

# Project Name:- Lead Management System for Salesforce

## Phase 1: Problem Understanding & Industry Analysis

### Goal

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

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### 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.

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### 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.
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### 2. Stakeholder Responsibilities

Stakeholder	Responsibilities
Admin	Manages setup, roles, data integrity
Sales Reps	Create/manage leads, update status, follow-up

Sales Manager	Monitors lead progress, approves opportunities, generates reports
Customer Service	Handles customer queries, identifies potential leads

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### 3. Business Process Mapping

#### Flow of Process:

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

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### 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 and task assignments.
  - Reports for conversion rates and lead sources.
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## 5. AppExchange Exploration

### Research:

Checked Salesforce **AppExchange** for “Lead Management” apps such as “LeadSquared”, “Pardot”, and “Sales Cloud Lead Management”.

### Conclusion:

Although many lead management tools exist, this project focuses on creating a **custom, simplified Lead Management System** using Salesforce’s standard objects and automation tools for better learning.