

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand the business need and define requirements for building a Lead Management System in Salesforce.

Problem Statement: Most sales teams struggle to track, prioritize, and convert potential leads efficiently. A Salesforce-based Lead Management System helps automate the process of capturing leads, assigning them to sales agents, tracking interactions, and improving conversion rates.

1. Requirement Gathering

Objective: Identify features needed to manage leads effectively.

Stakeholders Interviewed: Sales Manager, Sales Agents, Marketing Team, Customer Support

Key Requirements Identified:

- Capture and store lead details (name, contact info, source).
- Assign leads automatically to sales agents.
- Track lead status (New, Contacted, Qualified, Converted).
- Prevent duplication of leads.
- Generate performance and conversion reports.
- Notify agents of new or high-priority leads.

2. Stakeholder Analysis

Stakeholder	Role	Responsibilities
Admin	System setup & user management	Configure objects, permissions, and workflows.
Sales Agents	Lead follow-up	Contact and update lead status.
Sales Manager	Approval & reporting	Monitor performance and approve qualified leads.
Marketing Team	Lead generation	Add and import new leads from campaigns.
Customer Support	After conversion	Handle post-sales communication.

3. Business Process Mapping

Lead generated (website/campaign) → Lead recorded in Salesforce → Lead assigned to Sales Agent → Agent follows up and updates status → If qualified → Converted to Opportunity/Account → Report generated for management

4. Industry-Specific Use Case Analysis

In the sales industry, leads come from multiple channels (ads, forms, referrals). Quick follow-up improves conversion chances. Team performance depends on tracking and automation.

System Needs: Centralized lead tracking, automatic notifications, task assignments, and conversion rate reports.

5. AppExchange Exploration

Researched Salesforce AppExchange for 'Lead Management' apps such as LeadSquared, Pardot, and Sales Cloud Lead Management. Although many tools exist, this project focuses on creating a custom, simplified Lead Management System using Salesforce's standard objects and automation tools.