Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

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Part A Overview

1. **Task 1:** Structure and Download Lead Data

2. **Task 2:** Import Data in Salesforce

3. **Task 3:** Create a List View and Filter for Leads

4. **Task 4:** Associate Leads With a Campaign
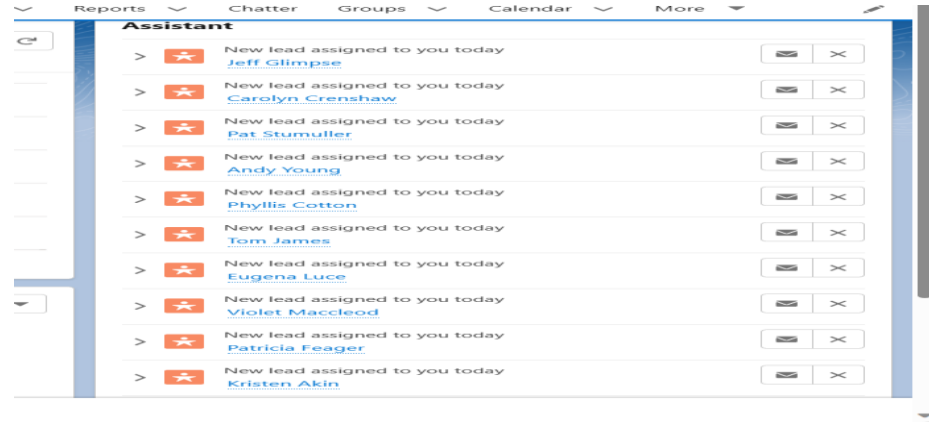
5. **Task 5:** Business Case Analysis

Part A, Task 1: Structure and Download Lead Data

	A	B	C	D	E	F
	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
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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						
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Part A, Task 2: Import Data in Salesforce

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

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

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

Part B Task 2: Initiate Contact with Leads via Email

Part B Task 3: Continue Contact with Leads via Calls

Part B Task 4: Mark Leads as Hot

Part B Task 5: Create Email Templates

Part B Task 6: Convert Leads