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CLEAR CONCISE CONSULTING

Salesforce Portfolio Project: Basic CRM Admin for Clear Concise Consulting

Project Level: Beginner

Estimated Time: 3-5 hours

Scenario: Clear Concise Consulting (CCC) helps individuals and organizations master Salesforce. As CCC grows, they need to implement a basic process within their own Salesforce org to manage incoming leads for their consulting and training services and track potential deals through a simple sales pipeline. As the newly hired Salesforce Admin for CCC, your first task is to set up this foundational sales process.

Goal: Configure core Sales Cloud features (Leads and Opportunities) to establish a basic sales pipeline for CCC, automate a simple follow-up task, and create reports/dashboards for visibility.

Business Requirements:

1. **Lead Capture:** Capture potential clients (individuals seeking training, organizations needing consulting) as Leads.
2. **Lead Qualification:** Qualify leads based on their needs and potential fit for CCC's services.
3. **Opportunity Management:** Convert qualified Leads into Accounts, Contacts, and Opportunities.
4. **Sales Pipeline Stages:** Track Opportunities through distinct stages: Prospecting, Needs Analysis, Proposal/Price Quote, Negotiation/Review, Closed Won, Closed Lost.
5. **Service Differentiation:** Differentiate between Opportunities for "Consulting Services" and "Training Services".
6. **Automated Follow-up:** When an Opportunity is marked as "Closed Won", automatically create a follow-up Task for the Opportunity Owner to initiate onboarding.
7. **Pipeline Reporting:** Provide basic reporting on the current sales pipeline, including the number of Opportunities at each stage and conversion rates.
8. **Dashboard Visibility:** Create a simple dashboard displaying key pipeline metrics.

Deliverables:

1. Configured Lead object with relevant fields and statuses.
2. Configured Account, Contact, and Opportunity objects.
3. Two Opportunity Record Types: "Consulting Services" and "Training Services".

4. Customized Page Layouts for each Opportunity Record Type.
5. Sales Path configured on Opportunities reflecting the defined stages.
6. A Flow that automatically creates a Task upon Opportunity Closure (Closed Won).
7. At least two Reports:
   - Opportunity Pipeline by Stage
   - Lead Conversion Rate (Optional, if tracking Lead Source)
8. A Dashboard containing components displaying the report data.
9. (Optional) Basic user setup for a sales user profile.

Learning Objectives:

- Understand and configure the Lead conversion process.
- Create and manage Record Types and Page Layouts for Opportunities.
- Implement Sales Path to guide users through sales stages.
- Build a record-triggered Flow for basic automation.
- Create basic Salesforce Reports and Dashboards.
- Apply core Salesforce Admin skills in a practical business context.