

# 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

## The Sales Process



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

*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](#)

100% \$ % .0 .00 123 Arial 10 B I S A 🔍 📊 📈 📉 📊 📈 📉 📊 📈 📉

	A	B	C	D	E	F
1	<b>First Name</b>	<b>Last Name</b>	<b>Title</b>	<b>Company</b>	<b>Phone Number</b>	<b>Email</b>
2	Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	(441) 709-5905	tbandi@jazzmystics.com
3	Denise	Choi	Director of Marketing Operations	Yaloo Search	(824) 617-6033	dchoi@yalooyoyos.com
4	Chidi	Seydou	Social Media Intern	Attitude Talent Agency	(851) 923-3824	chidiseydou415@attitude.com
5	Manisha	Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	(326) 598-4003	manishavis@growlers.com
6	Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	janet.steinberg@costumez.com
7	Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	(346) 269-7771	lawrence@collectionconsulting.com
8	Martha	Newman	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman@foodstars.org
9	Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	(347) 810-3329	kiranstefcia@marketersco.com
10	Jay	Farley	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	jayfarley1985@wishes.com
11	Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	danika@tedstoys.com
12						

## Part A, Task 2: Import Data in Salesforce

*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

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

Leads

All Open Leads

10 Items • Sorted by Name • Filtered by All leads • Created Date, Lead Status • Updated a few seconds ago

Search this list...

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

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

*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





PATHSTREAM




All ▾







      

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 ▾

25 Items • Sorted by Name • Filtered by All leads - Lead Status • Updated a few seconds ago

<input type="checkbox"/>	Name ↑ ▾	Company ▾	St... ▾	Email ▾	Lead Status ▾	Created Date ▾	Ow... ▾	U... ▾	
1	<input type="checkbox"/> Bertha Boxer	Farmers Coop. of FL...	FL	<a href="mailto:bertha@fcf.net">bertha@fcf.net</a>	Working - Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾
2	<input type="checkbox"/> Betty Bair	American Banking C...	PA	<a href="mailto:bblair@abankingco...">bblair@abankingco...</a>	Working - Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾
3	<input type="checkbox"/> Brenda McClure	Cadinal Inc.	IL	<a href="mailto:brenda@cardinal.net">brenda@cardinal.net</a>	Working - Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾
4	<input type="checkbox"/> Chidi Seydou	Attitude Talent Age...		<a href="mailto:chidiseydou415@at...">chidiseydou415@at...</a>	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	<input checked="" type="checkbox"/>	▾
5	<input type="checkbox"/> Danika Marcia	Ted's Toy Shop		<a href="mailto:danika@tedstoys.co...">danika@tedstoys.co...</a>	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	<input checked="" type="checkbox"/>	▾
6	<input type="checkbox"/> David Monaco	Blues Entertainmen...		<a href="mailto:david@blues.com">david@blues.com</a>	Working - Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾
7	<input type="checkbox"/> Denise Choi	Yaloo Search		<a href="mailto:dchoi@yalooyoyos...">dchoi@yalooyoyos...</a>	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	<input checked="" type="checkbox"/>	▾
8	<input type="checkbox"/> Janet Steinberg	Costumez Warehouse		<a href="mailto:janet.steinberg@co...">janet.steinberg@co...</a>	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	<input checked="" type="checkbox"/>	▾
9	<input type="checkbox"/> Jay Farley	Random Wishes Bui...		<a href="mailto:jayfarley1985@wish...">jayfarley1985@wish...</a>	Open - Not Contacted	5/4/2021, 4:05 PM	UShar	<input checked="" type="checkbox"/>	▾
10	<input type="checkbox"/> Jeff Glimpse	Jackson Controls		<a href="mailto:jeffg@jackson.com">jeffg@jackson.com</a>	Open - Not Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾
11	<input type="checkbox"/> Kaiti Sanders	T&B Corp	CT	<a href="mailto:kaiti@tandb.com">kaiti@tandb.com</a>	Working - Contacted	5/3/2021, 10:30 P...	UShar	<input checked="" type="checkbox"/>	▾

Cancel

Save ▾

Filter by Owner  
All leads

Matching all of these filters

Lead Status\*  
equals Open - Not Contacted

Add Filter Remove All

Add Filter Logic

# Part A, Task 3: Step 2 screenshot



PATHSTREAM



Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

All

Search Leads and 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...



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

# Part A, Task 3: Step 3 screenshot



PATHSTREAM

Navigation bar: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Search bar: Search Leads and more...

Tools: Star, Plus, Home, Help, Settings, Notifications, Avatar

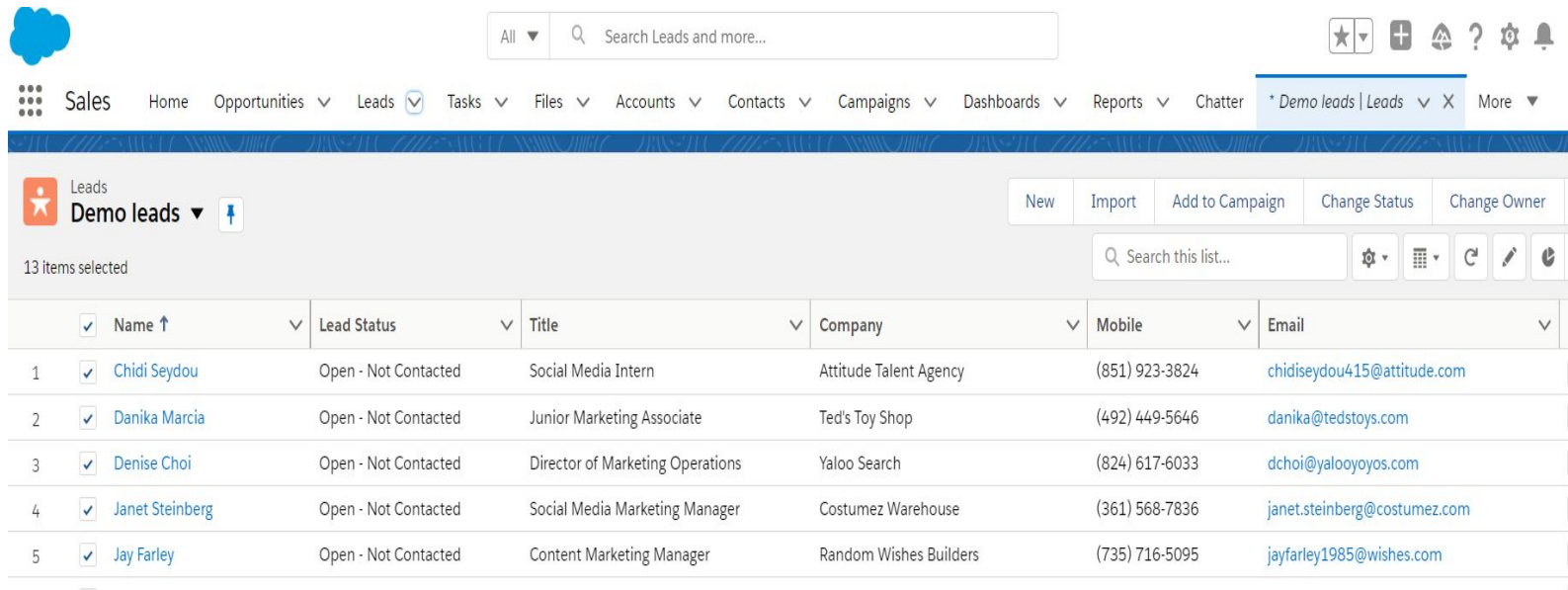
Leads section: Demo leads (13 items)

Actions: New, Import, Add to Campaign, Change Status, Change Owner

Search: Search this list...

	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@yaloooyoyos.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



Leads

**Demo leads** ▼

13 items selected

Search this list...

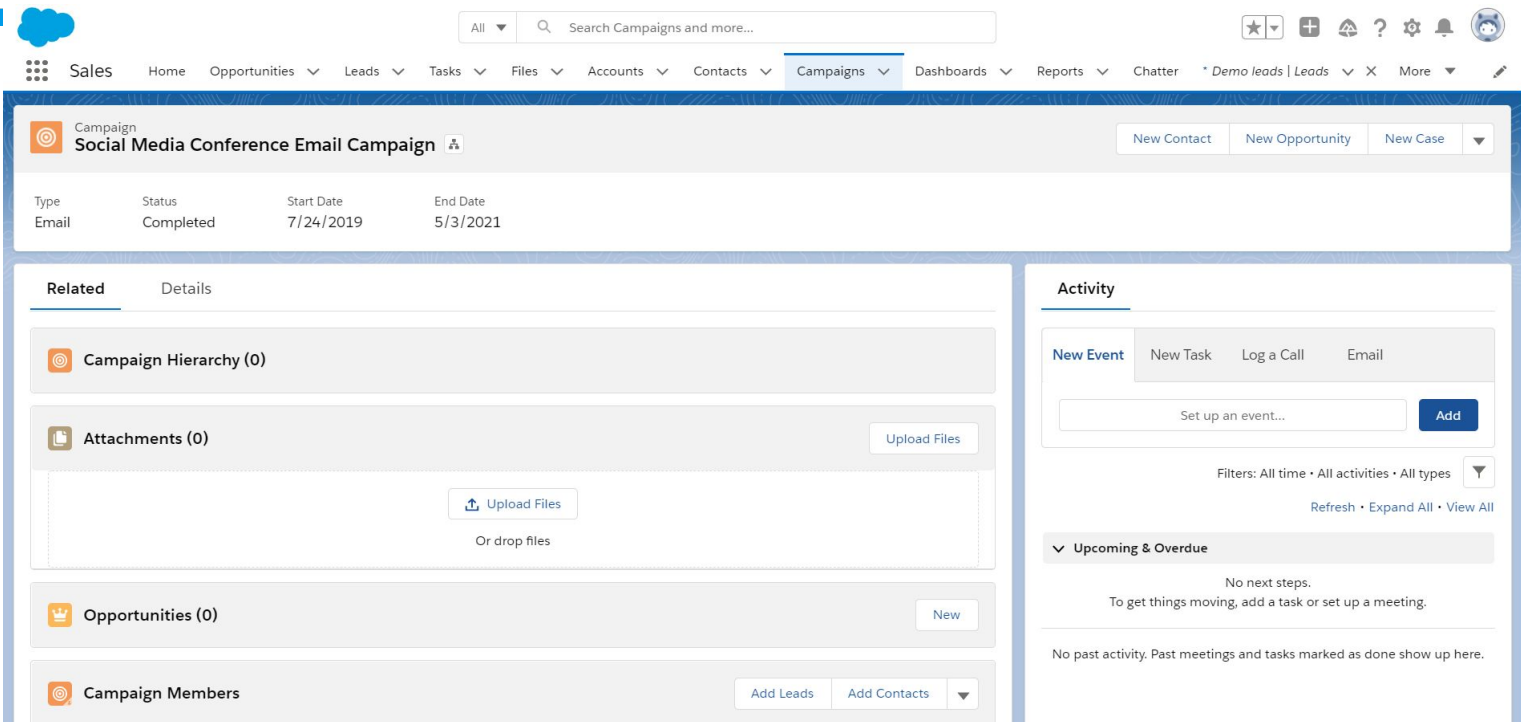
<input checked="" type="checkbox"/>	Name ↑	Lead Status	Title	Company	Mobile	Email
1	<input checked="" type="checkbox"/> Chidi Seydou	Open - Not Contacted	Social Media Intern	Attitude Talent Agency	(851) 923-3824	<a href="mailto:chidiseydou415@attitude.com">chidiseydou415@attitude.com</a>
2	<input checked="" type="checkbox"/> Danika Marcia	Open - Not Contacted	Junior Marketing Associate	Ted's Toy Shop	(492) 449-5646	<a href="mailto:danika@tedstoys.com">danika@tedstoys.com</a>
3	<input checked="" type="checkbox"/> Denise Choi	Open - Not Contacted	Director of Marketing Operations	Yaloo Search	(824) 617-6033	<a href="mailto:dchoi@yaloooyos.com">dchoi@yaloooyos.com</a>
4	<input checked="" type="checkbox"/> Janet Steinberg	Open - Not Contacted	Social Media Marketing Manager	Costumez Warehouse	(361) 568-7836	<a href="mailto:janet.steinberg@costumez.com">janet.steinberg@costumez.com</a>
5	<input checked="" type="checkbox"/> Jay Farley	Open - Not Contacted	Content Marketing Manager	Random Wishes Builders	(735) 716-5095	<a href="mailto:jayfarley1985@wishes.com">jayfarley1985@wishes.com</a>

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

*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



The screenshot displays the Pathstream CRM interface. At the top, a navigation bar includes a search bar with the text "Search Campaigns and more...", a star icon, a plus icon, a shield icon, a question mark icon, a gear icon, a bell icon, and a user profile icon. Below the navigation bar, a sidebar menu lists various sections: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns (highlighted), Dashboards, Reports, Chatter, Demo leads, Leads, and More. The main content area is titled "Campaign Social Media Conference Email Campaign". It features a table with columns for Type, Status, Start Date, and End Date, containing one row: Email, Completed, 7/24/2019, 5/3/2021. To the right of the table are buttons for "New Contact", "New Opportunity", and "New Case". Below the table, there are sections for "Related" (Campaign Hierarchy, Attachments, Opportunities, Campaign Members) and "Activity" (New Event, New Task, Log a Call, Email). The "Activity" section includes a filter dropdown set to "All time", "All activities", and "All types", and a "Refresh" button. The "Upcoming & Overdue" section shows "No next steps" and "No past activity".

**Campaign**  
**Social Media Conference Email Campaign**

New Contact New Opportunity New Case

Type	Status	Start Date	End Date
Email	Completed	7/24/2019	5/3/2021

**Related** Details

**Campaign Hierarchy (0)**

**Attachments (0)** Upload Files

Upload Files  
Or drop files

**Opportunities (0)** New

**Campaign Members** Add Leads Add Contacts

**Activity**

New Event New Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Part A, Task 5: Business Case Analysis

*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:

- 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.*

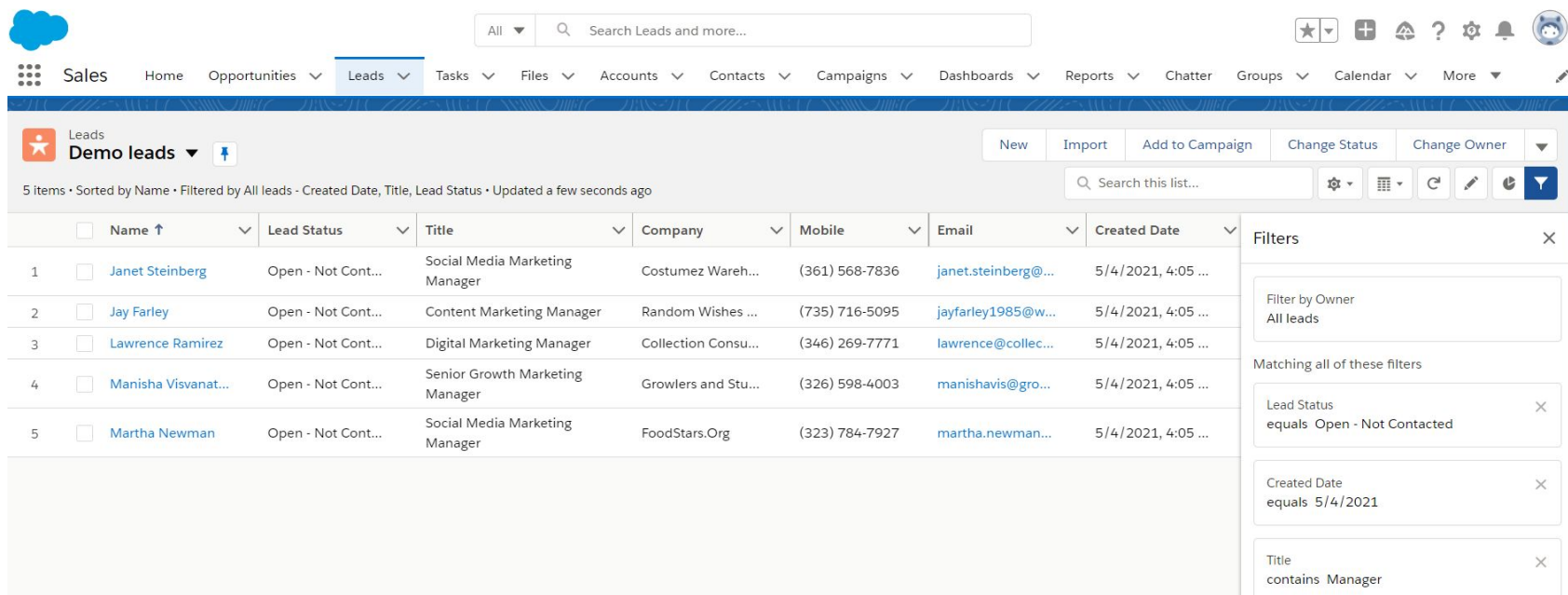
## Part B Overview

- 
- 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



The screenshot displays the PATHSTREAM application interface, specifically the 'Leads' management section. The top navigation bar includes a cloud icon, a search bar labeled 'Search Leads and more...', and various utility icons. The main navigation menu shows 'Sales' as the active section, with sub-menus for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The 'Leads' sub-menu is currently selected.

Below the navigation bar, the 'Leads' section is titled 'Demo leads' with a dropdown arrow and a pin icon. It includes action buttons: 'New', 'Import', 'Add to Campaign', 'Change Status', and 'Change Owner'. A search bar for the list is also present. The main content area displays a table of 5 items, sorted by Name, filtered by All leads, and created on 5/4/2021. The table columns are Name, Lead Status, Title, Company, Mobile, Email, and Created Date.

	Name ↑	Lead Status	Title	Company	Mobile	Email	Created Date
1	Janet Steinberg	Open - Not Cont...	Social Media Marketing Manager	Costumez Wareh...	(361) 568-7836	janet.steinberg@...	5/4/2021, 4:05 ...
2	Jay Farley	Open - Not Cont...	Content Marketing Manager	Random Wishes ...	(735) 716-5095	jayfarley1985@w...	5/4/2021, 4:05 ...
3	Lawrence Ramirez	Open - Not Cont...	Digital Marketing Manager	Collection Consu...	(346) 269-7771	lawrence@collec...	5/4/2021, 4:05 ...
4	Manisha Visvanat...	Open - Not Cont...	Senior Growth Marketing Manager	Growlers and Stu...	(326) 598-4003	manishavis@gro...	5/4/2021, 4:05 ...
5	Martha Newman	Open - Not Cont...	Social Media Marketing Manager	FoodStars.Org	(323) 784-7927	martha.newman...	5/4/2021, 4:05 ...

On the right side, a 'Filters' panel is open, showing the following filters:

- Filter by Owner: All leads
- Matching all of these filters
- Lead Status equals Open - Not Contacted
- Created Date equals 5/4/2021
- Title contains Manager

## Part B Task 2: Initiate Contact with Leads via Email

*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.*

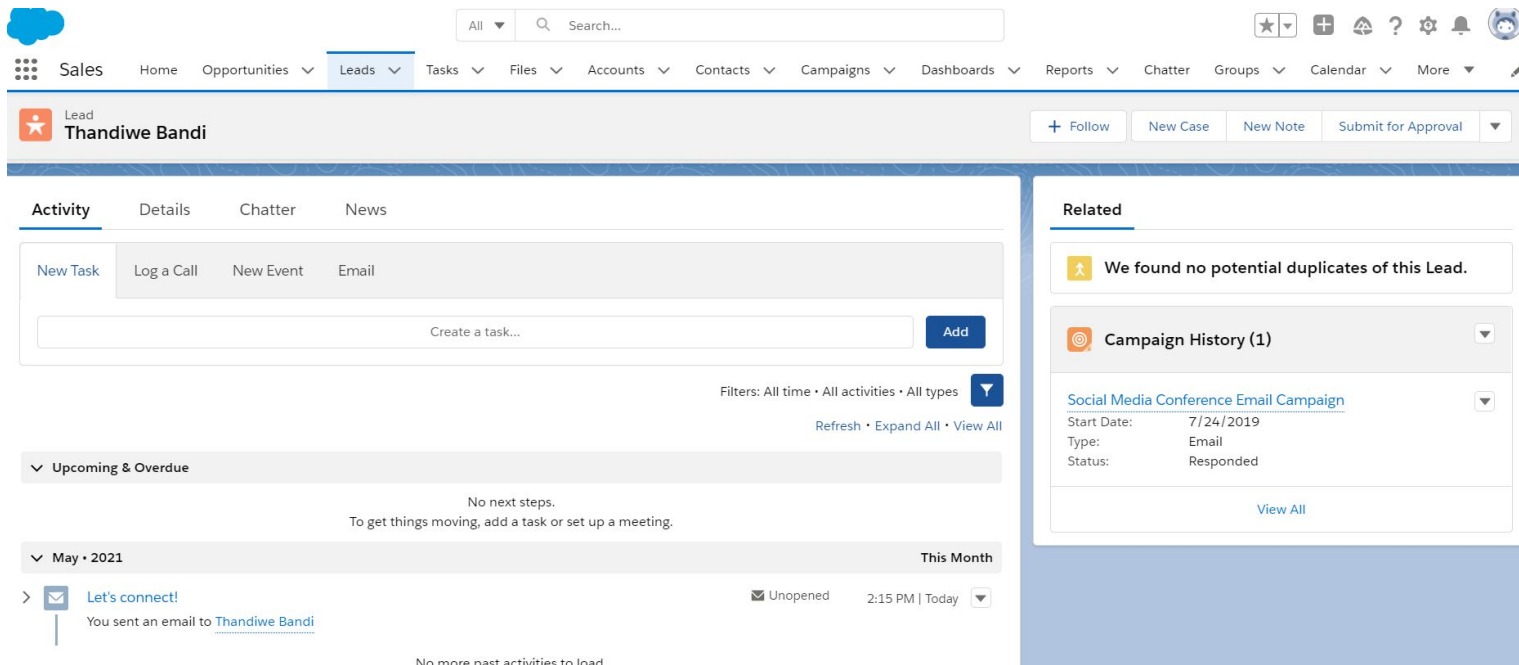
**Step 1:** Past activity for **Janet Steinberg** showing you've emailed them.

**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



The screenshot displays the PATHSTREAM interface for a Lead profile. The top navigation bar includes a search bar and various icons. The main navigation menu shows 'Sales' as the active section, with sub-menus for 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. The Lead profile for 'Thandiwe Bandi' is shown, with tabs for 'Activity', 'Details', 'Chatter', and 'News'. The 'Activity' tab is selected, showing a 'New Task' button and a 'Log a Call' button. Below these is a 'Create a task...' input field and an 'Add' button. The 'Upcoming & Overdue' section shows 'No next steps. To get things moving, add a task or set up a meeting.' The 'May 2021' section shows a calendar view with a 'Let's connect!' button and a note 'You sent an email to Thandiwe Bandi'. The 'Related' section on the right shows 'We found no potential duplicates of this Lead.' and 'Campaign History (1)' with a table of campaign details.

Lead  
Thandiwe Bandi

+ Follow New Case New Note Submit for Approval

Activity Details Chatter News

New Task Log a Call New Event Email

Create a task... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

May 2021 This Month

> Let's connect!  
You sent an email to Thandiwe Bandi

No more past activities to load

Related

We found no potential duplicates of this Lead.

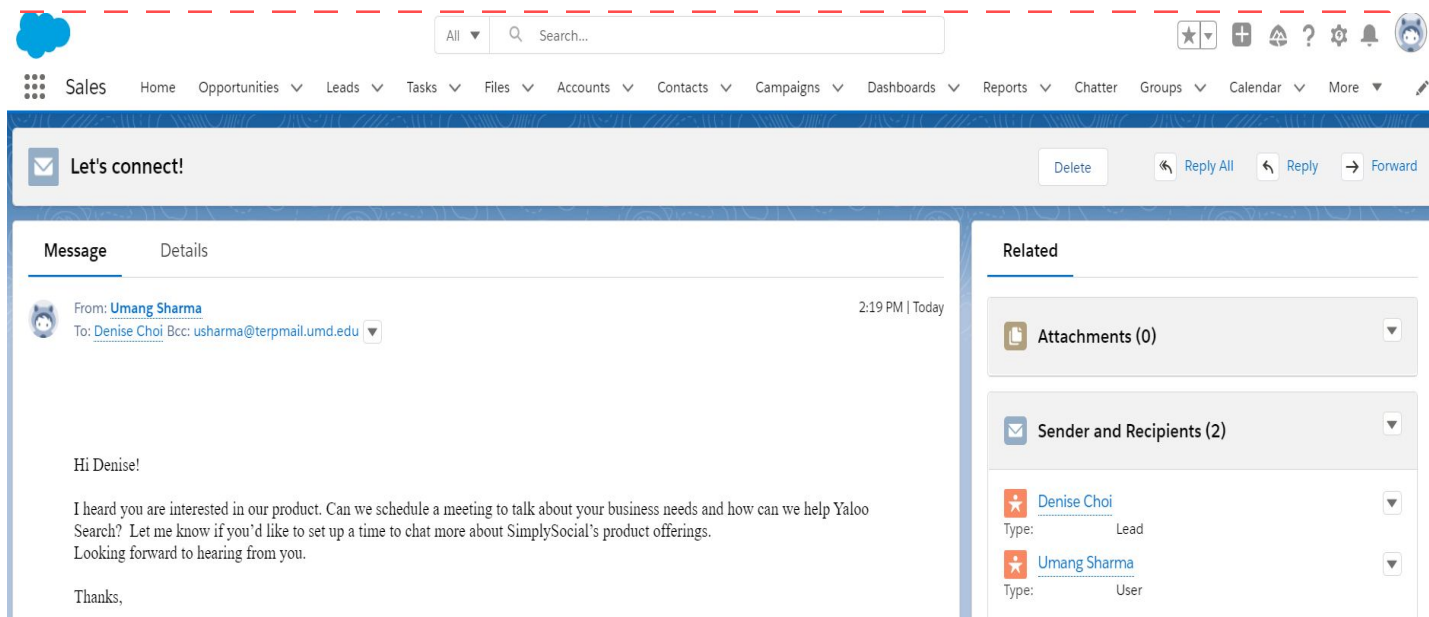
Campaign History (1)

Social Media Conference Email Campaign

Start Date: 7/24/2019  
Type: Email  
Status: Responded

View All

# Part B Task 2: Step 2 screenshot



The screenshot displays the PATHSTREAM application interface. At the top, there is a navigation bar with a search bar and various icons. Below this is a menu bar with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area shows an email message titled "Let's connect!". The message is from Umang Sharma to Denise Choi. The right sidebar shows related information, including attachments (0) and sender/recipient details.

**Message** Details

From: [Umang Sharma](#) 2:19 PM | Today  
To: [Denise Choi](#) Bcc: [usharma@terpmail.umd.edu](mailto:usharma@terpmail.umd.edu)

Hi Denise!

I heard you are interested in our product. Can we schedule a meeting to talk about your business needs and how can we help Yaloo Search? Let me know if you'd like to set up a time to chat more about SimplySocial's product offerings. Looking forward to hearing from you.

Thanks,

**Related**

**Attachments (0)**

**Sender and Recipients (2)**

- [Denise Choi](#)  
Type: Lead
- [Umang Sharma](#)  
Type: User

## 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.*

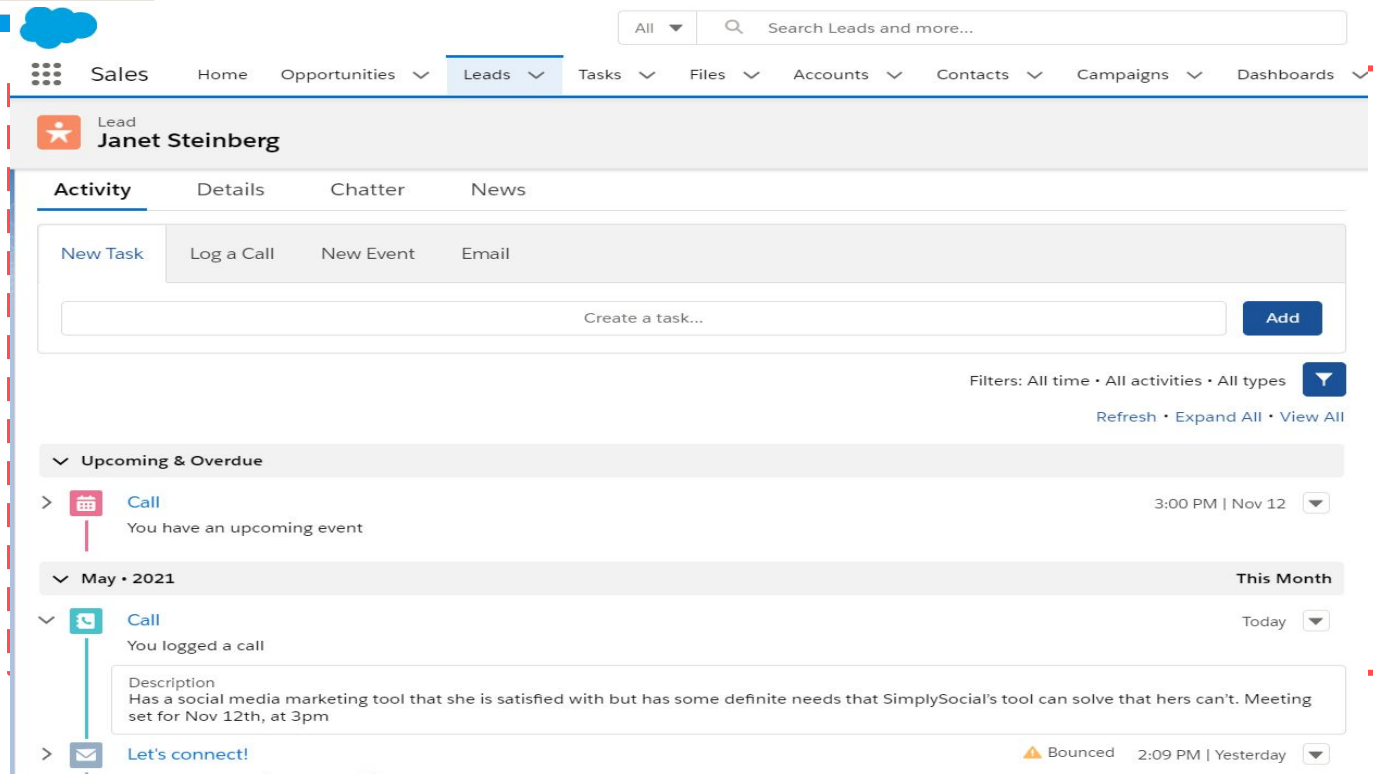
**Step 1:** Past activity for **Janet Steinberg** showing logged activities.

**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



Lead **Janet Steinberg**

Activity Details Chatter News

New Task Log a Call New Event Email

Create a task... **Add**

Filters: All time • All activities • All types **Y**

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

> **Call** 3:00 PM | Nov 12 ▼  
You have an upcoming event


▼ May • 2021 **This Month**

✓ **Call** Today ▼  
You logged a call

Description  
Has a social media marketing tool that she is satisfied with but has some definite needs that SimplySocial's tool can solve that hers can't. Meeting set for Nov 12th, at 3pm

> **Let's connect!** **Bounced** 2:09 PM | Yesterday ▼

# Part B Task 3: Step 2 screenshot

Lead  
**Thandiwe Bandi**

New Task

Log a Call

New Event

Email


Add

Filters: All time • All activities • All types

Y

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue


>  ☐ Call

Nov 11 ▼

You have an upcoming task


▼ May • 2021

This Month

>  Call

Today ▼

You logged a call

>  Let's connect!

Bounced 2:15 PM | Yesterday ▼

You sent an email to [Thandiwe Bandi](#)

# Part B Task 3: Step 3 screenshot

Activity

Details

Chatter

News

New Task

Log a Call

New Event

Email

Recap your call...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

Call

You have an upcoming event

3:00 PM | Nov 21

Research

You have an upcoming task

Nov 16

View More

May • 2021

This Month

Let's connect!

You sent an email to [Martha Newman](#)

Unopened 2:33 PM | Today

Call

You logged a call

Today

Related

We found no potential duplicates of this Lead.

Notes

Interested in Social media integration  
5/6/2021, 2:45 PM by Umang Sharma  
Very interested, especially in our product's ability to integrate social media channels across different social media platforms. Does marketing at a nonprofit so will need to enquire...

View All

Campaign History

View All

## Part B Task 4: Mark Leads as Hot

*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

Q Search this list...

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



Lead: **Thandiwe Bandi**

Buttons: + Follow, New Case, Submit for Approval, Clone

Title: Social Media Marketer | Company: Jazz Mystics Music Group | Phone (2): | Email: [tbandi@jazzmystics.com](mailto:tbandi@jazzmystics.com)

Progress: Closed - Not Converted (Current), Converted, Mark Status as Complete

Activity | Details | Chatter | News

New Task | Log a Call | New Event | Email

Create a task... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

- Call (Nov 11) You have an upcoming task

May • 2021 This Month

- Call (Today) You logged a call

Related

We found no potential duplicates of this Lead.

Notes (1)

Closed- Not converted!  
5/6/2021, 3:12 PM by Umang Sharma  
Thandiwe didn't answer the first call, so Sandro tried calling again per the task created in Salesforce earlier. They did not answer the call once again.

View All

Campaign History (1)

Social Media Conference Email Campaign

# Part B Task 5: Step 2 screenshot

Sales Home Opportunities **Leads** Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Email Templates More

Lead **Martha Newman** [+ Follow](#) [New Case](#) [Submit for Approval](#) [Clone](#)

al Media Marketing Manager Company FoodStars.Org Phone (2) Email

Open - Not Contacted

activity Details Chatter News

New Task Log a Call New Event Email


Upcoming & Overdue

Call You have an upcoming event

Research You have an upcoming task

May • 2021 This Month

**Your lead has been converted**



**ACCOUNT**

**FoodStars.Org**

Type:  
Phone:  
Website:  
Account Own... [Umang Shar...](#)  
Account Site:

**CONTACT**

**Martha Newman**

Ti... Social Media Marketing ...  
Account Name: [FoodStars.Org](#)  
Phone:  
E... [martha.newman@food...](#)  
Mobile: (323) 784-7927

**OPPORTUNITY**

**FoodStars.Org-**

Account Name: [FoodStars.Org](#)  
Close Date: 6/30/2021  
Amount:  
Opportunity O... [Umang Sh...](#)

[New Task](#) [Go to Leads](#)

[View More](#)

[Select Converted Status](#)

potential duplicates of this Lead.

ang Sharma  
th Martha, he has surmised that she is very interested  
he works for a nonprofit so she might have some budget...

a Integration  
ang Sharma  
y in our product's ability to integrate social media channels across  
orms. Does marketing at a nonprofit so will need to enquire...





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