

Salesforce lead management best practices - A checklist.

Effective lead management enhances lead quality for a targeted approach.

It encompasses key concepts like lead scoring, segmentation, qualification, and automated distribution for reduced customer acquisition costs.

This checklist will bolster your conversion rate with greater pipeline visibility:

Process definition

Collaborate with the sales and marketing teams to clearly understand Marketing Qualified Lead (MQL) and Sales Qualified Lead (SQL).

success teams.

This will help align sales, marketing, and customer

Document lead progression to track lead status, personalize communication, and support automation.







Lead capture Assimilate prospect sales engagement data

- across channels with your Customer Relationship Management (CRM) software Use Salesforce Sales Analytics software to close
- deals swiftly by enhancing forecast accuracy & revenue intelligence.
- Have the Salesforce sales enablement mechanism (backed by AI-powered coaching) to develop better selling capabilities.

Lead qualification Leverage the BANT (Budget, Authority,

- Need, and Timing) framework for lead qualification. Utilize Salesforce automation to support
- prequalification. Custom fields will help capture the
- prequalification data.





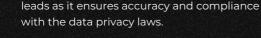


Avoid a one-size-fits-all approach for the stages

Tailored approach

- your lead progresses through. For the early stages, focus on educating and
- attracting potential leads through content marketing, social media campaigns, SEO techniques, and lead magnets. Lead nurture should be supported with Salesforce validation rules and custom fields.
- Capture leads with Salesforce Web-to-Lead forms.
- Data management





data integrity and quality.

Avoid duplicates and ensure consistency in data entry through validation rules, picklists, and dependent fields.

Periodic data audits must be done to ensure

Collect the first-party data directly from your







dashboards with tools like Tableau, G-Connector, Jotform, Klipfolio, etc. that blend seamlessly with the Salesforce ecosystem.

Reporting & analysis

Harness the potential of Salesforce CRM Analytics to determine lead characteristics and gain deeper insights. Utilize Einstein Lead Scoring to predict the

Create lead-specific custom reports and

current leads and prioritize them.

that facilitate a shared understanding of lead quality, conversion rates, and revenue targets.

Salesforce campaign management should be

Sales-Marketing collaboration

Establish Key Performance Indicators (KPIs)

- used to track marketing campaigns and their impact on lead generation. This also ensures that sales teams are aware of active campaigns.
- CRM to sync marketing automation efforts with your sales endeavors.

Salesforce Pardot should be integrated with









Persistent optimization

- Gather feedback regularly and conduct joint analysis sessions with Sales & Marketing teams. Don't hesitate to deploy new lead-scoring
 - Conduct regular Salesforce training sessions for

models and nurturing strategies if the existing ones aren't yielding the desired results.

