Transcript: Legacy System to Salesforce Migration Requirements

Meeting Participants:

- **Sarah Johnson** - Salesforce Solution Implementer, CloudTech Solutions
- **Michael Rodriguez** - Marketing Director, Horizon Manufacturing

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Sarah: Good morning, Michael! Thanks for setting up this meeting to discuss your move from your legacy system to Salesforce. To get started, can you tell me a bit about your current system and the challenges you're facing?

Michael: Morning, Sarah. We're currently using an older CRM called BusinessTrack that we implemented about eight years ago. It's served us well, but we've outgrown it. We can't easily track our marketing efforts, reporting is cumbersome, and the interface feels outdated compared to what our competitors are using.

Sarah: I understand completely. Many of our clients have faced similar challenges with older systems. Let's work through your specific requirements so we can build a Salesforce solution that addresses all your needs. You mentioned difficulty tracking marketing efforts - can you elaborate on your current lead generation process?

Michael: Sure. We have a corporate website where people can complete a "Request Information" form. Those submissions go to a shared email inbox, and then someone from marketing manually enters them into BusinessTrack. We classify them as either "hot," "warm," or "cold" leads, but there's no systematic way to track where they came from or which marketing activities are actually generating quality leads.

Sarah: Got it. With Salesforce, we can implement Web-to-Lead functionality to automatically capture those website form submissions directly as leads in the system. No more manual entry or shared inboxes. Do you also gather leads from other sources beyond your website?

Michael: Yes, we attend several industry tradeshows each year, run email campaigns, do some Google Ads, and have recently started with LinkedIn advertising. We also get referrals from existing customers, which tend to be our highest quality leads.

Sarah: Perfect. In Salesforce, we can set up a standardized "Lead Source" field with values for each of those channels. This will let you track exactly where each lead is coming from. We can also create custom fields to capture additional information specific to each source, like which tradeshow or which LinkedIn campaign generated the lead.

Michael: That sounds great. Would we be able to run reports to see which sources are bringing in the most leads?

Sarah: Absolutely! Salesforce has robust reporting capabilities. You can create reports showing lead volume by source, but more importantly, you can see which sources are generating the highest quality leads - those that actually convert to customers. This is much more valuable than just knowing raw numbers.

Michael: That's exactly what we need. Our CEO is always asking which marketing investments are actually paying off.

Sarah: Speaking of marketing investments, you mentioned email campaigns and digital advertising. Are you currently using any marketing automation tools, or would you like to integrate that with Salesforce?

Michael: We use a separate email platform called MarketBlast, but it doesn't talk to our CRM. We have to manually import lists for campaigns and then manually track responses. It's very disconnected.

Sarah: I see. Salesforce has several options here. There's Salesforce Marketing Cloud for enterprise-level needs, or Marketing Cloud Account Engagement (formerly Pardot) which is often a good fit for B2B companies like yours. These solutions allow you to create campaigns, track engagement, and automatically score leads based on their interactions with your marketing materials.

Michael: Can you explain what you mean by "campaigns" in Salesforce terms? In our current system, we just have email lists.

Sarah: Great question. In Salesforce, a Campaign is an organized marketing initiative like a tradeshow, webinar, email blast, or advertising campaign. You can associate leads with specific campaigns and track the entire customer journey from initial campaign touch to closed deal. This gives you true ROI tracking for your marketing efforts.

Michael: That sounds powerful. So we could see, for example, how many customers came from our annual industry conference versus our Google Ads?

Sarah: Exactly! You can set up campaign hierarchies too. For instance, you might have a parent campaign for "Fall 2024 Marketing" with child campaigns for specific activities like "September Email Series," "Q4 LinkedIn Ads," and "October Tradeshow." This structure helps you analyze effectiveness at different levels.

Michael: Our marketing team will love that. Now, about converting leads to customers - in our current system, we manually change a lead's status to "Customer" when they make a purchase, but there's no consistent process for this.

Sarah: In Salesforce, there's a structured lead conversion process. When a lead meets your criteria for becoming a qualified prospect, you can convert it, which automatically creates three things: an Account (the company), a Contact (the person), and an Opportunity (the potential deal). This maintains the relationship between all this information and preserves the lead source and campaign data for future reporting.

Michael: What kind of criteria can we set for lead conversion?

Sarah: That's entirely customizable based on your business processes. Common conversion criteria include budget qualification, identification of a specific need, engagement with marketing materials above a certain threshold, or completion of an initial sales call. What criteria do you currently use to determine when a lead is ready for sales attention?

Michael: We have what we call our "BANT" checklist - Budget, Authority, Need, and Timeline. If we've confirmed at least three of these, we consider them sales-ready.

Sarah: That's perfect. We can build this BANT qualification right into the lead record in Salesforce, with checkboxes for each criterion. We can even automate certain processes based on these fields - for example, when three BANT criteria are met, the lead could be automatically assigned to an appropriate sales rep, or a notification could be sent to the sales manager.

Michael: That would save us a lot of time. Currently, our marketing team has a weekly meeting just to review leads and decide which ones to pass to sales.

Sarah: Salesforce can definitely streamline that workflow. Now, you mentioned reporting on lead conversion by source. What specific metrics are most important to your team?

Michael: We need to know which lead sources generate not just the most leads, but the most qualified leads and ultimately the most customers. And if possible, we'd like to track the total revenue generated from each source or campaign.

Sarah: Salesforce excels at this type of reporting. You'll be able to create dashboards showing conversion rates at each stage of your pipeline, broken down by lead source. For example, you might find that tradeshow leads convert at 15%, while referrals convert at 35%. And yes, you can absolutely track revenue attribution back to the original lead source and campaign.

Michael: That would be incredible. Right now, we have absolutely no visibility into this data. We know our overall marketing ROI, but not which specific activities are driving it.

Sarah: You'll have complete visibility with Salesforce. One more question - does your team have any specific timeline requirements for following up with leads from different sources?

Michael: Yes, actually. Website leads should be contacted within 24 hours, tradeshow leads within 48 hours, and for our high-value product line, we try to follow up within 4 business hours.

Sarah: Great. We can build automated assignment rules and notification systems to ensure those SLAs are met. We can even create escalation procedures if a lead hasn't been contacted within the specified timeframe.

Michael: This all sounds exactly what we need. I'm starting to see why everyone says Salesforce is so powerful. But I'm also a bit concerned about user adoption. Our team struggled when we implemented BusinessTrack - will Salesforce be difficult for them to learn?

Sarah: That's a valid concern, and change management is actually a big part of our implementation process. Salesforce is quite user-friendly, and we'll customize the interface to match your team's workflow as much as possible. We also provide comprehensive training, documentation, and support during and after implementation. Many users find that once they get over the initial learning curve, they can't imagine going back to their old systems.

Michael: That's reassuring. And what about data migration? We have about eight years of customer data in our legacy system.

Sarah: We'll develop a detailed data migration plan. Not everything needs to migrate - we'll work with you to identify which historical data will be valuable in the new system. We have specialized tools to extract, transform, and load your data while maintaining relationships between records. And we'll conduct thorough validation to ensure nothing important is lost in the transition.

Michael: Sounds good. I think I have a much better understanding now of how Salesforce can address our needs. What are the next steps?

Sarah: I'll put together a detailed requirements document based on our conversation today for your review. Once you confirm those requirements, we'll develop a project plan with timelines, deliverables, and responsibilities. We typically start with a small proof of concept to validate the approach before full implementation. Does that work for you?

Michael: Yes, that makes sense. I'm looking forward to seeing the requirements document.

Sarah: I'll have that to you by the end of the week. Before we wrap up, is there anything else about your current processes or requirements that we haven't covered?

Michael: I think we've covered the main points. I'm just excited to finally have a system that can give us visibility into our marketing effectiveness and streamline our lead management process.

Sarah: We're excited to help you make that happen. Thank you for your time today, Michael. I'll be in touch with the requirements document soon.

Michael: Thanks, Sarah. Looking forward to working with you on this.