CRM Cheatsheet

L I G H T N I N G

GENERATE
MORE LEADS

- Plan and execute marketing campaigns that generate demand for your product or service
- Capture those leads through a variety of channels including your website

OPTIMIZE
LEAD FLOW

- Create a closed-loop follow-up process so leads don't slip through the cracks
- Establish a lead qualification process to make sure all sales reps use the same consistent methodology

CLOSE
MORE DEALS FASTER

- Close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording interactions
- Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle

Key terms and concepts

CRM
Boost your success with Salesforce Customer Relationship Management (CRM), which allows you to manage relationships with your customers and prospects and track all of your interactions.

SEARCH
Make searching data easy with powerful search features, including filtering and customizable search results layouts.

ACCOUNTS
Accounts are companies, entities, or organizations you do business with. Accounts can be businesses or individuals. Use accounts to track important information, including name, address, phone number, and related information like opportunities, activities, cases, notes, and more.

CONTACTS
Contacts are the people who work at (or are associated to) accounts. Using contacts in Salesforce, you can track key details such as phone numbers, addresses, titles, and more. You can also indicate a contact's role in a particular opportunity, such as decision maker or influencer.

EMAIL TEMPLATES
Make it easy to stay in touch with your accounts and contacts by using standard and customizable email templates.

IMPORT WIZARD
Easily import data into Salesforce. Map your information to leads, contacts, accounts, and more.

WEB-TO-LEAD
Create a simple online form for prospects to ask questions or sign up for events and free trials, and automatically create leads from submissions.

LEADS
Leads are prospects or potential opportunities, such as a person you met at a conference who expressed interest, or someone who filled out a form on your company's website.

OPPORTUNITIES
Opportunities are leads you've qualified to buy. Opportunities are your pending deals which fill your pipeline, which is where you track all of your deals in progress.

TASKS
Tasks are your to-do items which require follow-up. They can be assigned to you or someone else, and are related to leads, contacts, accounts, or other records.

ACTIVITIES
Activities are where you log your calls and activities with prospects and customers, allowing you to keep a complete history of your interactions.

EVENTS
Events are meetings you've arranged with your prospects and customers, all tracked in Salesforce.

REPORTS
Summarize and analyze your data with reports, which you can display, share, collaborate on, export, and print. Use standard reports or create custom reports. You can subtotal and filter your data to see exactly what you need.

DASHBOARDS
Access visualizations of your metrics and key performance indicators, through sets of charts and graphs. Visualize multiple reports on a single dashboard, using pie charts, bar charts, and more.

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LIGHTNING

WEBSITE & SOCIAL
- Organic web traffic
- Email responses
- Social mentions

WEB-TO-LEAD FORM
- Free trial
- “Contact me” request
- Event registration

INBOUND CALLS
- Referrals
- Google Maps

CREATE NEW LEADS
- Search first, then create a new lead in Salesforce

LISTS
- Purchased list
- Trade show
- Legacy data

IMPORT DATA
- Use the import wizard or data loader

LEAD CAPTURE
- Set up auto-response emails: “Thank you for your interest”
- Your trial information
- Event details
- Set up lead assignment rules
  - – Geography
  - – Company size
  - – Product of interest

MY OPEN LEADS
Set up different views to manage your leads. For example, today’s leads or leads sorted by lead type.

DUPLICATE LEAD?
Set up duplicate management to prevent duplicates at the point of entry. Manually merge legacy records.

PLAN AND EXECUTE MARKETING CAMPAIGN
- Email marketing
- Direct mail
- Cold calls
- Partners
- TV
- Radio
- Events
- Trade shows
- PR

ARCHIVE YOUR DEAD LEADS
Use email marketing and call downs to re-market to unqualified or no-contact leads

WORKING LEADS
When you’re working a lead, set up a series of tasks based on the type of lead.

For example:

Day 1: Personalize mass email

Day 2: Call/ voicemail

Day 3: Call/ voicemail

Day 4: Personalize mass email

QUALIFIED?
Create a set of qualification questions, such as current situation, product of interest, timeframe, key decision makers.

If the lead is qualified, convert it to a contact, with an associated opportunity and account.

OPPORTUNITIES
Monitor your opportunities reports and dashboards to keep track of top deals and prioritize your time.

PRESENTATION, PROPOSAL, NEGOTIATION
Customize Salesforce to fit your internal sales processes, making it easier to monitor your sales pipeline

WON
Salesforce gives your entire company a 360-degree view of your customers and facilitates collaboration across your organization, helping you build strong, lasting customer relationships.

ARCHIVE YOUR DEAD OPPORTUNITIES
Use email marketing and call downs to re-market to Closed Lost opportunities