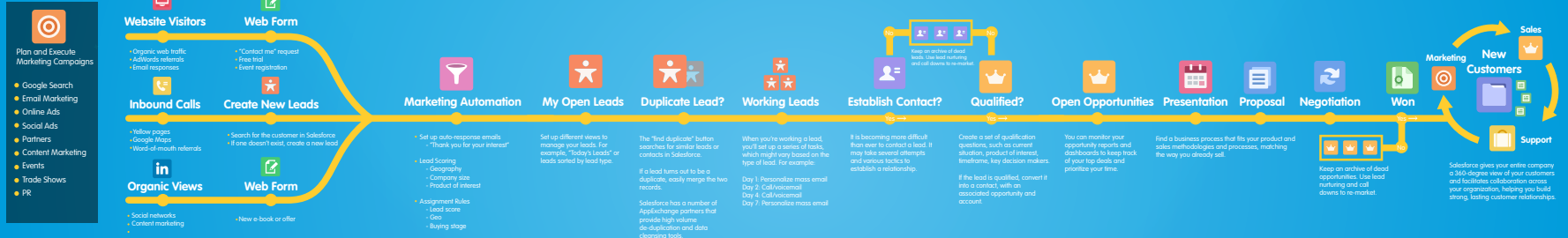
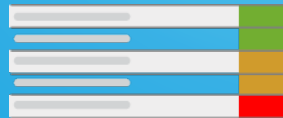


Sales Process Map

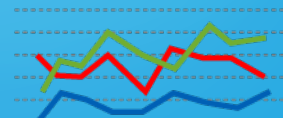
A step-by-step guide to reach prospects, qualify leads, and close deals



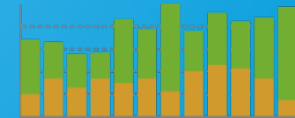
Campaign ROI



Top Search Terms



Leads by Source



Lead Quality



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



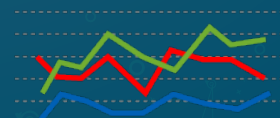
Key Metrics



Campaign ROI



Top Search Terms



Leads by Source



Lead Quality

Step 2. 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.



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: Personalize mass email
- Day 2: Call/voicemail
- Day 4: Call/voicemail
- Day 7: Personalize mass email



Establish Contact?

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

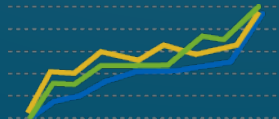
Close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording interactions. Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle.



Key Metrics



Top 10 Deals



Month-to-Date Trending



Closed Business by Month



Top Sales Reps

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