

Phase 1 Report

Lead - Management - Sales - Tracking

Problem Statement

A sales team relies on spreadsheets and email to manage leads, causing inefficiencies and missed opportunities. Follow-ups are delayed, duplicate leads exist, and managers lack real-time visibility into the sales funnel. Without a centralized CRM, forecasting and performance tracking become unreliable.

1. Requirement Gathering

The initial phase involved a comprehensive analysis of the client's current sales process. The existing system, which relies on manual spreadsheets and emails, is highly inefficient, leading to delayed follow-ups, missed opportunities, and a lack of real-time visibility into the sales pipeline.

The key objectives for this phase were to define clear and actionable requirements for the new Salesforce system, including:

- **Automated Lead Capture:** Automatically capturing leads from web forms, email campaigns, and manual entry.
- **Intelligent Lead Routing:** Assigning leads to the appropriate sales agents based on predefined criteria like geography or product line.
- **Activity Tracking:** Centralizing all lead-related activities (calls, emails, and meetings) for a complete historical record.
- **Workflow Automation:** Implementing automated reminders and notifications to improve follow-up efficiency.
- **Seamless Data Conversion:** Enabling the conversion of qualified leads into Accounts, Contacts, and Opportunities while retaining all associated data.
- **Real-time Reporting:** Providing sales managers with dashboards to monitor team performance, lead sources, and pipeline forecasting.
- **Data Integrity:** Ensuring data accuracy, consistency, and security across the organization.

2. Stakeholder Analysis

A thorough analysis of the key stakeholders was conducted to ensure the CRM solution is designed to meet their specific needs. The primary stakeholders are:

- **Sales Agents:** They require an intuitive system for efficient lead management and activity tracking.
- **Sales Managers:** They need real-time visibility into the sales pipeline and team performance for data-driven decision-making.

- **Prospective Customers:** They benefit from faster, more professional, and timely engagement with the company.

3. Business Process Mapping

This step involved a detailed mapping of the "As-Is" (current) and "To-Be" (proposed) sales processes.

- **Current ("As-Is") Process:** Manual lead entry and tracking in spreadsheets, leading to delays and data inconsistencies. Managers manually review data weekly.
- **Proposed ("To-Be") Process:** Leads are automatically captured and routed. All activities are tracked in Salesforce, and the lead status is updated dynamically. Qualified leads are converted seamlessly, and managers have real-time access to reports and dashboards.

4. Industry-Specific Use Case Analysis

Given the project's focus on the **Retail/Services B2B sector**, several industry-specific considerations were included. The solution must handle leads associated with a single account and effectively track marketing campaign ROI. **Data cleanliness** is a critical priority for accurate reporting, and automation is key to ensuring timely customer engagement.

5. AppExchange Exploration

An exploration of the Salesforce AppExchange was conducted to identify pre-built solutions that can enhance the core CRM functionality. Identified apps include:

- **FormAssembly / Formstack:** To improve web-to-lead form capabilities.
- **DemandTools:** To maintain data integrity by managing duplicate records.
- **Salesforce Maps:** To optimize territory planning for field sales.
- **Ebsta / Groove:** For seamless email integration and activity tracking.

Leveraging these solutions can accelerate the implementation and provide immediate value to the client.