PATHSTREAM

Lead Management in Salesforce

Independent Project: Use Salesforce to Identify Sales Prospects

[Umang Sharma]

Part A Overview

"Success is where preparation and opportunity meet" — Bobby Unser

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

Lead Management

How marketing associates generate leads, and how you could empower them with Salesforce to track and organize data about:

- Leads
- Campaigns that generated those leads
- The resulting tasks

Streamline their responsibilities. Salesforce can help them keep track of everything — from who they've reached out to, to what tasks they have to do, to what kinds of communications and responses they receive from leads. As a sales ops specialist, leverage Salesforce to help SDRs keep all of this information organized in one central place.

Ideal Customer Profiles :An ideal customer profile (ICP) is a data-based description of the type of customer most likely to purchase a product. Using information that a company has collected using a CRM system or other form of data collection, the company can pinpoint what type of customer frequently purchases their product, then summarize this into a description that SDRs refer to while generating and qualifying leads.

Lead management help sales and marketing team members keep track of their leads, and so the teammates are always on the same page about what to prioritize. Sales and marketing teams want to move leads through the sales process, but if their lead data is not organized, it will be harder for the team to know who to reach out to. Lead management can ensure that this part of the sales process moves as smoothly as possible.

Part A, Task 1: Structure and Download Lead Data

PATHSTREAM

After cleaning up the data and fixing all the errors in the spreadsheet data, insert a screenshot of all the lead data in your spreadsheet.

- First Name
- Last Name
- Title
- Company
- Phone Number
- Email

Part A, Task 1: Screenshot

PATHSTREAM

Independent Project, Part A: Inbound Leads

File Edit View Insert Format Data Tools Add-ons Help Last edit was seconds ago

First Name	Last Name	Title	Company	Phone Number	Email
Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com
Denise	Choi	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yalooyoyos.com
Chidi	Seydou	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
Manisha	Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavis@growlers.com
Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
Martha	Newman	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
Jay	Farley	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com

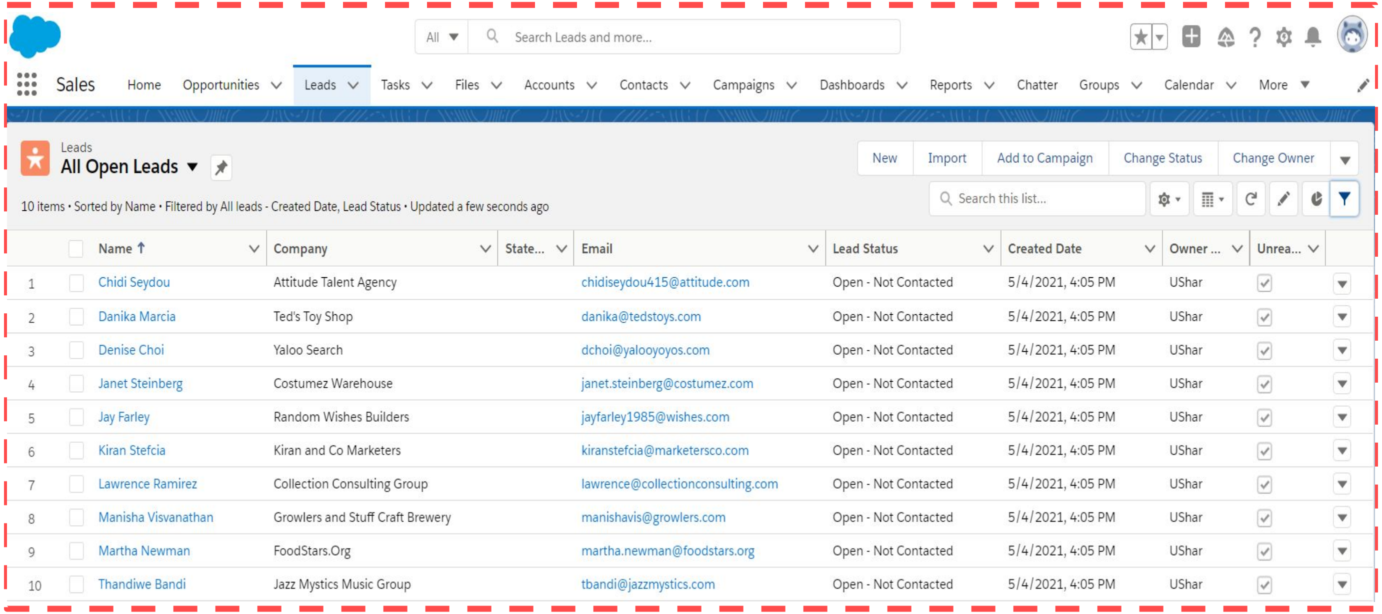
Part A, Task 2: Import Data in Salesforce

PATHSTREAM

Navigate to the App launcher and open the Sales app to the Leads tab. Organize the lead list so that the most recently created leads appear first. Then, insert a screenshot to show all 10 of the leads that you've just uploaded on the following slide.

Part A, Task 2: Screenshot

PATHSTREAM



	Name	Company	State...	Email	Lead Status	Created Date	Owner ...	Unrea...
1	Chidi Seydou	Attitude Talent Agency		chidiseydou415@attitude.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
2	Danika Marcia	Ted's Toy Shop		danika@tedstoys.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
3	Denise Choi	Yaloo Search		dchoi@yalooyoyos.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
4	Janet Steinberg	Costumez Warehouse		janet.steinberg@costumez.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
5	Jay Farley	Random Wishes Builders		jayfarley1985@wishes.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
6	Kiran Stefcia	Kiran and Co Marketers		kiranstefcia@marketersco.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
7	Lawrence Ramirez	Collection Consulting Group		lawrence@collectionconsulting.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
8	Manisha Visvanathan	Growlers and Stuff Craft Brewery		manishavis@growlers.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
9	Martha Newman	FoodStars.Org		martha.newman@foodstars.org	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
10	Thandiwe Bandi	Jazz Mystics Music Group		tbandi@jazzmystics.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓

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

PATHSTREAM

Insert screenshots of the Demo leads list view for each of the steps below in the following slides. Your screenshots should show that you've:

Step 1: Created a clone of the leads view titled "Demo Leads"

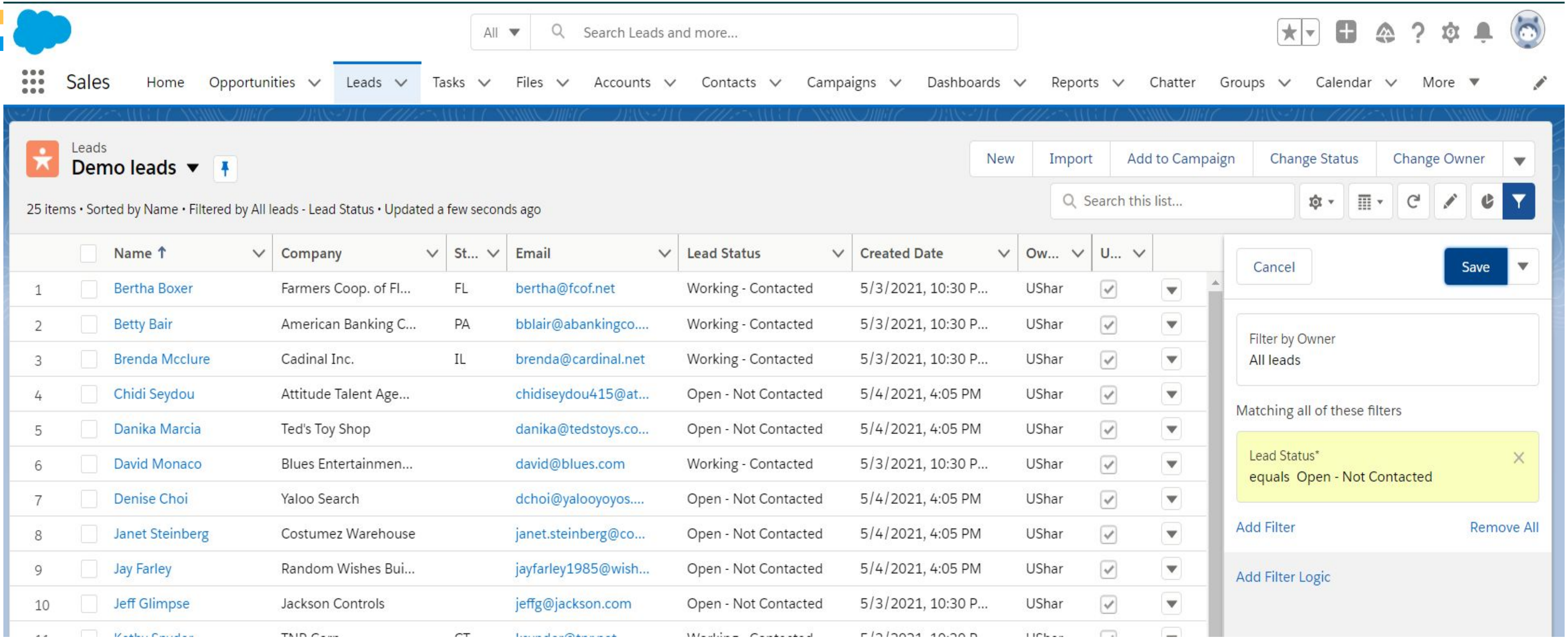
Step 2: Added a filter to only be able to see leads that are open and haven't been contacted

Step 3: Made sure all noted fields are visible and in the right order.

To further streamline view of these leads and make sure the right information appears first, make sure that the Name, Lead Status, Title, Company, Mobile, and Email fields are visible and are in that exact order.

Step 4: Created a separate tab for the leads.

Part A, Task 3: Step 1 screenshot



Part A, Task 3: Step 2 screenshot

PATHSTREAM

All | Search Leads and more...

Sales | Home | Opportunities | Leads | Tasks | Files | Accounts | Contacts | Campaigns | Dashboards | Reports | Chatter | Groups | Calendar | More

Leads

Demo leads

New | Import | Add to Campaign | Change Status | Change Owner

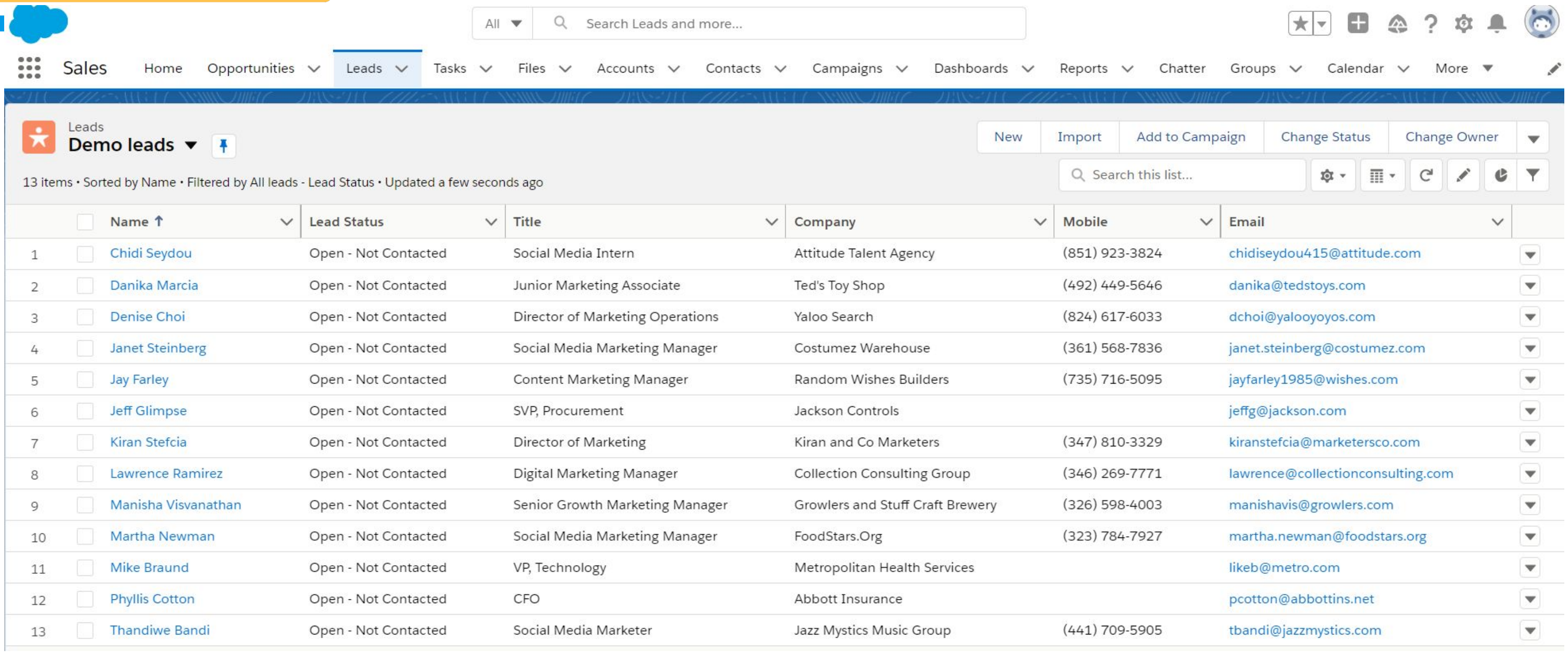
13 items • Sorted by Name • Filtered by All leads - Lead Status • Updated a minute ago

Search this list...

	Name ↑	Company	State...	Email	Lead Status	Created Date	Owner ...	Unrea...
1	Chidi Seydou	Attitude Talent Agency		chidiseydou415@attitude.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
2	Danika Marcia	Ted's Toy Shop		danika@tedstoys.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
3	Denise Choi	Yaloo Search		dchoi@yalooyoyos.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
4	Janet Steinberg	Costumez Warehouse		janet.steinberg@costumez.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
5	Jay Farley	Random Wishes Builders		jayfarley1985@wishes.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
6	Jeff Glimpse	Jackson Controls		jeffg@jackson.com	Open - Not Contacted	5/3/2021, 10:30 PM	UShar	✓
7	Kiran Stefcia	Kiran and Co Marketers		kiranstefcia@marketersco.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
8	Lawrence Ramirez	Collection Consulting Group		lawrence@collectionconsulting.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
9	Manisha Visvanathan	Growlers and Stuff Craft Brewery		manishavis@growlers.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
10	Martha Newman	FoodStars.Org		martha.newman@foodstars.org	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓
11	Mike Braund	Metropolitan Health Services	MD	likeb@metro.com	Open - Not Contacted	5/3/2021, 10:30 PM	UShar	✓
12	Phyllis Cotton	Abbott Insurance	VA	pcotton@abbottins.net	Open - Not Contacted	5/3/2021, 10:30 PM	UShar	✓
13	Thandiwe Bandi	Jazz Mystics Music Group		tbandi@jazzmystics.com	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	✓

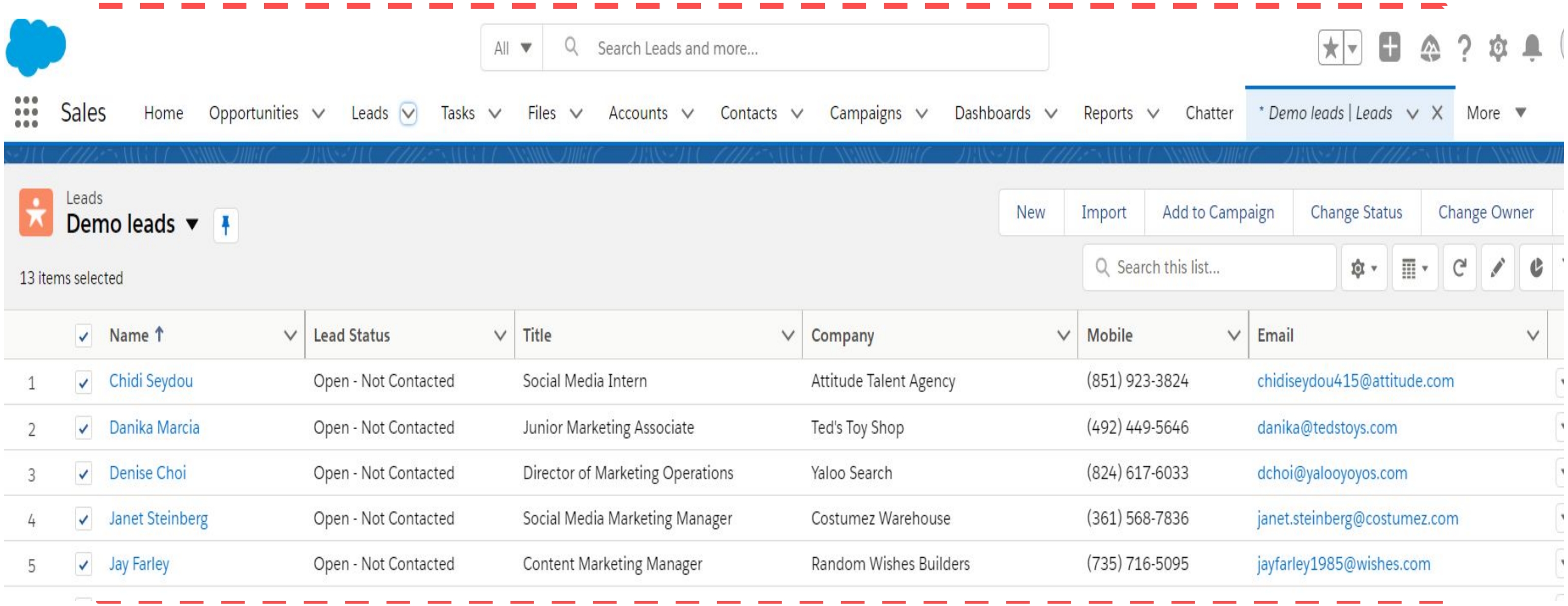
Part A, Task 3: Step 3 screenshot

PATHSTREAM



	Name ↑	Lead Status	Title	Company	Mobile	Email
1	Chidi Seydou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
2	Danika Marcia	Open - Not Contacted	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
3	Denise Choi	Open - Not Contacted	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yalooyoyos.com
4	Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
5	Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
6	Jeff Glimpse	Open - Not Contacted	SVP, Procurement	Jackson Controls		jeffg@jackson.com
7	Kiran Stefcia	Open - Not Contacted	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
8	Lawrence Ramirez	Open - Not Contacted	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
9	Manisha Visvanathan	Open - Not Contacted	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavis@growlers.com
10	Martha Newman	Open - Not Contacted	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
11	Mike Braund	Open - Not Contacted	VP, Technology	Metropolitan Health Services		likeb@metro.com
12	Phyllis Cotton	Open - Not Contacted	CFO	Abbott Insurance		pcotton@abbottins.net
13	Thandiwe Bandi	Open - Not Contacted	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com

Part A, Task 3: Step 4 screenshot



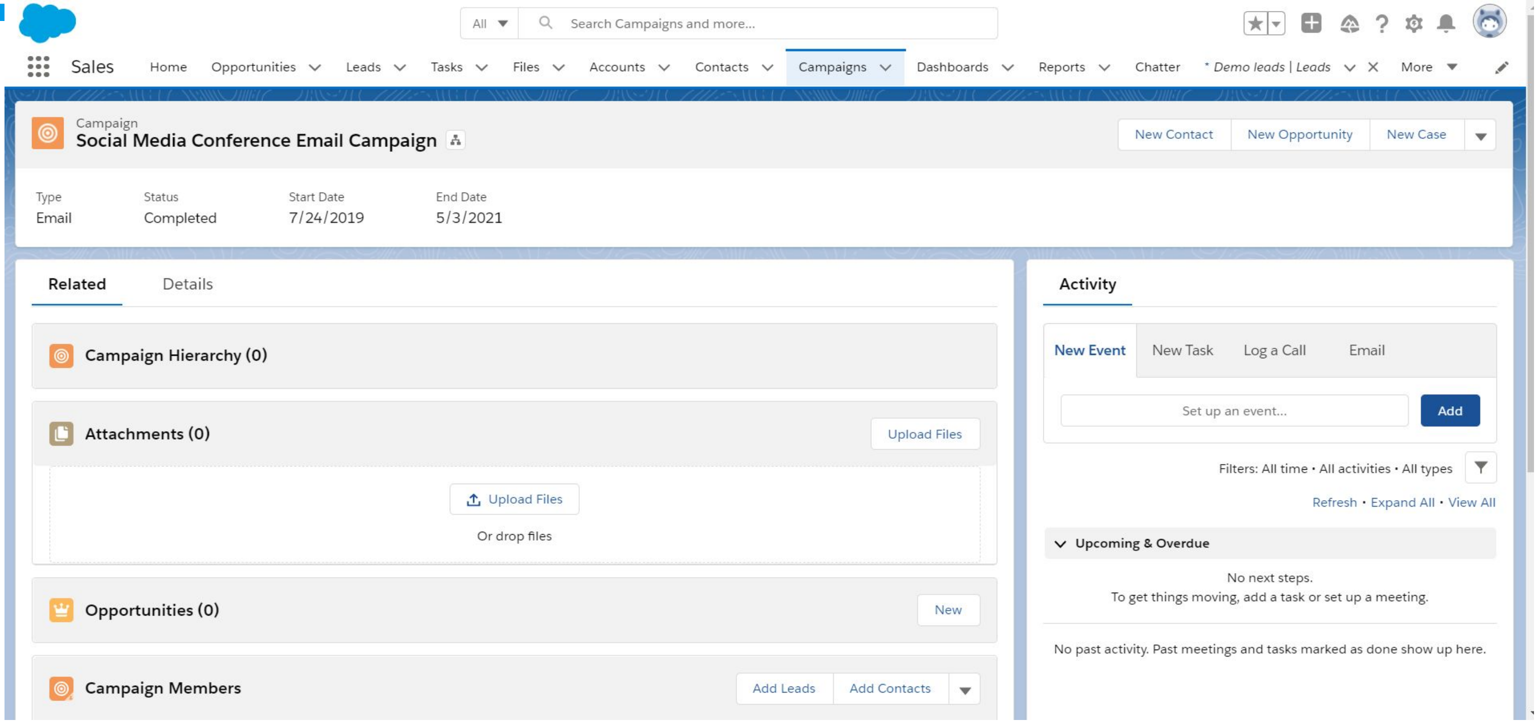
Part A, Task 4: Associate Your Leads with a Campaign

PATHSTREAM

After you've associated all 10 leads with the new campaign, navigate to the Campaigns tab of your Sales app.

- Campaign Name: Social Media Conference Email Campaign
- Type: Email
- Status: Completed
- Start Date: 7/24/2019
- End Date: yesterday's date
- Expected Revenue in Campaign: $10,000
- Budgeted Cost in Campaign: $5,000
- Actual Cost in Campaign: $4,500
- Expected Response (%): 5.00%

Part A, Task 4: Screenshot



Part A, Task 5: Business Case Analysis

PATHSTREAM

In a short paragraph on the following slide, describe how importing and organizing data in Salesforce would help the sales and marketing teams SimplySocial. In your description, include:

- The overall purpose of importing and organizing data.
- The major steps you took to import and organize data.
- How the sales and marketing teams at SimplySocial would benefit from imported and organized lead data in Salesforce.

Part A, Task 5:

PATHSTREAM

- Salesforce enables you to store all your lead data in one centralized location.
- Salesforce enables you to easily organize lead data
- Salesforce allows for great collaboration between sales team members

You have reached the end of Part A!

Make sure your screenshots are embedded in the appropriate slides before moving on. Note that you will complete Part B of this Independent Project at the end of Week 4.

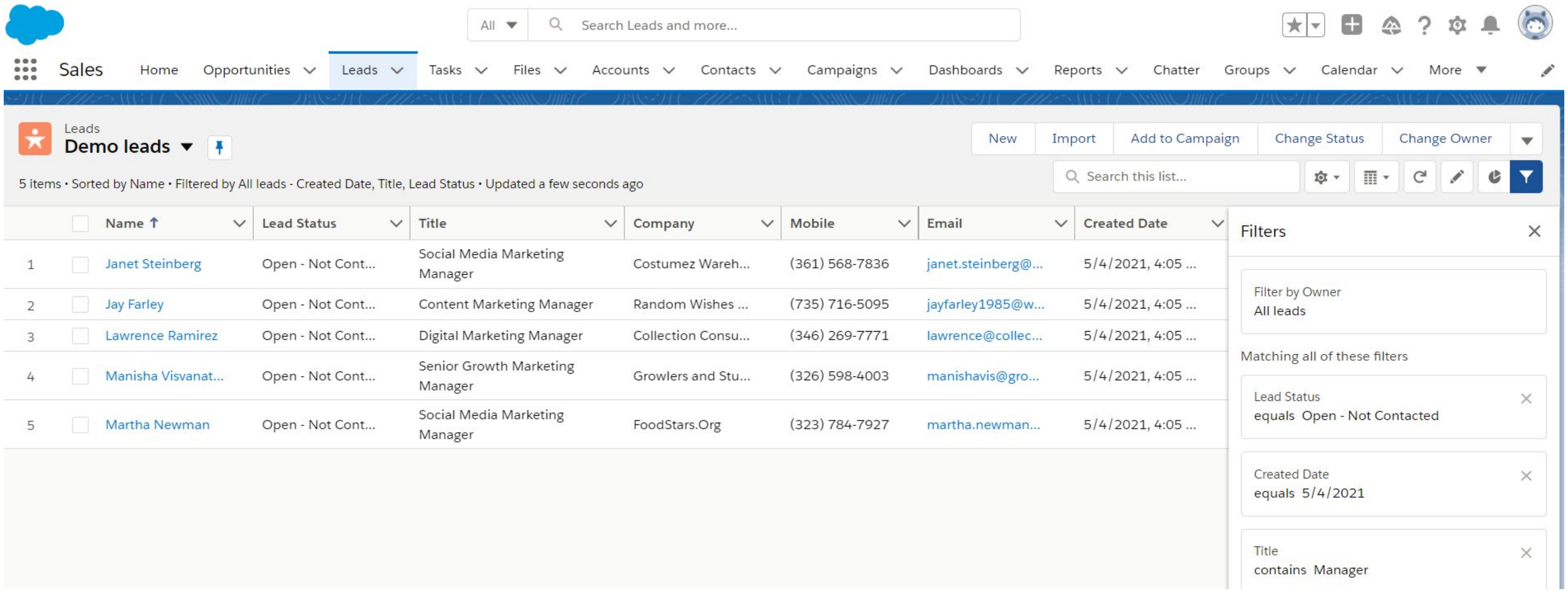
Part B Overview

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

After creating the necessary filter for the Demo Leads list, insert a screenshot showing the list with the leads filtered by manager. Make sure to adjust the size of the Title column so that all the leads' titles can be read.

Part B Task 1: Screenshot



Part B Task 2: Initiate Contact with Leads via Email

PATHSTREAM

Insert screenshots to show that you've emailed Janet, Thandiwe, Martha, and Denise. Your screenshots should display the past activities log for each of these leads showing that you have sent them an email. The past activities log is at the bottom of the Activity tab.

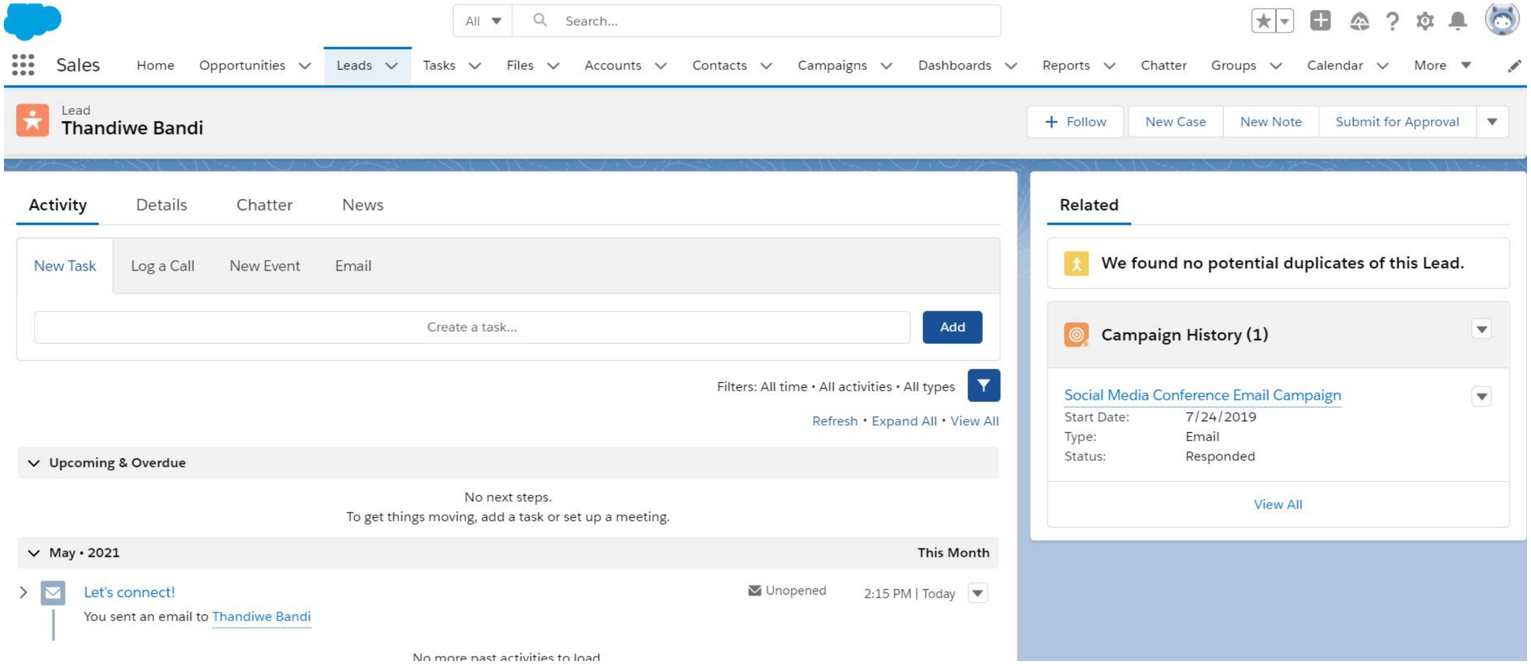
Step 1: Past activity for **Janet Steinberg** showing you've emailed them.

Step 2: Past activity for **Thandiwe Bandi** showing you've emailed them.

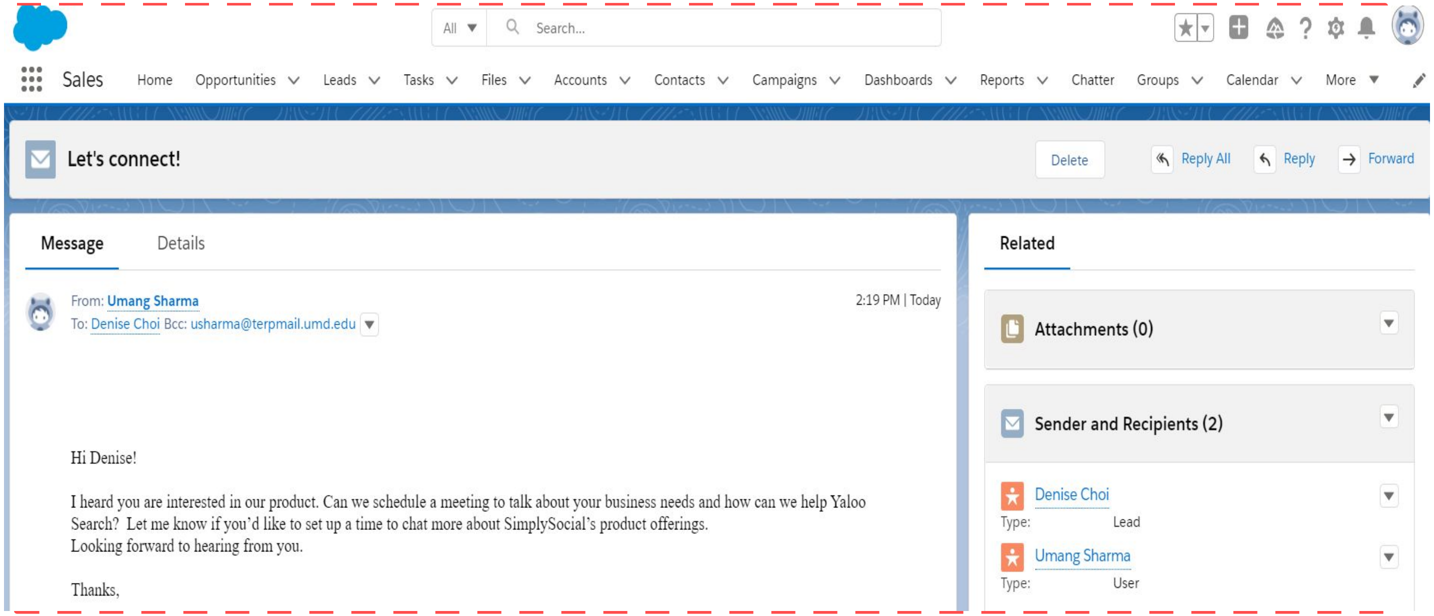
Step 3: Past activity for **Martha Newman** showing you've emailed them.

Step 4: Past activity for **Denise Choi** showing you've emailed them.

Part B Task 2: Step 1 screenshot



Part B Task 2: Step 2 screenshot



Part B Task 3: Continue Contact with Leads via Calls

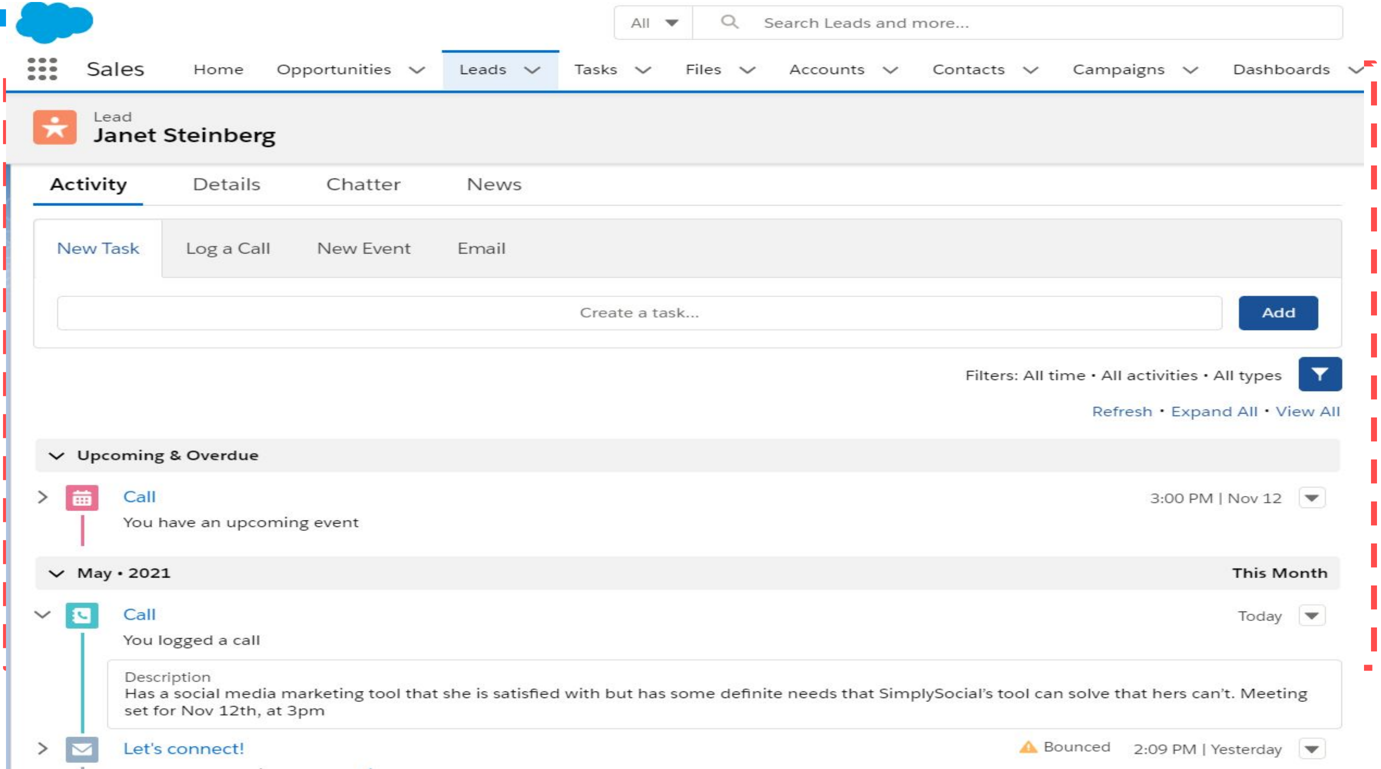
Insert screenshots for the calls with the four leads. Make sure your screenshots display the past activity logs for each of these leads showing that calls, notes, tasks, and/or emails have been logged with each of them. The past activities log is at the bottom of the Activity tab.

Step 1: Past activity for **Janet Steinberg** showing logged activities.

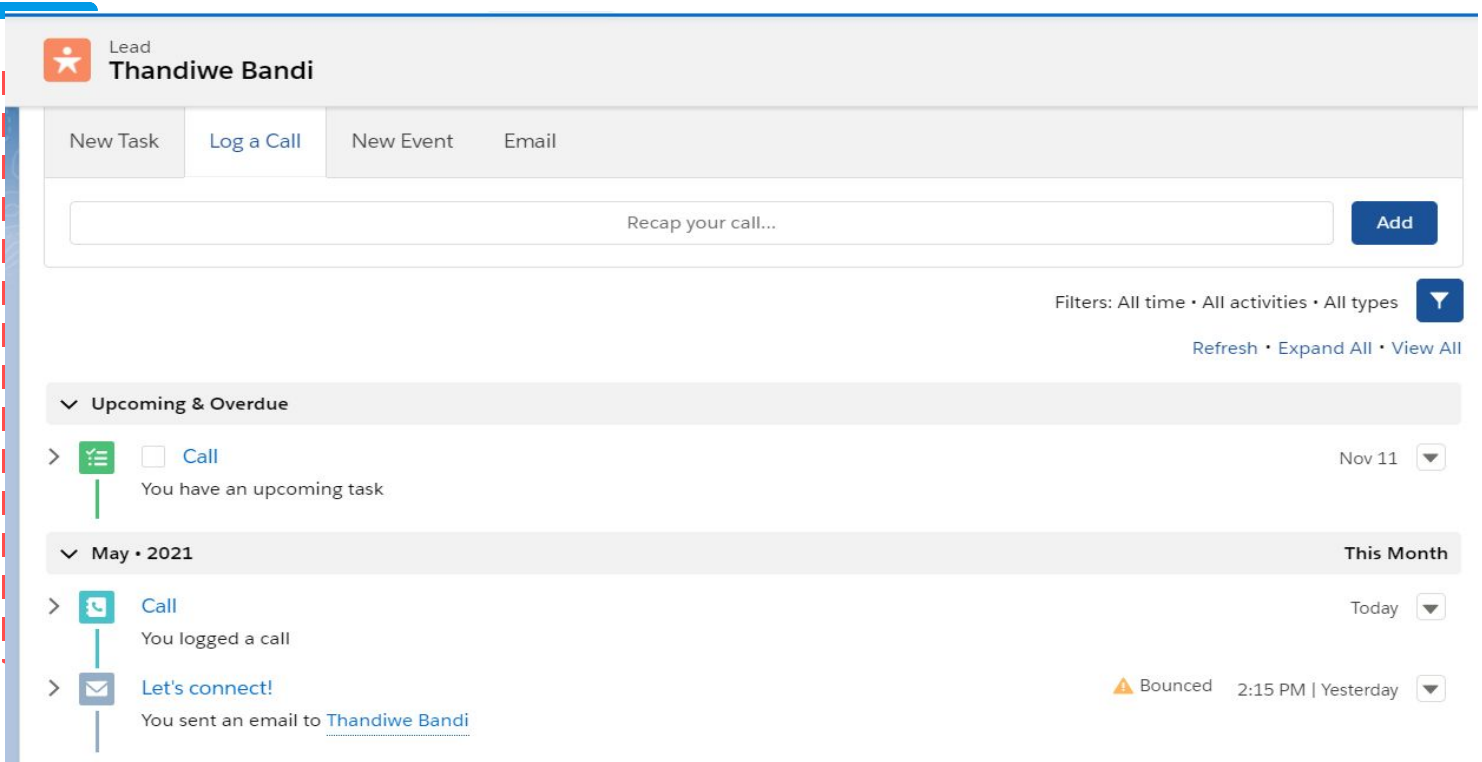
Step 2: Past activity for **Thandiwe Bandi** showing logged activities.

Step 3: Past activity for **Martha Newman** showing logged activities.

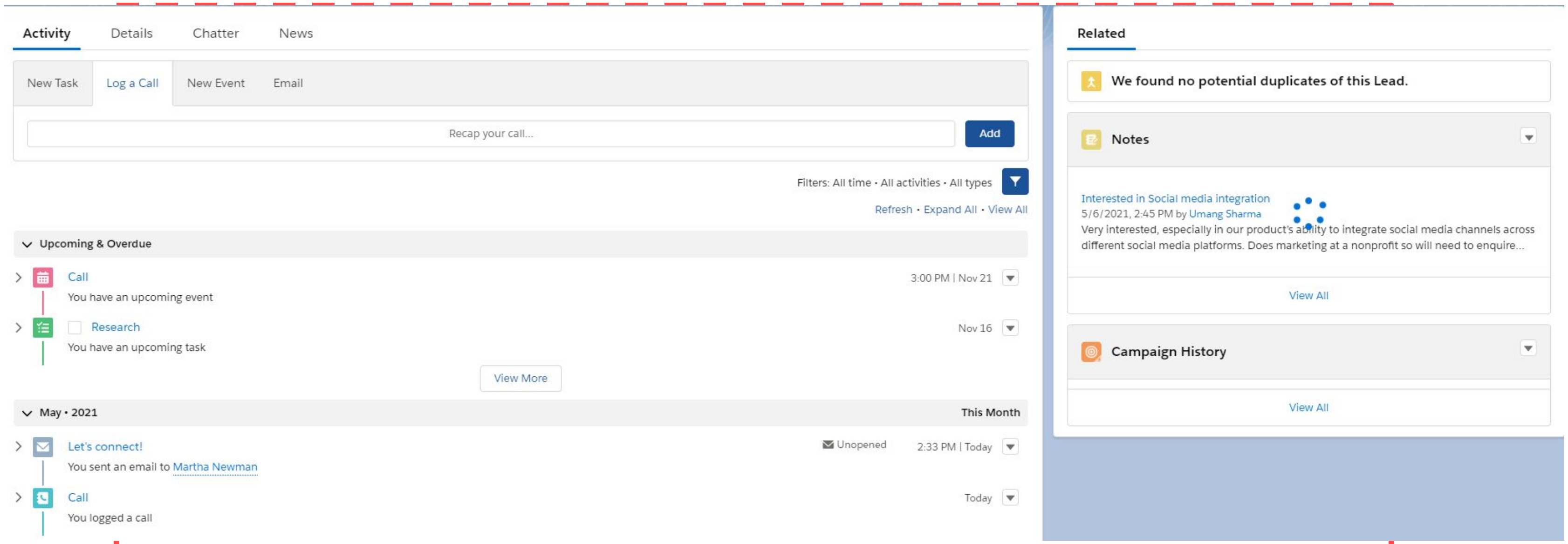
Part B Task 3: Step 1 screenshot



Part B Task 3: Step 2 screenshot



Part B Task 3: Step 3 screenshot



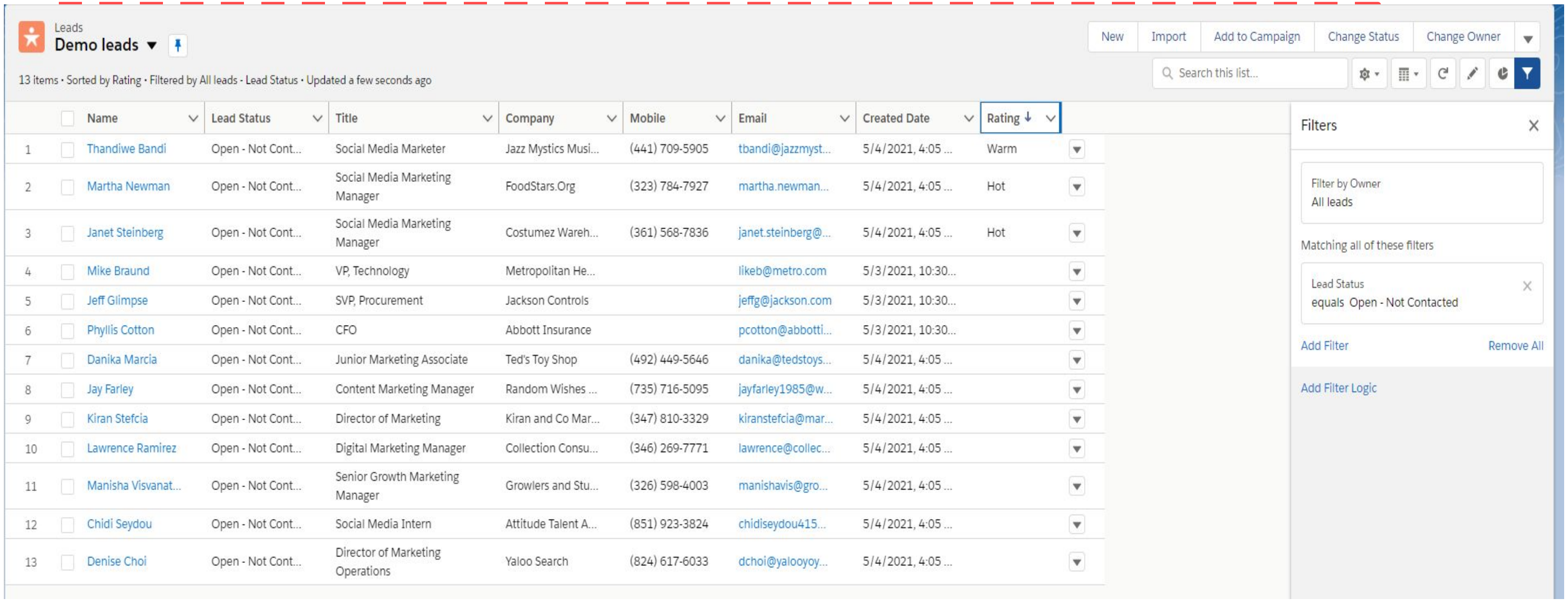
Part B Task 4: Mark Leads as Hot

PATHSTREAM

Insert a screenshot showing the leads marked as hot and warm on the leads list. Make sure that "Rating" is a displayed field on the leads list and that you have organized the list so that hot and warm leads appear first.

Part B Task 4: Screenshot

PATHSTREAM



Leads
Demo leads

New | Import | Add to Campaign | Change Status | Change Owner

13 items • Sorted by Rating • Filtered by All leads - Lead Status • Updated a few seconds ago

Search this list...

	Name	Lead Status	Title	Company	Mobile	Email	Created Date	Rating
1	Thandiwe Bandi	Open - Not Cont...	Social Media Marketer	Jazz Mystics Musi...	(441) 709-5905	tbandi@jazzmyst...	5/4/2021, 4:05 ...	Warm
2	Martha Newman	Open - Not Cont...	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman...	5/4/2021, 4:05 ...	Hot
3	Janet Steinberg	Open - Not Cont...	Social Media Marketing Manager	Costumez Wareh...	(361) 568-7836	janet.steinberg@...	5/4/2021, 4:05 ...	Hot
4	Mike Braund	Open - Not Cont...	VP, Technology	Metropolitan He...		likeb@metro.com	5/3/2021, 10:30...	
5	Jeff Glimpse	Open - Not Cont...	SVP, Procurement	Jackson Controls		jeffg@jackson.com	5/3/2021, 10:30...	
6	Phyllis Cotton	Open - Not Cont...	CFO	Abbott Insurance		pcotton@abbotti...	5/3/2021, 10:30...	
7	Danika Marcia	Open - Not Cont...	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys...	5/4/2021, 4:05 ...	
8	Jay Farley	Open - Not Cont...	Content Marketing Manager	Random Wishes ...	(735) 716-5095	jayfarley1985@w...	5/4/2021, 4:05 ...	
9	Kiran Stefcia	Open - Not Cont...	Director of Marketing	Kiran and Co Mar...	(347) 810-3329	kiranstefcia@mar...	5/4/2021, 4:05 ...	
10	Lawrence Ramirez	Open - Not Cont...	Digital Marketing Manager	Collection Consu...	(346) 269-7771	lawrence@collec...	5/4/2021, 4:05 ...	
11	Manisha Visvanat...	Open - Not Cont...	Senior Growth Marketing Manager	Growlers and Stu...	(326) 598-4003	manishavis@gro...	5/4/2021, 4:05 ...	
12	Chidi Seydou	Open - Not Cont...	Social Media Intern	Attitude Talent A...	(851) 923-3824	chidiseydou415...	5/4/2021, 4:05 ...	
13	Denise Choi	Open - Not Cont...	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yalooyoy...	5/4/2021, 4:05 ...	

Filters

Filter by Owner
All leads

Matching all of these filters

Lead Status
equals Open - Not Contacted

Add Filter
Remove All

Add Filter Logic

Part B Task 5: Convert Leads

Insert screenshots on the following slides to show the updates you've made to each lead according to the directions below:

Step 1: Screenshot Thandiwe Bandi's lead record page.

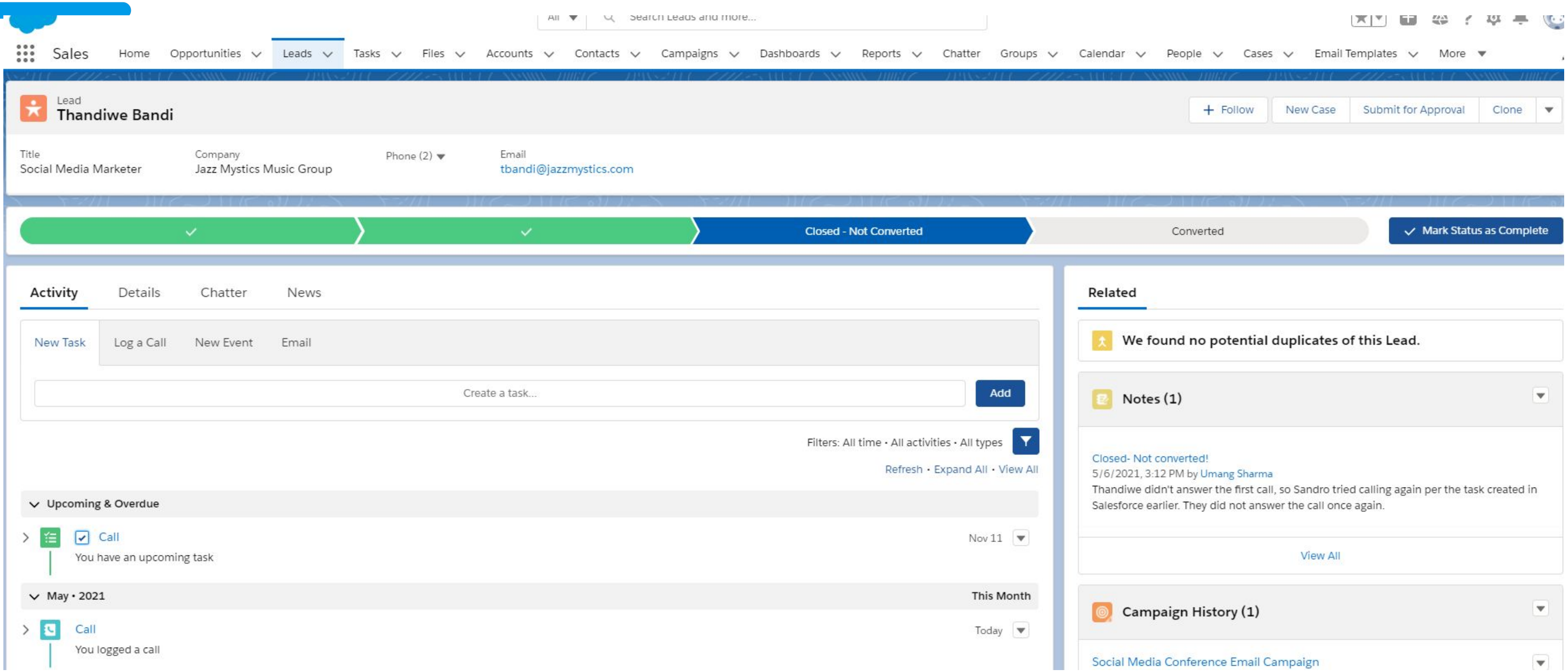
- *Make sure your screenshot shows the lead's name, the note you created, and that their lead status in the lead path is updated to Closed — Not Converted.*

Step 3: Screenshot the popup after converting Martha Newman.

- *This is the popup labeled "Your lead has been converted". Make sure that the screenshot shows the Account, Contact, and Opportunity that have been created.*

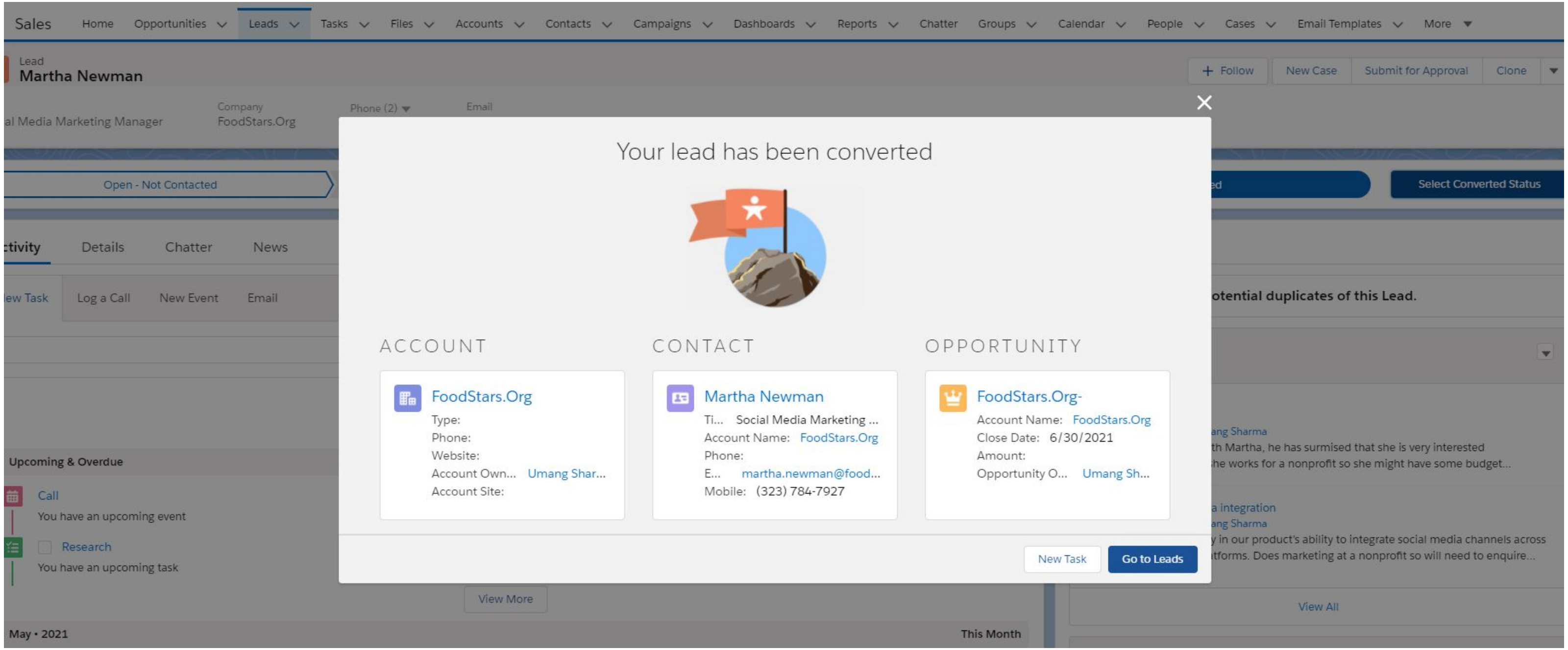
Part B Task 5: Step 1 screenshot

PATHSTREAM



Part B Task 5: Step 2 screenshot

PATHSTREAM



This is the end of this Independent Project! Great job completing all these tasks in Salesforce.