

Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

Leonor Duarte

15/11/2024



Part A Overview

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Task 1: Structure and Download Lead Data

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Task 2: Import Data in Salesforce

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Task 3: Create a List View and Filter for Leads

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Task 4: Associate Leads With a Campaign

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Task 5: Business Case Analysis

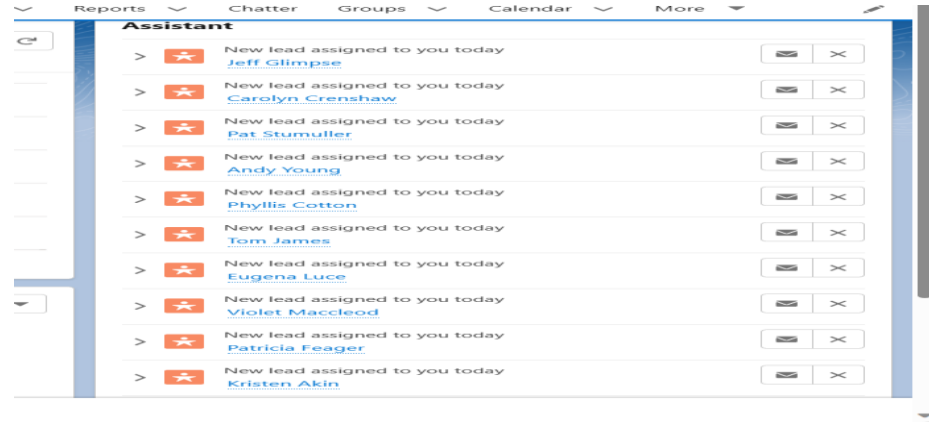
Part A, Task 1: Structure and Download Lead Data



C15 ▾ fx

	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@yaloooyoyos.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						
13						

Part A, Task 2: Import Data in Salesforce



The screenshot shows the Salesforce Assistant interface. At the top, there are navigation tabs: Reports, Chatter, Groups, Calendar, and More. Below these, the title 'Assistant' is displayed. The main content area lists ten new leads assigned to the user today. Each entry includes a star icon, a right-pointing arrow, the text 'New lead assigned to you today', the lead's name (a blue hyperlink), and two action buttons (one with a trash icon and one with an 'X' icon).

Assistant			
>	★	New lead assigned to you today Jeff Glimpse	[Trash] [X]
>	★	New lead assigned to you today Carolyn Crenshaw	[Trash] [X]
>	★	New lead assigned to you today Pat Stumuller	[Trash] [X]
>	★	New lead assigned to you today Andy Young	[Trash] [X]
>	★	New lead assigned to you today Phyllis Cotton	[Trash] [X]
>	★	New lead assigned to you today Tom James	[Trash] [X]
>	★	New lead assigned to you today Eugena Luce	[Trash] [X]
>	★	New lead assigned to you today Violet MacCleod	[Trash] [X]
>	★	New lead assigned to you today Patricia Feager	[Trash] [X]
>	★	New lead assigned to you today Kristen Akin	[Trash] [X]

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



Leads Demo Leads 1 Demo Leads was planned Import Add to Campaign

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

	Name	Company	Title	Email	Lead Status	Created Date
1	Brenda Beezer	Beezer Corp.	off Florida	brenda@bcorp.com	Working - Contacted	09/10/2023, 8:22 pm	SV	...
2	Betty Bat	American Banking Corp.	PA	bbat@americanbank.com	Working - Contacted	09/10/2023, 8:22 pm	SV	...
3	Brenda Michener	CashNet Inc.	IL	bmichener@cashnet.com	Working - Contacted	09/10/2023, 8:22 pm	SV	...
4	Chidi Seydiou	Attitude Talent Agency		chidi@attitudeagency.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
5	Danika Marica	Ted's Toy Shop		danika@tedstoyshop.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
6	David Monaro	Blurs Entertainment Co.		david@blurs.com	Working - Contacted	09/10/2023, 8:22 pm	SV	...
7	Denise Choi	Nolo Search		dchoi@nolosearch.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
8	Jean Stenberg	Customer Warehouse		jean.stenberg@customerwarehouse.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
9	Jay Farley	Random Wishes Builders		jayfarley1985@randomwishes.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
10	Jeff Glimpse	Jackson Controls		jeffg@jacksoncontrols.com	Open - Not Contacted	09/10/2023, 8:22 pm	SV	...
11	Kathy Snyder	TNR Corp.	CT	ksnyder@tnr.net	Working - Contacted	09/10/2023, 8:22 pm	SV	...
12	Kiran Sarkis	Kiran and Co Marketers		ksarkis@kiranandco.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
13	Kristen Allen	Andrews House Products		kallen@andrewshouse.com	Working - Contacted	09/10/2023, 8:22 pm	SV	...
14	Laurence Ramirez	Collection Consulting Gr.	VA	lramirez@collectionconsulting.com	Open - Not Contacted	09/10/2023, 8:22 pm	SV	...
15	Marisha Visswanath	Groveland and Stull Craft		marishav@grovelandandstull.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
16	Marsha Newman	FoodFarms Org.		marshanewman@foodfarms.org	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...

Leads Demo Leads 1 Demo Leads was planned Import Add to Campaign Change Status Change Owner

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

	Name	Company	Title	Email	Lead Status	Created Date
1	Chidi Seydiou	Attitude Talent Agency		chidi@attitudeagency.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
2	Danika Marica	Ted's Toy Shop		danika@tedstoyshop.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
3	Denise Choi	Nolo Search		dchoi@nolosearch.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
4	Jean Stenberg	Customer Warehouse		jean.stenberg@customerwarehouse.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
5	Jay Farley	Random Wishes Builders		jayfarley1985@randomwishes.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
6	Jeff Glimpse	Jackson Controls		jeffg@jacksoncontrols.com	Open - Not Contacted	09/10/2023, 8:22 pm	SV	...
7	Kiran Sarkis	Kiran and Co Marketers		ksarkis@kiranandco.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
8	Laurence Ramirez	Collection Consulting Gr.		lramirez@collectionconsulting.com	Open - Not Contacted	09/10/2023, 8:22 pm	SV	...
9	Marisha Visswanath	Groveland and Stull Craft		marishav@grovelandandstull.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
10	Marsha Newman	FoodFarms Org.		marshanewman@foodfarms.org	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
11	Mike Brandt	Metrologion Health Serv.	MD	mbrandt@metrologion.com	Open - Not Contacted	09/10/2023, 8:22 pm	SV	...
12	Phyllis Cotter	Altob Insurance	VA	pcotter@altobinsurance.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...
13	Thandrea Banti	Jazz Myotis Music Group		tbanti@jazzmyotis.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	...

Filters
Name to Owner: All leads
Matching all of these filters
Lead Status: Open - Not Contacted
Lead Status: Open - Not Contacted
Add Filter
Remove All
Add Filter Logic

Leads Demo Leads 1 List view updated Import Add to Campaign Change Status Change Owner

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

	Name	Lead Status	Title	Company	Mobile	Email
1	Chidi Seydiou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(815) 623-3624	chidi@attitudeagency.com
2	Danika Marica	Open - Not Contacted	Junior Marketing Assistant	Ted's Toy Shop	(802) 449-5446	danika@tedstoyshop.com
3	Denise Choi	Open - Not Contacted	Director of Marketing Operations	Nolo Search	(824) 617-4033	dchoi@nolosearch.com
4	Jean Stenberg	Open - Not Contacted	Social Media Marketing Manager	Customer Warehouse	(301) 568-7836	jean.stenberg@customerwarehouse.com
5	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Builders	(733) 716-5095	jayfarley1985@randomwishes.com
6	Jeff Glimpse	Open - Not Contacted	SVP, Procurement	Jackson Controls		jeffg@jacksoncontrols.com
7	Kiran Sarkis	Open - Not Contacted	Social Media Intern	Kiran and Co Marketers	(347) 810-3329	ksarkis@kiranandco.com
8	Laurence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting Group	(348) 289-7771	lramirez@collectionconsulting.com
9	Marisha Visswanath	Open - Not Contacted	Operations	Groveland and Stull Craft Brewery	(326) 788-4003	marishav@grovelandandstull.com
10	Marsha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodFarms Org.	(302) 784-7627	marshanewman@foodfarms.org
11	Mike Brandt	Open - Not Contacted	VP, Technology	Metrologion Health Services		mbrandt@metrologion.com
12	Phyllis Cotter	Open - Not Contacted	CEO	Altob Insurance		pcotter@altobinsurance.com
13	Thandrea Banti	Open - Not Contacted	Social Media Marketer	Jazz Myotis Music Group	(441) 709-5955	tbanti@jazzmyotis.com

Leads Demo Leads 1 Demo Leads was planned Import Add to Campaign Change Status Change Owner

25 items • Sorted by Name • Filtered by All leads • Lead Status • Updated 2 minutes ago

	Name	Lead Status	Title	Company	Mobile	Email
1	Chidi Seydiou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(815) 623-3624	chidi@attitudeagency.com
2	Danika Marica	Open - Not Contacted	Junior Marketing Assistant	Ted's Toy Shop	(802) 449-5446	danika@tedstoyshop.com
3	Denise Choi	Open - Not Contacted	Director of Marketing Operations	Nolo Search	(824) 617-4033	dchoi@nolosearch.com
4	Jean Stenberg	Open - Not Contacted	Social Media Marketing Manager	Customer Warehouse	(301) 568-7836	jean.stenberg@customerwarehouse.com
5	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Builders	(733) 716-5095	jayfarley1985@randomwishes.com
6	Jeff Glimpse	Open - Not Contacted	SVP, Procurement	Jackson Controls		jeffg@jacksoncontrols.com
7	Kiran Sarkis	Open - Not Contacted	Social Media Intern	Kiran and Co Marketers	(347) 810-3329	ksarkis@kiranandco.com
8	Laurence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting Group	(348) 289-7771	lramirez@collectionconsulting.com
9	Marisha Visswanath	Open - Not Contacted	Operations	Groveland and Stull Craft Brewery	(326) 788-4003	marishav@grovelandandstull.com
10	Marsha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodFarms Org.	(302) 784-7627	marshanewman@foodfarms.org
11	Mike Brandt	Open - Not Contacted	VP, Technology	Metrologion Health Services		mbrandt@metrologion.com
12	Phyllis Cotter	Open - Not Contacted	CEO	Altob Insurance		pcotter@altobinsurance.com
13	Thandrea Banti	Open - Not Contacted	Social Media Marketer	Jazz Myotis Music Group	(441) 709-5955	tbanti@jazzmyotis.com

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



*** Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter * Demo Leads | Leads X More

Campaigns > Social Media Conference Email Campaign

Campaign Members

13 items • Sorted by Last Modified Date • Updated a few seconds ago

Add Leads Add Contacts Update Status Remove Manage Campaign Members


	Type	Status	Name	Title	First Name	Last Name	Company	
1	<input type="checkbox"/> Lead	Responded	Chidi Seydou	Social Media Intern	Chidi	Seydou	Attitude Talent Agency	
2	<input type="checkbox"/> Lead	Responded	Danika Marcia	Junior Marketing Associate	Danika	Marcia	Ted's Toy Shop	
3	<input type="checkbox"/> Lead	Responded	Denise Choi	Director of Marketing Operations	Denise	Choi	Yaloo Search	
4	<input type="checkbox"/> Lead	Responded	Janet Steinberg	Social Media Marketing Manager	Janet	Steinberg	Costumez Warehouse	
5	<input type="checkbox"/> Lead	Responded	Jay Farley	Content Marketing Manager	Jay	Farley	Random Wishes Builders	
6	<input type="checkbox"/> Lead	Responded	Jeff Glimpse	SVP, Procurement	Jeff	Glimpse	Jackson Controls	
7	<input type="checkbox"/> Lead	Responded	Kiran Stefcia	Social Media Intern	Kiran	Stefcia	Kiran and Co Marketers	
8	<input type="checkbox"/> Lead	Responded	Lawrence Ramirez	Digital Marketing Manager	Lawrence	Ramirez	Collection Consulting Group	
9	<input type="checkbox"/> Lead	Responded	Manisha Visvanathan	Operations	Manisha	Visvanathan	Growlers and Stuff Craft Brewery	
10	<input type="checkbox"/> Lead	Responded	Martha Newman	Social Media Marketing Manager	Martha	Newman	FoodStars.Org	
11	<input type="checkbox"/> Lead	Responded	Mike Braund	VP, Technology	Mike	Braund	Metropolitan Health Services	
12	<input type="checkbox"/> Lead	Responded	Phyllis Cotton	CFO	Phyllis	Cotton	Abbott Insurance	
13	<input type="checkbox"/> Lead	Responded	Thandiwe Bandi	Social Media Marketer	Thandiwe	Bandi	Jazz Mystics Music Group	

Part A, Task 5: Business Case Analysis



- The goal of importing data into Salesforce is to streamline the process of handing off leads to Sales Development Representatives (SDRs). These representatives then work to convert Marketing Qualified Leads (MQLs) into Sales Qualified Leads (SQLs). To make this process efficient, marketing associates use the Data Import Wizard to upload lead data from Excel spreadsheets into Salesforce.
- To successfully import data using the Data Import Wizard, the spreadsheet must be saved as a .csv file. Once uploaded, the fields in the .csv file need to be mapped to the corresponding fields in Salesforce based on specific criteria. After mapping, the import process begins, and the data is stored in the **Lead** object.
- One of the main benefits of importing data into Salesforce is that it allows SDRs to quickly identify potential customers who are most likely to move forward and close deals. This helps improve efficiency and ensures that valuable leads are not overlooked.

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



Leads

Demo Leads ▾

New Import Add to Campaign Change Status Change Owner ▾

4 Items • Sorted by Created Date • Filtered by All leads - Title, Lead Status • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Name ▾	Lead Status ▾	Title ▾	Create... ↑ ▾	Company ▾	Mobile ▾	Email ▾
1	<input type="checkbox"/> Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	09/10/20...	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
2	<input type="checkbox"/> Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	09/10/20...	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
3	<input type="checkbox"/> Martha Newman	Open - Not Contacted	Social Media Marketing Manager	09/10/20...	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
4	<input type="checkbox"/> Jay Farley	Open - Not Contacted	Content Marketing Manager	09/10/20...	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com

Part B Task 2: Initiate Contact with Leads via Email



Lead: Janet Steinberg

Open - Not Contacted Working - Contacted Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overview

No activities to show. Get started by sending an email, scheduling a task, and more.

October - 2023 This Month

Let's be in touch! You sent an email to Janet Steinberg. Unopened 1:24 PM / today

No more past activities to load.

Related

4 We found no potential duplicates of this Lead. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 06/06/2023 Type: Email Status: Responded View All

Lead: Thandwe Bandi

Open - Not Contacted Working - Contacted Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overview

No activities to show. Get started by sending an email, scheduling a task, and more.

October - 2023 This Month

Let's be in touch! You sent an email to Thandwe Bandi. Unopened 1:29 PM / today

No more past activities to load.

Related

4 We found no potential duplicates of this Lead. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 06/06/2023 Type: Email Status: Responded View All

Lead: Martha Newman

Open - Not Contacted Working - Contacted Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overview

No activities to show. Get started by sending an email, scheduling a task, and more.

October - 2023 This Month

Let's be in touch! You sent an email to Martha Newman. Unopened 1:22 PM / today

No more past activities to load.

Related

4 We found no potential duplicates of this Lead. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 06/06/2023 Type: Email Status: Responded View All

Lead: Denise Choi

Open - Not Contacted Working - Contacted Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overview

No activities to show. Get started by sending an email, scheduling a task, and more.

October - 2023 This Month

Let's be in touch! You sent an email to Denise Choi. Unopened 1:22 PM / today

No more past activities to load.

Related

4 We found no potential duplicates of this Lead. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Campaign History (1)

Social Media Conference Email Campaign

Start Date: 06/06/2023 Type: Email Status: Responded View All

Part B Task 3: Continue Contact with Leads via Calls



Lead: Janet Steinberg

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

- Meeting on Jan-Nov-19: You have an upcoming task.

October - 2023

- Call: You logged a call.
- Let's be in touch!: You sent an email to Janet Steinberg.

No more past activities to load.

Related

- We found no potential duplicates of this Lead.**
- Notes (1)**
- Campaign History (1)**

Lead: Thandine Bandi

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

- Again log a call (Nov-11): You have an upcoming task.

October - 2023

- Call: You logged a call.
- Let's be in touch!: You sent an email to Thandine Bandi.

No more past activities to load.

Related

- We found no potential duplicates of this Lead.**
- Notes (1)**
- Campaign History (1)**

Lead: Martha Newman

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

- Meeting (Nov-21, 2:30am): You have an upcoming task.

October - 2023

- Call: You logged a call.
- Let's be in touch!: You sent an email to Martha Newman.

No more past activities to load.

Related

- We found no potential duplicates of this Lead.**
- Notes (1)**
- Campaign History (1)**

Lead: Denise Choi

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

- Next call: You have an upcoming event.
- Send descriptions of the platform before the next call: You have an upcoming task.

October - 2023

- Call: You logged a call.
- Let's be in touch!: You sent an email to Denise Choi.

Related

- We found no potential duplicates of this Lead.**
- Notes (1)**
- Campaign History (1)**

Part B Task 4: Mark Leads as Hot

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Leads All Open Leads

25 Items • Sorted by Rating • Filtered by All leads • Lead Status • Updated a few seconds ago

Search this list...



	Name	Company	Stat...	Rati...	Email	Lead Status	Created Date	Own...	Unre...
1	<input type="checkbox"/> Janet Steinberg	Costumez Warehouse		Warm	janet.steinberg@costumez.com	Working - Contacted	09/10/2023, 9:08 pm	SV	<input type="checkbox"/>
2	<input type="checkbox"/> Thandiwe Banti	Jazz Mystics Music Group		Warm	tbanti@jazzmystics.com	Working - Contacted	09/10/2023, 9:08 pm	SV	<input type="checkbox"/>
3	<input type="checkbox"/> Martha Newman	FoodStars.Org		Hot	martha.newman@foodstars.org	Working - Contacted	09/10/2023, 9:08 pm	SV	<input type="checkbox"/>
4	<input type="checkbox"/> Denise Choi	Yaloo Search		Hot	dchoi@yaloooyos.com	Working - Contacted	09/10/2023, 9:08 pm	SV	<input type="checkbox"/>
5	<input type="checkbox"/> Danika Marcia	Ted's Toy Shop			danika@tedstoys.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
6	<input type="checkbox"/> Jay Farley	Random Wishes Builders			jayfarley1985@wishes.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
7	<input type="checkbox"/> Kiran Stefcia	Kiran and Co Marketers			kiranstefcia@marketersco.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
8	<input type="checkbox"/> Lawrence Ramirez	Collection Consulting Group			lawrence@collectionconsulting.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
9	<input type="checkbox"/> Manisha Visvanathan	Growlers and Stuff Craft Brewery			manishavis@growlers.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
10	<input type="checkbox"/> Chidi Seydou	Attitude Talent Agency			chidiseydou15@attitude.com	Open - Not Contacted	09/10/2023, 9:08 pm	SV	<input checked="" type="checkbox"/>
11	<input type="checkbox"/> Betty Blair	American Banking Corp.	PA		bblair@abankingco.com	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>
12	<input type="checkbox"/> Sandra Eberhard	Highland Manufacturing Ltd.	CA		sandra_e@highland.net	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>
13	<input type="checkbox"/> David Monaco	Blues Entertainment Corp.			david@blues.com	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>
14	<input type="checkbox"/> Kristen Akin	Aethna Home Products	VA		kakin@athenahome.com	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>
15	<input type="checkbox"/> Norm May	Greenwich Media	OH		norm_may@greenwich.net	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>
16	<input type="checkbox"/> Shelli Brownell	Western Telecommunications Corp.	CA		shelli@westerntelecom.com	Working - Contacted	09/10/2023, 8:22 pm	SV	<input checked="" type="checkbox"/>

To Do List

Part B Task 5: Create Email Templates



Send List Email

Recipients  (2 Recipients) All Open Leads 

Subject

Content **Review**

Recipients



✓ [Selected Recipients](#)


Denise Chol
Martha Newman

Hello Denise

I am Sitharthan , i am here to know about your interest in our product.Tell me when we will make a call...

thanks
Sitharthan
Powered by Salesforce
<http://www.salesforce.com/>

 [Save as Draft](#) [Send](#) 

 10/10 send limits remaining

Part B Task 6: Convert Leads



Lead: **Thandive Bandi**

Follow Convert Edit New Cast

Upload New Connected

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

October - 2023

Again: log a call (New 1)

Call

Let's be in touch!

Notes (2)

We found no potential duplicates of this Lead.

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Lead: **Janet Steinberg**

Follow Convert Edit New Cast

Upload New Connected

Activity Details Chatter News

Log a Call New Task New Event Email

Filters: All time • All activities • All types

Upcoming & Overview

October - 2023

Call

Let's be in touch!

Notes (2)

We found no potential duplicates of this Lead.

Your lead has been converted

ACCOUNT

CONTACT

OPPORTUNITY

New Task Go to Leads

Your lead has been converted

ACCOUNT

CONTACT

OPPORTUNITY

New Task Go to Leads