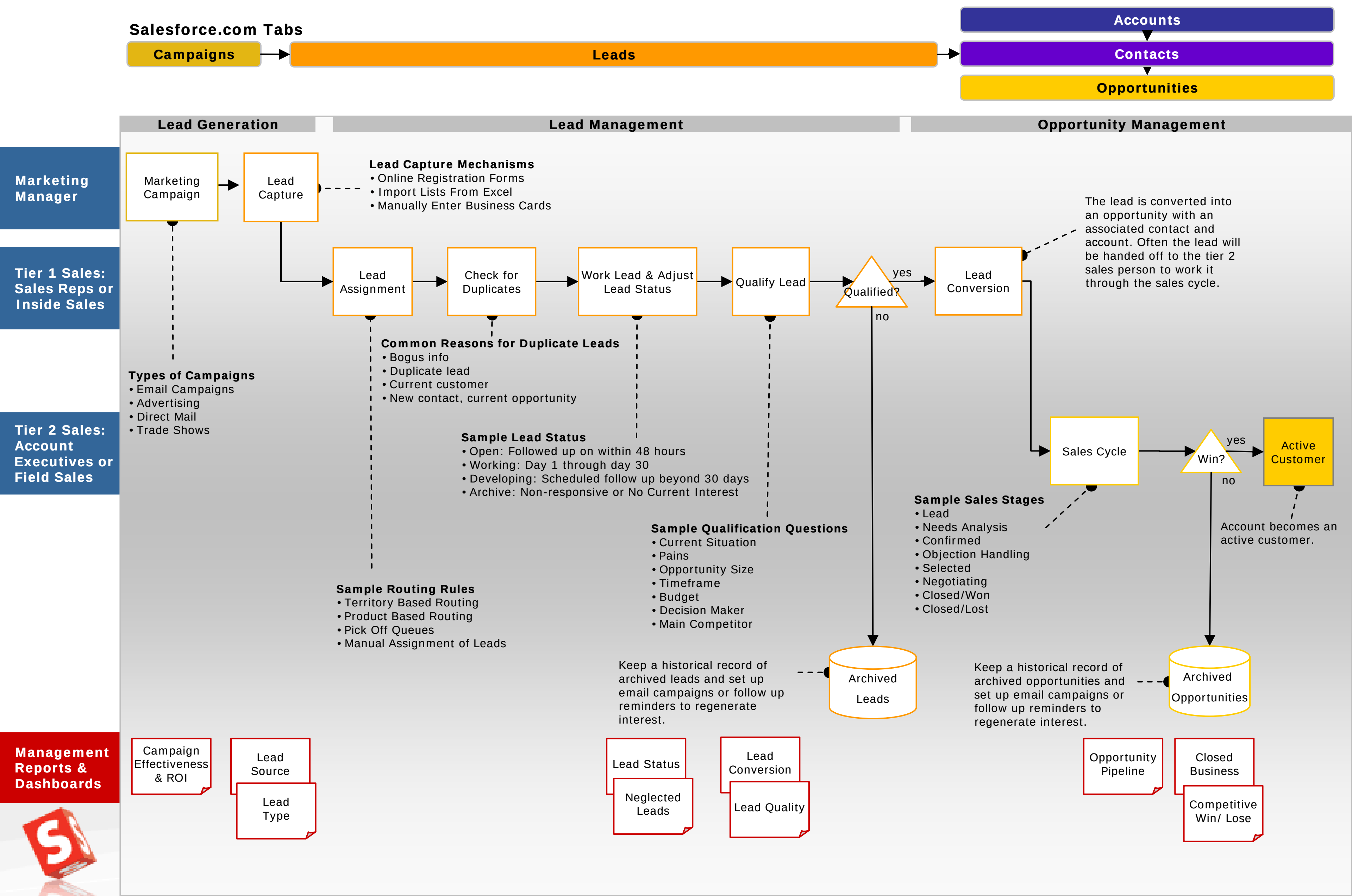
Sales Process Map, Campaign to Customer

Two tier sales process typically found in high volume B2B sales organizations where marketing campaigns generate leads, a tier one team qualifies leads to pass on to a tier two sales team that manages the sales cycle.



Marketing

- **Marketing Campaigns:** There are a number of ways to simulate demand for your product or service including email campaigns, search engine marketing, direct mail, or trade shows. Within salesforce.com, you can set up a campaign to manage details such as the key dates, budget, and project details. The campaigns feature also allows you to track the ROI of a particular initiative including the number of prospects touched, converted leads, and pipeline generated.

- **Lead Capture:** To measure the success of a given campaign it's important to have lead capture mechanisms. Leads can always be entered manually by sales reps on the phone, but it's more effective if you can feed your sales team leads and reduce the data entry. One way of doing this is by importing lead lists from an excel worksheet. Another is to setup a web-to-lead form and post it on your website. This might be a contact me request or a registration page to download a whitepaper. When a user submits their information a lead is created inside Salesforce and routed to the correct sales rep based upon business rules you set up.

- **Auto Response Rules:** When a lead is created inside Salesforce you have the option of sending a personalized auto-response email thanking them for their interest and letting them know that someone will follow-up shortly.

- **Lead Assignment:** You can also set up lead assignment rules, based upon the fielded information you captured. For example, you might want to create geography based routing rules, or maybe you route leads based upon product of interest. This ensures the right sales rep receives the lead and is accountable for prompt follow-up. Note that there are other forms of lead distribution, such as assigning leads to a queue or a sprinkler.

- **Lead Scoring:** With Salesforce you can automatically assign a score to each lead so that your sales team can prioritize their day. For example, a lead with a hotmail address might get a lower score than a lead with a corporate email address, or maybe you place a greater emphasis on certain job titles. With a lead score field, your reps can create filtered views and power through their call downs.

Lead Management

- **Duplicate Leads:** Duplicate leads and dirty data is a challenge which almost every company faces. It's very embarrassing if you call into a lead, only to find out that they are already a customer. Salesforce.com has a number of AppExchange partners (Ringlead and DemandTools) who can help merge duplicate leads as they are entered into the system. You'll also want to train your team on ways to manually de-dup leads. On the lead record there is a button called find duplicates. This tool does a search on the person's name, the company name, and the tail end of the email address to help determine if there are any matches. If a duplicate lead is found, there is a button which initiates the merge process.

- **Rules of Engagement:** When a new lead comes in it will be assigned a lead status of open. You'll want to design your own rules of engagement for who has the right to work this lead. Most of the time the lead owner retains ownership unless the customer calls in on the 800 line before the rep is able to get to is. Once the lead owner initiates contact and sets the lead to working, they own that lead. The reason being, you want to create a single point of contact and reward them for their work.

- **Follow-Up:** In addition to rules of engagement, it's good to set up a standardized follow up plan. For example; all open leads are followed up on within 48 hours. A lead is then set to working. The sales rep will start with a phone call, then send an email, followed by another phone call and email three days later. If you are unable to establish contact within 30 days the lead will be set to Archived. Note that the exact follow-up schedule will depend on the type of lead and your particular business process.

- **Email Templates:** One way to help ensure a consistent follow-up plan is to create a standardized set of email templates for the reps to send out. These templates can be personalized, pulling information such as first name or company name, from the lead record. Email templates are a big time saver. They can be sent using the mass email tool or one-off.

Lead Management

- **Lead Qualification:** You'll want to devise a set of qualification questions which are required for a rep to convert the lead. For example you might want to capture current situation, pains, opportunity size, timeframe, budget, decision maker, and main competitor. This information can be added as a call note to the activity history to ensure a smooth hand-off to the tier two sales rep. Salesforce.com also offers a call scripting application which allows you to create scripts using branched wizards and lead scoring. This is especially helpful in training new reps or selling complex products.

- **Converting Leads:** Once a lead is qualified it will be converted over into an opportunity with an associated contact and account. In some cases the account will already exist, so the rep simply appends the new opportunity. During the conversion process the rep will usually re-assign it to a tier two sales rep who will manage it through the sales cycle. While the new sales rep will receive an email notification, it's a good idea to send a hand-off email to the customer with contact information for their Account Executive.

- **Developing and Archived Leads:** Before we move on to explain steps in the sales cycle, we should talk a little bit about what happens to developing and archived leads. The lead status developing is used for leads which have a follow-up task which extends beyond 30 days. For example the prospect might say, "We aren't quite ready yet, but give me a call back in 3 months." This keeps the ownership in the hands of the sales rep who owns the follow-up task. For those opportunities which are archived, Marketing should come up with a quarterly email campaign to maintain the relationship and re-new interest.

Sales

- **Sales Cycle:** Each sales organization will have their own sales methodology which can be mapped to Salesforce. Some popular ones include Miller Heiman, Solution Selling, the Complex Sale, and ValueVision. With each methodology you'll have a set of sales stages and actions which are to be performed. For example, your stages might be lead, needs analysis, confirmed, objection handling, selected, negotiating, closed/won, closed/lost. Each sales stage also has a probability associated with it which will help forecast revenue.

- **Active Customer:** When you win deal and bring on a new customer there should be a whole new set of steps that kick off, and begin the account management process.