CCS in SFDC

Standard Sales Process Guide

A Sales Process that Combines Customer Centric Selling (CCS) and Salesforce.com (SFDC)

or

Taking an Active Opportunity to a Won Opportunity in 10 Easy Steps! (and Documenting it Along the Way)

Overview

This document details a Standard Sales Process (SSP) that combines Customer Centric Selling (CCS) and Salesforce.com (SFDC). The SSP is a series of steps that provides a standard process for qualifying opportunities from when they first enter the sales pipeline as active opportunities through to the outcome of the Opportunity. Its goal is to help a sales force close opportunities as quickly as possible and at the highest revenue amount possible. The SSP is the foundation of understanding the health of the sales pipeline and ensuring an accurate forecast. The SSP includes two components Customer Centric Selling® (CCS) as the sales methodology – how the SSP is done – and Salesforce.com (SFDC) as the sales force automation tool – how the steps of the SSP are documented.

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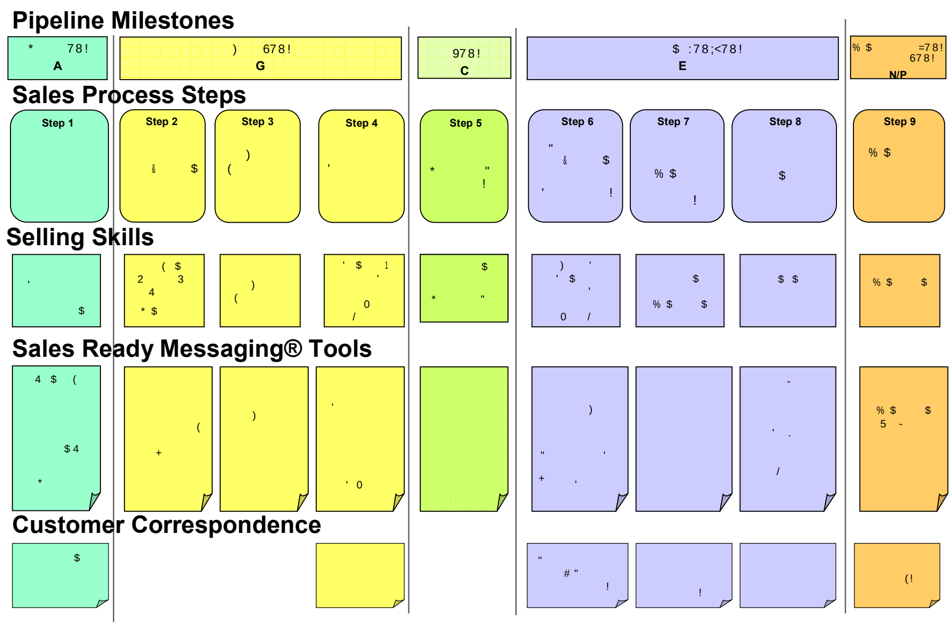
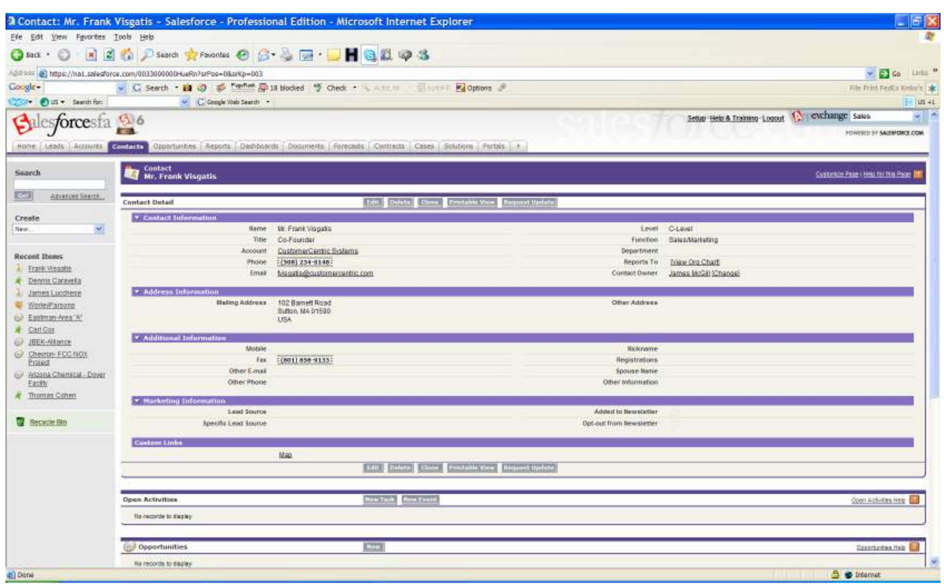
1. Introduction

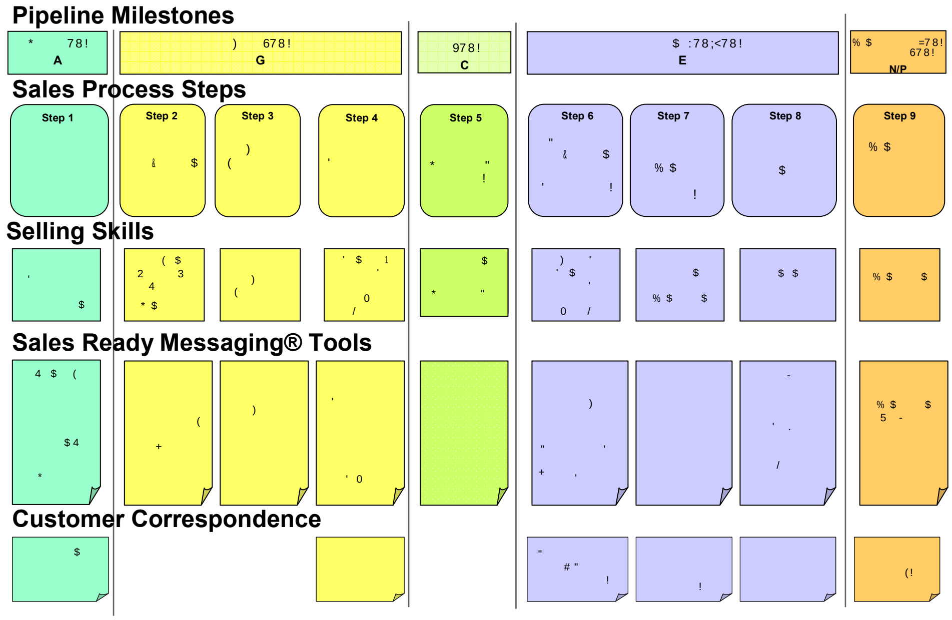
This document details the Standard Sales Process, which is a series of steps that provides a standard process for qualifying opportunities from when they first enter the sales pipeline as Leads through to the close of the Opportunity. Its goal is to help our clients achieve a goal, solve a problem or satisfy a need. Its objective is to help a sales force close opportunities as quickly as possible and at the highest revenue amount possible. The Standard Sales Process is the foundation for both good client relationships and understanding the health of the sales pipeline.

The Standard Sales Process includes two components Customer Centric Selling® (CCS) as the sales methodology – how the Standard Sales Process is done – and Salesforce.com (SFDC) as the sales force automation tool – how the steps of the Standard Sales Process are documented. The below shows the two components in the Standard Sales Process





2. The Standard Sales Process



This section provides information on the Standard Sales Process (SSP) using CCS. In CCS, a Pipeline Milestone is a measure of overall Opportunity progress in the SSP. Each Pipeline Milestone has an associated Win Probability, which is the probability that the Opportunity will result in a win for your company. The amount associated with each Opportunity in the SSP is multiplied by the Win Probability to create the Forecast, which is a real-time prediction of the revenue that is expected to close within a specific timeframe.

Each Pipeline Milestone also has one or more Sales Process Steps, which are specific actions taken to progress the Opportunity through the SSP. While each Sales Process Step is listed individually to clearly define what is required to qualify an Opportunity, a single call or visit may accomplish multiple steps, such as going from Step 2 through Step 4. Each Sales Process Step also has associated Selling Skills, Sales Ready Messaging Tools and may have Customer Correspondence.

A Selling Skill is the specific salesperson capability or capabilities required to successfully complete a Sales Process Step. For example, prospecting in Step 1 or negotiating in Step 9. A Sales Ready Messaging (SRM) Tool is a CCS tool that is designed to uncover a buyer's goals, current situation, steps required to implement the solution, value of the solution and closing the Opportunity. The Solution Development Prompter (SDP) is an SRM tool.

Finally, Customer Correspondence is created by the salesperson to document information about the Opportunity. It enables the buyer to confirm they agree with the salesperson's assessment of the Opportunity information, helps salespersons to disqualify opportunities earlier in the SSP (if information cannot be uncovered) and permits others to quickly review and understand the Opportunity.

The remainder of this section details each SSP Sales Process Step, including the associated Pipeline Milestone, description, Selling Skills required, supporting Sales Ready Messaging (SRM) tools required, Customer Correspondence required, and the actions required in SFDC to fully document the Sales Process Step. While each Sales Process Step is presented individually to clearly define what is required for that step to qualify an Opportunity, a single call or visit may accomplish multiple steps, such as going from Step 2 to Step 4. However, it is highly unlikely that multiple Pipeline Milestones can be achieved in a single call or visit as follow-up actions are required by the salesperson

2.1. A1-Active

2.1.1. Pipeline Milestone

This step is in the Active Pipeline Milestone. Its Win Probability is 0%.

2.1.2. Description

Contact has been made and the prospect has expressed some form of interest.

2.1.3. Selling Skills

The primary skills required for this step are business development and prospecting.

2.1.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- Prospecting Tools by industry, such as e-mail templates, for creating interest.
- The Targeted Conversation List section identifies potential targets by title.
- The Phone Scripts section can guide cold calling.

2.1.5. Customer Correspondence

At this stage, the Customer Correspondence required is a meeting confirmation call or e-mail.

2.1.6. SFDC Documentation

The following should be documented in SFDC:

- The activity used to generate interest by selecting the appropriate value in the Lead Source field and indicating the specific tool used in the Specific Lead Source field. This enables the effectiveness of the tools used to be better identified.
  - If the Opportunity was qualified from a Lead, these have already been documented.
- Attach the meeting confirmation e-mail to the Opportunity. If sent from within SFDC or using the Outlook edition of SFDC this occurs automatically.
- Enter the meeting as an Event.

2.2. G2-Initial Call/Meeting Completed

2.2.1. Pipeline Milestone

This step is in the Goal Pipeline Milestone. Its Win Probability is 10%.

2.2.2. Description

The initial call and/or meeting with the prospect has been completed.

2.2.3. Selling Skills

The primary skills required for this step are building rapport & trust and alignment with the prospect.

2.2.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- The Call Intro Prompter section can guide call introduction, including company facts.
- The Success Stories section can help generate interest.

2.2.5. Customer Correspondence

At this stage, no Customer Correspondence is required.

2.2.6. SFDC Documentation

The following should be documented in SFDC:

- If the initial call/meeting has been completed, The Opportunity Stage field should be changed to "G2-Initial Call/Meeting Completed". If not, the Opportunity stage should not be changed.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.3. G3-Goal Identified

2.3.1. Pipeline Milestone

This step is in the Goal Pipeline Milestone. Its Win Probability is 10%.

2.3.2. Description

The goal or goal(s) for the prospect have been identified.

2.3.3. Selling Skills

The primary skill required for this step is the ability to extract a goal from the prospect.

2.3.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- The Menu of Goals section identifies typical goals by title.
- The Success Stories section can also help uncover the prospect goal.

2.3.5. Customer Correspondence

At this stage, no Customer Correspondence is required.

2.3.6. SFDC Documentation

The following should be documented in SFDC:

- If the Goal has been identified, then the Opportunity Stage field should be changed to "G3-Goal Identified". If not, the Opportunity stage should not be changed.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.4. G4-Solution Developed

2.4.1. Pipeline Milestone

This step is in the Goal Pipeline Milestone. Its Win Probability is 10%.

2.4.2. Description

The prospect's current situation has been understood, the required capabilities have been identified and the solution vision has been developed. Gather any information required to perform pricing.

2.4.3. Selling Skills

The primary skills required for this step are the ability to frame, diagnose (with numbers) and confirm the current situation, identify required capabilities and develop a solution vision.

2.4.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- The Solution Development Prompter (SDP) section has the SDP by title.
- A Champion Letter template.
- Sales call debrief questions.

2.4.5. Customer Correspondence

At this stage, no Customer Correspondence is required.

2.4.6. SFDC Documentation

The following should be documented in SFDC:

- If the Solution has been developed, then the Opportunity Stage field should be changed to "G4-Solution Developed". If not, the Opportunity stage should not be changed.
- A summary of the current situation, goal(s) and capabilities identified should be attached to the Opportunity.
- The Champion Letter e-mail should be sent through SFDC to track opens.
- If the Champion Letter e-mail has attachments (such as a PDF version of the letter) these should be attached to the Opportunity.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.5. C5-Champion Qualified

2.5.1. Pipeline Milestone

This step is in the Champion Pipeline Milestone. Its Win Probability is 20%.

2.5.2. Description

Qualify the prospect by identifying his/her willingness to grant access to Key Players. If the prospect agrees to grant access, then they are a Champion. If they do not grant access, this is likely an indication that the Opportunity may not be well qualified or not very good. Typically, pricing information should not be provided until the Champion and Key Players.

2.5.3. Selling Skills

The primary skill required for this step is the ability to gain access to Key Players.

2.5.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

The Buyer Qualification Prompter (BQP) section has the BQP by title.

2.5.5. Customer Correspondence

At this stage, a Champion letter documenting the Goal, Current Situation (with numbers), Required Capabilities, Company Fit and request for access to Key Players is sent for review. The letter is followed up with a call to confirm its content and ask what other Key Players should be contacted.

2.5.6. SFDC Documentation

The following should be documented in SFDC:

- If the Champion grants access to Key Players, then the Opportunity Stage field should be changed to "C5-Champion Qualified". If not, please contact your Sales Manager to identify a path forward.
- The Key Players should be added as Accounts and Contacts in SFDC.
- The Key Players should added to the Opportunity with their Contact Role set to "Unknown" unless they are specifically identified as one of the following:
  - Adversary: Biased against the solution or your company. Must be converted or neutralized. If the Adversary is powerful, the Opportunity may be abandoned.
  - Beneficiary: Will benefit from the solution.
  - Coach: Shares information with the seller.
  - Champion: Visualizes a solution biased towards your company. The Champion shares information with the seller, does internal selling as needed and provides access to other Key Players.
  - Decision Maker: Helps the seller get access to the where needed in the company, finds the money (even if unbudgeted) and is willing to negotiate/manage the SOE.
  - Implementer: The person that will implement the solution and with whom the implementation plan must be negotiated.
  - Financial Approver: Approves funding for the solution, even if unbudgeted.
  - User/User Manager: Will directly use or manage users of the solution.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.6. E6-Key Player(s) Qualified

2.6.1. Pipeline Milestone

This step is in the Evaluating Pipeline Milestone. Its Win Probability is 40%.

2.6.2. Description

The Key Players have been contacted and their goals, current situation and required capabilities have been identified and their solution visions have been developed.

2.6.3. Selling Skills

The primary skills required for this step are building rapport & trust and alignment with the Key Players, the ability to extract a goal from the Key Players and the ability to frame, diagnose (with numbers) and confirm the current situation, identify required capabilities and develop a solution vision.

2.6.4. SRM Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- The Call Intro Prompter section can guide call introduction, including company facts.
- The Success Stories section can help generate interest or uncover a goal.
- The Menu of Goals section identifies typical goals by title.
- The Solution Development Prompter (SDP) section has the SDP by title.
- A Key Player Letter template.
- Sales call debrief questions.

2.6.5. Customer Correspondence

At this stage, Key Player letters documenting their Goals, Current Situations (with numbers), Required Capabilities and Company Fit is sent to each for review. The letter is followed up with a call to confirm its content.

2.6.6. SFDC Documentation

The following should be documented in SFDC:

- If the Key Players have been qualified, then the Opportunity Stage field should be changed to "E6-Key Player(s) Qualified". If not, the Opportunity stage should not be changed.
- A summary of each Key Player's current situation, goal(s) and capabilities identified should be attached to the Opportunity.
- The Key Player Letter e-mails should be sent through SFDC to track opens.
- If the Key Player Letter e-mails have attachments (such as a PDF version of the letter) these should be attached to the Opportunity.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.7. E7-Opportunity Qualified

2.7.1. Pipeline Milestone

This step is in the Evaluating Pipeline Milestone. Its Win Probability is 50%.

2.7.2. Description

Qualify the Opportunity by summarizing the information gathered (goal, current situation, capabilities required, company fit) and analysis of value to the Key Players. Get agreement that the value analysis is reasonable and that there is enough value to proceed. These will be used as the Success Metrics. If there is, then ask them what they would like to see in order to evaluate your company. If not, close the meeting. Do not agree to any unreasonable evaluation requests (such as free samples), but simply acknowledge that you are recording them. Some evaluation requests may be granted quickly, such as a demonstration of capabilities as initial proof. This can consist of client case studies, automated demonstration of capabilities, etc.

Following this, present a draft Sequence of Events (SOE) for review and negotiation. The timeline for the SOE need not be negotiated during the meeting, but the Key Players should be asked what steps should be added and the timeframe for the overall evaluation. Ask with whom the timeline for the SOE steps should be discussed and follow-up them to determine the dates and investments (if required) for the steps. Create a follow up letter that include the SOE steps with some dates blank (to require their review) and any reasonable items for evaluation, do not include unreasonable requests unless they agreed by the Sales Manager. If the person raises the issue that a request was not included, for out more about why it is needed and try to identify other options. If agreement is not reached, it is better to identify now rather than later.

2.7.3. Selling Skills

The primary skill required for this step is the ability to present the information gathered and value analysis in the Opportunity qualification meeting and to negotiate the SOE.

2.7.4. SRM and Other Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the “Industry SRM Tool” link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab. Other supporting tools are available in folders on the Documents tab.

- A presentation for summarizing the information gathered, presenting the value analysis and providing a draft SOE.
- An Opportunity Qualification Letter template.

2.7.5. Customer Correspondence

At this stage, an Opportunity Qualification letter listing the Goal(s), Current Situation (with numbers), Required Capabilities, Company Fit, the final value analysis and the final SOE is sent to all.

2.7.6. SFDC Documentation

The following should be documented in SFDC:

- If the Opportunity has been qualified, then the Opportunity Stage field should be changed to “E7-Opportunity Qualified”. If not, the Opportunity stage should not be changed.
- The Opportunity Qualification Letter e-mails should be sent through SFDC to track opens.
- If the Opportunity Qualification Letter e-mails have attachments (such as a PDF version of the letter) these should be attached to the Opportunity.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.8. E8-Sequence of Events in Progress

2.8.1. Pipeline Milestone

This step is in the Evaluating Pipeline Milestone. Its Win Probability is 60%.

2.8.2. Description

The SOE is in progress and being managed. It is a living document, with dates and steps being updated when needed. Value generated is also being measured through the process (to be used in the Success Metric analysis) and investment is being made by the client as agreed in the SOE. SOE update letters should be issued to all key players on a regular basis that summarizes the steps completed and the overall Success Metrics. An Implementation Plan is also developed for broader rollout. At the end of SOE, a final Success Metrics and Investment-Benefit analysis should be distributed.

2.8.3. Selling Skills

The primary skills required for this step are the ability to manage the SOE, create an implementation plan (in coordination with others within your company), and finalize the Success Metrics and Investment-Benefit analysis.

2.8.4. SRM and Other Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- An SOE Update Letter template.
- An Implementation Plan Letter template.
- Success Metrics and Investment-Benefit Analysis templates for calculations.

2.8.5. Customer Correspondence

At this stage, SOE Update Letters and an Implementation Plan Letter should be sent to all.

2.8.6. SFDC Documentation

The following should be documented in SFDC:

- If the SOE is underway, then the Opportunity Stage field should be changed to "E8-Sequence of Events in Progress". If not, the Opportunity stage should not be changed.
- The SOE Update Letters and Implementation Plan Letter e-mails should be sent through SFDC to track opens.
- If the SOE Update Letters and Implementation Plan Letter e-mails have attachments (such as a PDF version of the letter) these should be attached to the Opportunity.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.9. N9-Negotiations Underway or P9-Proposal without All Steps

2.9.1. Pipeline Milestone

While both steps are in the Negotiating/Proposal Pipeline Milestone, they have different Win Probabilities. The Win Probability for N9-Negotiations Underway is 80%. The Win Probability for P9-Proposal without All Steps is 10%

2.9.2. Description

For N9-Negotiations Underway, the SOE has been has been completed successfully and negotiations for the final purchase are underway. For negotiations, please ensure the following:

- Verify that your company is the vendor of choice and that price is the only remaining obstacle.
- You are negotiating with a Decision Maker.
- Head off "apples and oranges" comparisons by having a differentiator and a situational question to highlight the buyer's need for it.
- Posture by using pre-prepared polite "no" questions to respond (as many as three times) to requests for better pricing.
- Ask the buyer if the "get" you want is possible.
- Offer your conditional "give" and be prepared to leave if the transaction does not close at that point – leaving the door open, of course, for further rounds, but only after taking your concession off the table.

For P9-Proposal without All Steps, the prospect has been sent a proposal without completing all steps of the SSP. The steps provide qualification and understanding of the Opportunity. Without them, the probability of winning is significantly reduced. Note that the proposal should expire within 30 days.

2.9.3. Selling Skills

The primary skill required for this step is the ability to positively and unemotionally negotiate.

2.9.4. SRM and Other Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

- Negotiating Worksheet.
- Proposal Template

2.9.5. Customer Correspondence

For N9-Negotiations Underway, any e-mails or documents for the negotiation are required. For P9-Proposal without All Steps, a proposal is required.

2.9.6. SFDC Documentation

The following should be documented in SFDC:

- If negotiations are underway, then the Opportunity Stage field should be changed to "N9-Negotiations Underway". If a proposal is sent without completing all steps of the SSP, then the Opportunity Stage field should be changed to "N9-Negotiations Underway".
- The Proposal e-mails should be sent through SFDC to track opens.
- The Proposal PDF should be attached to the Opportunity.
- Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

2.10. W10-Contract Signed, L10-Loss to Competitor, L10-Loss to No Decision, L10-Loss to No Funding or L10-Opportunity Rejected

2.10.1. Pipeline Milestone

This step is not in a Pipeline Milestone. The Win Probability for W10-Contract Signed is 100%. For losses, it is 0%.

2.10.2. Description

The descriptions are below:

W10-Contract Signed: The contract has been signed and the purchase is final.

L10-Loss to Competitor: The Opportunity was lost to a competitor (including traditional techniques).

L10-Loss to No Decision: A decision was made by the client not to proceed at all

L10-Loss to No Funding: Funding was not approved or the company with whom we were working did not receive the work.

L10-Opportunity Rejected: The Opportunity was rejected as it was not an Opportunity in which you were interested, was "un-winnable", etc.

2.10.3. Selling Skills

The primary skills required for this step is the ability to understand the route causes of the win or loss and share this learning with others.

2.10.4. SRM and Other Tools

The SRM Tools available to support this stage are below. These are accessible within SFDC by clicking the "Industry SRM Tool" link in the Custom Links section of the Opportunity or by viewing the Internal Support folder on the Documents tab.

Win/Loss Analysis.

2.10.5. Customer Correspondence

At this stage, no Customer Correspondence is required.

2.10.6. SFDC Documentation

The following should be documented in SFDC:

If negotiations are underway, then the Opportunity Stage field should be changed to "N9-Negotiations Underway". If not, the Opportunity stage should not be changed.

The Win/Loss Analysis should be attached to the Opportunity

The Contract PDF should be attached to the Opportunity.

Any improvements or feedback for the Industry SRM tool should be documented in the Opportunity Notes.

3. Using Salesforce.com to Document the SSP

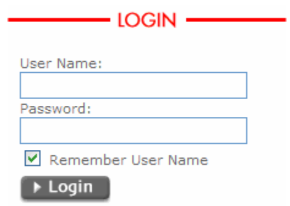
Salesforce.com (SFDC) is the sales force automation tool that documents the steps in the SSP. This section provides a basic overview for how to use SFDC. It also includes naming conventions and other guidelines to ensure consistency of the SFDC data. For more information, visit the Help & Training link in the upper right-hand side of SFDC. Each section also contains a link or links to the relevant topics in SFDC.

A Day in the Life of a Salesperson: http://www.salesforce.com/usertutorial/en/sales_page1.html

Fundamentals Online Training: http://na1.salesforce.com/train/evalSF.jsp?classID=cussal010002

3.1. Logging in

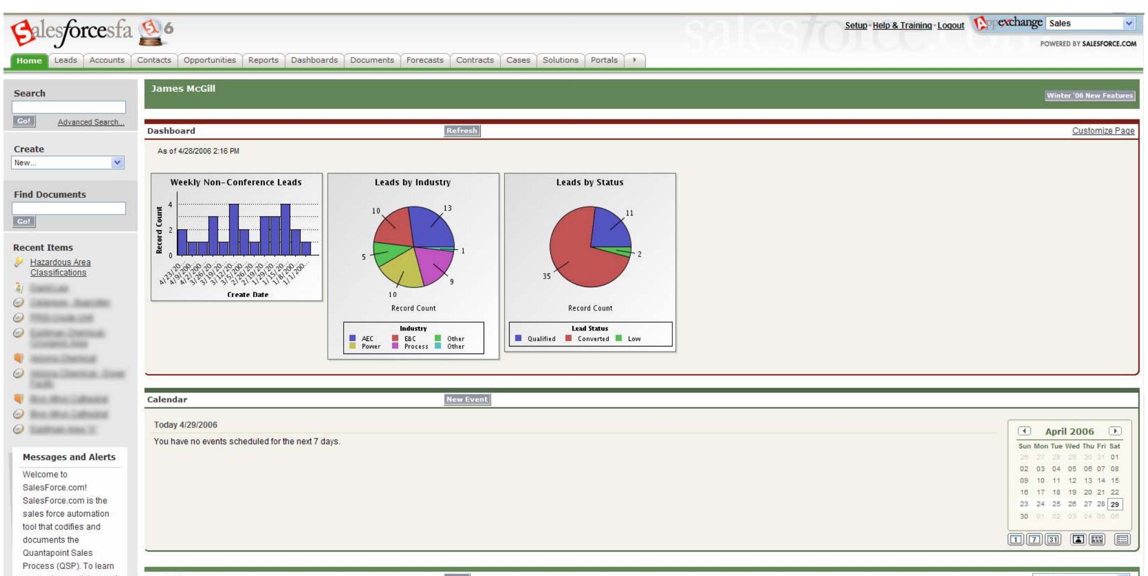
To log in to SFDC, open https://www.salesforce.com/login.jsp and enter your user name and password. If you do not have these, please contact your Sales Manager or Sales Coordinator. You can check the "Remember User Name" checkbox to avoid having to re-enter your log in name each time.



If you forgot your password or enter an incorrect password, a "Forgot your password?" link will be shown. You may click this link to have a new password sent to you or you may simply contact the Sales Coordinator.

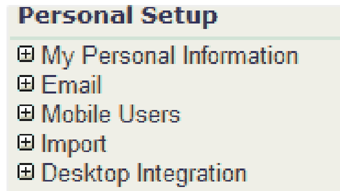
3.2. SFDC Interface Overview

When you log in to SFDC, the first page displayed is your Home Page. Some interface elements are common to all areas of SFDC. For example, the Tabs at the top enable you to access different items in SFDS. In the Sidebar (left margin), the Search textbox enables you to search items in SFDC, the Create drop-down list enables you to quickly create a new SFDC record, the Recent Items in the middle of the Sidebar shows recently items recently accessed and the Messages and Alerts provides new information, documents, capabilities, etc.



3.3. Updating Personal Setup in SFDC

SFDC has a variety of settings that can be used to customize its usage. To access the Setup, click the Setup link in the upper right corner of SFDC.



3.3.1. My Personal Information

Click the + sign beside My Personal Information to show the items that may be updated.

Click on Personal Information to edit your personal information in SFDC or change your password.

Note: Do not modify your user name or role as this may cause issues in SFDC.

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Enables you to change your password and enter a "hint" question in case you forget your password.

Enables you to create personal groups in SFDC. These are separate from the Public Groups.

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Enables you to customize your display on one page.

Note: The Leads, Campaigns, Cases, Solutions and Portals tabs may be removed for salespersons. Please do not remove any of the Selected Lists from the tabs as all may be required.

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Enables SFDC customer support to log in to your account temporarily.

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Shares you calendar with the rest of the team.

Note: Do not disable calendar sharing as this enables schedules to be coordinated.

3.3.2. Email

Click the + sign beside Email to show the items that may be updated.

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You may change the name displayed for outgoing e-mails, the e-mail address used for reply e-mails, whether you are automatically BCC'ed on e-mails sent using SFDC and add an e-mail signature.

You may create personal e-mail templates you may use in addition to the standard e-mail templates.

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Modify the text for the e-mail used to ask Contacts to update their information.

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Enables you to schedule weekly or monthly emails to your direct reports to remind them to keep opportunity information up to date in preparation for reviews or other meetings.

3.3.3. Mobile Users

Enables access of SFDC information to users that are frequently travel or may be offline for other reasons

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Access the offline version of SFDC.

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Access SFDC via Palm or Pocket PC devices.

3.3.4. Import

Enables Contact information to be imported into SFDC.

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Modify the text for the e-mail used to ask Contacts to update their information.

Note: Please send your Contact and Account databases to the Sales Coordinator to import. Do **not** import large amounts of information yourself as this may cause many duplicates.

3.3.5. Desktop Integration

Integrate SFDC with your computer desktop.

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Install the Outlook Edition that integrates Outlook e-mail with SFDC.

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Install the Office Edition that enables Microsoft Office Word and Excel to extract information from SFDC for mail merges, calculations, etc.

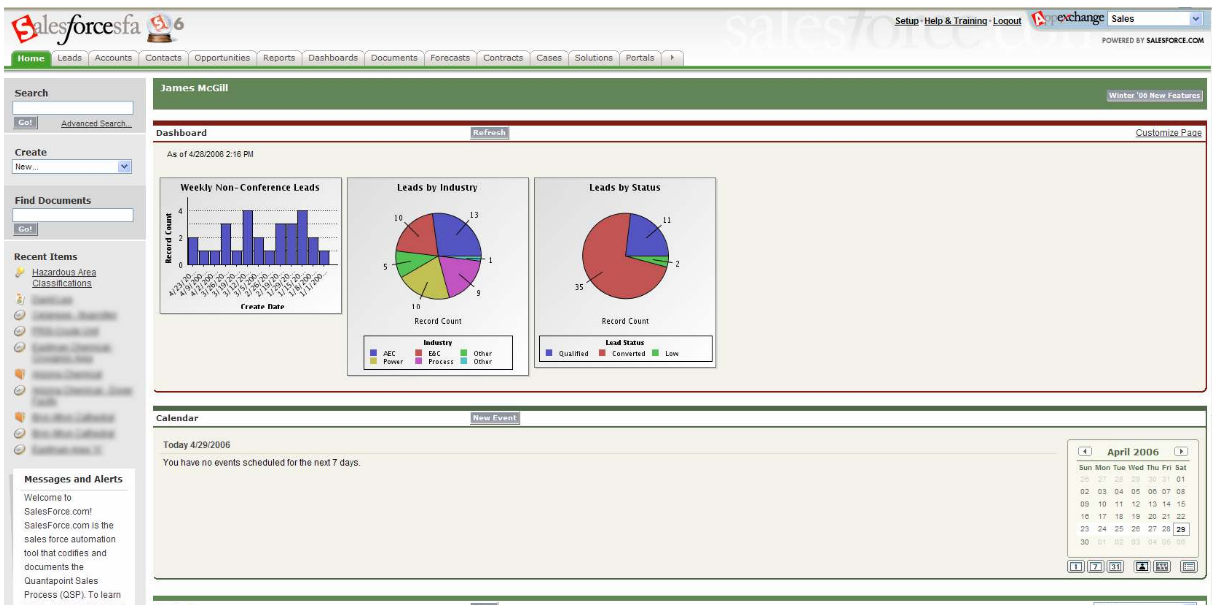
3.4. The Home Page

The Home Page also contains various elements to help provide you with Dashboards to provide key performance indicators and a list of all upcoming Events and Tasks. Standard Dashboards are available for sales personnel, but additional custom Dashboards may be created upon request. Information in the Dashboard may be updated to the most current by clicking the Refresh button.

The Calendar shows Events (activities with a specific date and time) that are due within the next seven days. Click the “New Event” button to add a new Event to the Calendar. The icons beneath the Calendar can change the view to manage Events by day, week, month, multi-user or in a list. My Tasks shows Tasks (activities due on a specific date, but not at a specific time) that are due within the next seven days.

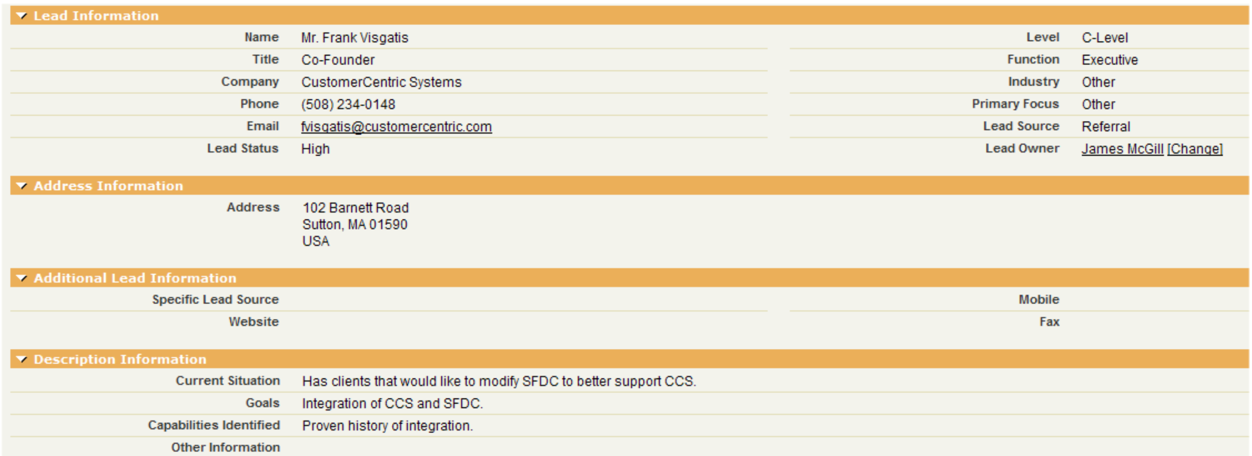
The Sidebar also provides a Find Documents textbox that enables you to search for documents stored in SFDC and Messages and Alerts that provide messages from both SFDC and your company.

<u>Note</u>: Please regularly review the Messages and Alerts section as new information, documents, capabilities, etc. will be listed here.



3.5. Leads Tab

A Lead is a person that might be interested in your company services. Leads are generated from a variety of sources, such as the web site, events, articles, advertisements, newsletters, etc. Leads are handled by the Sales Coordinator who performs basic qualification to identify the Lead's interest in your company, their goal and current situation.



Lead Information

Name	Mr. Frank Visgatis	Level	C-Level
Title	Co-Founder	Function	Executive
Company	CustomerCentric Systems	Industry	Other
Phone	(508) 234-0148	Primary Focus	Other
Email	fvisgatis@customercentric.com	Lead Source	Referral
Lead Status	High	Lead Owner	James McGill [Change]

Address Information

Address	102 Barnett Road Sutton, MA 01590 USA

Additional Lead Information

Specific Lead Source		Mobile	
Website		Fax	

Description Information

Current Situation	Has clients that would like to modify SFDC to better support CCS.
Goals	Integration of CCS and SFDC.
Capabilities Identified	Proven history of integration.
Other Information	

Based on this qualification, one of three actions will be performed:

The Lead will be converted to an Opportunity that is assigned to a salesperson by the Sales Manager based on its vertical, region, etc. The Contact is also added to the appropriate newsletter.

The Lead will be converted to an Account and Contact as there is no current Opportunity, but there is value in keeping their Contact information. The Contact is also added to the appropriate newsletter.

The Lead will be deleted if there is no potential for business, such as a competitor.

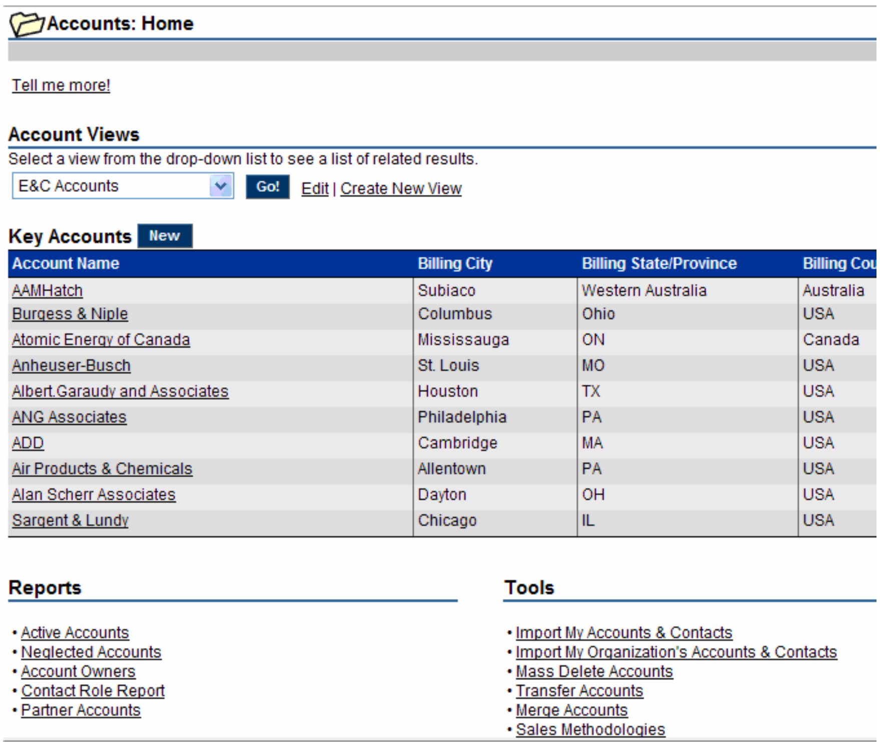
Note: The data entry and basic qualification of all Leads is the responsibility of the Sales Coordinator. Salespersons do not work with Leads, they work with Opportunities.

3.6. Accounts Tab

An Account is a company with whom your company could or has done business. The Account home page lets you search for Accounts, view specific existing Accounts or add new Accounts. The Key Accounts list can show 10 or 25 Accounts that have been recently viewed, modified or created. A variety of standard Reports and tools are available at the bottom of the home page.

Basic Account Introduction: http://www.salesforce.com/usertutorial/en/sales_page3.html

Account Support Information: https://na1.salesforce.com/help/doc/user_ed_feature.jsp?feature=accounts



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