Qolsum

SALESFORCE

USER GUIDE

Company Name here

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Introduction to the Salesforce Sales Cycle

It is crucial to understand the role each object plays in the Salesforce ecosystem in order to use them to your advantage. Let's use a real-life scenario.

You are at a networking event, and you are about to strike up a conversation with an interesting individual. After a couple of questions, you identify that they might be an interesting prospect for **[Company Name]**.

They give you their business card with some information about them and the company they represent. After mingling a bit more, you realize that some of your colleagues also have business cards from other individuals at that same company.

You and your colleagues agree that it is best that only one of you reaches out to further the conversation. If at a later stage, you require help from your team to close the deal, you can definitely tag team this client.

Let's translate this scenario into Salesforce objects:

- Business card → **Lead**

Upon conversion, Salesforce categorizes the information you stored on the lead into different objects

- Interesting prospect → **Contact**
- Company → **Account**
- Possibility of a sale → **Opportunity**

Lead Management

A lead represents a business card. The lead qualification process should represent a short moment in time where you are simply vetting if this prospect is a good fit for **[Company Name]**.

Converting a lead means that you have identified 2 things
- The prospect is a good fit for **[Company Name]**
- There is a possibility for a sale in the near future

Step 1 - Verify lead duplicates

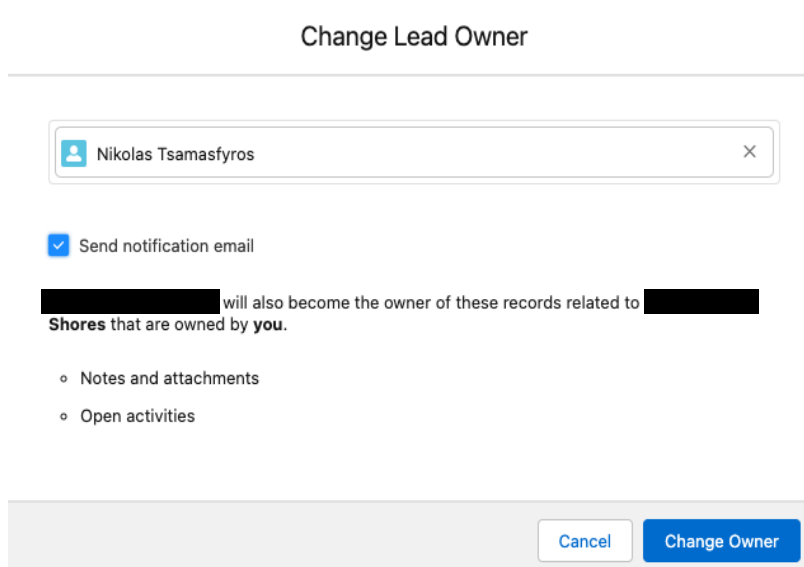
If no duplicates are found, skip to step 2.

Here are three scenarios where duplicates can be found.

<u>Lead to Lead</u>

Remember in our example at the networking event you and your colleagues spoke to multiple prospects from the same company, this means that multiple leads can exist in Salesforce.

You can have two separate prospects from Castle Resorts & Hotels both existing as a lead. It is best practice that only one sales rep from **[Company Name]** reaches out to Real Estate Ventures.



Depending on the status of the lead duplicate you find, here are the recommended next steps:

- New → Merge and assign the duplicate lead to yourself and notify the duplicate lead owner and a sales manager
- Working, Nurturing, or Qualified → There is another sales rep working this lead, assign your lead to them to avoid confusion with the client