The Marketer's Definitive Guide to Salesforce

RingLead ringDNA

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Introduction

How did Salesforce become the amazing nerve center of so many of the world's top companies? In a word, it's "marketing." Salesforce.com's ability to inspire, educate and motivate its customers - as more than 120,000 Dreamforce attendees will attest to - is legendary.

But the amazing flexibility of the platform is probably the real reason that more companies use Salesforce than any other CRM. Look no further than the vast ecosystem of Salesforce consultants, administrators and apps, and you'll witness the definition of a true technology platform. It's one that can be used in a dizzying number of ways.

However, with so many choices about implementation, and so many apps, it can be difficult to identify best practices. While there's no single right way to use Salesforce, this eBook describes methods that are right for most companies that want to align their marketing and sales efforts into a fearsome revenue machine.

Use the Lead Object for Easy Marketing Segmentation

- **Does your company have a sales team?**
- **Does your company do content marketing to create prospect lists?**
- **Does your company acquire prospect lists for your sales and marketing teams?**

If you answered yes to any of the above questions, you might want to use what Salesforce calls the Lead Object. To put it simply, in Salesforce, “Leads” are people that you want to become customers. Not always true, some Salesforce users getting rid of the lead object.

Separating “Leads” from “Contacts” in Salesforce essentially creates a safe-haven for sales and marketing activity. For example, it might always be appropriate to send email invitations to Leads for special product promotions, but it might only be appropriate for certain Contacts.

Typical Delineation of Leads and Contacts

	Leads	Contacts
Receives general marketing promotions	Yes	No
Can be worked by sales development reps	Yes	No
Associated with Opportunities	No	Yes
Associated with Accounts	No	Yes
Associated with Revenue	No	Yes

Some Companies Don't Use the Lead Object

Complexity of implementation - One common myth is that adding a distinction between Leads and Contacts adds additional complexities to implementation. But it's really just a series of decisions that Sales and Marketing need to agree on.

They don't have a B2B business model - Another myth is that companies using the Lead Object are almost entirely B2B. This simply isn't true. Take the insurance, personal electronics and travel industries as just three examples - each model typically requires a lot of marketing effort to amass large prospect lists ("Leads") in hopes of enticing them into making a purchase.

They have a pure play eCommerce business - Companies that simply sell through their website or apps, and have no sales team, probably don't need to distinguish Leads from Contacts. Their marketing programs are typically geared toward encouraging repeat business.

Four Good Reasons to Use the Lead Object

#1

A Clear Hunting Ground for Sales and Marketing. It's common for sales reps to begin working Contacts in Salesforce, only to find that they are customers, partners, or have been sold to before. This problem can be solved in a lot of ways, but when all else fails, the Lead Object provides a clear and simple differentiation between prospects and customers.

#2

Accountability. Certain standard Salesforce fields such as "Lead Status" were designed to help sales managers monitor whether the qualified Leads earned by marketers are being worked by sales reps. Without this, getting visibility into problem areas in Marketing and Sales is more difficult.

#3

Easier ROI Reporting. As a marketer, you'll want to report on the number of qualified Leads and Opportunities for your sales team. Distinguishing between Leads and Contacts is an easy way to isolate marketing performance from sales performance. Can you still run reports on Contacts? Of course. But there are a lot of great out-of-the-box mechanisms in Salesforce that depend on the progression of Leads to Contacts and Opportunities.

#4

Awesome Apps. A lot of Salesforce apps are built on the assumption that you're using the Lead Object. In many cases, a great-sounding marketing or sales app simply won't work if you don't have any Leads in your system.

Use Salesforce Campaigns For Every Significant Marketing Initiative

It may be easiest to think of a Salesforce Campaign as a database tool that lets you easily segment customers by behavior or activity, report on the results of marketing initiatives, or create lists for sales reps.

When your Salesforce Leads and Contacts perform certain activities you think are important - downloading an eBook, for example, or calling a phone number - they will automatically become "members" of associated campaigns that you set up. This is a fantastic way to segment your prospects and customers according to the marketing initiatives they respond to.

Using Salesforce Campaigns takes a little extra planning, but for marketers, the rewards are potentially endless.

Five Real World Uses for Salesforce Campaigns

#1

Uploading an email list. Imagine that you've returned from an industry event with a list of prospects. You'll upload them into Salesforce as Leads, simultaneously assigning them to a Salesforce Campaign called "10th Annual User Conference Leads." Now that they're members of this Campaign, you can easily find them and segment them in the future.

Five Real World Uses for Salesforce Campaigns

#2

Create a lead view for a sales rep. Imagine that you're back from a conference, and you've got a bunch of new Leads. It's time for sales reps to contact your Leads in hopes that some of them will become customers. Simply create a Salesforce lead view based on the the Salesforce Campaign "10th Annual User Conference." Your sales reps now have an instant list from which to work. Assuming that all our customers or opportunities are "Contacts" in Salesforce, your rep can now work the list.

#3

Nurture a list. You've got some amazing eBooks, blog posts and webinars for the prospects you met at the conference. Using Salesforce or a marketing automation system that integrates with Salesforce, email the members of the "10th Annual User Conference" Salesforce Campaign, offering them an eBook. To do this, you'll create a second campaign, called "Free eBook," and create a workflow rule within your marketing automation software that adds prospects to the "Free eBook" Salesforce Campaign if they download it.

#4

Report ROI on the conference. Now imagine 12 weeks have passed since the conference. The easiest way to create a report in Salesforce is based on the members of a Salesforce Campaign. Salesforce will automatically calculate which members of the campaign are associated with opportunities and revenue, so all you have to do is specify the campaign (e.g. "10th Annual User Conference"), and you can easily see how many campaign members became opportunities and drove actual revenue.

Five Real World Uses for Salesforce Campaigns

#5

Track and measure content engagement. In this scenario, you have a list of unconverted Leads that you know little about, and you start offering them content or promotions through a marketing automation tool such as Marketo, Pardot or Eloqua. You can automatically add them to a new Salesforce Campaign based on any engagement metric, such as an email click, an eBook download or survey completion. Later, this engagement record will come in handy as you decide which prospects to further target.

Smart Campaign Planning

As you create campaigns, you'll probably want to set up child/parent campaign relationships. This technique can make reporting on many items at once easier. For example, you could have a parent campaign called "All Website Forms" and underneath it, child campaigns for the different types of web submission forms you have on your website.

You'll also want to standardize naming conventions. It's common for marketers to amass hundreds of Salesforce Campaigns over time. It'll be far easier to find and organize them later if you use easy naming conventions. For example, "EMAIL [name of email campaign] [date]" for all outbound email campaigns.

Also, remember that Leads and Contacts can be members of multiple campaigns simultaneously. So long as your Salesforce Campaigns reflect behavior that you think is important - such as an app download, or contest participation - each campaign layer associated with a prospect can be used down the road in your marketing efforts.

Scoring Leads and Contacts

Chances are, you've heard about "lead scoring" - the process of measuring the engagement your prospects show for your content, apps, sites and even your sales team.

But it's best to get out of the habit of referring to it as lead scoring, since you'll also want to score your Contacts as well. Although some of your Contacts may be current customers, many others may have once been prospects that just weren’t quite sales-ready yet. If you nurture them with content, and score their engagement, they’ll stand a better chance of becoming customers in the future.

Quick Ways Lead Scoring Can Benefit Sales and Marketing

Sales

- A rising lead score could indicate a sales-ready buyer (a “marketing qualified lead”), which will help your sales team with lead prioritization. Lead scoring will help your sales team use their time more effectively, and can increase their win rate by focusing on higher quality Leads from the beginning.

- A rising contact score could indicate an existing customer that’s ready for an upsell, or a former opportunity that’s now ready to buy.

Marketing

Varying lead scores can mean different things to marketing teams. For example:

- A zero lead score typically means no engagement at all. That’s usually a sign of either no interest or bad data, such as the wrong email address.

- A slowly ascending lead score can signal promising Leads that might respond to the right promotional offer.

- Quickly rising lead scores can indicate that an immediate handoff to Sales is needed.

- A rising contact score - if it's existing customer - could indicate a Lead that's ready to give you a glowing testimonial.

Sample Lead Scoring Hierarchy

Behavior	Score
Contacted sales via web form	+30
Called sales	+30
Attended sponsored conference session	+20
Installed a free app	+15
Downloaded decision-stage content	+10
Visited pricing page on website	+5
Mentioned us on Twitter	+5
Came by conference booth	+5
Downloaded awareness-stage eBook	+5
Signed up for the blog	+3
Visited any site page	+1
Unsubscribed from email list	-5

Train Sales to Complete These Three Vital Steps

Marketing isn't the only department that needs to adhere to best practices in Salesforce. There are likely many other things that your sales team will need to do as well. However, if they do just these three things, life will be much easier for you and your company.

#1

Create Opportunities from Contact Roles

Let's imagine a lead, Jane Smith, becomes sales-ready. Your sales rep will convert Jane to become a Contact. Then he'll create an Opportunity. You need to train your sales team to do this from the NEW OPPORTUNITY button on the contact page itself (instead of from the Opportunities tab within Salesforce). Doing it this way, you can be sure that whatever Salesforce Campaign Jane Smith belonged to first will be listed as the "Primary Campaign Source" on the Opportunity page. This means that your Salesforce Campaign - which, remember, is a marketing behavior - will automatically be credited not only with the Opportunity, but also with the revenue if Jane becomes a customer.

#2

Always Sync Leads from Your Marketing Automation Software

Lots of marketing teams enable sales by alerting them the moment hot Leads come in. The only problem is that it often takes several minutes for those Leads to show up in Salesforce lead views. When sales reps want to work a lead before the sync has happened, Sales reps often simply create a new lead in Salesforce. This causes duplicates - and lots of headaches down the road. For one, your automated campaign reporting no longer works, because the LEAD your sales reps will be working isn't the same one that was created in the system. Instead, simply get your sales rep to manually sync the lead from your marketing automation software to Salesforce. Depending on the system, there's usually a "sync" button on the LEAD record within your marketing automation system.

#3

Always Add Job Titles

If you work for a B2B company, you'll likely want to segment your Leads at some point by job titles. Job titles not only indicate a lead's area of focus, but also their level. But job title fields are often left untouched. To incentivize your sales team, simply explain to them that they'll likely get more hot Leads if they can be properly nurtured, and taking a few seconds to edit or add a job title is the key to Marketing being able to do just that.

Keep Your Salesforce Data Clean

Even if you use best practices, over time, your contact data will simply decay - especially if you're in a B2B business model.

According to the Bureau of Labor Statistics, the average American worker changes jobs about every 4.5 years. They get promoted, or terminated, or they simply get a better offer elsewhere. That translates to about 1.85% monthly change at each company. If your customers are in Silicon Valley, the rate of change is much steeper, at 7.69%. Note that some in management positions may not change roles as often.

Here's a summary of the data in your CRM that's likely to change over time for each prospect.

- **Change in title/promotion**
- **Change in working location**
- **Change of phone number**
- **Add mobile phone number**
- **Change of department**
- **Change of area code**
- **Change of email format**
- **Change in email domain**
- **Change in company name**
- **Change in company website**
- **Merger or acquisition**

Overall, about 12% of your data, on average, will change each year. As just one example, 75 phone numbers change every 30 minutes.

Fortunately, there's a lot you can do to maintain a stellar database.

#1 **Continuously generate new Leads** - ensuring that you've always got a fresh cache of good Leads is the oxygen in your database.

#2 **Use an application to remove and prevent duplicate Leads** - Duplicate Leads don't just cause confusion and inefficiency - they also derail reporting by associating data with the wrong Leads, Contacts and Opportunities.

#3 **Update existing Leads** - Data cleanup applications can be directed at segments of your database to bring Leads up to date with new job titles, phone numbers and other vital data. These tools make it possible for your team to reconnect with Leads that might otherwise be lost.

Sync Essential Custom Sales and Marketing Metrics with Salesforce

All too often, standard web Leads are about the only thing set up to automatically pass from your marketing automation system into Salesforce. However, there are many more opportunities for automation once you venture beyond the basics. Here are three common things that many companies miss out on during implementation.

Opportunity Fields - Have you ever recieved marketing emails from a company when you're already a customer? In many cases, this is because their marketing team had no visibility into Opportunity status fields in their marketing automation system. Opportunity fields are an easy, automatic way to ensure your good prospects and existing customers don't get the wrong messaging. For example, you could write a rule in your marketing automation software that Contacts associated with Opportunities above 20% never receive certain email messages.

Inbound Call Metrics - If you have a sales team, chances are that your company is taking inbound calls. Believe it or not, the rise of mobile search is actually driving the number of business calls up. According to Kelsey, the number of inbound sales calls will double from 30 billion to 60 billion in the next 3 years. Using call tracking software, you can get visibility into the marketing sources that are not only driving inbound calls, but also opportunities and revenue. This can be the single biggest driver for channel optimization. For example, the best AdWords managers aren't just optimizing their keywords and ads based on web conversion performance; they're also looking at inbound call volume and associated revenue to see what's really driving revenue.

Custom Application Data - No matter your company's product - whether you refinance loans, build mobile apps or provide survey creation software - chances are, you've got some type of custom application data streaming into Salesforce. If any of that data is behavioral, and can indicate customer preferences or even demographics, you need to sync it with your marketing automation software. Once you are pulling custom data, you can then set up nurturing campaigns around that data to trigger upsells, content workflows and other best practices that can accelerate revenue.

Salesforce Dashboards

Think of Salesforce Dashboards as the reward for all the work you and your marketing and sales teams put into Salesforce. Using dashboards, it's possible to have a single view of all (or nearly all) the metrics you'll need to not only monitor results and efficiency, but also to show off at your next board meeting.

Schedule Report Run Times

Dashboards are based on Salesforce reports. Once you've created all the reports that will be the basis of your dashboards, the critical step is making sure that those reports are updated regularly. If you'll be looking at your Salesforce dashboards at least daily, then your reports will need to be scheduled to run daily as well so that your dashboards will be up to date.

Focus on the Metrics that Matter

Of course, entrance/exit pages on your website, share of social voice, and email open rates matter to anyone running a marketing team.

It's fine, and probably even advisable, to measure those metrics elsewhere, as they are useful within the context of your marketing operations. But when sharing with the broader team, put yourself in the position of your CEO or board members, and focus only on what they would want to see.

Common Standard Salesforce Marketing Metrics

Report	Objective
Overall Lead volume	What is the overall lead velocity?
Lead volume by Channel	Which channels are producing the most Leads?
Lead volume by Campaign	Which campaigns are producing the most Leads?
Lead to Contact conversion ratio	How many Leads are sales-qualified?
Opportunities by Channel	Which channels are creating the most opportunities?
Opportunities by Campaign	Which campaigns are creating the most opportunities?
Closed won Opportunities by Channel	Which channels are creating the most sales and revenue?
Closed won Opportunities by Campaign	Which campaigns are creating the most sales and revenue?

Recommended Additional Salesforce Marketing Metrics

Report	Objective
Number of open Leads	Is your sales team tending to all incoming Leads? If not, how many are being missed?
Lead response time	Is your sales team responding to Leads within five minutes, or at least one hour? How are they responding - by phone, email or other communication channel?
Call Ratings	Which inbound marketing channels are driving the best calls?
Deal competitors - Total Opportunities	Which competitors is your sales team coming up against again and again?
Deal competitors - Closed / won Opportunities	Which competitors are you consistently winning deals against?
Deal competitors - Closed / lost Opportunities	Which competitors are you consistently losing to?

Salesforce Dashboards

The Standard Three-Column Approach

Salesforce dashboard pages are typically three columns, with each column designated for a general type of activity or time line. Here's an example:

Left - Current Activities	**Center - Current Results**	**Right - Long-Term**
Total Lead volume, past 30 days	Closed/won Opportunities by Channel, current month	Month-over-month Lead volume Past 6 months
Leads by Campaigns, past 30 days	Closed/won opportunities by Campaign, current month	Closed/won opportunities by Campaign, past 6 months
Leads by Channel, past 30 days	Lead to Contact conversion ratio, current month	Closed/won opportunities by Channel, past 6 months

Tracking Communications with Customers

When used correctly, Salesforce not only helps make marketing and sales more collaborative, but also improves transparency in order to provide a customer-focused experience.

It's vital for any team member to be able to quickly view what emails, phone calls and other forms of communications have taken place with a lead or contact.

Examples:

- **Marketing Manager** - spots an angry Tweet from a prospect complaining of too much "spam." As a marketing manager, it's vital to be able to quickly go into the prospect's Salesforce record and see a complete picture of which emails, phone calls and other activities that prospect is receiving.

- **Sales Rep** - is about to reach out to a Lead that has gone cold. If that prospect has received marketing content recently, and that event was recorded in Salesforce, the rep can easily reference the content as a more organic way to get back in touch.

Train Sales Reps to Track All Outbound Emails

Send an Email from Salesforce Underneath the Activity section of any Salesforce Lead or Contact page, is a button that reads, "Send an Email." When sales reps send an email directly from Salesforce, it will automatically be stored as an activity.

Use Email Applications and Plugins There are a variety of great tools available that will connect your sales reps' email client with Salesforce, and write a record of your sales teams' email communications to a lead or contact's activities field. If you're using marketing automation software, definitely look for an email integration plugin, since these tools also offer the added marketing benefit of embedding trackable links.

Use Email to Salesforce Method This requires a bit of setup from your Salesforce administrator, but it enables sales reps to have email records in both their regular email software as well as Salesforce. First, get each sales rep an "Email to Salesforce" address. Then, when composing or replying to email, they simply enter that Email to Salesforce address in the BCC field. Salesforce receives a copy of the email and typically stores it in the activity history on any Lead or Contact page.

Train Sales Reps to Track All Outbound Calls

Previously, we discussed the importance of tracking inbound calls from marketing campaigns. But in order to create a completely accurate record of lead and account follow-up, tracking your team's outbound calls is vital.

Salesforce1 offers the option for any rep to manually log calls in Salesforce from a mobile device. The only problem is that it requires reps to decide to do this every time.

Since you can't rely on your sales reps to manually log every call, automatic call logging and recording is the way to go for most teams. You'll need an application to help you do this.

ringDNA

Connect and Close Faster With Sales Acceleration Software

- Double your sales ROI
- Connect with at least 57% more of the prospects you call
- Get 100% visibility into marketing ROI
- See the impact of marketing efforts on sales outcomes

RingDNA maximizes inside sales performance by helping sales teams qualify, connect with and convert more customers. RingDNA also aligns sales and marketing teams by providing sales reps with contextual marketing data that helps reps close more deals. Marketers can make smarter investments by knowing, in real-time, which efforts drive the most valuable calls. RingDNA is the only revenue acceleration platform created specifically for the specialty inbound and outbound sales roles that exist in today's inside sales teams.

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