

# 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).

This will help align sales, marketing, and customer success teams.

- 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.



## Tailored approach

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

- Collect the first-party data directly from your leads as it ensures accuracy and compliance with the data privacy laws.
- Avoid duplicates and ensure consistency in data entry through validation rules, picklists, and dependent fields.
- Periodic data audits must be done to ensure data integrity and quality.



## Reporting & analysis

- Create lead-specific custom reports and dashboards with tools like Tableau, G-Connector, Jotform, Klipfolio, etc. that blend seamlessly with the Salesforce ecosystem.
- Harness the potential of Salesforce CRM Analytics to determine lead characteristics and gain deeper insights.
- Utilize Einstein Lead Scoring to predict the current leads and prioritize them.



## Sales-Marketing collaboration

- Establish Key Performance Indicators (KPIs) that facilitate a shared understanding of lead quality, conversion rates, and revenue targets.
- Salesforce campaign management should be used to track marketing campaigns and their impact on lead generation. This also ensures that sales teams are aware of active campaigns.
- Salesforce Pardot should be integrated with CRM to sync marketing automation efforts with your sales endeavors.



## Persistent optimization

- Gather feedback regularly and conduct joint analysis sessions with Sales & Marketing teams.
- Don't hesitate to deploy new lead-scoring models and nurturing strategies if the existing ones aren't yielding the desired results.
- Conduct regular Salesforce training sessions for sales and marketing folks.

