# Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

*[Your Name]*

# Part A Overview

**1** **Task 1:** Structure and Download Lead Data

**2** **Task 2:** Import Data in Salesforce

**3** **Task 3:** Create a List View and Filter for Leads

**4** **Task 4:** Associate Leads With a Campaign

**5** **Task 5:** Business Case Analysis

# Part A, Task 1: Structure and Download Lead Data

*After you've finished cleaning up the data and fixing all the errors in the spreadsheet data, insert a screenshot of all the lead data in your spreadsheet. Make sure you can see all the columns, including:*

- First Name
- Last Name
- Title
- Company
- Phone Number
- Email

*Replace the text box on the following slide with your screenshot*

PATHSTREAM

# Part A, Task 1: Screenshot

PATHSTREAM

Independent Project, Part A: Inbound Leads   in 🗀 My Drive

File   Edit   View   Insert   Format   Data   Tools   Extensions   Help

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C7   fx   Digital Marketing Manager

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | **First Name** | **Last Name** | **Title** | **Company** | **Phone Number** | **Email** |
| 2 | Thandiwe | Bandi | Social Media Marketer | Jazz Mystics Music Group | (441) 709-5905 | tbandi@jazzmystics.com |
| 3 | Denise | Choi | Director of Marketing Operations | Yaloo Search | (824) 617-6033 | dchoi@yalooyoyos.com |
| 4 | Chidi | Seydou | Social Media Intern | Attitude Talent Agency | (851) 923-3824 | chidiseydou415@attitude.com |
| 5 | Manisha | Visvanathan | Senior Growth Marketing Manager | Growlers and Stuff Craft Brewery | (326) 598-4003 | manishavis@growlers.com |
| 6 | Janet | Steinberg | Social Media Marketing Manager | Costumez Warehouse | (361) 568-7836 | janet.steinberg@costumez.com |
| 7 | Lawrence | Ramirez | Digital Marketing Manager | Collection Consulting Group | (346) 269-7771 | lawrence@collectionconsulting.com |
| 8 | Martha | Newman | Social Media Marketing Manager | FoodStars.Org | (323) 784-7927 | martha.newman@foodstars.org |
| 9 | Kiran | Stefcia | Director of Marketing | Kiran and Co Marketers | (347) 810-3329 | kiranstefcia@marketersco.com |
| 10 | Jay | Farley | Content Marketing Manager | Random Wishes Builders | (735) 716-5095 | jayfarley1985@wishes.com |
| 11 | Danika | Marcia | Junior Marketing Associate | Ted's Toy Shop | (492) 449-5646 | danika@tedstoys.com |
| 12 | | | | | | |
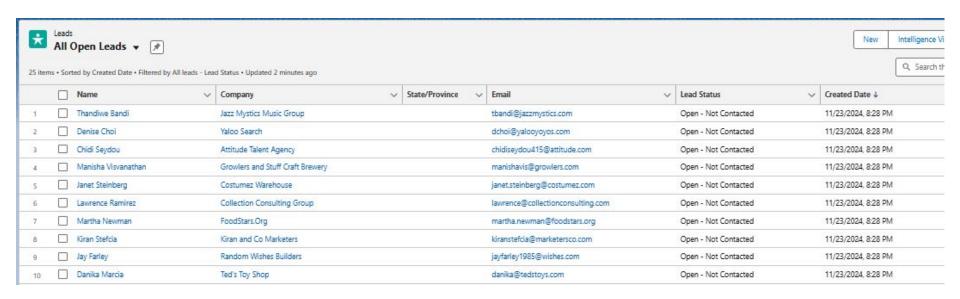
# Part A, Task 2: Import Data in Salesforce

*Navigate to the App launcher and open the Sales app to the Leads tab. Organize the lead list so that the most recently created leads appear first. Then, insert a screenshot to show all 10 of the leads that you've just uploaded on the following slide.*

# Part A, Task 2:  Screenshot

PATHSTREAM

**Leads**
**All Open Leads** ▼

New | Intelligence Vi

25 items • Sorted by Created Date • Filtered by All leads - Lead Status • Updated 2 minutes ago

Q Search th

| | | Name | Company | State/Province | Email | Lead Status | Created Date ↓ |
|---|---|---|---|---|---|---|---|
| 1 | ☐ | Thandiwe Bandi | Jazz Mystics Music Group | | tbandi@jazzmystics.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 2 | ☐ | Denise Choi | Yaloo Search | | dchoi@yalooyoyos.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 3 | ☐ | Chidi Seydou | Attitude Talent Agency | | chidiseydou415@attitude.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 4 | ☐ | Manisha Visvanathan | Growlers and Stuff Craft Brewery | | manishavis@growlers.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 5 | ☐ | Janet Steinberg | Costumez Warehouse | | janet.steinberg@costumez.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 6 | ☐ | Lawrence Ramirez | Collection Consulting Group | | lawrence@collectionconsulting.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 7 | ☐ | Martha Newman | FoodStars.Org | | martha.newman@foodstars.org | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 8 | ☐ | Kiran Stefcia | Kiran and Co Marketers | | kiranstefcia@marketersco.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 9 | ☐ | Jay Farley | Random Wishes Builders | | jayfarley1985@wishes.com | Open - Not Contacted | 11/23/2024, 8:28 PM |
| 10 | ☐ | Danika Marcia | Ted's Toy Shop | | danika@tedstoys.com | Open - Not Contacted | 11/23/2024, 8:28 PM |

# Part A, Task 3: Create a List View and Filter for Leads

PATHSTREAM

*Insert screenshots of the Demo leads list view for each of the steps below in the following slides. Your screenshots should show that you've:*

**Step 1:** Created a clone of the leads view titled "Demo Leads"

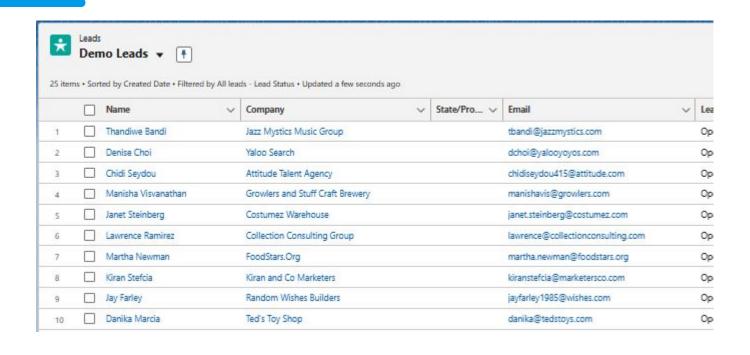**Step 2:** Added a filter to only be able to see leads that are open and haven't been contacted

**Step 3:** Made sure all noted fields are visible and in the right order
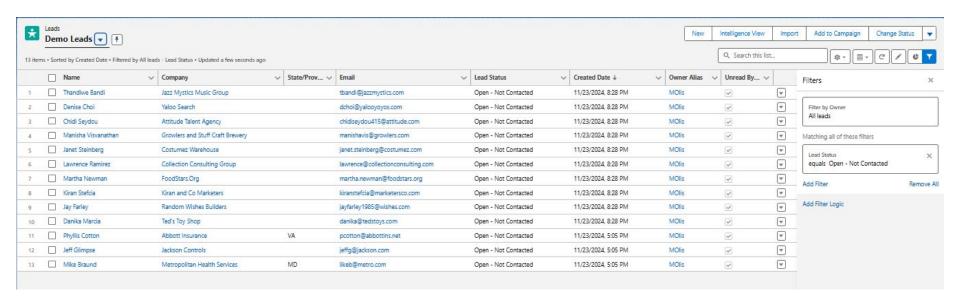
**Step 4:** Created a separate tab for the leads.

# Part A, Task 3: Step 1 screenshot



Leads
**Demo Leads** ▼  📌

25 items • Sorted by Created Date • Filtered by All leads - Lead Status • Updated a few seconds ago

| | | Name ▼ | Company ▼ | State/Pro... ▼ | Email ▼ | Lea |
|---|---|---|---|---|---|---|
| 1 | ☐ | Thandiwe Bandi | Jazz Mystics Music Group | | tbandi@jazzmystics.com | Op |
| 2 | ☐ | Denise Choi | Yaloo Search | | dchoi@yalooyoyos.com | Op |
| 3 | ☐ | Chidi Seydou | Attitude Talent Agency | | chidiseydou415@attitude.com | Op |
| 4 | ☐ | Manisha Visvanathan | Growlers and Stuff Craft Brewery | | manishavis@growlers.com | Op |
| 5 | ☐ | Janet Steinberg | Costumez Warehouse | | janet.steinberg@costumez.com | Op |
| 6 | ☐ | Lawrence Ramirez | Collection Consulting Group | | lawrence@collectionconsulting.com | Op |
| 7 | ☐ | Martha Newman | FoodStars.Org | | martha.newman@foodstars.org | Op |
| 8 | ☐ | Kiran Stefcia | Kiran and Co Marketers | | kiranstefcia@marketersco.com | Op |
| 9 | ☐ | Jay Farley | Random Wishes Builders | | jayfarley1985@wishes.com | Op |
| 10 | ☐ | Danika Marcia | Ted's Toy Shop | | danika@tedstoys.com | Op |

# Part A, Task 3:  Step 2 screenshot

PATHSTREAM

# Part A, Task 3: Step 3 screenshot



**Leads**
**Demo Leads** ▼

13 items • Sorted by Name • Filtered by All leads - Lead Status • Updated a few seconds ago

New | Intelligence View | Import | Add t... | List View Controls | ...ange Status | ▼

Search this list...

| | Name ↑ | Lead Status | Title | Company | Phone | Email | Created Date |
|---|---|---|---|---|---|---|---|
| 1 | Chidi Seydou | Open - Not Contacted | Social Media Intern | Attitude Talent Agency | (851) 923-3824 | chidiseydou415@attitude.com | 11/23/2024, 8:28 PM |
| 2 | Danika Marcia | Open - Not Contacted | Junior Marketing Associate | Ted's Toy Shop | (492) 449-5646 | danika@tedstoys.com | 11/23/2024, 8:28 PM |
| 3 | Denise Choi | Open - Not Contacted | Director of Marketing Operations | Yaloo Search | (824) 617-6033 | dchoi@yalooyoyos.com | 11/23/2024, 8:28 PM |
| 4 | Janet Steinberg | Open - Not Contacted | Social Media Marketing Manager | Costumez Warehouse | (361) 568-7836 | janet.steinberg@costumez.com | 11/23/2024, 8:28 PM |
| 5 | Jay Farley | Open - Not Contacted | Content Marketing Manager | Random Wishes Builders | (735) 716-5095 | jayfarley1985@wishes.com | 11/23/2024, 8:28 PM |
| 6 | Jeff Glimpse | Open - Not Contacted | SVP, Procurement | Jackson Controls | 886-2-25474189 | jeffg@jackson.com | 11/23/2024, 5:05 PM |
| 7 | Kiran Stefcia | Open - Not Contacted | Director of Marketing | Kiran and Co Marketers | (347) 810-3329 | kiranstefcia@marketersco.com | 11/23/2024, 8:28 PM |
| 8 | Lawrence Ramirez | Open - Not Contacted | Digital Marketing Manager | Collection Consulting Group | (346) 269-7771 | lawrence@collectionconsulting.com | 11/23/2024, 8:28 PM |
| 9 | Manisha Visvanathan | Open - Not Contacted | Senior Growth Marketing Manager | Growlers and Stuff Craft Brewery | (326) 598-4003 | manishavis@growlers.com | 11/23/2024, 8:28 PM |
| 10 | Martha Newman | Open - Not Contacted | Social Media Marketing Manager | FoodStars.Org | (323) 784-7927 | martha.newman@foodstars.org | 11/23/2024, 8:28 PM |
| 11 | Mike Braund | Open - Not Contacted | VP, Technology | Metropolitan Health Services | (410) 381-2334 | likeb@metro.com | 11/23/2024, 5:05 PM |
| 12 | Phyllis Cotton | Open - Not Contacted | CFO | Abbott Insurance | (703) 757-1000 | pcotton@abbottins.net | 11/23/2024, 5:05 PM |
| 13 | Thandiwe Bandi | Open - Not Contacted | Social Media Marketer | Jazz Mystics Music Group | (441) 709-5905 | tbandi@jazzmystics.com | 11/23/2024, 8:28 PM |

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# Part A, Task 3: Step 4 screenshot

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# Part A, Task 4: Associate Your Leads with a Campaign

*After you've associated all 10 leads with the new campaign, navigate to the Campaigns tab of your Sales app. Take a screenshot of the Campaign Members page of the Social Media Conference Email that shows all the leads you've just associated with this campaign, and insert it on the next slide.*

PATHSTREAM

# Part A, Task 4: Screenshot

PATHSTREAM

Campaigns > Social Media Conference Email Campaign
## Campaign Members

10 items • Sorted by Last Modified Date • Updated 2 minutes ago

| | Type | Status | Name | Title | First Name | Last Name | Company | |
|---|---|---|---|---|---|---|---|---|
| 1 | Lead | Responded | Thandiwe Bandi | Social Media Marketer | Thandiwe | Bandi | Jazz Mystics Music Group | |
| 2 | Lead | Responded | Denise Choi | Director of Marketing Operations | Denise | Choi | Yaloo Search | |
| 3 | Lead | Responded | Chidi Seydou | Social Media Intern | Chidi | Seydou | Attitude Talent Agency | |
| 4 | Lead | Responded | Manisha Visvanathan | Senior Growth Marketing Manager | Manisha | Visvanathan | Growlers and Stuff Craft Brewery | |
| 5 | Lead | Responded | Janet Steinberg | Social Media Marketing Manager | Janet | Steinberg | Costumez Warehouse | |
| 6 | Lead | Responded | Lawrence Ramirez | Digital Marketing Manager | Lawrence | Ramirez | Collection Consulting Group | |
| 7 | Lead | Responded | Martha Newman | Social Media Marketing Manager | Martha | Newman | FoodStars.Org | |
| 8 | Lead | Responded | Kiran Stefcia | Director of Marketing | Kiran | Stefcia | Kiran and Co Marketers | |
| 9 | Lead | Responded | Jay Farley | Content Marketing Manager | Jay | Farley | Random Wishes Builders | |
| 10 | Lead | Responded | Danika Marcia | Junior Marketing Associate | Danika | Marcia | Ted's Toy Shop | |

Add Leads | Add Contacts | Update Status | Remove | Manage Campaign Members

# Part A, Task 5: Business Case Analysis

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*In a short paragraph on the following slide, describe how importing and organizing data in Salesforce would help the sales and marketing teams SimplySocial. In your description, include:*

- The overall purpose of importing and organizing data.

- The major steps you took to import and organize data.

- How the sales and marketing teams at SimplySocial would benefit from imported and organized lead data in Salesforce.

# Part A, Task 5: Written response

*Importing and organizing data in Salesforce ensures that the sales and marketing teams at SimplySocial have accurate, up-to-date, and actionable insights into their leads and customers. The process involved gathering lead data from various sources, cleaning it to remove duplicates and errors, mapping it to Salesforce fields for consistency, and then importing it using Salesforce's data import tools. Finally, the data was segmented and organized into categories such as lead status, source, and priority to streamline workflows. This enables the sales team to focus on high-priority leads and close deals faster, while the marketing team can create targeted campaigns and track engagement effectively, ultimately driving better collaboration and revenue growth.*

# You have reached the end of Part A!



*Make sure your screenshots are embedded in the appropriate slides before moving on. Note that you will complete Part B of this Independent Project at the end of Week 4.*

# Part B Overview

**1**   **Task 1:** Filter Leads to Decide Who to Approach

**2**   **Task 2:** Initiate Contact With Leads via Email

**3**   **Task 3:** Continue Contact With Leads via Calls

**4**   **Task 4:** Mark Leads as Hot

**5**   **Task 5:** Create Email Templates

**6**   **Task 6:** Convert Leads
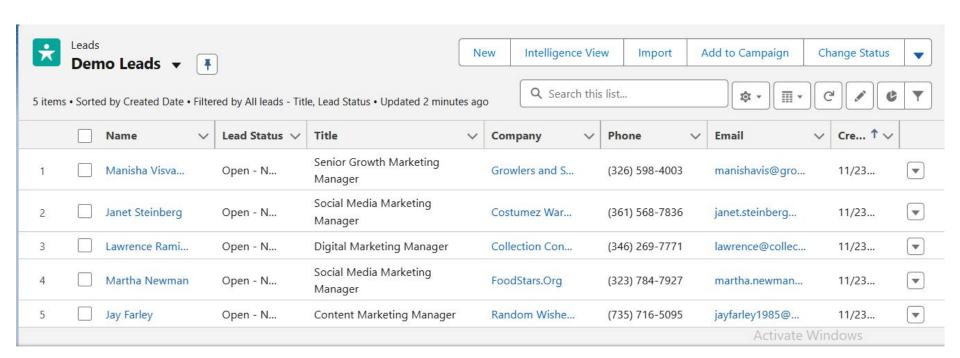
# Part B Task 1: Filter Leads

*After creating the necessary filter for the Demo Leads list, insert a screenshot showing the list with the leads filtered by manager. Make sure to adjust the size of the Title column so that all the leads' titles can be read.*

# Part B Task 1: Screenshot

# Part B Task 2:  Initiate Contact with Leads via Email

PATHSTREAM
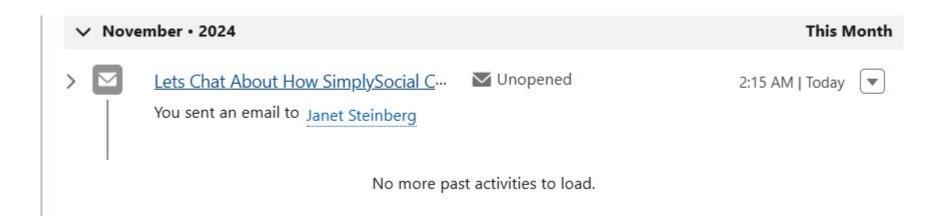
*Insert screenshots to show that you've emailed Janet, Thandiwe, Martha, and Denise. Your screenshots should display the past activities log for each of these leads showing that you have sent them an email. The past activities log is at the bottom of the Activity tab.*

**Step 1:** Past activity for **Janet Steinberg** showing you've emailed them.

**Step 2:** Past activity for **Thandiwe Bandi** showing you've emailed them.

**Step 3:** Past activity for **Martha Newman** showing you've emailed them.

**Step 4:** Past activity for **Denise Choi** showing you've emailed them.
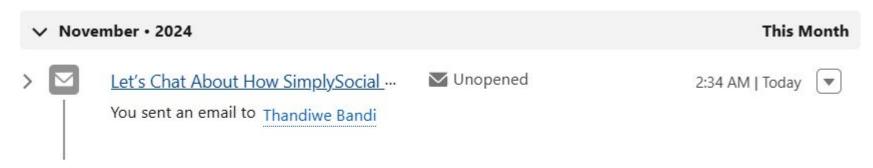
# Part B Task 2: Step 1 screenshot

| ∨ November • 2024 | This Month |
|---|---|

> ✉ Lets Chat About How SimplySocial C... ✉ Unopened                    2:15 AM | Today ▾

You sent an email to Janet Steinberg

No more past activities to load.

# Part B Task 2: Step 2 screenshot

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| ∨  November • 2024 | | This Month |
|---|---|---|

> ✉  **Let's Chat About How SimplySocial** …    ✉ Unopened      2:34 AM | Today ▾

You sent an email to   Thandiwe Bandi

No more past activities to load.

# Part B Task 2: Step 3 screenshot

PATHSTREAM

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**November • 2024**                                             **This Month**

> ✉  Let's Chat About How SimplySocial ...     ✉ Unopened          2:37 AM | Today  ▼

You sent an email to  Martha Newman

No more past activities to load.

PATHSTREAM

| ∨ November • 2024 | This Month |
|---|---|

⟩ ✉️ Let's Chat About How SimplySocial ... ✉️ Unopened       2:36 AM | Today ▾

You sent an email to  Denise Choi

No more past activities to load.

PATHSTREAM

*Insert screenshots for the calls with the four leads. Make sure your screenshots display the past activity logs for each of these leads showing that calls, notes, tasks, and/or emails have been logged with each of them. The past activities log is at the bottom of the Activity tab.*

**Step 1:** Past activity for **Janet Steinberg** showing logged activities.
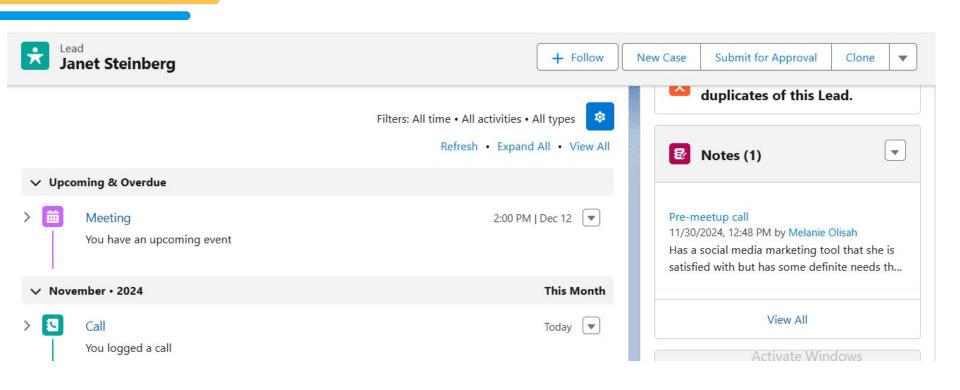
**Step 2:** Past activity for **Thandiwe Bandi** showing logged activities.

**Step 3:** Past activity for **Martha Newman** showing logged activities.

**Step 4:** Past activity for **Denise Choi** showing logged activities.
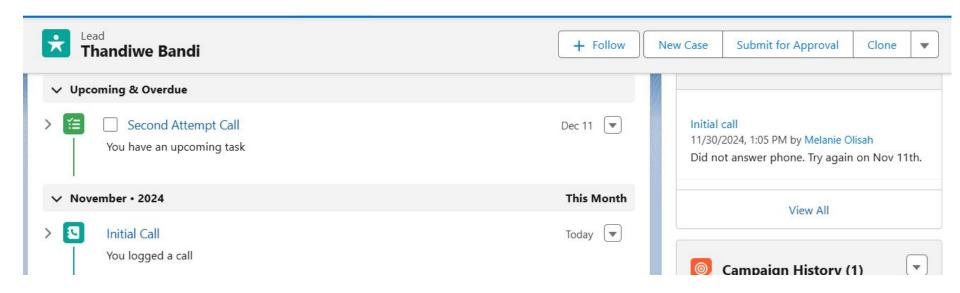
# Part B Task 3: Step 2 screenshot
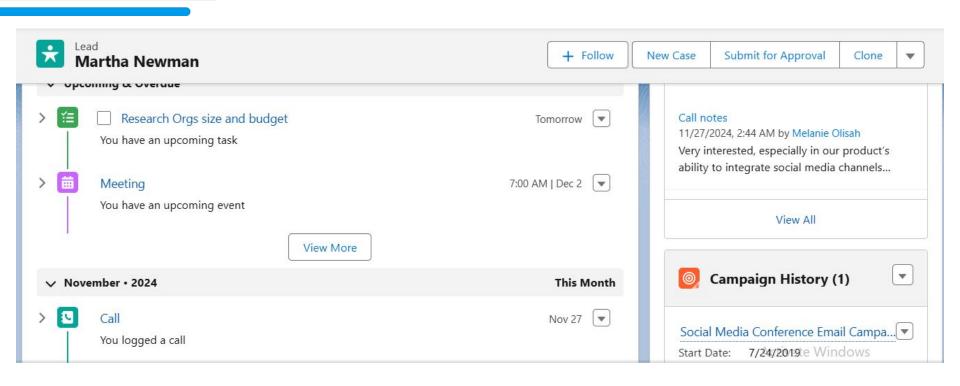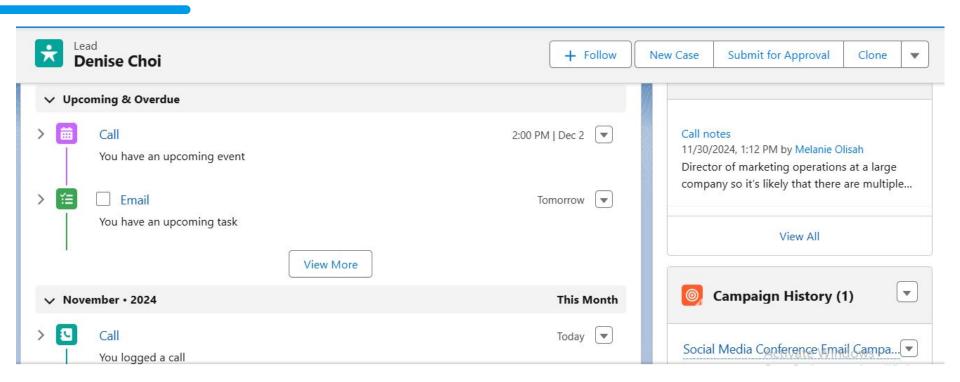
# Part B Task 3: Step 3 screenshot

# Part B Task 3: Step 4 screenshot
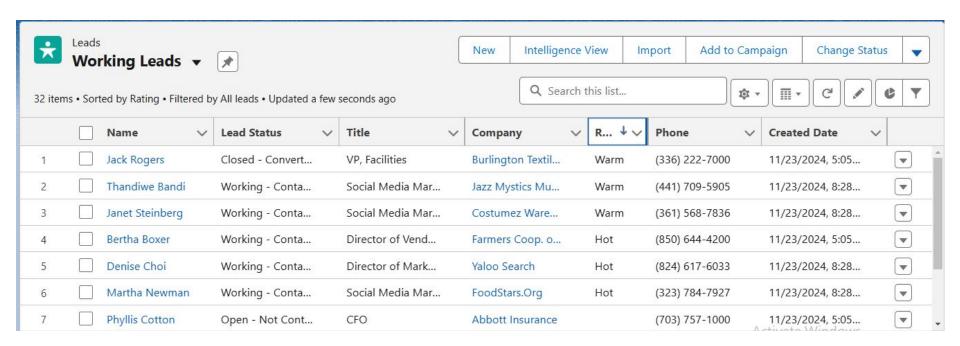
# Part B Task 4: Mark Leads as Hot

*Insert a screenshot showing the leads marked as hot and warm on the leads list. Make sure that "Rating" is a displayed field on the leads list and that you have organized the list so that hot and warm leads appear first. The leads that appear marked as hot and warm may include leads that pre-existed in Salesforce before you imported your leads.*

# Part B Task 4: Screenshot
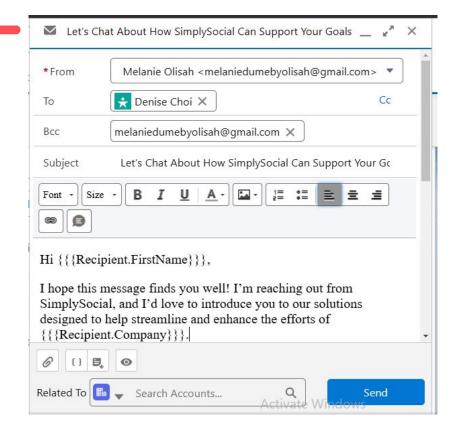
# Part B Task 5: Create Email Templates

*Insert a screenshot showing an email that can be sent to either Martha Newsom or Denise Choi. The email should include a merge field for the recipient's first name.*

# Part B Task 5: Screenshot

# Part B Task 6: Convert Leads

*Insert screenshots on the following slides to show the updates you've made to each lead according to the directions below:*

**Step 1: Screenshot Thandiwe Bandi's lead record page.**
- *Make sure your screenshot shows the lead's name, the note you created, and that their lead status in the lead path is updated to Closed — Not Converted.*

**Step 2: Screenshot Janet Steinberg's lead record page.**
- *Make sure your screenshot shows the lead's name, the note you created, and that their lead status in the lead path is updated to Closed — Not Converted.*

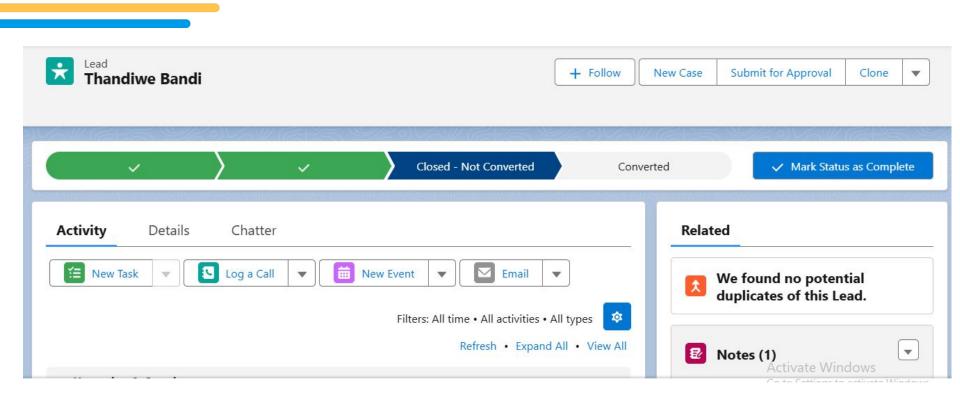**Step 3: Screenshot the popup after converting Martha Newman.**
- *This is the popup labeled "Your lead has been converted". Make sure that the screenshot shows the Account, Contact, and Opportunity that have been created.*

**Step 4: Screenshot the popup after converting Denise Choi.**
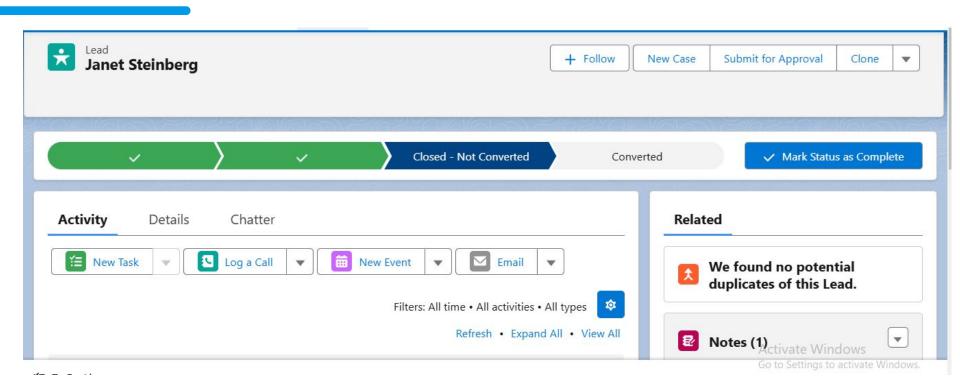- *Make sure to show that an Account, Contact, and Opportunity have been created.*
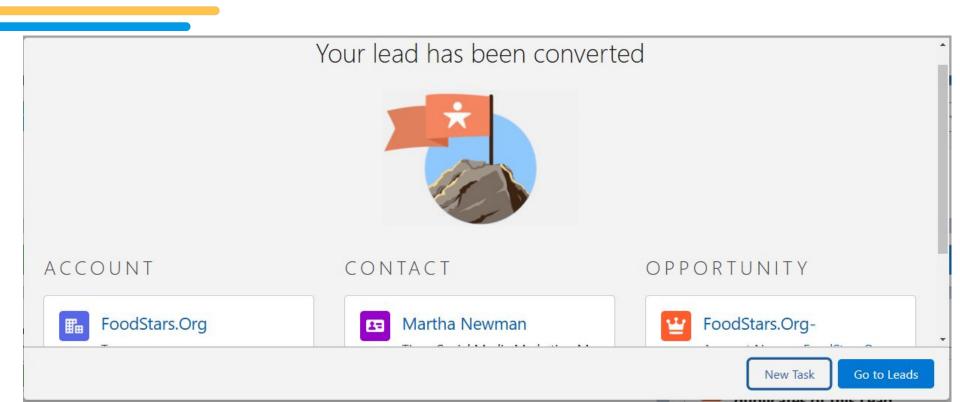
# Part B Task 6: Step 1 screenshot

PATHSTREAM

Your lead has been converted

ACCOUNT

FoodStars.Org

CONTACT

Martha Newman

OPPORTUNITY

FoodStars.Org-

New Task    Go to Leads

# Part B Task 6:  Step 4 screenshot

## ACCOUNT

**Yaloo Search**

Type:
Phone:   (824) 617-6033
Website:
Account Owner:   Melanie Olisah
Account Site:

## CONTACT

**Denise Choi**

Ti...   Director of Marketing Ope...
Account Name:   Yaloo Search
Phone:   (824) 617-6033
Email:   dchoi@yalooyoyos.com
Mobile:

## OPPORTUNITY

**Yaloo Search-**

Account Name:   Yaloo Search
Close Date:   12/31/2024
Amount:
Opportunity Ow...   Melanie Oli...

New Task     Go to Leads

# You have reached the end of Part B!

*This is the end of this Independent Project! Great job completing all these tasks in Salesforce. Make sure you download a copy for your portfolio.*