Lead Management

Lead object is used to store information about a person interested in the product or service we are delivering. In business terms leads are the people who are your potential customers.

It contains some information about a company and the information of person working into that company. Hence it can be considered as a business card.

Leads are prospects who've expressed interest in our product but aren't qualified to buy it, hence they can also be called as an unqualified prospect.

Lead conversion means qualifying a lead for the sales process.

Lead management is a process that allows to measure and monitor lead conversion. It helps inside opportunities or telesales teams qualify leads before passing them on to sales.

Sales reps get instant access to the latest prospects and ensures that leads are never dropped.

Important Fields

1. Company:
   Name of the company with which the lead is affiliated.
2. Title:
   Position of lead within his/her own company.
3. Lead Status:
   This field specifies the status on which the lead is. For example, Open, Contacted, Working, Closed-Converted or Closes-Not Converted.
4. Lead Source:
   This field specifies the source from which the lead is captured. It can be anything like Web, Purchased List, and Partner Referrals etc.

Related Lists

Campaign History

Campaign & Leads are related through a junction object i.e. Campaign Member.

Campaign History related list describes that in which campaign this particular lead has been added as a member and also its status for that campaign.

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When we initially create a lead record and add the campaign through a lookup dialog then also it is added to campaign history not as a field.

Lead Processes

Lead processes allows to create different process cycle a Sales representative follow for leads.

We can set up different lead processes to control the steps our users follow for leads because there are different stages through which a lead gets in the process of qualifying and converting which varies from company to company & department to department.

In a Lead process we define the picklist values of Status field which will be available to the user using that lead process.

By implementing different lead processes, we can have different lead life cycle for each kind of lead.

Lead processes are included in record types which can be assigned to user's profile to have a different lead life cycle.

Setting up each process takes several steps:
1. Create the lead status needed in the lead process.
2. Name the lead process, and select what lead status are included in that particular process.
3. Create a record type for the sales process. Record types link the sales process to the page layout that goes with it.

Assignment Rules:

Lead assignment rules are used to automatically assign lead records to a particular user or queue based on different conditions.

A lead assignment rule can contain many rule entries which determines the assignee of a lead.

Rule entry specifies the:
- Sort Order which determines the order of evaluation of rule entries.
- Entry criteria which determines that the response will be sent through which rule entry.
- Name of the user/queue to which the record should be assigned.
- Email template which will be used to the send the response.

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We can create as many assignment rules as we want but only 1 can be active at a time.

"Don't Reassign Owner" determines if the user whose process stack is in use becomes the owner of the rule entity, or if it remains owned by its creator user.

Web-to-Lead:

The process of capturing leads from website is called Web-to-Lead.

It allows organizations to generate a web form which they can add in their company's website using which people can register themselves as a lead and show their interest in your product, the entries in that web form when submitted, creates a lead record within Salesforce.com.

To allow the leads to be submitted through web we need to enable web-to-lead then we need to create a web form.

While generating the web form we can specify the fields we would like to capture from leads.

In web-to-lead form fields like Name and email should always be set required explicitly.

It asks for the return URL also where the page will be redirected when the lead will be submitted through the web form.

Web-to-Lead is limited to receiving 5000 leads per day.

Salesforce runs field validation rules before creating records submitted via Web-to-Lead and only creates records that have valid values.

Auto Response Rule:

Lead Auto response rules are used to automatically send an email response to the leads captured through web.

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We can create as many auto response rules as we want but only 1 can be active at a time.

A rule can contain many rule entries.

Rule entry specifies the:

- Sort Order determines the order of evaluation of rule entries.

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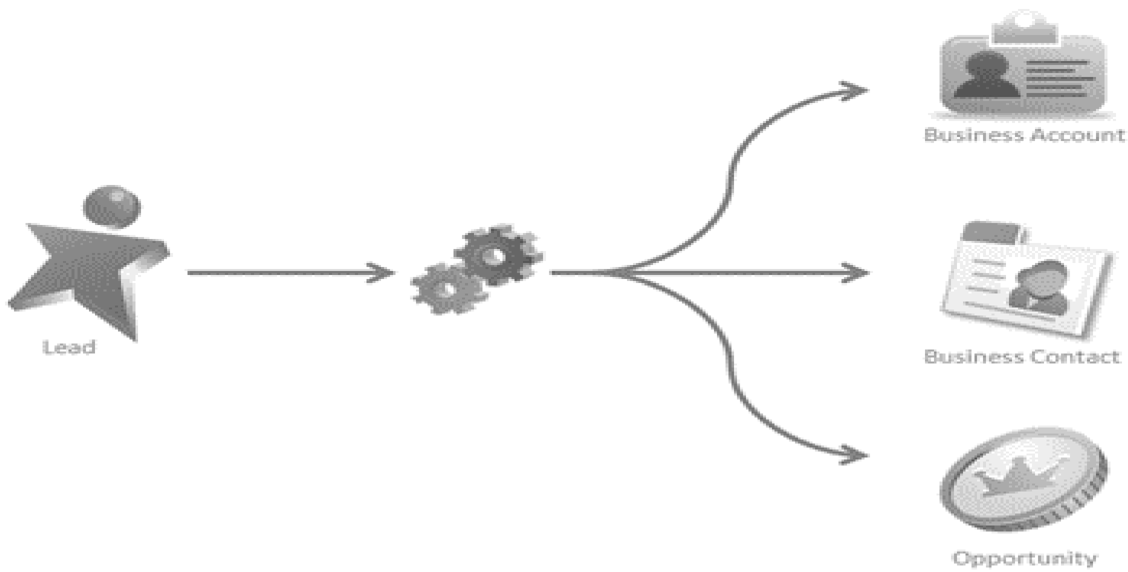
- Entry criteria which determines that the response will be sent through which rule entry.
- “From” address & Name mentioned in the response.
- Email template which will be used to the send the response.

Salesforce processes each rule until it finds a match between the lead attributes and the rule entry criteria. When it finds the first match it send the response according to it and other rule entry criteria after it are not evaluated.

If none of the rule entry matches the criteria then response is sent according to “Default Response Template” specified in Web-to-Lead settings to the leads registered from Web.

Lead Conversion:

Lead conversion is a process in which a lead record is converted into Accounts, Contacts & Opportunities. This happens when a lead is identified as a qualified Sales prospects.



When a lead is converted

- A contact, account & opportunity are created and populated with the lead’s data (unless otherwise specified during conversion).
- The lead field “Converted” is changed from false to true.

After the conversion the lead record cannot be viewed or edited as a lead but it can be viewed in reports as a lead that means the record is still present.

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The data within standard lead fields are automatically transferred to contact/account and/or opportunity.

The data within custom lead fields to transfer to the contact/account/opportunity during lead conversion, the administrator must map the custom lead fields.

Note: A custom lead field can only be mapped to a single field on either contact, account or opportunity.

If the account/contact/opportunity already exists then

- There is no way to convert a lead to an existing opportunity.
- When we convert a lead Salesforce attempts to find an account with the same name as the field “Company” on the lead record. If an account name contains the company’s name, then you will have the option to use the existing record.
- If we attach the lead to an existing account and the lead name matches the name of an existing contact, then you will have the option to use the existing contact record also.

Notes:

- Converted leads cannot be modified at all.
- It is not always necessary to create an opportunity when converting a lead.
- The default record type for the user performing lead conversion is selected automatically for records created in the conversion process.
- Once a lead in converted it cannot be reverted to an unconverted state.
- Salesforce does not overwrite existing Account/Contact data on lead conversion.

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