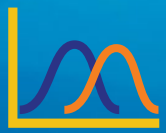
THE SALES PROCESS MAP

A step-by-step guide to reach prospects, qualify leads, and close deals

Top 10 Deals



Data Trending

Closed Business by Month

Top Sales Reps

salesforce sales cloud

Step 1: 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.

Plan and Execute Marketing Campaigns

- Google Search
- Email Marketing
- Online Ads
- Social Ads
- Partners
- Content Marketing
- Events
- Trade Shows
- PR
- Cold Calls

Website Visitors

- Organic web traffic
- AdWords referrals
- Email responses

Web Form

- "Contact me"
- Free trial
- Event registration

Inbound Calls

- Yellow pages
- Google Maps
- Word-of-mouth referrals

Create New Lead

- Search Salesforce for lead
- If one doesn't exist, create a new lead

Organic Views

- Social networks
- Content marketing
- Online communities

Web Form

- Social networks
- Content marketing
- Online communities

Marketing Automation

- Set up auto-response emails
  - "Thank you for your interest"
- Lead Scoring
  - Geography
  - Company size
  - Product of interest
- Assignment Rules
  - Lead score
  - Geo
  - Buying stage

Key Metrics

Campaign ROI

Top Search Terms

Leads by Source

Lead Quality

Step 2. Optimise Lead Flow

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

My Open Leads

Set up different views to manage your leads. For example, "Today's Leads" or leads sorted by lead type.

Duplicate Lead?

The "find duplicate" button searches for similar leads or contacts in Salesforce.

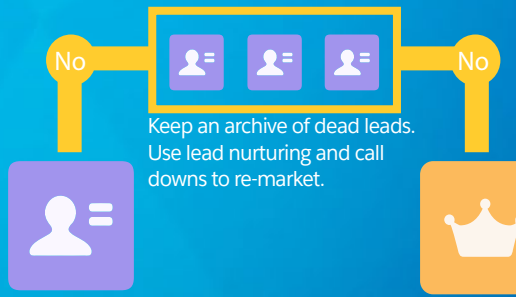
If a lead turns out to be a duplicate, easily merge the two records.

Salesforce has a number of AppExchange partners that provide high volume de-duplication and data cleansing tools.

Working Leads

When you're working a lead, you'll set up a series of tasks, which might vary based on the type of lead. For example:

Day 1: Personalise mass email
Day 2: Call/voicemail
Day 4: Call/voicemail
Day 7: Personalise mass email



Establish Contact?

Yes →

It is becoming more difficult than ever to contact a lead. It may take several attempts and various tactics to establish a relationship.

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 into a contact, with an associated opportunity and account.

Key Metrics

Lead by Status

Lead Conversion %

Converted Leads by Month

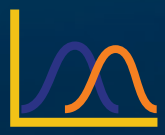
Top Sales Reps

Step 3. Close More Deals

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

Key Metrics

Top 10 Deals



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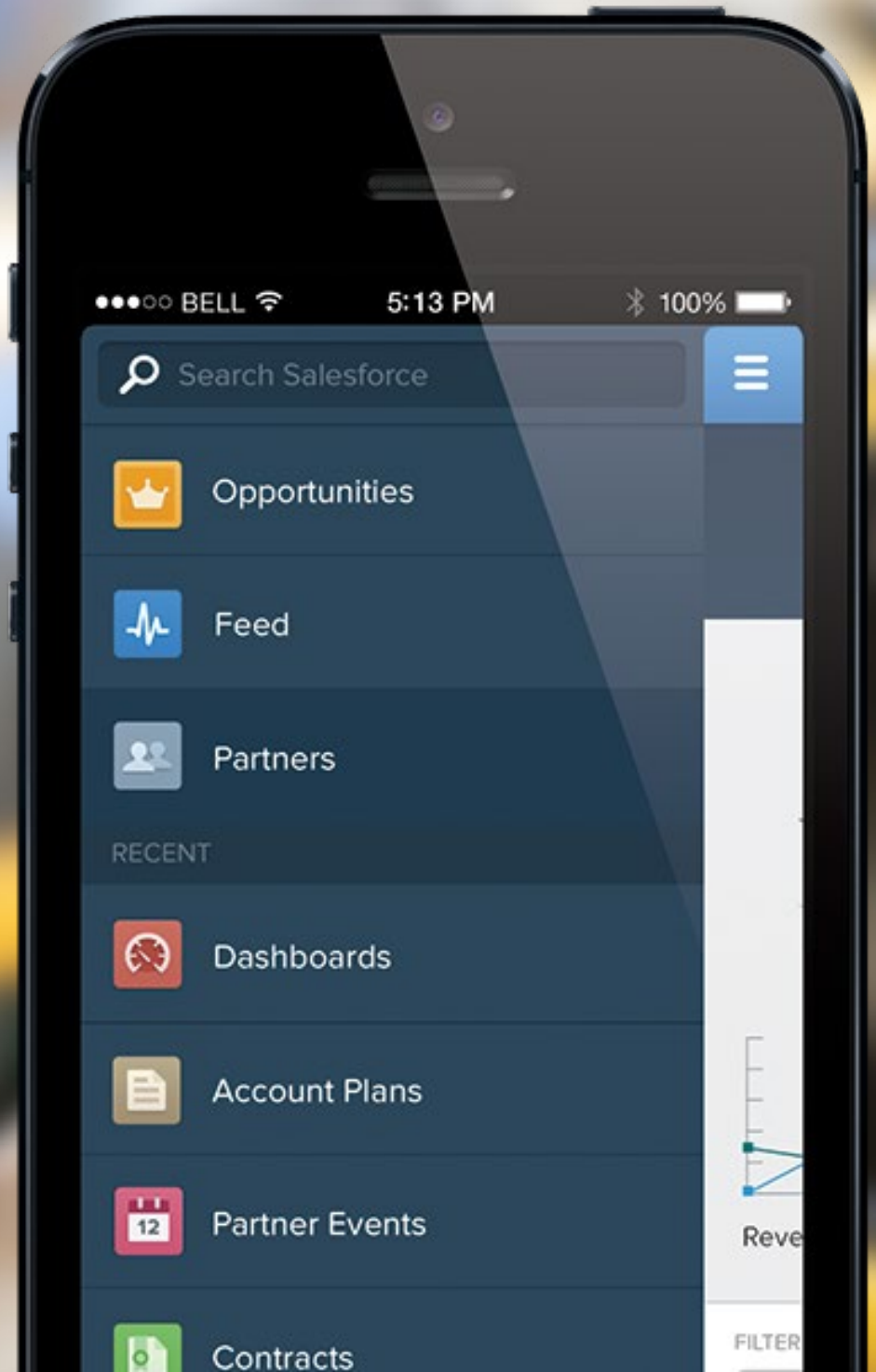
Closed Business by Month

Top Sales Reps

Take an interactive guided tour.

Learn how a sales manager and sales rep use Salesforce to manage their day. This interactive tour guides you through the different capabilities of Salesforce. Experience the world's #1 CRM app today.

Learn more ›

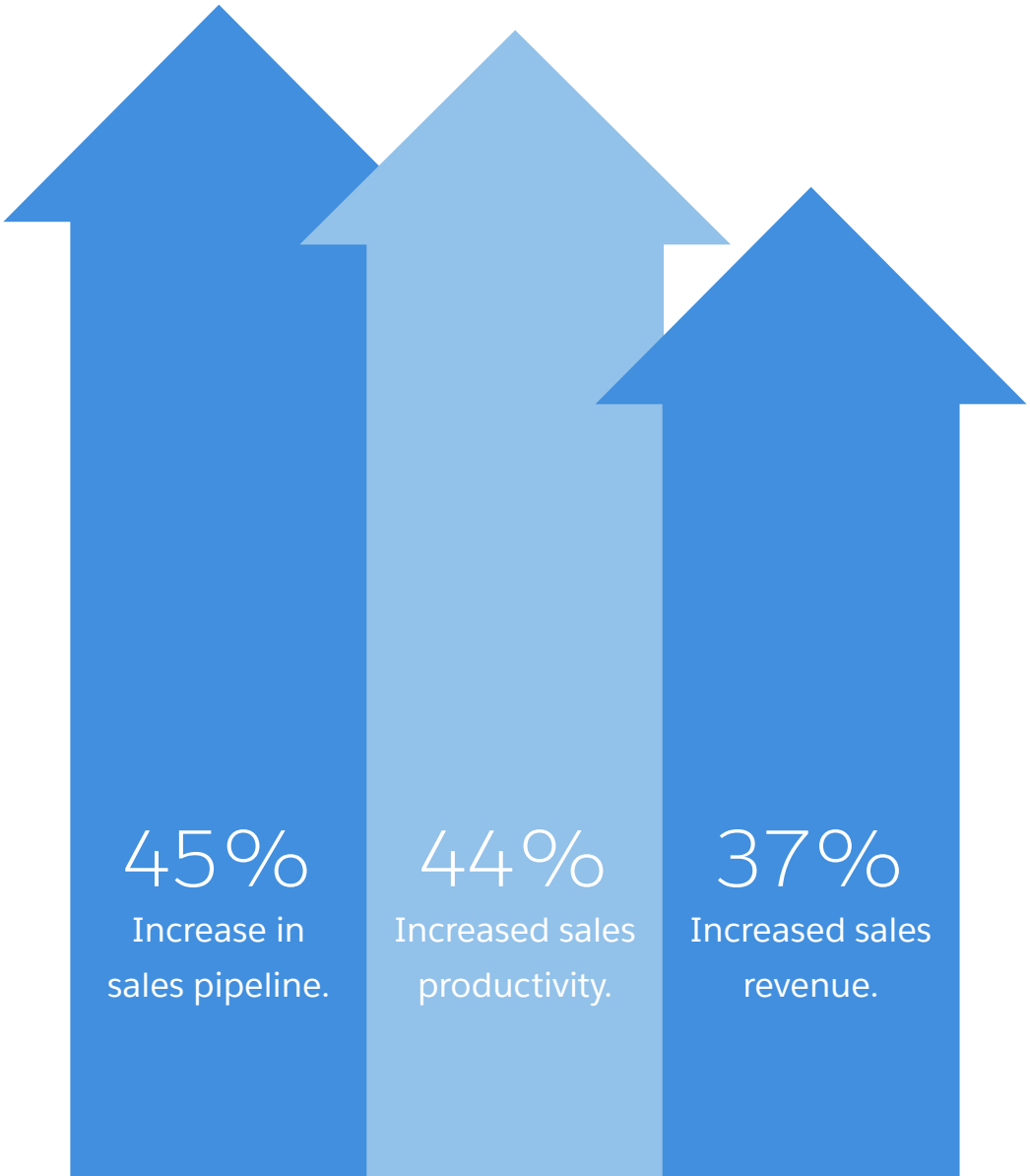


A sales tool as powerful as you.

Even the best sales people need the right tools to close the deal. Salesforce is the industry leader in customer relationship management and was designed with top sales performers in mind. From the world's most loved CRM features, to cutting edge new functionality that is redefining the industry, Salesforce is focused on one thing: making you successful.

Close more deals, get more leads, gain more insight, and accelerate productivity, with Salesforce Sales Cloud.

LEARN MORE



Source: Salesforce Customer Relationship Survey conducted May 2015, by an independent third-party, Confirmit Inc., on 4,600+ customers randomly selected. Response sizes per question vary. Note: Performance metrics are intended as a guideline based upon historical results from a sample set of customers. Results are dependent upon many different factors that are customer-specific. Therefore, actual results will vary.

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