



INSIGHTSQUARED



*The CEO's Guide to*

# Getting the Most From Salesforce

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# Introduction

Salesforce.com has emerged as one of the most powerful, versatile and downright essential sales tools the business world has ever seen. It has changed the way companies operate and created a framework for the modern sales process. It has, quite simply, transformed the sales landscape.

But there's a problem: **Most companies don't truly know how to get the most out of their Salesforce instance.** Like any complex and dynamic tool – especially one that is always evolving – it is almost impossible for non-experts to maximize its utility and power. Companies of all stripes and sizes understand that, with perfect use, Salesforce can take them from a good company to a great one. Using best practices, they can become one of those rare companies whose peerless sales execution helps them blow through their goals.

But what company uses Salesforce perfectly?

The short answer, of course, is none. Even companies that bring on experienced Salesforce administrators, empower and support their Sales Operations team, and ensure adoption among their sales reps hardly tap into the barest potential of Salesforce. What's worse, the mistakes they make hurt them again and again in terms of sales execution and management.

This eBook helps to change that – to narrow the gap between the ideal Salesforce use case and the way the vast majority of sales teams use the platform. Though far from comprehensive, the eBook is designed to help companies **understand the operational principles of Salesforce, navigate its complexities** and **adapt it to their specific context.**

To do that, the eBook is broken into 2 main sections:

1. General best practices of Salesforce
2. Specific tactics for organizing your data within Salesforce

This guide (which is drawn from dozens of blog posts we've written over the last 3 years) can be used either as primer for companies new to Salesforce, or as a reference to be dipped into throughout the life of your Salesforce instance. Either way, it should help you move beyond the basics of Salesforce and into a world where you are truly getting the most from this invaluable service.

Section // 1

# **Salesforce: A Birds-Eye View**

# Summary

Ask a CEO or Sales VP to divide the life of their company and they will probably give you a simple answer: The time before they started using Salesforce, and everything after. Salesforce is truly that transformative. The platform is so baked into the modern sales process that most companies consider it a necessary cost of doing business. Just like office space, employees, and internet, **Salesforce is a fundamental component of sales success.**

But that doesn't mean that all executives understand it, even at a fairly basic level. What are Salesforce's core functionalities? What are its borders? Who owns its implementation and management? How can executives ensure they're using the platform correctly? These are all questions that business leaders ask, but that few find satisfying answers to.

In this chapter, we provide holistic answers to most of these questions, including:

- 5 Things Every CEO Should Know About Salesforce
- How Salesforce Affects Sales Management
- 5 Steps to Increase Salesforce Adoption

# 5 Things Every CEO Must Know About Salesforce

You've successfully installed your company's instance of Salesforce.com, and you're now ready to start automating your sales and marketing processes. You're excited to have all this analyzable sales data at your fingertips. The possibilities of what you can do and the actionable insights you can gain from this Customer Relationship Management (CRM) software seems boundless. So you're ready to jump right in and get your sales managers and reps up and running, right?

Not so fast. Salesforce is an extremely powerful tool that can transform your sales process and, ultimately, your revenue and profitability. However, all of that is contingent on your team doing things the right way. And that starts at the top. You must lead the way in the culture, adoption and understanding of Salesforce.

Here are 5 things all CEOs should know about Salesforce.

## 1. Salesforce is contingent on rep adoption

Many sales reps are instinctively apprehensive to make Salesforce a part of their daily routine. To them, it's just another frustrating step in the sales process – one more thing that comes between them and actually selling. However, Salesforce only works when there is clean and consistent data across the board, and the more of it you have, the better. If even one of your reps refuses to adopt Salesforce, the accuracy and benefits of the entire team's data is jeopardized. **Work from Day 1 to bake Salesforce into your reps' sales process.**

## 2. (Data) Cleanliness is next to Godliness

Even if your reps embrace Salesforce, it won't help your team unless they're serious about data hygiene. Without it, your Salesforce implementation won't even be able to get off the ground.

Low-quality data, misplaced data entries, duplicates, muddy metrics – these are all a sales manager's headache. After all, how can managers be expected to find actionable insights from their data if they are working with messy, incomplete or unreliable data? **If the input is sullied, the output will be as well.** Train your sales reps to be disciplined and accurate in their data entry right off the bat. Getting the most out of Salesforce means putting the most in.

### 3. Democratize Access to Sales Data

Historically, sales managers and executives have been considered the people who benefit the most from Salesforce – they’re the ones identifying trends and using data to make decisions. However, it’s become clear that reps have as much to gain from Salesforce adoption as anyone. **Data works best when it is truly democratized, accessible and visible to all tiers of the organization.**

All reps and managers should be able to go into their instance and pull the reports and information they need to do their job as well as possible. When this data is accessible to all, reps will take more ownership over their pipeline and start really seeing the benefits of Salesforce. Sales VPs can take this transparency and accessibility one step further by using a sales analytics product in addition to Salesforce. In some organizations, privacy is a concern. If this is true for you, you should give admins control over which data is displayed.

### 4. Management by Exception is the Rule

Sales managers and CEOs who want to get the most out of the data in Salesforce need to manage by exception. Salesforce is great for watching large trends unfold, but it’s even better for quickly spotting anomalies. This means focusing on tackling situations that deviate from the norm or are exceptions to the common rule.

Once you accept the “normal,” you can focus on finding the variances where, with tweaks and optimization, you can have a real impact and difference on your company’s success. Experiment and compare the new metrics against your baseline sales metrics. **Use alerts and workflows to notify you (and your reps) when things are awry.** Set goals for all users within Salesforce. When you can manage effectively using exception reports and analysis, you will start seeing all the areas of improvement that exist in your sales process.

### 5. Understand the Limitations of Salesforce Reports

Salesforce is an absolute must-have for data-driven sales managers and CEOs. However, it is not a cure-all for all your woes, and is certainly not perfect. There are several limitations to Salesforce reports, including issues with sharing, visualization, historical trends and others. (We will get into this in much more detail in the fifth section of this guide.)

One of Salesforce’s most glaring limitations is its inability to report across different data sets, a major part of many sales processes. Sales managers regularly need to connect the dots across seemingly disparate objects, such as between marketing efforts and sales results. This is not easy in Salesforce, and requires either complex and time-consuming Excel analysis, or a third-party sales analytics product.

# How Salesforce Fits into Sales Management

Getting sales reps to break their routines and try something new – even if the “new” has been proven to pay great dividends – is no easy feat. Sales reps are habit-driven, for both good and bad. When implementing a new sales process or adopting new tools, you can rest assured that they will push back.

Which is why it is so critical that you, the Sales VP or sales manager, leads by example when you’re implementing and adopting Salesforce. **The value of Salesforce lies in it being a critical part of your company’s overall operations.**

This means setting the right expectations, creating the right processes, training and overseeing adoption and, most importantly, getting buy-in.

Here are some tips for how sales management executives can lead by example when implementing Salesforce.

## 1. Make Salesforce Your Information Hub

All your data and information will now be housed within your Salesforce instance. It should be the single place you turn to when looking for data and the subsequent analysis (unless you use a third-party reporting and analytics product to enhance Salesforce’s features, such as InsightSquared). Reps who previously recorded prospect information in individual spreadsheets, notebooks or some other system will have to adapt. So will you.

Show your reps how easy it is to find answers in Salesforce. All the information you use to drive your sales team forward – from pipeline information to rep activity levels – will be drawn from Salesforce. If you’re using it so heavily, your reps should be too.

## 2. Ensure Sales and Marketing are Aligned

Although sales and marketing don’t always seem to be on the same page, both sides are ultimately dependent on each other. With Salesforce, your sales and marketing teams have the opportunity to be much more closely aligned. **Salesforce utilizes data from every part of the sales and marketing cycle**, which makes it easy to see the whole picture. Marketing can easily hand off leads to sales, which can in turn follow-up quickly. With a more streamlined process, your reps will enjoy much better alignment with their marketing counterparts. It’s also important to **make sure Salesforce and your marketing automation software are on the same page**. Do objects (like Marketing Qualified Leads, for example) have the same definition in both pieces of software? Are changes made in one platform automatically implemented in the other?



### 3. Help Your Reps Work More Efficiently

One of the key benefits of Salesforce is the way it allows reps to have much more control over their work day. If they use Salesforce correctly, your reps will act like mini-CEOs, able to analyze their own data and determine what works well and what doesn't. With all that up-to-date and real-time information at their fingertips, they will be able to better prioritize which opportunities to work on, which leads are in most urgent need of follow-up, and which ones are likely to turn out to be duds. A tool that can help your reps work more efficiently? Sign them up!

### 4. Understand That You're *Not* Micromanaging

When forced to enter so much data – data they might not have had to reveal previously – your reps might feel that you've become Big Brother, spying on their work processes and overseeing them even more. Dispel those fears immediately. Salesforce is not meant to help you spy on your reps – yes, you will have more visibility into what your reps are doing, but that should promote accountability, not paranoia. If your reps take this in a defensive manner, that might be a sign that they're not the right reps for you. Other reps will see this as a chance to step their games up and to show you, with data-backed information, that they are indeed a strong performer who understands how personal data can help them improve.

### 5. Salesforce Should Not Be an Administrative Burden

Other reps might feel like this will add hours of work to their day, in the form of data entry. And yes, initially there might be a lot of information to enter and process. However, once you have your Salesforce instance up and running, through automation and a better-synched process, your reps will actually work much more efficiently, and therefore save time. Data will not need to be re-entered multiple times. Tasks will be more easily recorded. The information-gathering process will be streamlined.

### 6. Be Open to Helping Your Reps Succeed

Salesforce is not perfect. There are several limitations that result from having your sales process so connected to any one platform. Communicate to your reps that you are more than happy to help them iterate the platform and figure out what will best serve their needs. Don't be afraid to provide your reps with the sales enablement tools they need, too. The Salesforce AppExchange is chock-full of great add-ons to help solve for some of Salesforce's limitations or to provide enhancements in other areas. If your reps can make a strong argument for why they need [a few of these apps](#), you should not hesitate to purchase them.

# 5 Best Practices for Salesforce Admins

Salesforce administrators play an integral role in the success of their businesses. Salesforce is complex, by design, which means that it often takes an expert to ensure that total value is being extracted. **Admins are the ones who ensure that Salesforce is a boon not a burden.**

Here are 5 best practices to help Salesforce administrators better understand the platform so they can take their companies to the next level.

## 1. Never Stop Learning

Even as a certified Salesforce administrator, there is always room to grow and always more to learn. Salesforce constantly gets upgraded, adds new features, changes workflow rules and formulas, and it is an admin's responsibility to stay up-to-date on all these changes. Whatever Salesforce-specific role you play within your organization – be it as an administrator, a developer, a solution expert, or an end user – there are training options and classes tailored specifically to your needs. Free classes and a wealth of videos on YouTube covering various niche Salesforce topics makes your continued Salesforce education an attainable goal.

## 2. Get to Know the AppExchange

The Salesforce AppExchange was launched in 2005 as a marketplace for cloud computing web applications that users can integrate with their existing Salesforce operations. Today, there are thousands of apps – ranging from do-it-yourself email marketing to a [free sales funnel](#) that Salesforce administrators and users can benefit from. With so many developers regularly introducing new applications into the marketplace, it is important for Salesforce administrators to stay abreast of all new developments. You never know if [the app you need](#) to dramatically improve your company is already out there.

**Download Our Free Funnel App For:**

- // A Configurable Funnel Report
- // Visualization of Your Sales Process
- // Stage-to-Stage Conversion Rates

POWERED BY  
 INSIGHT SQUARED

Stage	Count	Conversion Rate
Deal	104	34%
Closing	402	37%
Opportunity Conversion	1014	

### **3. Support SFDC with Great Analytics and Reporting**

Companies turn to CRMs for information and actionable insights, but you can't do this if you're limited in your reporting and data analysis capabilities. As a Salesforce administrator, you have to know what kinds of Salesforce reports are available to you. If the reports that you need cannot be generated within Salesforce itself, perhaps you should consider looking for third-party alternatives, such as InsightSquared. Figure out what key decision-makers such as your Sales VP are looking for or trying to learn from their data, and craft these reports to suit their needs. Know your reporting tools backwards and forwards, send regular reports out to users and make sure they're visual and easily digested.

### **4. Connect with Salesforce User Groups and Communities**

With so many Salesforce users around the world, you should never feel alone. Salesforce users love sharing what they know, and chances are that if you have a question, someone else has already asked it and had it answered. Reach out to and join your local Salesforce User Group. Exchange ideas and best practices. Communication and collaboration doesn't have to stop there, however. Interact with other Salesforce admins and users on Twitter and LinkedIn. Working together, the global Salesforce community can be extremely powerful and tackle any Salesforce issues that arise.

### **5. Communicate and Build Trust**

As a Salesforce administrator, you might feel like you are an army of one. Don't let this silo you. Many people in various departments of your company depend on you and the reports you produce from the company's CRM data. They need the information and actionable insights within these reports to enact change and improvements at the business. Build trust in your organization by ensuring a consistently high level of clean data quality and easy-to-understand reports. Communicate with various departments regularly on what you're working on, any changes to Salesforce and how they might be affected. A weekly email or newsletter from their friendly neighborhood Salesforce admin can go a long way in bridging gaps within the office.

# 5 Tips to Increase Salesforce Adoption

As we've already mentioned, **if your reps aren't using Salesforce, your company isn't really either.** There are a variety of reasons your reps may be failing to fully adopt Salesforce, but whatever the reason, it is your job to make sure they commit to Salesforce.

Here are 5 steps to improve your company's adoption and use of Salesforce.

## 1. Show the Importance of Validating Opportunities

Opportunities, leads and activities – and your subsequent tracking and analysis of them – form the foundation of Salesforce reports. Sales VPs need to know what stage their opportunities are in for both forecasting and pipeline management purposes. If there are many opportunities in late stages, that's great. Chances are at least a few of them will close, boosting your forecast. This also means that your pipeline needs to be replenished, so make sure you pull those levers.

Sales reps also need to know what stage their opportunities are in, so they can prioritize and engage with the right opps. It is critical that reps are disciplined in logging their opportunity stages and know when to convert from lead status to opportunity stage. Once there is a culture of diligence when logging opportunities in Salesforce, both you and your reps will gain tremendous visibility and be able to validate opportunities at every stage of the buyer's process. **Show your reps how Salesforce can help them better manage their opportunities.**

## 2. Tighten Your Process by Improving Lead Management

Before leads become opportunities, they must be carefully managed. This puts the burden on reps to be conscientious about every step a lead takes before converting to an opportunity. Sales reps need to track the activities that a lead is receiving, when they are seeing these activities, and then convert the lead to an opportunity as need be.

## 3. Track Activities Better

Which brings us to activities. In Salesforce, reps can – and should – log every single activity, from an email sent to a voicemail left to a meeting scheduled and completed. Best practices suggest that reps should be using the Task Type field to log activities in Salesforce instead of the less reliable Subject field. (We will cover Task Types in more detail in the next section.)

For each activity that a rep logs on a lead or an opportunity, they can select from a drop-down box featuring a list of every possible activity that can be taken. Managers can then pull this data into an overall activities report to understand just how much their reps are working.

#### 4. Practice Regular and Consistent Communication

Having clean data and in-depth Salesforce reports leads to regular and transparent communication between sales reps and sales leadership, which is the ultimate goal. Whether you rely on Salesforce's native reports or use a third-party provider (like InsightSquared), you should be able to have much more meaningful meetings between reps and managers.

Real-time, unambiguous data means that your meetings are not spent trying to find answers, but instead using those answers to adjust behavior and identify areas for improvement.

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#### 5. Enable Real-Time Alerts

Don't just wait for one-on-one meetings, though. Unlock the data in Salesforce (and make it more actionable) by sending real-time alerts to reps about their daily or weekly performance.

This helps them see that the time they spend inputting data into Salesforce is not wasted – it is a way for them – and you – to stay close to how their activities are affecting sales results. **Salesforce is not just a tool for measuring overall sales performance**, it is perfect for helping reps manage their days.

# Conclusion

Once you understand the value Salesforce can provide to your organization as a whole, it's time to learn how you can use it to improve sales results. The first step in this process is managing your reps' daily activities.

In the next section, we explore the best practices for managing the nuts and bolts of your sales team: **activities**. Read on to learn how Salesforce can be the perfect tool for helping reps work more efficiently and identify the right areas to change their behavior.

Section // 2

# Managing Activities in Salesforce

# Summary

Salesforce can't coach your reps to be more polished salespeople. It can't instill a hard-working attitude or give them the motivation to constantly improve. It can't identify their weaknesses or leverage their strengths. Despite its best intentions, it can't even ensure that reps have all the necessary information at their fingertips or plan their days.

No, despite all its power and versatility, Salesforce is not going to be the magic bullet that single-handedly turns your reps into a cohesive, foolproof selling machine.

But what Salesforce *can* help you do is manage, track, store and analyze your reps' activities. And, although this isn't everything listed above, it is nothing to scoff at. **Sales is really all about activities**, and the ability to effectively manage these activities is what separates the most effective sales teams from the rest. To get the most out of Salesforce's activity management capabilities, you may need to use a plug-in or third-party application (such as Yesware for email open and response tracking), but Salesforce itself has a lot of built-in tools for activity tracking.

In this chapter, we explore the basics and best practices of using Salesforce to manage activities, including:

- The Right Way to Manage Activities in SFDC
- The Importance of Task Type
- The Benefits of Click-to-Dial



# The Right Way to Manage Activities

Boiled down, Salesforce is a sales process management platform. It takes all the discrete bits that make up your sales process – lead generation, call data, prospect information, opportunity movement, contract details – and stores them all in one central location. This helps sales teams ensure that nothing falls between the cracks and that every piece of pertinent information is available when they need it.

But it only works if you (and your reps) know how to manage the activities they're logging in the platform.

Here are some of the benefits you'll get with proper activity management:

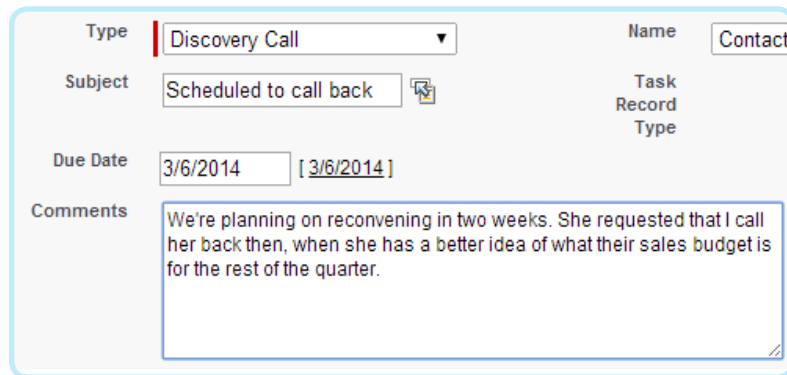
- **Having a centralized information hub will make their jobs easier.** The extra work in data entry will be offset by the time they save avoiding the painful process of tracking down individual opportunity data every time they need it.
- **Your reps will develop a sense of accountability.** When activity data entry is an integral part of the sales process, your reps will know that they can't hide behind the data or other subjective evaluations. This sense of accountability will help them work harder and smarter, and ultimately compound itself as all reps buy in.
- **The team's overall time management skills will improve.** Time is the most valuable asset sales reps have, which is why they must manage and budget it thoughtfully. Knowing how many activities they've done – versus their daily or weekly goal – will help them more accurately assess how they are spending their time, and how they can improve it.
- **Sales management will have a better idea of overall performance** and a more realistic model to base decisions on. They will know what's really involved in closing business, in terms of activity touches. With that data, they can then make better management decisions, such as setting fairer quotas and allocating resources more efficiently.

## How can I manage activities in Salesforce?

Once the benefits are clear, it's time to actually improve the way you manage activities. The best way is to think of activities through the Salesforce lens of task types. On the lead or opportunity page in Salesforce, there is an editable "Subject" field, with an accompanying "Comments" box (see Figure 1). Reps can leave themselves subjective notes, keep track of when they've made contact, measure conversation rates, and determine what the appropriate follow-up is.

However, this isn't that useful for sales managers looking for a holistic view of activities. Sales managers need normalization in their lives. They can't afford to suffer the consequences of a lazy or sloppy sales rep, who doesn't log his or her

activities correctly. They can't import activities from a subject field over to a third-party sales reporting software for additional analysis. They need Task Types.

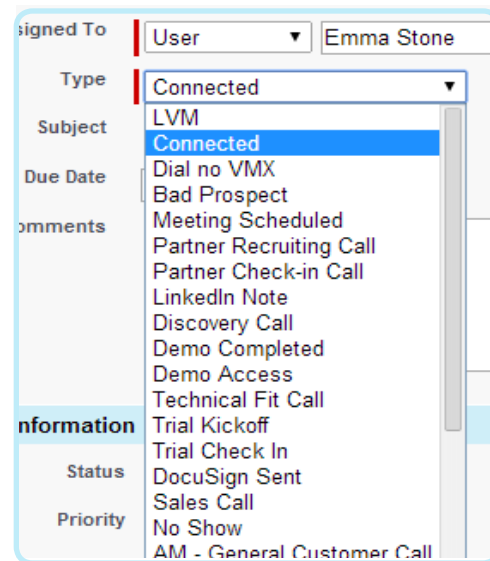


**FIGURE 1** The Comments box allows reps to leave themselves helpful reminder notes

## Best Practices for Task Types

**Using Task Types ensures that reps are using uniform language for their daily activities.**

With a hard-coded drop-down menu, filled with a customizable picklist of the various types of activities that your sales reps might undertake while working a prospect (Figure 2), all reps will have to record information in the same way. There isn't wiggle room – you can even set up your Salesforce instance to make logging a new Task Type a required field – reps can't save their new information without first selecting one of these Task Type options.



**FIGURE 2** A hard-coded Task Type picklist helps ensure uniform behavior

The Task Type option also allows sales reps to schedule out and keep track of their behaviors, while giving sales managers a quick glance at the activities reps are performing, compared to what they're supposed to be doing. On Salesforce.com, Subject Lines are an editable field, a box where reps can leave themselves subjective notes. For example, a rep might note that he or she made contact with the lead and had a promising conversation, with a vague promise of a follow-up call in a couple of weeks. This is great for the rep to take notes for their own references, but sales managers ultimately can't get caught up in these nitty-gritty details.

Instead, sales managers benefit greatly from normalization – they need all reps to log certain information in the same way, providing them a quick snapshot of how their team is doing as a whole. The Task Type field does this. A manager can stipulate that all reps go through the same activities with their prospects, and subsequently log those activities in this Task Type field.

**Giving reps a structured and defined list of activities – and, subsequently, clear goals – helps streamline the sales process.** Whether a rep has made a discovery call, sent an email, left a voicemail, scheduled a demo, initiated a trial, signed a contract or suffered through a no-show, the manager will instantly know...if they have established a culture of having reps log these Task Types.

Without the use of a normalized system such as Task Type – as, for instance, relying only on subjective Subject Lines – managers have to hope that everyone's data quality is perfect. This is often not the case. Reps who are not trained in data analysis, sloppy with their activity logging, prone to producing typos or are even just plain lazy could mess up the Salesforce reporting system for the entire team, giving sales managers an imprecise look into the activities of their team.

Subject Lines are great for adding personalized notes that can help jog a rep's memory when connecting with the prospect at a later date. However, the normalization of Task Types is essential for producing the most useful Salesforce reports and for more efficient sales management of reps overall.

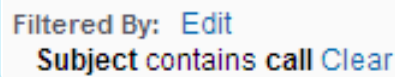
## How to Set Up Task Types

When using Salesforce, it's important for sales managers to enforce the highest standards for data quality. This is especially true in activity tracking, which is why you should use task type, and not just subject lines.

### What's the Problem?

The default Salesforce configuration for Tasks is not ideal for maintaining high standards of data quality. Many Salesforce users stick with this default setup and use the Subject line to keep track of which types of activities are occurring.

Managers will typically track activities by matching against a specific word, like in the example to the right.



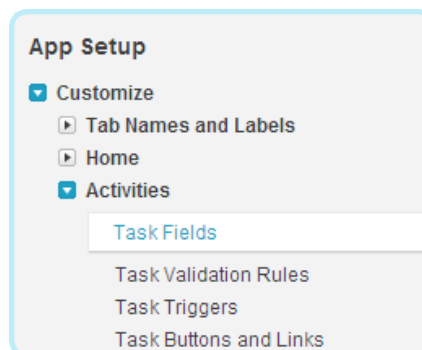
Filtered By: [Edit](#)  
Subject contains call [Clear](#)

But what if the rep inadvertently mistyped “Coll” instead of “Call”? The lookup for activities tagged with the word “Call” will miss this record, which should have been included but for an accidental typo. Or, what if a rep enters the subject “Orders returned, massive recall!”? Then, the sales manager who sees that record might think more calls are being logged than actually occurred.

Setting up Task Types can help you avoid this problem. Read on to learn how to easily set this up.

### Step 1: Set Up Your Task Types

Navigate to your Salesforce setup and find the “Task Fields” section:



Look for the Type field – a standard field in Salesforce – at the bottom. Click the word “Type” to look at your current picklist choices for this field. You can edit the existing fields or add new, more appropriate ones that fit your business. For example, if your reps don’t typically work with emails, then you can leave this out. Select the one that will be your default selection.

Task Type Picklist Values				
Action	Values	Send Email Default	Default	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Call	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Andrew Varley</a> , 5/21/2013 7:50
<a href="#">Edit</a>   <a href="#">Del</a>	Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Andrew Varley</a> , 4/2/2013 8:38
<a href="#">Edit</a>   <a href="#">Del</a>	Other	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Andrew Varley</a> , 4/2/2013 8:38
<a href="#">Edit</a>   <a href="#">Del</a>	Email	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Andrew Varley</a> , 4/2/2013 8:38

### Step 2: Make it Visible

Once you’ve selected the appropriate Task Types you want your sales team to select from, you have to make these options visible to the team. Navigate to the Task Page Layout section, which determines which fields are available each time your team logs a new Task.

“Type” should be at the top of the page and not part of the current Task layout. Add it there by dragging the “Type” box from the top of the page to where you want it displayed on the Task layout.

#### App Setup

- ▣ Customize
  - ▶ Tab Names and Labels
  - ▶ Home
  - ▣ Activities
    - Task Fields
    - Task Validation Rules
    - Task Triggers
    - Task Buttons and Links
    - Task Page Layouts
    - Task Field Sets
    - Task Record Types
    - Task Limits
    - Event Fields
    - Event Validation Rules

Task Layout Custom Console Components Mini Page Layout Mini Console View | Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

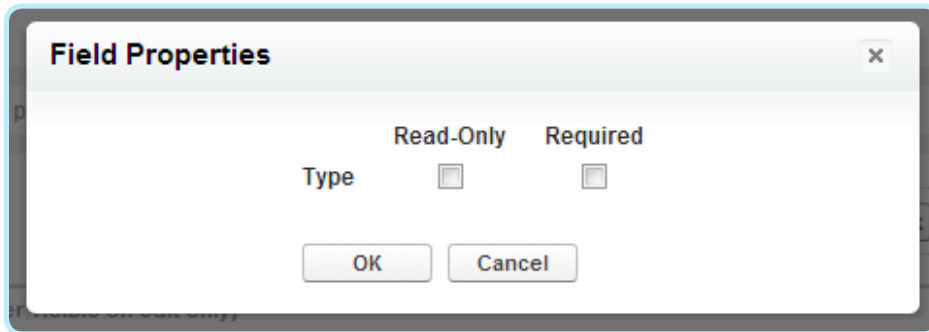
Quick Find Field Name

Section	Call Object Ident...	Created By	Name	Status
Blank Space	Call Result	Due Date	Phone	Subject
Assigned To	Call Type	Email	Priority	Type
Call Duration	Comments	Last Modified By	Related To	

### Step 3: Make it Mandatory

Finally, sales reps might not always be as diligent as you would like about entering the required information in Salesforce. **To ensure that they start logging Task Types, make it a required field when logging new Tasks** (Figure 3).

Hover over the “Type” field that you’ve just dragged into the layout and click on the wrench that appears next to it. This will let you select that the field is a required one to fill in before Salesforce will let you save.



**FIGURE 3** Making certain fields “required” allows you to enforce desirable behaviors.

# Why You Need Click-to-Dial

Salesforce is designed to streamline and standardize the sales process. There are many ways it can do this, but one of the most important is also one of the most overlooked: enabling one-touch dialing. This is achieved through click-to-dial, and it is one of the best ways to get the most out of your Salesforce instance.

Click-to-Dial means that sales reps can pull up information, including phone numbers, on a lead or contact in Salesforce and, with one click, connect with that person over the phone. Reps no longer have to dig up and manually enter phone numbers. You have many options, including Thinking Phones and InsideSales.com, when shopping for Click-to-Dial connectors.

But Click-to-Dial integration provides so much more than just one-click dialing. There is a wealth of benefits associated with this feature. Here are some of the powerful benefits of using Click-to-Dial in Salesforce:

- **Increased efficiency** – We've already touched on this, but this is a huge benefit that both sales managers and reps will appreciate. Time is the most precious resource a sales rep has, so being able to work efficiently and get through simple tasks quickly can add up to a lot of saved time over a week. Even something as simple as one-click dialing – instead of looking up the phone number and then manually dialing – will have huge efficiency benefits down the line. You can also quickly hold or transfer calls, or loop leads into a conference call through the connector.
- **More immediate pre-call information** – When pulling up a lead and before making a call, sales reps can quickly get up to speed on the status of this lead or contact, based on information logged in Salesforce. How many times has this person been contacted? How successful were each of these attempts? How many more times – based on your sales call workflow – should we continue to try and call this person?
- **Everything gets logged** – Data-driven Sales VPs crave more and more information on their sales reps and the activities they're performing; after all, how else can they be expected to improve, other than by analyzing the relevant sales performance metrics? With these Click-to-Dial connectors, all calls are immediately logged in Salesforce, with information such as call duration and number of attempts. Sales reps have to record a call result, even if the call is not a productive one. Reps and managers can then pull up the activity history on any lead or contact. Not sure if your sales reps are hitting their daily activity quotas, in terms of calls made? With a Click-to-Dial connector synched with Salesforce.com, you can find out pretty quickly.

- **Recording options** – Sales reps can record certain calls to go back over with their sales managers during one-on-one sales coaching sessions. After all, the film review is a critical aspect of improving a rep’s performance. Being able to talk through calls and pinpoint specific mistakes or highlight strong showings will lead to team-wide improvement. Managers can also listen in live on some of their reps calls, to provide silent real-time coaching.
- **Save time with templates** – Reps can also produce and save certain templates in Salesforce, to be reused again in the right situation. If the situation calls for a generic voicemail or email reply – letting the prospect know you’ll call back later in the day, for example – reps can choose from their saved template options and quickly send the right message.
- **Schedule reminders** – Did you catch the contact at a busy time and need to call back in a few hours, after lunch? With these connectors, you can schedule callback times that synch with Salesforce tasks to shoot you a reminder or an alert when the time is right to call someone back.

The tremendous gains in efficiency that sales reps get from using Click-to-Dial connectors in Salesforce will greatly improve their overall job performance. Additionally, with everything automatically logged in the platform, managers will be able to review, track and analyze their reps’ sales performance metrics with activities and activity ratios. When starting out with sales enablement tools, a Click-to-Dial integration with Salesforce is a no brainer.



# Conclusion

Sales success is the product of sales activities. The teams that perform the right activities, and the right number of them, is the team that most often gets the results it desires. Salesforce is the perfect tool to help your reps most effectively manage (and optimize) their activities, but only if they know how to use it correctly.

In this chapter, we looked at how Salesforce can help your team operate more efficiently by tracking and analyzing activity data. This is the first step in getting your team to use data to improve its performance, but it is only the first step. The next piece of the puzzle is dealing with the product of those activities: **leads**.

In the next chapter we dive into how to use Salesforce to help your sales team manage, measure and manipulate leads.

Section // 3

# Managing Leads and Campaigns

# Summary

There is no denying that sales is a complicated beast. But underneath that complexity is a simple truth: **The best sales teams are masters of efficiently converting leads into deals.** They're vigilant about working leads quickly and thoroughly. They don't waste time chasing leads that are unlikely to ever become customers. And, most importantly, they don't let hot leads fall through the cracks.

The linchpin in all of this is Salesforce.

Salesforce is built to help sales teams track leads from their birth until they're closed. It acts as the single nexus of all information about all the leads your team is working. This may sound trivial, but it could not be more important in terms of hitting your number and optimizing your sales execution.

The only problem is that the process of managing leads and opportunities in Salesforce is far from easy. There are a lot of moving parts, a ton of common traps, and a whole lot to learn.

In this chapter, we start from the basics and work our way through advanced lead management, including:

- The Importance of Lead Status and Demographic Data
- Tips for Managing a Lead's Lifecycle
- How to Measure Campaigns

# Lead Status and Demographic Data

**Leads are only as valuable as the information you provide about them.** Salesforce is, first and foremost, a repository for lead and opportunity data, so make sure your reps are diligent about updating the leads in their names with as much information (and activity) as possible.

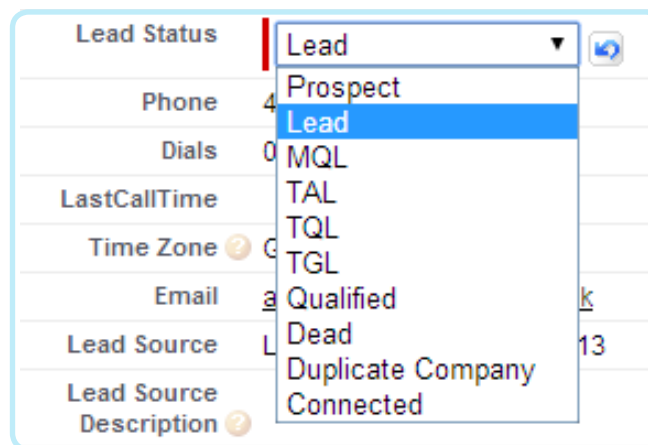
This is especially important because Salesforce’s use of the word “lead” is not always the same as the companies using it. Be clear about what you mean by “lead” and communicate this definition throughout your organization. Simply using “lead” as a stand-in for anything between “stranger” and “closed opportunity” is a sure recipe for failure.

Categorizing leads is essential for helping reps determine their next action. As a lead moves down the sales funnel, it is your reps responsibility to update it with appropriate notes, and to change its status to reflect its situation.

Luckily Salesforce is perfectly set up to help you do this – if you understand the platform’s vocabulary and architecture. **Here are a few things to know about lead status management in Salesforce.**

## For Every Lead, a Status

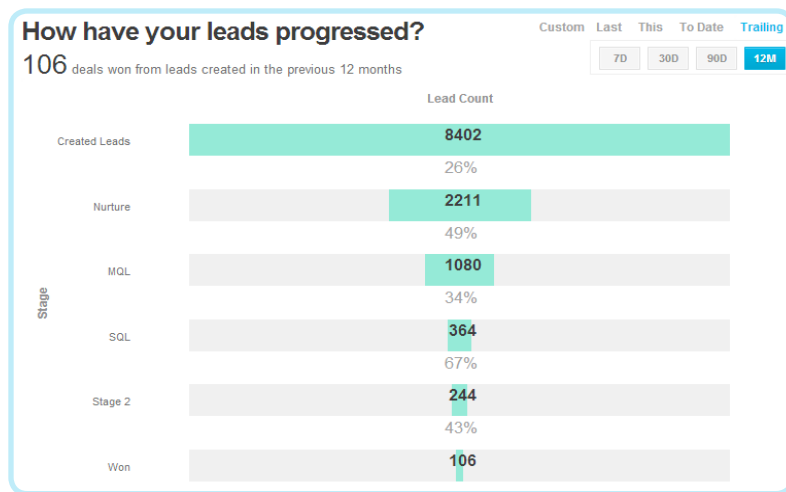
Each lead should be assigned a specific status, depending on what state it is in. The picklist of statuses (Figure 4) on Salesforce is customizable, depending on how your sales process is set up. Many organizations have a basic framework for how leads are nurtured (with educational content, webinars, and other relationship-building practices) before becoming qualified by Marketing (as an MQL), the telesprospecting team (Teleprospecting Accepted/Qualified Leads or TALs/TQLs) or disqualified altogether. Leads that have been rendered dead or tagged as duplicates should not be clogging up your pipeline of leads. Direct your team to assign a status to each lead before moving on to the next one.



**FIGURE 4**  
*Customize the lead status picklist to match your sales process.*

The management of lead status in Salesforce is a critical component of your selling process for two primary reasons. For starters, having an organized set of statuses (Figure 5) helps sales managers map and organize their selling process, with a clear visualization and outlined methodology for the path that a lead takes on its way to converting to an opportunity. With each step, your sales rep has to assign a different status to the lead – they are either progressing with forward momentum or stalling into negative velocity, and the latter group should be sent back to marketing for more nurturing.

Another reason that lead statuses are so important in Salesforce is because sales managers need to separate their leads by queues or buckets for more effective sales organization. Sales managers can use this capability to quickly sort through all leads in a specific status, such as MQLs or leads with which a rep has already connected. They can then use a Lead Aging report to see the age of engagement with each of these leads – perhaps some leads are lingering in an unconnected status because reps haven't engaged with them in more than three weeks. When sales managers create queues based on lead statuses, they can help reps prioritize their efforts more efficiently. An outbound calling team that is trying to figure out whom to call can simply be directed to a pool of leads that have not been qualified and have not been engaged with in some time.



**FIGURE 5** Having an established set of lead statuses makes it easier for sales leaders to quickly see how leads are progressing through the sales funnel.

Assigning a lead status in Salesforce helps separate the wheat from the chaff in your pool of leads, while helping you map your selling process and streamline your outbound calling and sales teams' efforts. Implement a system that emphasizes assigning a lead status in Salesforce, and use Lead Funnel and Lead Aging reports to gain actionable insight on the productivity and effectiveness of each of your leads and lead sources.

All lead statuses play an important role in the sales process, but for many companies, there is one status that carries special weight: the MQL.

# Understanding Marketing Qualified Leads

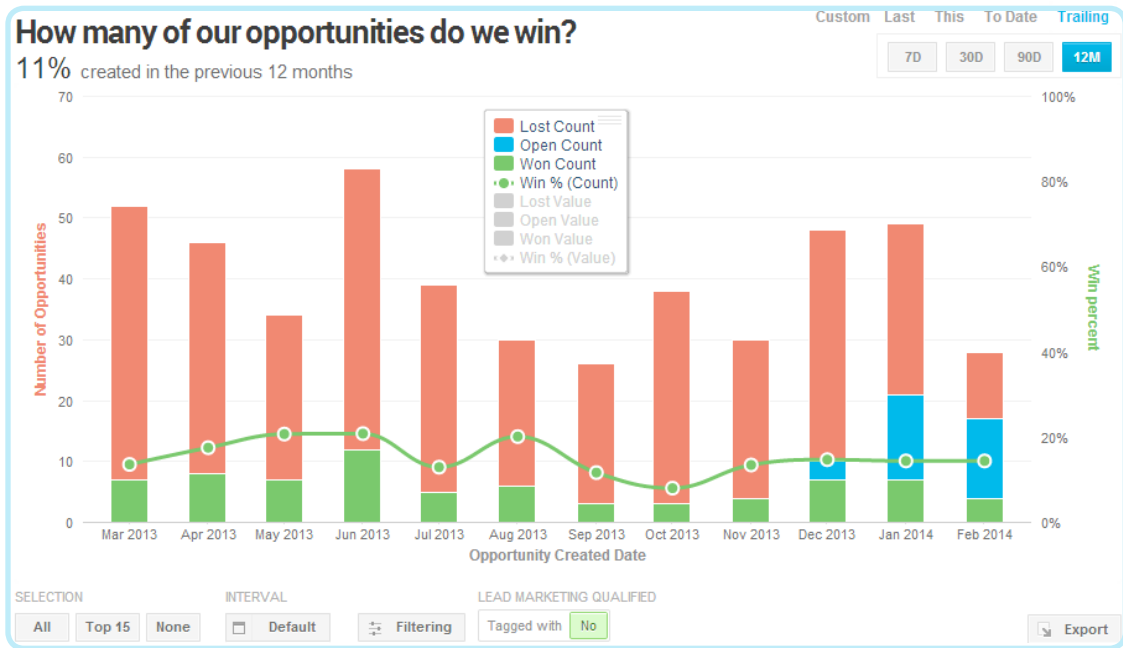
A lot of companies today rely on marketing for the bulk of their leads. Such a large portion of the sales process has moved online that marketing is now in the perfect position to gather interested prospects and hand them over to the sales team.

But not every name that a marketing team collects is sales-ready. In most businesses, marketing is responsible for not only passing over lots of leads, but also for determining which of them meet the criteria of a Marketing Qualified Lead (MQL). The criteria for an MQL vary from organization to organization, but the principle is constant: MQL is an important status for an efficient sales process, and your Salesforce instance needs to reflect this.

Your reps should be able to choose 'MQL' from the customized picklist in Salesforce so they can more easily know when it's time to tackle these prioritized leads. With one click, this helps them quickly bucket leads, which in turn helps them plan their days and work more efficiently.

Once these MQLs have been properly identified, the rest of the hand-off process is ready to be optimized for maximum efficiency. Having an MQL slip through the cracks and not receive follow-up from any of your reps for two weeks or more is a cardinal sin that is sure to give your Marketing VP a coronary – “I gave you these great leads and you just forgot about them?!” Having MQL as a lead status in Salesforce allows your reps to have a clean and organized MQL queue, full of leads that they can prioritize and work on accordingly.

Another benefit of having a (consistently applied) MQL status in Salesforce is the retroactive tracking it enables. Are MQLs much better leads than the rest? Do they convert into deals at a higher rate (see Figure 6)? These are the assumptions your sales process is built on, so it is important to have the data to back it up. And there is no way to get this data without having lead status accurately reflect the reality of the situation.



**FIGURE 6** Tracking MQLs separately allows sales leaders to analyze how and if they perform differently than other types of leads.

If the data had revealed something different, then the marketing and sales teams would have to huddle up and rectify the situation. Perhaps they need to redefine what qualifies as an MQL, applying more stringent standards to separate the good from the bad. After all, if these MQLs really are a cut above, the data should be representative of their quality.

Having MQL as a lead status in Salesforce is absolutely crucial for you to make these determinations, so ensure that you have an accurate definition for MQLs, that your reps are accurately recording these leads and that there is an efficient workflow for making sure the right reps are putting forth a concerted effort to work on these leads.

# Best Practices for Changing Lead Statuses

MQLs aren't the only leads that need a consistent status-change process – **every lead in your database should be properly tagged at all times**. In theory this may sound easy, but there's a reason so many sales teams get it wrong: It requires a strong process, wide-scale adoption, and consistency. It is much harder to go back and correct thousands of improperly tagged leads, so it is best to start at the very beginning.

As soon as you get a pile of leads into Salesforce, your reps will start working on them to varying degrees. Once a lead is ready to be converted from the first stage (a conference, organic searches, whatever), Salesforce will create a new account and contact for this lead, while defaulting to creating a new opportunity as well. Users have the option of determining when Salesforce should convert that lead to an opportunity.

The first option is simply to convert this lead to an opportunity as soon as it raises its hand and indicates that it is a legitimate prospect with some semblance of interest in buying your product.

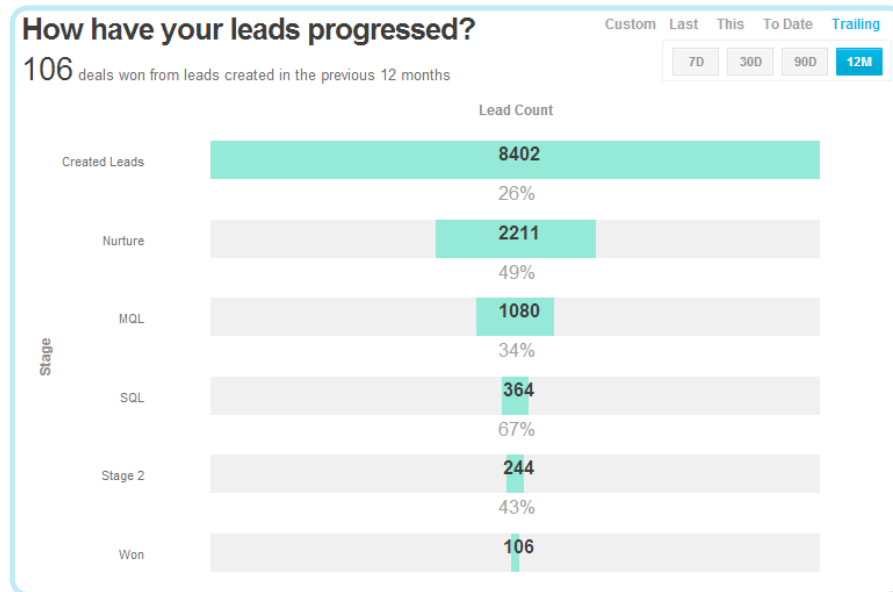
The second option, a common one among many sales organizations, is to convert from lead status to opportunity status as soon as both sides have agreed to a sales meeting and the prospect attended that sales meeting. This is a significant indicator of interest.

The third option is reserved for the leads that are absolutely interested in buying, with a request for pricing information used as the ultimate indicator of interest in this area. Once pricing has been broached by either party, then the lead is ready to be converted to an opportunity.

Sales organizations that opt for options one or two – early conversions from lead to opportunity – end up with large opportunity pipelines but low win rates. Subsequently, sales organizations that opt for the third option or even later will have small opportunity pipelines that feature huge win rates. Which would you rather have at your organization?



Take a look at Figure 7. This organization has created a Salesforce workflow where opportunities are converted after four stages – lead created, lead nurtured, marketing-qualified and sales-qualified. According to this report, this organization was only able to turn 364 of a massive list of leads into opportunities to fill the sales pipeline with. Subsequently, the team’s win rate on opportunities was 29%.



**FIGURE 7** Tracking lead and opportunity stages makes it easier to see where there is dropoff in your sales process.

However, this sales manager could’ve lowered the standard for when a lead should convert to an opportunity. Could this conversion take place a stage or two earlier, after the lead has engaged with your sales rep or any marketing efforts? Sure it could. If that were the case, the opportunity pipeline suddenly looks a lot more robust, with 1,256 opportunities in there. However, that win rate has now shrunk dramatically, all the way down to a scant 8%. Which is a better indicator of how your business is doing? That is up to you to decide.

**What’s important is that you have consistent, universally adopted process for changing lead statuses** and converting leads to opportunities. Ultimately, this ensures that your reps are working the right leads, and not wasting their time sorting through a messy pile of unsorted leads.

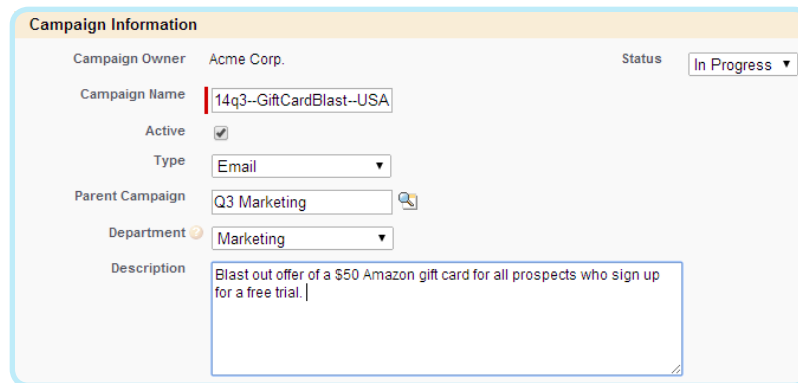
Correctly tagging leads has another benefit: It helps businesses assess the effectiveness of various campaigns.

# How to Measure Campaigns

Most often, leads come from campaigns. These can be marketing campaigns or sales-based calling campaigns, but the point is the same: **Knowing which campaigns are producing the most (and most valuable) leads is essential for fueling the right channels and maximizing lead flow and lead quality.**

Here are 4 steps for effectively creating and measuring campaigns in Salesforce:

**Creating the Campaign.** The first step is also the easiest: inputting the required standard fields when you go to create a new Salesforce campaign. Fill out the campaign name, select from a picklist as to what type of campaign this will be and mark the campaign as “In Progress” or “Planned,” if the campaign is to be launched at a later date. Be clear in your description – campaigns are great when used as record-keeping, so you want to ensure that someone looking into this campaign years later will have any idea at all of what the campaign was about.



The screenshot shows the 'Campaign Information' form in Salesforce. The form includes the following fields and values:

- Campaign Owner: Acme Corp.
- Status: In Progress (dropdown menu)
- Campaign Name: 14q3--GiftCardBlast--USA
- Active:
- Type: Email (dropdown menu)
- Parent Campaign: Q3 Marketing (with search icon)
- Department: Marketing (dropdown menu)
- Description: Blast out offer of a \$50 Amazon gift card for all prospects who sign up for a free trial. |

One Salesforce tip to keep in mind here is to **be careful with the naming convention of your campaign.** You want your Salesforce campaign names to be consistent and intuitive, for easy identification. Your exact parameters here will depend on your company’s marketing, industry, target markets etc. One suggested method for naming looks like this:

*<year+quarter>--<marketing event>--<geography>*

Putting the year and quarter first allows you to rapidly and clearly sort your campaigns when you export to Excel for analysis. Having double dashes allows them to be easily and unambiguously parsed by reporting software.

**Adding members to your campaign.** Member is a broad Salesforce term that refers to a Lead or Contact that interacted with this specific marketing campaign. Adding these members to each of your Salesforce campaigns allows you to track the response rates of each prospect to that specific campaign. You can also track if and when your sales reps have targeted and made contact with that specific Lead or Contact. Keep in mind, that in this age of multi-channel attribution, a Lead can – and probably will – interact with more than one campaign before converting to an opportunity. Campaign Members allows them to be associated to multiple campaigns. Now all you have to do is start adding and associating people to your campaign. There are three general ways of doing so:

- **Manual entry** – Yes, it's true. Leads are entered manually sometimes. It doesn't happen often but there are certain scenarios – such as when reps collect business cards at a networking event – where it is possible. When doing so, it is critical to look for the lead first or use a duplicate preventer like DupeCatcher to make sure you don't have multiple entries of the same lead.
- **Web leads and Marketing Automation** – This is a very common method in today's marketing world, with many leads coming in through a form or a landing page on your website. Again, it would be wise to use a third-party web entry application to make sure you don't have duplicates in your Salesforce system. With web leads, you can take the data to the next level by creating an Activity for the user's download history, creating Custom Objects to see a user's page-view sequence or create topic-interest strings to specific fields. Be warned: this type of web page logic requires code to push the data properly into Salesforce, unless you use a high-quality Marketing Automation System to handle it for you. Most modern companies use both Salesforce and a Marketing Automation System to help streamline the handoff of leads from marketing to sales.
- **Spreadsheet / list imports** – Many marketing teams will buy huge lists of names that they can then send their marketing efforts to, importing those .csv files into Salesforce. This is an extremely common way to market today. Parse the individual entries to correct spelling errors, formatting issues and dirty data. Make sure that all the data is standardized and match your system's pick-list values. Remove all duplicates, and change the column headers to fit with your Salesforce instance's template.

**Understanding Campaign Statistics.** There are a few campaign statistics that your campaign reporting will touch on, and that are important for you to understand. Let's go through them:

- **Total responses** – the sum of all visible records associated with this campaign with a member status of “Responded”
- **Total leads** – the sum of all leads associated with this campaign. The number of leads will decrease if two lead records are merged, or if a lead is deleted.
- **Converted leads** – the sum of all leads associated with this campaign that were connected to a contact
- **Total contacts** – the sum of all contacts associated with this campaign
- **Number of total / won opportunities** – the opportunities created from this campaign, and how many of those were won
- **Total value opportunities / won opportunities** – The calculated field for the total amount, in dollar value, of the opportunities created from this campaign, and how much was won.

Results			
Total Responses	29	Num Total Opportunities	6
Total Leads	16	Num Won Opportunities	2
Converted Leads	12	Total Value Opportunities	USD 7,545.00
Total Contacts	40	Total Value Won Opportunities	USD 3,600.00

**Tracking Campaigns.** Now that you've set up your campaigns and have hit the ground running, it's time to do what they were meant to do – track the responses to your marketing efforts. There are three types of ways to track campaign responses:

- **Website responses** – After prospects fill in a form on your website, you can use Web-to-Lead to set up a microsite or landing page for the campaign. If your web form includes the Campaign field value, all leads will be directly associated to the right campaign. You could also automatically mark all submissions with a particular member status.
- **Manual update** – Prospects respond via phone or email. One of your sales reps or ops members will have to manually update the Campaign History for the lead or contact.
- **Mass update / offline response** – This will include any responses you track in an offline list, such as attendees from a trade show. You can then update the status of all these campaign members to the same campaign.

On your campaign record, you can then sort through all your Salesforce campaign members, responses, lead conversions and opportunities. Run the pre-built ROI report – or export that data to a third-party sales analytics product like InsightSquared – to figure out just how effective your marketing campaigns are.

# Conclusion

Leads, opportunities and campaigns are the lifeblood of your sales process, so you must treat them with respect. Salesforce is perfect for helping you do this, but only if you are careful and knowledgeable about what you must do. If you are, you will find that your team wins more deals and brings in more revenue.

Which brings us to the next important step of getting the most from your Salesforce instance: **deals and losses**. In the next section, we look at what happens to deals you win and lose in Salesforce, and how this can help you optimize your sales process and extract the most value from the leads you bring in.

Section // 4

# Opportunity Management

# Summary

Ultimately, Salesforce is all about helping your sales team win more deals. We've talked about the platform from a holistic level, about how it can help you track activities, manage leads and create campaigns – and now we've come to the meat of the sales process: **opportunity management**.

Closing deals – both won and lost – is an essential part of keeping your sales process clean, helping your reps work as efficiently as possible, and gleaning actionable insights from your sales results. One of the most persistent barriers to these benefits is losing track of stale opportunities that realistically should be closed out, or failing to update deals you've won.

In this chapter, we dive into the best practices for closing opportunities, including:

- Monitoring Close Dates
- Setting up Closed-Lost Stages
- The Virtues of Lost Reasons

# How to Create Opportunity Stages

**Salesforce doesn't know anything about your sales process.** As a platform, it is really just an empty vessel that you must explicitly tailor to your needs if you want it to work for you. This is true throughout the sales process, but especially critical in terms of opportunity management.

If your reps are managing their opportunities in Salesforce (which they should be), it is essential that their understanding of different opportunity stages perfectly matches the rules written into your Salesforce instance. And to do this, you must make sure that your sales process matches the way buyers actually behave.



The image above is a representation of how you can align the seller and buyer journey to ensure that your reps are not simply making decisions based on their own experience, but also factoring in the buyer's expectations.

**This process should be exactly mapped in your Salesforce instance.** Every opportunity should have a hard-coded picklist with your sales process stages. Reps should update this every time the potential buyer has met the **pre-arranged exit criteria for each stage**.

One part of this process that many sales teams ignore is close date. Every opportunity should have a close date, and that close date should be updated anytime information comes in that affects the close date.

In the next section we look at the best practices for monitoring and changing close dates.



# Why You Should Monitor Close Dates

Your sales rep has just talked to a potential customer for the first time. He feels great about how the call went, and is optimistic that the opportunity will be converted soon and fills in his estimated close date in Salesforce. Based on the date he entered, it's clear that this opportunity will be closed by the time his manager is looking at the Salesforce report for the month.

Fast forward a month. Your sales team struggled to convert opportunities this month, resulting in the company missing its number. That rep who filled in the optimistic close date on the aforementioned opportunity not only didn't close that deal – he didn't even realize that the close date had expired. **Expired close dates do not raise alerts on Salesforce**, and overdue opportunities are omitted from forward-looking Salesforce reports, which means that the rep did not realize he hadn't engaged with this opportunity in quite a while. Now, this once-promising opportunity has slipped through the cracks. This is why it is critical that you monitor close dates in Salesforce.

The threat of having opportunities fall by the wayside is very real, and very dangerous. Sales teams handling hordes of opportunities and potential clients at once might find it difficult to keep tabs on all of them. When something like this occurs – where the estimated close date has passed without any alerts – **sales reps might forget to adequately engage with opportunities and give them the attention they require**. Sales managers don't know to ask because they simply can't keep track of every opportunity their reps are working on. They can't help their reps hunt overdue opportunities if they don't realize these opportunities are overdue in the first place.

Another reason for closely monitoring close dates in Salesforce is to provide more accurate sales forecasts. If your reps are overly optimistic and have filled in a bunch of close dates for the end of this month, that might swell your pipeline and make it look healthier than it actually is. The truth is that most of these opportunities might take longer than the end of the month to close, or might not close at all. When sales managers forecast for the month using that pipeline information, they would be deceived into producing a robust sales forecast that is ultimately not true. Inaccurate sales forecasts can drive the wrong business decisions, such as prompting a sales manager to hire more unnecessary employees, purchase a surplus of raw materials or present overly optimistic revenue projections to board members.

**The problem is that most sales reps simply push the close dates on all their opportunities to the end of the month**, whether that's an accurate representation of these opportunities or not. When that happens, you end up with a report with clumps of opportunities at the end of each month. That inevitably leads to a scramble at the end of the month as the rep attempts to discern which of these opportunities should be prioritized and engaged with.

This also presents a tremendous headache for sales managers in trying to understand and manage each rep's individual opportunity pipelines. Sales managers are there to help reps perform better, and a big part of that is in helping them narrow down which opportunities should be prioritized and engaged with. If all opportunities look the same thanks to poorly monitored and maintained closed dates, then sales managers can't offer much help or advice.

To overcome these issues, **sales managers must instill a culture that emphasizes data accuracy and quality among their sales reps**. Reps must understand the importance of maintaining accurate close dates to help themselves prioritize opportunities while helping sales managers produce more accurate sales forecasts.

Salesforce's issue with not sending alerts for overdue opportunities is not easily fixed, unfortunately. To prevent opportunities from slipping through the cracks, it would be better to adopt a more conservative approach to close dates from the onset. After the initial call, instruct your reps to **set close dates farther out than they normally would, aiming toward the end of the month, quarter or at the end of the average sales cycle**. With each subsequent call, additional contact or any other progress through the selling stages, that rep can then move the opportunity's close date forward as necessary. Being prudent about close dates and adjusting accordingly is a much safer strategy than being overly optimistic about all opportunities and their close dates, only to see them fall short.

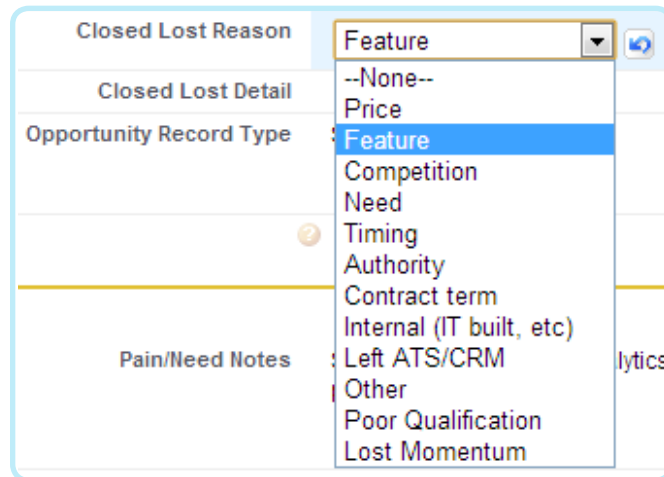
Making sure your reps are diligent about monitoring close dates – and using them correctly – is an important part of Salesforce hygiene, but it is not the only thing you should keep in mind when considering closed-opportunity best practices. You should also adopt a policy of having two fields for closed-lost opportunities.

# Why You Need Two Fields For Closed Opps

Having a field for a picklist of Closed Lost Reason options is insufficient. This information alone will paint an incomplete picture and produce Salesforce reports that don't tell the whole story of your sales process. You need 2 fields for closed-lost opportunities in Salesforce.

## What is Each Field For?

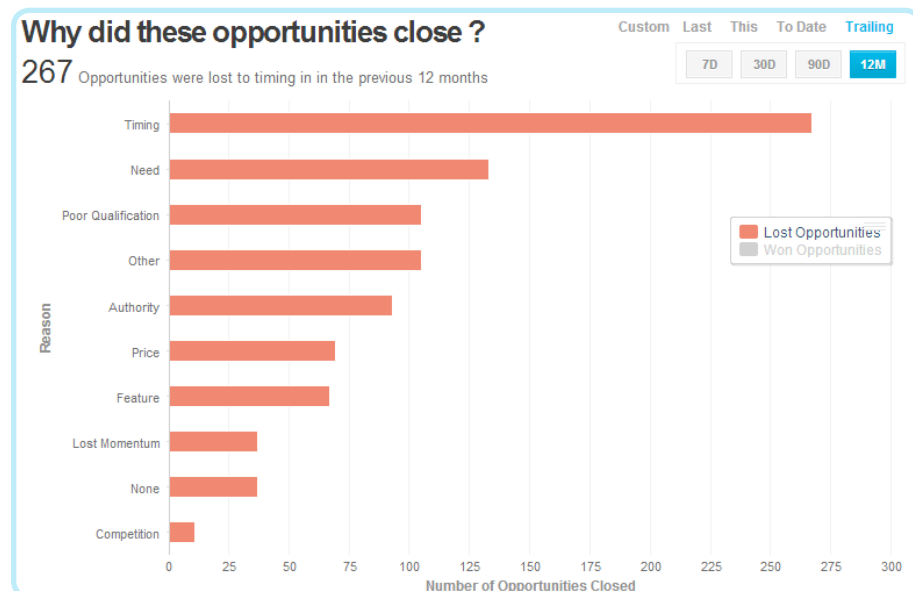
The Closed Lost Reason field is a simple picklist of various options – as determined by your company and the market it sells to – of possible reasons for why the opportunity was lost. Some commonly encountered reasons include timing, budget, authority, competition, need, price, lack of qualification or lost sales momentum.



Having a picklist of options is great for data standardization – sales managers can choose to sort by all the records that have lost reasons of “Authority,” for instance. That data normalization is also great when exporting Salesforce data to a sales analytics product like InsightSquared, creating easy-to-analyze sales reports like this one in Figure 8.

**FIGURE 8**

*Enforcing the input of Lost Reasons allows companies to better track the reasons they are losing deals.*



The Closed Lost Detail is an editable field and asks for exactly what it says in its name – more detail. Here, you should expect your sales reps to furnish the record of this opportunity with additional details, diving deeper into why this opportunity was lost.

For example, let's say Opportunity X was lost because of "Timing". In the Closed Lost Detail, the responsible sales rep should talk about why now is a bad time and when they could call back in the future. Maybe the opportunity said that they had spent all their allocated budget for these types of products and services for the year already, and if you reached back out in Q2 of 2014, they will be more receptive. That type of detail can be tremendously helpful in rescuing this opportunity – **simply noting that this opportunity was lost due to timing does not provide any meaningful insights** into what else can be done in terms of follow-up.

If "Competition" is selected as a lost reason, the rep should detail the competitor that won and what specifically led to that result – did the competitor have a feature that the prospect wanted? Was their pricing structure more affordable? Does the competition have better customer service or better sales reps?

Getting as many details as possible from the losing opportunity and listing those in the editable field can also make a big impact on the rest of the company. For example, if a series of "Feature" complaints were cropping up regularly, you could bring that information to your product team. This might provide clues to product flaws or where they could improve that the product team might not have thought about before.

These closed-lost reasons can prove to be some of the most important pieces of information you collect during the sales process, so it's essential that you learn how to properly set them up.

# How to Set Up Lost Reasons

The most important part of setting up Lost Reasons in Salesforce is making it part of your ongoing sales process. Managers need to make it mandatory for every rep to record a lost reason for each lost opportunity.

The first step is to set up your picklist of lost reasons for your sales reps to choose from. In Salesforce:

1) Click on “Setup” under your name.

<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input checked="" type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.

2) Click on “Customize” under “App Setup,” then “Opportunities” and “Fields.” This screen gives you a chance to create “New” Opportunity Custom Fields and Relationships.

3) Specify the field type (“Picklist”), fill in the details of what values you want in your picklist (i.e. the lost reasons that are applicable to your sales team)

4) Add this new picklist option to the appropriate reports and your team is now well on it’s way to specifying a reason for each lost opportunity.

The next step is to coach your reps to add this small, but important, step to their sales process. For starters, make this a mandatory field in Salesforce. **Set up the CRM so reps can’t save opportunity details or move on until a lost reason has been specified.** Impress upon them the critical nature of recording a specific reason for each lost opportunity.

Opportunity  
New Custom Field Help for this Page ?

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label  i

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Price  
Timing  
Product  
Fit  
Authority

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.  
 Use first value as default value

Field Name  i

Description

Help Text  i

Make sure to choose the right lost reasons for your picklist. “Can’t contact” and “None” are bad reasons that indicate laziness on the part of your sales reps in not pursuing or qualifying the opportunity well enough, or in failing to discern a specific lost reason from the contact. Additionally, implement a close lost detail box for reps to add more specifics.

Every lost reason within the picklist – but especially for vague reasons such as “Other” – should be supported with more details. Sales managers who are armed with more in-depth information on why reps are losing deals will be better positioned to coach and coax improvements from them.

**Having a normalized list of lost reasons in Salesforce is an essential element of sales coaching** and analytical sales management. When sales managers go to their won/lost reports, they can visualize an overview of all lost opportunities, or segment by specific lost reasons. This information can drive better business decisions for many different teams within the organization.

Sales managers will be able to coach their reps more efficiently and effectively. The product team will gain instant feedback on what areas they might need to improve in. C-level executives could gain insights into whether they are selling to the right market, or if they have the right price point. Setting up lost reasons in Salesforce is a simple process that can lead to critical insights that touch every team in a company.

# Conclusion

Most sales reps emphasize the beginning of the sales process – when things are fresh and promising – and ignore the end of the sales process, which focuses on spring-cleaning type exercises like removing dead opportunities and detailing lost reasons. While natural, this type of behavior can be very harmful. Purging your Salesforce instance of unlikely-to-convert opportunities is critical to an efficient sales process that doesn't force reps to chase their own tails or let winnable deals slip through the cracks due to sloppy Salesforce use.

Throughout this guide, we've discussed how to get the most from your Salesforce instance – by doing everything from accurately understanding its framework to being vigilant about adoption and proper use. But there's one thing we haven't discussed that can have a huge impact on your ability to maximize the value you get out of Salesforce: its **limitations**.

Salesforce can do a *lot*, but it can't do everything – and thinking it can is setting you up for failure. To truly get the most from Salesforce, you must have a firm grasp on where it falls short and what it cannot do.

Section // 5

# Overcoming Salesforce's Limitations



# Summary

For all its strengths and power, Salesforce is a limited solution. And this is by design. There is no way a single platform can satisfy every need for every sales team, so Salesforce was designed to work in most cases and provide most of the functionality its users crave.

But this still leaves a few holes. And these holes can have a serious effect on your sales team's execution if you don't learn to identify (and, ultimately, overcome) them.

In this section, we look at some of Salesforce's main shortcomings, and offer suggestions for how to get past them, including:

- The Limitations of Salesforce Reporting
- The Difficulty of Cross-Object Reporting
- The Virtues of the AppExchange

# The Limitations of Salesforce Reporting

As a storehouse for reams of sales data, Salesforce is unparalleled. But when it comes time to turn that data into something actionable and usable, it's a different story. Salesforce is seriously constrained in terms of reporting, which is a damning issue only if you don't recognize it and plan around it. Here are some of Salesforce's major limitations:

## Too Much Training Required

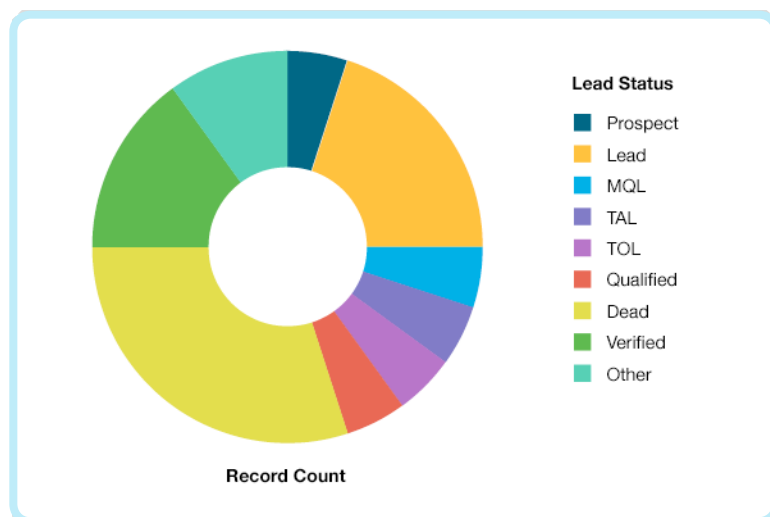
Sales VPs should not have to invest a great deal of time in learning how to use or understand sales reports. Practically every report builder on the market – including Salesforce's – lacks the intuitiveness for easy out-of-the-box adoption. Sales VPs rarely have the luxury to spend hours training and studying up on the many nuances of report builders. Many will end up delegating these reporting responsibilities to their Sales Operations team, sit back and hope for the best, without really digging into the data themselves. The more separation that Sales VPs have from the data, the less effective that information will ultimately be.

Furthermore, if a great deal of training is required for a Sales VP to fully embrace Salesforce reporting, odds are many other members of the sales team will require similar tutorials. This will produce a level of resistance and backlash that diminishes the overall impact of the CRM software, mitigating the net impact of having all this data at your fingertips. Sales reporting should be intuitive and not require a backbreaking amount of training.

## Limited Visualization

When it comes to data visualization, the general public typically knows just enough to be dangerous. But they haven't attended an Edward Tufte seminar, they haven't read Stephen Few's dashboard books and they certainly haven't studied up extensively on data visualization.

**Salesforce provides a variety of visualization techniques in its reporting features – just enough, in fact, to encourage some poor practices.**



When should you use a vertical bar chart versus a horizontal bar chart? Are dashboard gauges provided by Salesforce.com ever a good idea? Do pie graphs fit in anywhere? Salesforce.com provides some commonly used data visualization tools – unfortunately, they are also commonly misused by their customers.

### Difficult to Share Reports

Even if the best reports have been built through the software, there are still a host of issues regarding the sharing of these reports. For starters, the **sales reports can only be sent to other paid users within Salesforce**. If your CEO or board member isn't a registered member, you'll have to jump through several hoops just to circulate your report to them.

There are many options for scheduling recurring reports, but none for sending out a one-off report right now. You have the option for scheduling daily, weekly or monthly reports to be sent in an estimated time in the future, depending on your job queue. Sometimes, immediacy can be a highly desired asset.

### Hard to Access Historical Data

One of the best benefits of CRM software is the capability to study historical data and make accurate forecasts using this data. The snapshotting capabilities on Salesforce allow this, with one catch – they must be planned out and set well in advance. This means that sales managers must have the foresight to predict the information they need....before they actually need it. Furthermore, the schedule of these snapshots cannot be changed once they've been set. If a manager has established monthly snapshots, but suddenly wants to look at weekly information, they are fresh out of luck.

### Problems with Cross-Object Reporting

With so much data collected on Salesforce, many sales managers would be excited at the opportunity to study various objects for deeper trend analysis. Unfortunately, these managers will be hindered by Salesforce's limited cross-object reporting capabilities.

For example, if a manager wanted to compare data on lead sources and opportunities to find out specifically how leads converted to revenue, they would have to pull two separate Salesforce.com reports, export them to Excel and then time-consumingly merge them to gain any sort of meaningful insights.

There are a few ways around this shortcoming, however.

# The Value of Cross-Object Reporting

As we discussed, cross-object reporting is notoriously difficult in Salesforce. Before we get into a few methods for circumventing this limitation, let's talk about why cross-object reporting is valuable.

## The Benefits of Cross-Object Reporting

Activities by your sales reps – calls, voicemails, emails, etc – are logged in Salesforce; each time a rep makes a sales call, that information should be closely tracked. Your reps are making these calls to try and convert leads into opportunities and, eventually, those opportunities into winning deals. As a Sales VP or sales manager, you want to know, *“How many activities, on average, does it take to convert a lead into an opportunity? How many of our opportunities do we win? How can I draw a direct line between my rep’s activities and our winning deals?”*

You need that information to make better decisions. For instance, if the data suggests that the more activities your reps make, the more deals they win, you could decide to implement higher activity goals. Or you might choose to hire more reps, to help perform more activities. Without connecting those dots, sales managers are operating blindly.

Unfortunately, there is no easy way to make these connections in Salesforce. Calls are logged as activities in Salesforce.com; opportunities are an object, while deals are a type of opportunity stage. Essentially, those are 2 different objects that live across different parts of your Salesforce.com instance. That means cobbling together 2 or 3 different reports in order to get the information you need.

## Measuring the Effectiveness of Marketing Efforts

Marketing creates leads, and attributes a lead source to this new batch of leads in Salesforce; for example, from buying a list. Then, sales goes ahead and wins a couple of deals this month. Now, as part of the deal retrospective, it's time for your marketing ops admin or your sales manager to go back and answer, *“Which lead sources did these deals come from?”*

This type of marketing attribution is critical; decision makers need to know what's working in marketing, what isn't, and generally figure out where their business is coming from. Which campaign generated the most leads? Which campaign's leads most consistently converted to opps? Is there a productive well that marketing can keep dipping back in over and over again?

Go a level deeper, and these complex questions become even more complicated (and even harder to do on a cross-object reporting level). *Of the leads that you bought, how many were marketing-qualified leads (MQLs)? Which MQLs have been called? How many MQLs converted to winning deals? How many deals did you, the marketing operations manager, help your company win?*

Again, these are disparate dots that are not easily connected. Leads and opportunities are different objects that live in different areas of your Salesforce instance.

### **Organizing the Financials on Deals**

When a booking is completed, there's still work for the company to be done, namely in collecting the revenue from that deal. You can pull up a table on each opportunity to track the scheduled revenue, i.e. when specifically the payments for that deal will come in.

Unfortunately, in identifying the lifetime value of a customer, or the future revenue from a customer, you will have to do some cross-object reporting. An account might have three different opportunities living in it. CEOs and CFOs need full visibility into how much is being paid for each opportunity, and when those payments are scheduled to come in. Relating winning deals back to their account requires linking these various objects together.

## 3 Ways to Do Cross-Object Reporting

### 1) Write an Apex Trigger for Cross-Object Workflow

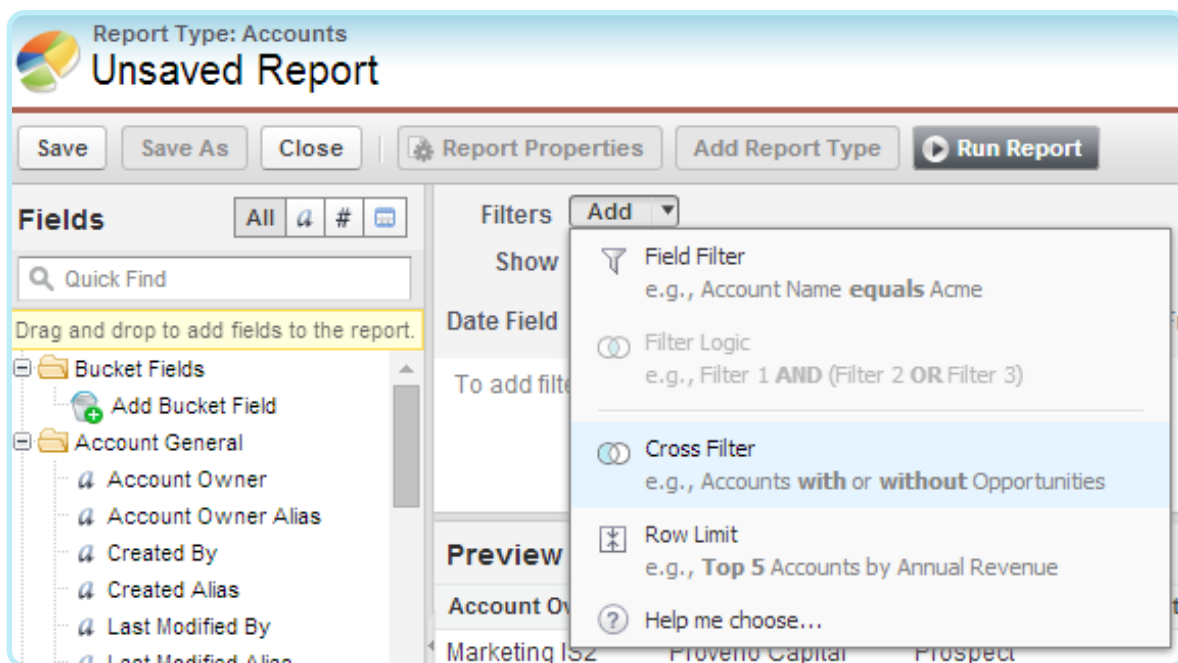
Cross-object workflows are when a field or event happens on one object, and something else is concurrently changed on a related object. For instance, tracking closed-won opportunities back to their originating lead sources is such a popular ask that most companies have created an Apex trigger to point the lead source from the lead directly to the opportunity at the time of conversion.

The problem with **writing these potentially complex Apex code triggers is that it changes what your Salesforce instance looks like**, it only solves one challenge at a time, you have very limited room on an object, and it's very complicated to do yourself (or expensive, if you keep hiring people to do it for you).

### 2) Create Multiple Reports and Export to Excel

You can also create multiple reports, and then add a cross filter to those reports.

At this point, you have to export that data to Microsoft Excel and, using VLookups and a dedicated analyst, make some sense of that information in order to draw the trend patterns you need to run your business. In theory, this is a doable task. In practice, this is extremely time-consuming, leaves lots of room for error and requires the hiring or dedication of an analyst comfortable in Excel and diligent in data hygiene.



### **3) Use Sales Analytics Software That Pulls From Your Salesforce Data**

Sales analytics software that pulls safely from your Salesforce data can solve many of these cross-object reporting problems. For instance, InsightSquared's activity reports can draw direct links between the number of calls made to the number of opportunities sourced. Our marketing reports reveal which of your influencing campaigns have been most effective, in terms of leads created, opportunities converted and bookings sourced.

Of course, even if you do find a workaround for Salesforce's limitations in terms of cross-object reporting, you will want to share it with the rest of your sales team – and this is not as easy as it sounds.

# 4 Problems with Sharing Reports in SFDC

You're the VP of Sales. You just had a hallway conversation with the CEO about Joe Salesperson and you want to follow up with some data. It's time to dust off your Salesforce reporting skills. Try this right now in your Salesforce.com portal:

1. Load a report
2. Filter the report to show the data on Joe
3. Send it to the CEO with a note "Take a look – Joe is killing it this month!!"

Unfortunately, this seemingly simple task is not possible in Salesforce for 4 reasons:

## Impossible #1: Send to Your CEO

In Salesforce, *you can only send to other paid users within Salesforce*. That's fine for sending reports to a salesperson but what if your CEO isn't in Salesforce?

Sorry, you can't. You'll need to "print screen", crop it, paste into PowerPoint and then email the PowerPoint. Which is then difficult to read when your CEO opens the screenshot-in-PowerPoint on their smartphone.

## Impossible #2: Send Now

You can *schedule* a report to be emailed in Salesforce, but you can't *send it now*.

The closest they have "now" is an *hourly* pulldown...and even that is just an estimate that will "depend on job queue." You could end up waiting 59 minutes or more for your "quick" email to be sent. That's probably longer than it would take to walk across the office and hand-deliver it.

## Impossible #3: Send Once

You can't send a *one-off* report in Salesforce.com. What? That's right. You can only schedule it for *recurring delivery*. Your choices are Daily, Weekly, or Monthly.

If you just wanted to send your CEO a single email, you need to schedule it for delivery – then come back in an hour because remember you can't send now – and cancel it again.

## Impossible #4: Attach a Note

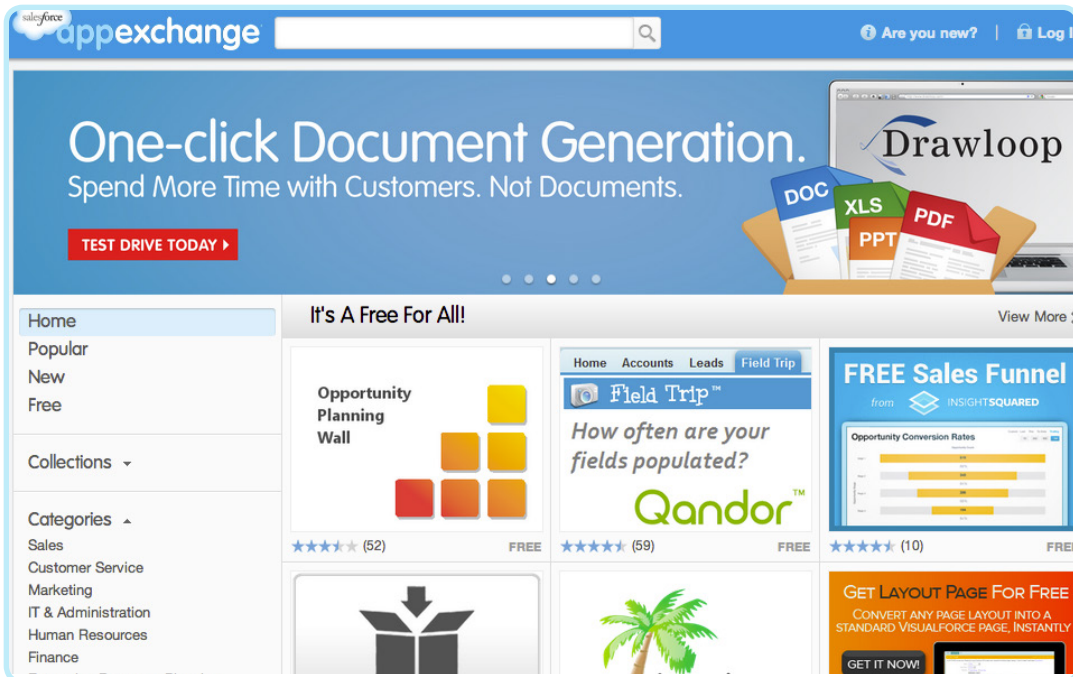
Context matters. If you want to identify why you are sending the data or call out a specific portion, you can't. You can't attach a note in Salesforce. Your recipient will need to guess.

These problems may seem insurmountable, but there are potential solutions. And, for the most part, these solutions live in Salesforce's AppExchange.



# Getting to Know the AppExchange

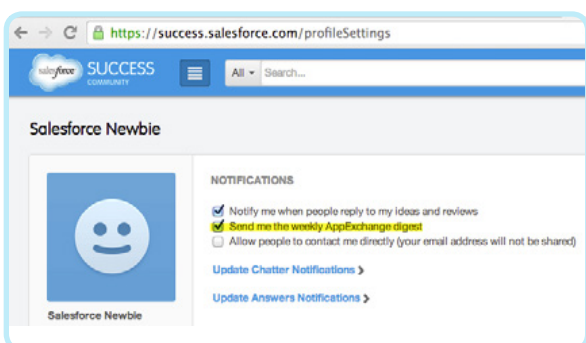
Most businesses using Salesforce.com do not take enough advantage of the thousands of resources that come with using the world's leading CRM – including Salesforce's own marketplace of add-ons, the Salesforce AppExchange.



With 2,000+ easy-to-install applications on the AppExchange, over 900 of which are absolutely free, you need to leverage the AppExchange to get the most out of Salesforce. What's the best way to get started? Here are 3 simple ways.

## Get the Lay of the Land: Homepage and Weekly Digest

Not only does Salesforce have a searchable database of all of the apps on AppExchange, but they also have a talented team of curators finding you the best tools available and updating them on the AppEx home page regularly. The AppEx home page, left nav, and scrolling banners will give you a great sense of what's available to make your Salesforce experience faster, more powerful, and better for your business.

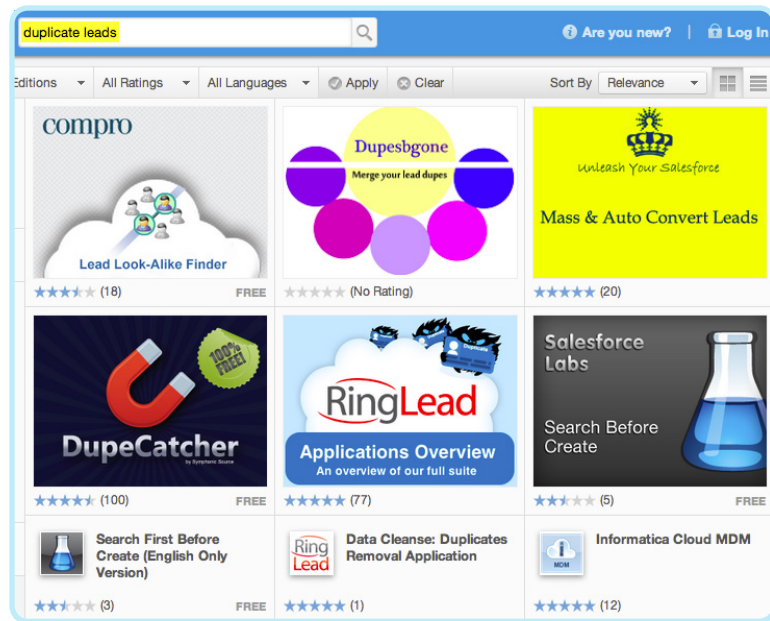


Another great resource to get you started is the handpicked, Weekly AppExchange Digest. Not sure if you're opted-in? Go to your Salesforce profile settings and check the box on the left to receive all notifications.

## Search Pain Points You're Experiencing

Come up with 3 areas of running your business where you occasionally think, "Geez, it would be great if Salesforce did [this thing]" and plug those keywords into the search box. For InsightSquared, we often struggle with squashing duplicate leads, so a natural search could be the search shown in Figure X.

Almost every organization on the AppExchange is willing to give you a demo of their product before you commit to purchasing it, and often, you can even find some absolutely can't-live-without-them apps here that are entirely free.

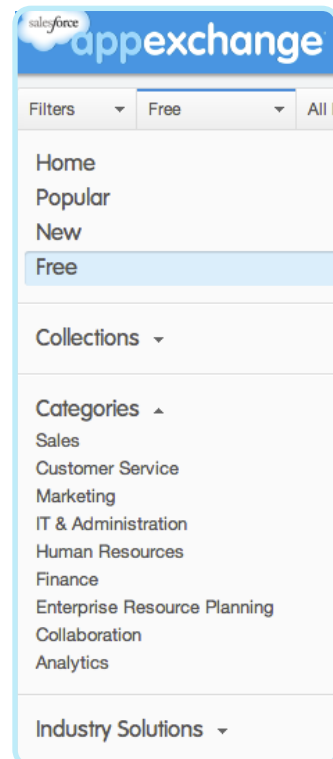


## Take Full Advantage of Free Apps

Unlike trying to live solely off of free food court condiments at the mall, living off of Free Apps on the AppExchange is both quite easy and highly recommended. Not only are there over 900 such options to choose from, but you could live quite comfortably off of them alone, depending on the level of detail you need to run your business.

Many free apps are either "entry level" versions of Salesforce partner offerings, or are free tools that consulting shops make to get people interested, but like other freemium models popular with consumers (such as Words with Friends or Pandora) sometimes they're all you need.

Whether you need help with sales, marketing, permissioning, or keeping better track of your accounts, well, there's probably a free app for that. Start digging in today.



# Conclusion

As much as we'd love it to be, Salesforce is not a cure-all for the modern sales team. It can do a lot, but it does have its limitations. However, understanding these shortfalls minimizes their negative impact, and allows you to continue getting a ton of value from the platform.

The deeper you dig into Salesforce, the more you get out of it, and the more you discover you need. This is healthy. Salesforce solves the basic problems of any sales team, but it is not enough to ensure optimal sales execution.

For that, you need smart leadership, a strong, well-constructed sales process, and a great team. Check out some of the other FREE resources in our content library to start mastering those next-level sales issues.

[See More Sales Resources](#)

# Afterword

Salesforce is an extremely powerful tool that can help you optimize your sales team's performance – but only if you know how to get the most from it. In this eBook, we laid out some of the information to help you:

- Understand how Salesforce fits into your company's operations
- Learn the best ways to organize your data with Salesforce

This eBook is far from an exhaustive guide to Salesforce's complexities, but it is a good way to start getting more from your Salesforce instance. Whether you use it as a one-time introduction or as a dog-eared resource, this eBook should ensure that you're not just getting the minimum value from Salesforce, but actually adapting it to your specific needs so it can be the powerful, flexible, insight-rich tool it should be.