Sales Process Map

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

**Website Visitors**
- Organic web traffic
- AdWords referrals
- Email responses

**Inbound Calls**
- Yellow pages
- Google Maps
- Word-of-mouth referrals

**Organic Views**
- Social networks
- Content marketing
- Online communities

**Web Form**
- "Contact me" request
- Free trial
- Event registration

**Create New Leads**
- Search for the customer in Salesforce
- If one doesn’t exist, create a new lead

**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. Optimize 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:** 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.

You can monitor your opportunity reports and dashboards to keep track of your top deals and prioritize your time.

Find a business process that fits your product and sales methodologies and processes, matching the way you already sell.

Keep an archive of dead opportunities. Use lead nurturing and call downs to re-market.

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.

Key Metrics

- Top 10 Deals
- Month-to-Date Trending
- Closed Business by Month
- Top Sales Reps
Ready to get started driving sales?

Try salesforce.com for free.