Salesforce project

Problem Statement: Currently, the organization struggles to manage incoming leads effectively. Leads are often unorganized, lack ownership, and are not followed up in a timely manner. This results in **lost sales opportunities, poor customer experience, and revenue leakage**.

The goal is to design and implement a **Salesforce Lead Management System** that:

* Captures leads from multiple sources into Salesforce.
* Assigns leads automatically to appropriate sales reps.
* Tracks and nurtures leads until conversion or closure.
* Provides visibility through reporting and dashboards.

Objectives:

* **Centralize** lead collection in Salesforce.
* **Automate** lead assignment using rules (region, product, source, etc.).
* **Prioritize** high-value leads through scoring and qualification.
* **Track** interactions, follow-ups, and conversion rates.
* **Analyze** performance with real-time dashboards and reports.

Use Cases:

**Use Case 1: Lead Capture and Creation**

* **Actor:** Marketing Executive
* **Precondition:** A new lead fills out a website form.
* **Steps:**
  1. Lead submits information via the website form.
  2. Salesforce automatically creates a new lead record.
  3. Lead details (name, email, source, product interest) are captured.
* **Outcome:** New lead stored in Salesforce, ready for assignment.

**Use Case 2: Automated Lead Assignment**

* **Actor:** Salesforce System (Automation)
* **Precondition:** A new lead is created in Salesforce.
* **Steps:**
  1. Lead assignment rules check the lead’s region and product interest.
  2. Lead is assigned to the correct sales representative automatically.
  3. Sales rep receives notification of new lead assignment.
* **Outcome:** Lead ownership is clearly defined, ensuring accountability.

**Expected Benefits**

* Improved lead response times.
* Increased lead-to-opportunity conversion rate.
* Better visibility for managers into team performance.
* Reduced lead leakage and duplication.
* Scalable system aligned with business growth.

**Constraints**

* Must comply with data privacy regulations (GDPR, CCPA).
* System performance depends on Salesforce org limits (API calls, storage).
* Budget restrictions may limit advanced custom development.

**Conclusion:**

A **Salesforce Lead Management System** will address inefficiencies in lead handling, ensure **ownership, accountability, and follow-ups**, and provide actionable insights for sales leadership. This solution directly impacts **revenue growth, customer satisfaction, and operational efficiency**.