# Salesforce CRM Portfolio Project

## Sales Funnel Management

### Objective:

The goal of this project is to demonstrate a real-world simulation of the end-to-end sales process using Salesforce Customer Relationship Management (CRM) software. It covers key CRM activities including lead generation, lead qualification, opportunity tracking, sales stage progression, report building, and dashboard visualization. This project is designed to showcase my ability to manage and analyze sales data using cloud-based CRM tools.

### Scenario Summary:

Imagine a mid-sized B2B SaaS company generating leads from multiple sources such as social media, email campaigns, and trade shows. As a CRM analyst, your role is to enter those leads into Salesforce, qualify and convert them into opportunities, track their progress through the pipeline, and finally present a visual report to the sales leadership.

### Tools Used:

- Salesforce CRM (Developer Edition)
- Google Docs (for documentation and portfolio presentation)
- Canva (optional, for visual design)

### Skills Demonstrated:

- CRM Data Entry and Management
- Lead Qualification and Opportunity Conversion
- Sales Funnel Structuring and Tracking
- Custom Report Creation
- Sales Dashboard Design
- Business Communication and Documentation

# Leads View

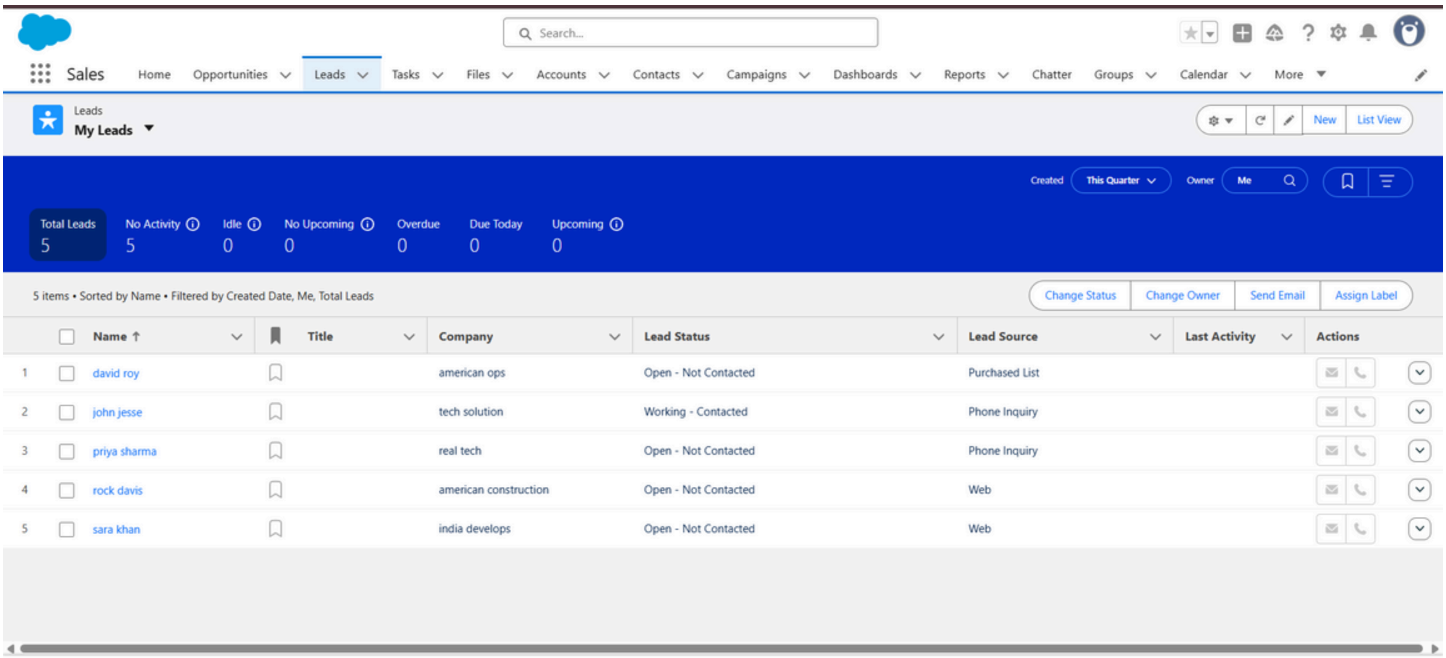
## Objective of This Step:

To simulate the process of lead generation and capture in Salesforce. Leads represent potential customers who have shown interest but are not yet qualified for direct sales outreach.

## What Was Done:

- Created a variety of sample leads in Salesforce with details such as:
  - Lead Name
  - Company
  - Lead Source (e.g., Social Media, Web, Referral)
  - Status (e.g., New, Contacted, Qualified)
- Assigned leads realistic values to reflect different acquisition channels and stages.
- Used **Lead Status** to track progress and readiness for conversion into opportunities.

## Screenshot:




## Explanation of Screenshot:

This screenshot shows a list of leads that were manually added to Salesforce. Each row represents an individual or company contact that entered the sales funnel. The **Lead Source** field indicates how the lead was acquired, while the **Status** field reflects the current stage of engagement. This view helps sales teams prioritize follow-ups and move qualified leads into the next phase of the pipeline.

# Opportunities View

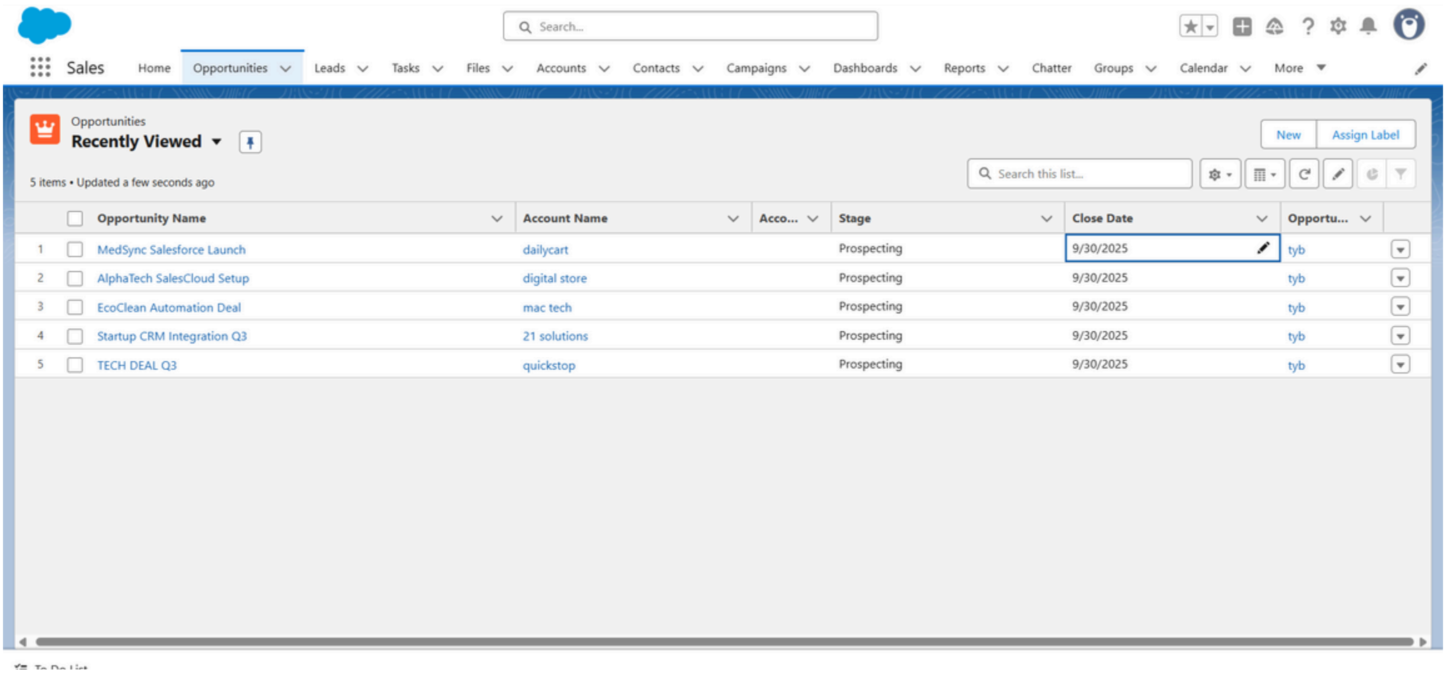
## Objective of This Step:

To simulate opportunity management in Salesforce by converting qualified leads into sales opportunities and tracking them through different sales stages. Opportunities help forecast revenue and measure sales performance.

## What Was Done:

- Converted selected qualified leads into opportunities.
- Populated opportunity fields including:
  - Opportunity Name
  - Account Name
  - Stage (e.g., Prospecting, Proposal, Negotiation, Closed Won/Lost)
  - Close Date
  - Amount
- Tracked each opportunity through its **sales funnel stage**, updating status as progress was made.

## Screenshot:




## Explanation of Screenshot:

This screenshot displays active opportunities created from converted leads. Each opportunity represents a potential deal with estimated value and expected close date. The **Stage** field is critical for understanding pipeline health and revenue forecasting. Using Salesforce's **Kanban view** , the opportunities are visually tracked across stages like **Prospecting**, **Qualification**, and **Negotiation**, providing a clear picture of deal progression.

# Sales Funnel Report

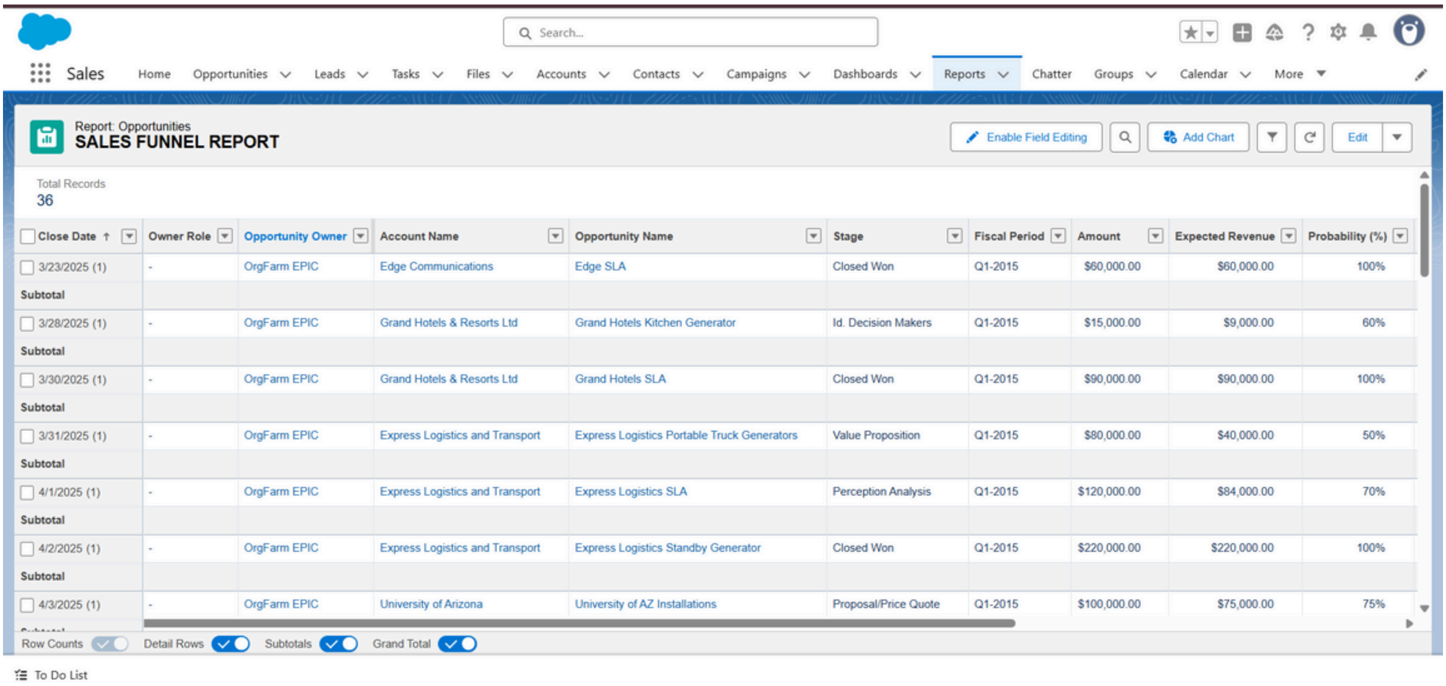
## Objective of This Step:

To create a customized Salesforce report that provides a visual and data-driven overview of how leads and opportunities move through the sales funnel. Reports help sales managers understand performance, identify bottlenecks, and make data-backed decisions.

## What Was Done:

- Created a **Sales Funnel Report** using Salesforce's "Opportunities by Stage" report type.
- Configured filters to include:
  - All open opportunities
  - Current quarter
- Grouped data by **Sales Stage** and **Lead Source**.
- Added **summarized fields** such as:
  - Total Opportunity Amount per Stage
  - Number of Opportunities per Stage
- Used a **Bar or Funnel Chart** to visually represent the pipeline flow from initial contact to deal closure.

## Screenshot:




| Close Date | Owner Role | Opportunity Owner | Account Name | Opportunity Name | Stage | Fiscal Period | Amount | Expected Revenue | Probability (%) |
|---|---|---|---|---|---|---|---|---|---|
| 3/23/2025 (1) | - | OrgFarm EPIC | Edge Communications | Edge SLA | Closed Won | Q1-2015 | $60,000.00 | $60,000.00 | 100% |
| Subtotal | | | | | | | | | |
| 3/28/2025 (1) | - | OrgFarm EPIC | Grand Hotels & Resorts Ltd | Grand Hotels Kitchen Generator | Id. Decision Makers | Q1-2015 | $15,000.00 | $9,000.00 | 60% |
| Subtotal | | | | | | | | | |
| 3/30/2025 (1) | - | OrgFarm EPIC | Grand Hotels & Resorts Ltd | Grand Hotels SLA | Closed Won | Q1-2015 | $90,000.00 | $90,000.00 | 100% |
| Subtotal | | | | | | | | | |
| 3/31/2025 (1) | - | OrgFarm EPIC | Express Logistics and Transport | Express Logistics Portable Truck Generators | Value Proposition | Q1-2015 | $80,000.00 | $40,000.00 | 50% |
| Subtotal | | | | | | | | | |
| 4/1/2025 (1) | - | OrgFarm EPIC | Express Logistics and Transport | Express Logistics SLA | Perception Analysis | Q1-2015 | $120,000.00 | $84,000.00 | 70% |
| Subtotal | | | | | | | | | |
| 4/2/2025 (1) | - | OrgFarm EPIC | Express Logistics and Transport | Express Logistics Standby Generator | Closed Won | Q1-2015 | $220,000.00 | $220,000.00 | 100% |
| Subtotal | | | | | | | | | |
| 4/3/2025 (1) | - | OrgFarm EPIC | University of Arizona | University of AZ Installations | Proposal/Price Quote | Q1-2015 | $100,000.00 | $75,000.00 | 75% |

## Explanation of Screenshot:

The screenshot displays a custom Salesforce report breaking down open opportunities by sales stage. The **funnel chart** visually depicts deal progression and drop-offs, while the **data table** quantifies how many deals exist at each stage and their cumulative value. This report is useful for sales forecasting and prioritizing high-value deals nearing the close date.

# Sales Dashboard

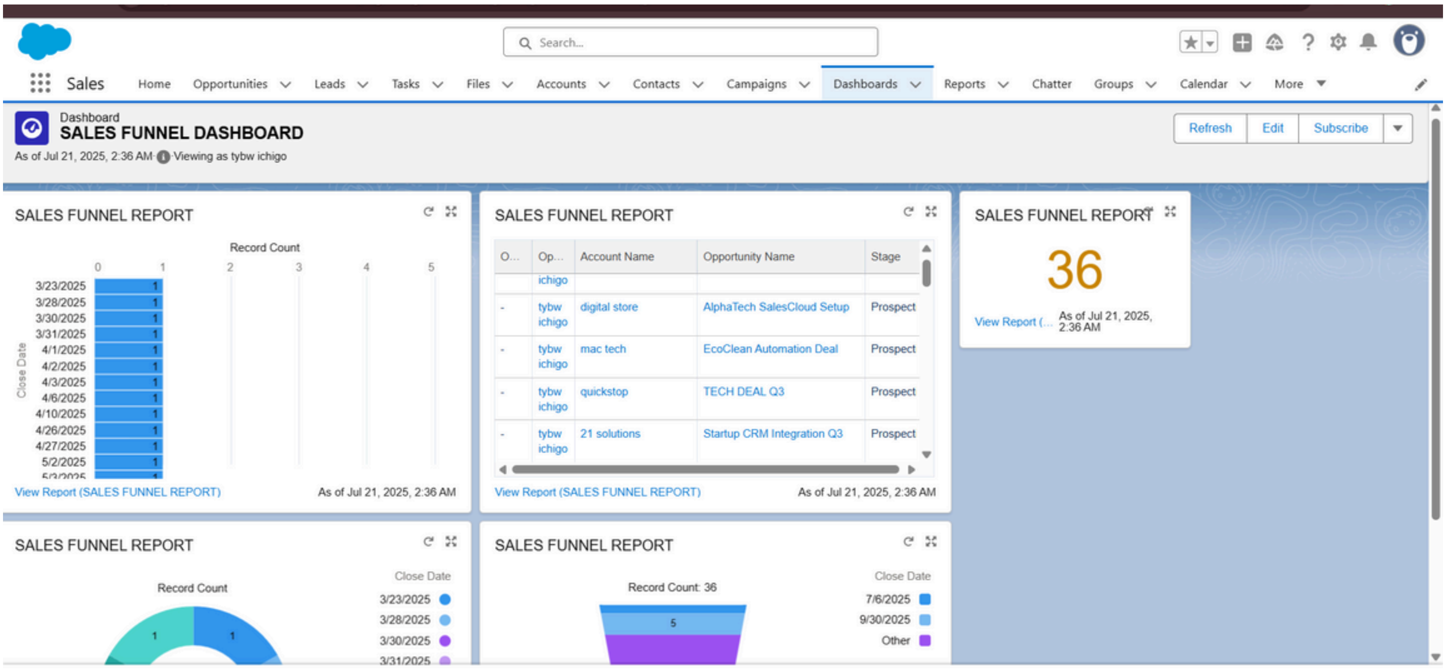
## Objective of This Step:

To build a centralized, real-time dashboard that displays key sales metrics and visuals using Salesforce's built-in dashboard tools. Dashboards allow stakeholders to monitor team performance and sales pipeline health at a glance.

## What Was Done:

- Created a custom **Sales Performance Dashboard** in Salesforce.
- Added key visual components such as:
  - **Funnel Chart:** Opportunities by Stage
  - **Bar Chart:** Opportunities by Lead Source
  - **Metric Widgets:** Total Open Pipeline Value, Average Deal Size, Win Rate
  - **Pie Chart:** Closed Won vs. Closed Lost Opportunities
- Arranged visuals for clarity, grouping by lead generation insights and deal progression.

## Screenshot:




## Explanation of Screenshot:

This screenshot shows a real-time sales dashboard summarizing pipeline activity. The visual layout includes a **funnel** for opportunity flow, **bar and pie charts** for distribution insights, and **metrics** for overall sales performance. Dashboards like this provide actionable insights for sales managers, allowing data-driven prioritization and strategic forecasting.

## Project Overview:

This Salesforce CRM portfolio project reflects a full simulation of a professional sales process within one of the world's leading customer relationship management platforms. Over the course of five structured sections, the project walked through creating and managing leads, converting those leads into qualified opportunities, building analytical reports, and presenting key insights through a real-time sales dashboard. The hands-on experience mirrors real industry workflows used by marketing, sales, and operations teams.

## Skills Demonstrated:

- Lead Lifecycle Management:
  Gained practical understanding of how leads are captured, nurtured, and qualified within a CRM environment. Demonstrated how segmentation, lead status tracking, and contact management are used in high-performing sales teams.
- Opportunity Tracking & Pipeline Management:
  Developed the skill to create and track opportunities through customized stages. Demonstrated how Salesforce can be used to visualize, prioritize, and move deals through the sales funnel in alignment with sales goals.
- Data Analysis & Reporting:
  Built tailored reports using Salesforce's reporting features to track sales activity and performance. Highlighted how to measure KPIs such as win rates, deal size, and pipeline velocity.
- Dashboard Development & Visualization:
  Created a live dashboard integrating multiple visual data components. Showed how to provide decision-makers with quick, accessible insights to support forecasting, team management, and performance review.

## Strategic Value of the Project:

This project shows more than just technical CRM ability—it demonstrates strategic thinking and a strong understanding of the business implications of using Salesforce effectively:

- It simulates how companies use Salesforce to scale their sales process, increase conversion rates, and make data-driven decisions.
- The ability to build custom dashboards and interpret sales data aligns closely with Sales Operations Analyst, CRM Specialist, and Business Intelligence roles.
- It reflects your readiness to step into roles that demand cross-functional collaboration, customer journey mapping, and system optimization.

## Key Learnings:

- CRM is not just a tool—it's the central nervous system of a modern sales team.
- Visualizing data empowers sales managers to forecast revenue, identify drop-offs, and re-allocate resources effectively.
- Managing a pipeline is about timing, prioritization, and communication—Salesforce helps align these.