CRM Lightning Cheatsheet











GENERATE

MORE LEADS

- Capture leads through a variety of channels, including your website, purchased lists, events, and social mentions
- Add those leads to Salesforce

CONVERT

MORE LEADS

- Establish a lead qualification process to make sure all sales reps use the same consistent methodology
- Use Sales Path to guide sales reps through your sales process

CLOSE

MORE DEALS

- Close deals faster with the opportunity workspace, a productive user experience where sales reps can use the composer to make quick updates, get contextual coaching with sales path, and see details on related records on hover with quick view
- Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle

Key terms and concepts

CRM

Boost your success with Salesforce Customer Relationship Management (CRM), which allows you to manage relationships with your customers and prospects and track all of your interactions.

SEARCH

Make searching data easy with powerful search features, including filtering, recent items, and customizable search results layouts.

ACCOUNTS

Accounts are companies, entities, or organizations you do business with. Accounts can be businesses or individuals. Use accounts to track important information, including name, address, phone number, and related information like opportunities, activities, cases, notes, and more.

CONTACTS

Contacts are the people who work at or are associated to accounts. Using contacts in Salesforce, you can track key details such as phone numbers, addresses, titles, and more. You can also indicate a contact's role in a particular opportunity, such as decision maker or influencer.

HOME

An intelligent home page helps you sell smarter. Access a performance chart, account insights, top deals, and an assistant which helps you focus on important tasks each day.

NOTES

Enhanced notes tool, with autosave, rich text capabilities, and the ability to relate a note to multiple records in Salesforce.

BOARD

Visualization tool showing opportunities organized by stage, with the ability to drag and drop to move deals through the sales cycle.

LEADS

Leads are prospects or potential opportunities, such as a person you met at a conference who expressed interest, or someone who filled out a form on your company's website. Use leads to move prospects through stages to qualification, guided by the lead Sales Path.

OPPORTUNITIES

Opportunities are leads you've qualified to buy. Use opportunities to manage your pending deals in the pipeline, with Sales Path guidance at each stage in the sales process.

TASKS

Tasks are your to-do items which require follow-up. They can be assigned to you or someone else, and are related to leads, contacts, accounts, or other records.

ACTIVITIES

Activities are where you log your calls and activities with prospects and customers, allowing you to keep a complete history of your interactions.

EVENTS

Events are meetings you've arranged with your prospects and customers, all tracked in Salesforce.

REPORTS

Summarize and analyze your data with reports, which you can display, share, collaborate on, export, and print. Use standard reports or create custom reports. Using a modern, sleek user interface, you can subtotal and add easy filters to see exactly what you need.

DASHBOARDS

Access visualizations of your metrics and key performance indicators, through sets of charts and graphs. Using a modern, sleek user interface, you can visualize multiple reports on a single dashboard, using pie charts, bar charts, and more, all in a flexible layout.

WEBSITE & SOCIAL

- Organic web traffic
- Email responses
- Social mentions

WEB-TO-LEAD FORM

- Free trial
- · "Contact me" request
- Event registration

LEAD CAPTURE



MY OPEN LEADS



DUPLICATE LEAD?

INBOUND CALLS

- · Referrals · Google Maps
- · Search first, then create a new lead in Salesforce

CREATE NEW LEADS

- Set up auto-response emails: "Thank you for your interest"
- · Your trial information
- Event details
- Set up lead assignment rules
 - Geography
 - Company size
 - Product of interest

Set up different views to manage your leads. For example, today's leads or leads sorted by lead type. Easily visualize data on the fly with list view charts.

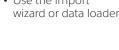
Set up duplicate management to prevent duplicates at the point of entry. Manually merge legacy records.

LISTS

- · Purchased list
- · Trade show
- · Legacy data

IMPORT DATA

· Use the import





ARCHIVE YOUR DEAD LEADS

Use email marketing and call downs to re-market to unqualified or no-contact leads

WORKING LEADS

OUALIFIED?



PRESENTATION, PROPOSAL, NEGOTIATION



WON

Salesforce gives your

When you're working a lead, set up a series of tasks based on the type of lead.

For example:

Day 1: Personalize mass email

Day 2: Call/ voicemail

Day 3: Call/ voicemail

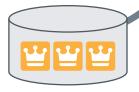
Day 4: Personalize mass email

Create a set of qualification questions, such as current situation, product of interest, timeframe, kev decision makers.

If the lead is qualified, convert it to a contact, with an associated opportunity and account.

Monitor your opportunities reports and dashboards to keep track of top deals and prioritize your time. Visualize and manage your deals using the Board.

Use Sales Path to support your sales processes, making it easier to monitor your pipeline and provide contextual guidance to sales reps.



entire company a 360-degree view of your customers and facilitates collaboration across your organization, helping you build strong, lasting customer relationships.

ARCHIVE YOUR DEAD OPPORTUNITIES

Use email marketing and call downs to re-market to Closed Lost opportunities