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.

**Phase 2: Org Setup & Configuration**

**Salesforce Editions**

* **Definition:** Salesforce provides different editions like Essentials, Professional, Enterprise, Unlimited.
* **Purpose:** Each edition offers a different set of features, limits, and pricing models. For learning or pilot projects, the **Developer Edition** is ideal since it is free and includes core features.

**Company Profile Setup**

* **Definition:** Stores company information like name, address, currency, timezone, and locale.
* **Purpose:** Ensures global settings are applied consistently.
* **Implementation:**
  + Setup → Company Settings → Company Information.
  + Enter **Company Name, Address, Default Locale, Language, Currency**.

**Business Hours & Holidays**

* **Definition:** Defines the working hours and holidays for support and escalations.
* **Purpose:** Used in Service Level Agreements (SLAs), escalation rules, and case management.
* **Implementation:**
  + Setup → Company Settings → Business Hours.
  + Define standard hours (e.g., Mon–Fri, 9 AM–6 PM).
  + Setup → Holidays → Add holidays (e.g., Independence Day).

**Fiscal Year Settings**

* **Definition:** Determines how sales reporting and forecasting are structured (Standard or Custom).
* **Purpose:** Aligns Salesforce reporting with company’s financial planning.
* **Implementation:**
  + Setup → Company Settings → Fiscal Year.
  + Choose Standard Fiscal Year (Jan–Dec) or define Custom Year (e.g., Apr–Mar).

**User Setup & Licenses**

* **Definition:** Users need a license to log into Salesforce.
* **Purpose:** Assign appropriate access to employees.
* **Implementation:**
  + Setup → Users → Add New User.
  + Assign **Profile + Role + License** (e.g., Salesforce Sales Cloud User).

**Profiles**

* **Definition:** Profiles define what users can do (object permissions, field-level security, tabs, apps).
* **Purpose:** Baseline security control for all users.
* **Implementation:**
  + Setup → Profiles → Clone Standard Profile → Adjust permissions.

**Roles**

* **Definition:** Roles define record-level access and visibility in the org hierarchy.
* **Purpose:** Managers can see subordinates’ records.
* **Implementation:**
  + Setup → Roles → Create Role Hierarchy (CEO → Manager → Sales Rep).

**Organization-Wide Defaults (OWD)**

* **Definition:** Baseline level of record access (Private, Public Read, Public Read/Write).
* **Purpose:** Secures sensitive data by default.
* **Implementation:**
  + Setup → Sharing Settings → OWD → Set per object (e.g., Leads = Private).

**Sharing Rules**

* **Definition:** Expand record access beyond OWD.
* **Purpose:** Automatically share records with groups or roles.
* **Implementation:**
  + Setup → Sharing Rules → New → Define Criteria/Owner-based rules.

**Login Access Policies**

* **Definition:** Security settings for login hours, trusted IP ranges, and policies.
* **Purpose:** Prevent unauthorized access.
* **Implementation:**
  + Setup → Security → Session Settings & Login IP Ranges.

**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**.