Salesforce

By Chauvy Burgess



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

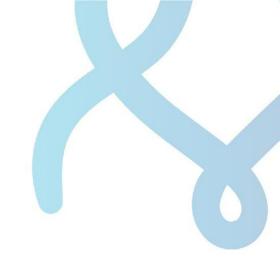
1.00-2.00: Aligned Salesforce vision & opportunity pipeline

- 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



B. Qualifying & Meeting

C. Close & Management













Dashboard

Marketing

Sales Development

Business Development Managers

