Best Practices for Marketing Managers

As a marketing manager, one of your jobs is getting high-quality leads for your company's pipeline. Salesforce CRM helps you deliver, with tools that help you generate leads and run effective campaigns.

What's more, you no longer have to run your campaign and just cross your fingers. Instead, you can see how campaigns perfom every step of the way—and how many leads, deals, and revenues are generated by a campaign. So you can make smart decisions about where to invest your marketing dollars.

Optimize your lead process
- 6 proven ways to generate more leads
- 5 steps to effective lead management
- 9 tips for using lead scoring to close more deals

Run and measure campaigns
- 5 steps to running your campaigns in Salesforce CRM
- 9 tips for successful email campaigns
- 4 steps to getting started with Salesforce CRM and Google AdWords
- How to make the most of search engine marketing
- 8 steps to creating a social media strategy campaigns
- Turbo-charge customer communications with email templates

Business strategy
- 5 simple steps to reports and dashboards
- For business success, mind your metrics

6 proven ways to generate more leads

Few things are more vital to a business than generating leads and future sales. But traditional marketing efforts to generate leads have been very costly. One way to get more from your marketing efforts at a lower cost is to meet your customers where they are—on the Internet. With Salesforce CRM, you can automatically capture leads when people find your site and fill out your Web forms. You can then route those leads to your reps for immediate follow up.

Abstract
Capture more leads and follow up on them more efficiently with Salesforce CRM. This document covers the tools and resources that will turbocharge your lead-generation efforts.

By Kirti Patel

Because consumer behavior changes constantly, so do lead-generation opportunities. The latest opportunities for getting leads come from social networking sites. For that reason, it's important to revisit your lead capture strategies periodically to take advantage of evolving consumer behavior and technical trends.

Here's are 6 ways Salesforce CRM can help you get more leads, process them more effectively, and refine your lead-generation efforts:

1. **Simplify lead capture from tradeshows and conferences –** If your business participates in such events, you know they're a great tool for generating interest—and lots of business cards. You also know that getting all those contact details into the application can be time-consuming and prone to errors. No more! By using applications such as CardLasso, you can automatically transcribe business cards into leads. Instead of wasting time typing in contact information, your reps can be calling new leads.

2. **Use Web-to-lead functionality** – People who visit your website are already interested in your product or service. You can capture visitor information automatically to create leads in Salesforce CRM, ready for your reps to qualify. When using Web-to-lead, keep in mind the following points:

   - **Know your target audience** – Before creating your Web-to-lead form, think about what information you want to collect in standard and custom fields during the initial contact. Taking the time to define these details also helps define your internal process. For example, if a lead is interested in a particular product, you can use assignment rules or queues to assign that lead to a product expert.

   - **Consider "where" and "how much"** – When designing your form, decide where to place the input fields and how much information to ask for. Usability tests show that contact information fields near the bottom of forms generate more leads than those near the top. Also, don't ask people for too much personal information at the first contact—it's the most common reason people don't complete forms.

   - **Don't be afraid to multiply** – Use several forms to capture different types of information, depending on where the form appears. For example, you may want to collect different information in a "Contact me" form than in an "Event Registration" form.

3. **Market where your prospects are looking** – There are many tools—both free and available for a fee—to help you make sure people find your site when they search.

   - **Use Google AdWords** – Capture prospects that use Google to search for your designated keywords and generate leads automatically. Then segment those leads so your reps can follow up quickly.

4. **Check the AppExchange** – Look for apps that will enhance your SEM efforts. For example, the free edition of the app SEO for Salesforce automatically connects to intelligence data through Google Analytics. Use this information to track lead origins and report by search engine, search type, keyword, and campaign through your entire sales cycle.

5. **Use the social cloud** – Be ready to take advantage of the latest trend in marketing—using social networking—and salesforce.com's tools to help you capture leads from those areas. For example, check out AppExchange apps that help you promote your product through Twitter campaigns and automatically capture leads from Twitter, such as Toucan CRM.

6. **Evaluate your lead sources** – In the past, it was difficult to see which lead sources performed best. With the analytics functionality of Salesforce CRM, it's easy to track how lead sources perform, so you can invest in those marketing techniques that get the best results. For example, check out the lead and opportunity management dashboards on the AppExchange.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700

5 steps to effective lead management

Leads are the people who are interested in your product and service. They're the life blood of any business—converting leads to loyal customers is what it takes to stay in business and thrive. By managing your leads in a systematic and structured way, you can increase both the number of leads you generate and how many of those leads you convert.

The following 5 steps can help you increase your pipeline, make sure you focus on the right leads, and track what works and what doesn't:

1. Align sales and marketing
2. Capture more leads
3. Keep data clean
4. Work leads efficiently
5. Track lead-generation efforts

Abstract
Fine-tune your lead management process to get more leads and then make the most of them.

Align sales and marketing, grow your pipeline, shorten your sales cycle, and turn more leads into customers.

By John Kucera

Step #1: Align sales and marketing

You spend lots of resources developing leads. Now make the most of those efforts by making sure marketing and sales work together so no lead is overlooked or dropped.

Many companies use a three-step process for processing leads: Marketing nurtures leads, inside sales qualifies the leads and converts them to opportunities, and sales works the opportunity. Others use just two steps: Marketing converts the leads to sales opportunities when they meet agreed-upon criteria, such as a high lead score. Sales then works the opportunity.

- **Map out your sales process** – Ask yourself: What are the stages of your sales cycle? Which stages of the lead status do you want to track? And what happens to leads after they come in?

- **Define clear hand-off criteria between marketing and sales** – Define when a marketing lead is passed to inside sales. And determine when an inside sales lead should be converted into an opportunity, account, and contact.

  Many organizations pass marketing leads to inside sales only if a lead reaches a lead-score threshold. Before passing on a lead, it's a best practice to make sure the lead has a defined need, the necessary budget, the purchasing authority, and an appropriate purchasing timeline. If not, you should continue to nurture the lead within marketing.

- **Define success metrics up front** – How will you measure success for both marketing and sales? By defining these metrics up front, you'll be sure you'll capture the most important information as leads move through the funnel.

  Many successful companies measure marketing based on pipeline generated. For example, to measure pipeline by industry, your reps could enter industry information into the lead or you could capture that information on your landing pages. Then you can use a lead history report to show the number of all open opportunities by converted lead industry.

Step #2: Capture more leads

More leads mean more potential business. With Salesforce CRM, you have several options for getting leads into the app: capture them automatically from your Web site or through social media, import them, or enter them manually. For more details, see the Best Practice "5 proven ways to generate more leads."

- **Capture leads automatically** – Use your Web properties, search engine marketing (SEM) campaigns, and social media to capture potential customers. These strategies are very successful because potential customers are already looking for you.

  - **Use Web-to-lead forms** – Capture contact information from people who fill out your forms.

  - **Use SEM and Google AdWords** – Capture and analyze prospects who use Google to search for your keywords. With Salesforce CRM, you can see which AdWords campaigns generate the most *revenue*, not just which campaigns generate the most leads. For more information about SEM campaigns, see the Best Practice "How to make the most of search engine marketing."

  - **Use Twitter** – Set up your Twitter page and convert the people who follow you.

- **Import leads** – Take lead lists from Excel spreadsheets or from email applications such as Outlook or Gmail. You can also import leads directly from other CRM applications such as ACT!

- **Enter leads manually** – This approach works well for individual leads.

Step #3: Keep your data clean

Here's a common scenario: A rep meets a prospect at a conference and enters that person's information as a lead in Salesforce CRM. The same person then clicks on a Google ad, which takes him to a landing page with a form he submits. You've now got a duplicate lead.

What to do? Ask your reps to use the Find Duplicates button frequently to find and resolve duplicate leads. Also explore the following ways to keep your data clean:

- **Clean your leads regularly** – Despite your best efforts, data will get "dirty" because of prospects' job changes, human error, and duplicate or incomplete submissions. Check out the data cleansing tools in the AppExchange to help with your de-duplication efforts.

- **Use validation rules** – For example, you can create a rule that prevents leads from being converted if no email address was entered or if the customer's need has not been defined.

For more information about data quality, see the Best Practice "6 steps toward top data quality."

Step #4: Work leads efficiently

Once you have lots of leads, how do you make the most of them? Because leads differ in quality, you should prioritize them to make sure reps focus on your hottest leads first.

- **Prioritize leads with lead scoring** – Use a point system to assign values to characteristics that align with successful sales. For example, you may assign 10 points to a CEO and 3 points to a manager, based on the experience that CEO prospects result in more closed deals. Revisit scoring criteria regularly as you learn more about how various characteristics correlate with success. Also consider formula fields for basic demographic scoring. For more information about lead scoring, see the Best Practice "9 tips for using lead scoring to close more deals."

  Visit the AppExchange to install the free lead scoring app from salesforce.com. For more advanced scoring needs—such as scoring a visit to a pricing page or opening an HTML email—check out these scoring applications.

- **Categorize scored leads** – Once scored, you can categorize leads into levels of priority, such as A, B, and C. Meet regularly to fine-tune the criteria for these categories. If your threshold for an A lead is usually 50, for example, you might lower that threshold to flow more leads to sales if lead volume is low.

- **Use assignment rules to route leads** – It's a good idea to assign unqualified leads, such as category C leads, to a marketing queue to be nurtured until they're ready to buy. Route qualified leads to the appropriate inside sales rep for further qualification. Also be sure to create a rule without filters that routes leads to a default user, such as the marketing queue. That way, you can make sure no leads are lost because of gaps in your rules.

Step #5: Track your lead-generation efforts

To improve lead generation, you need to know which marketing tools work best for you. Is it email campaigns? Google AdWords campaigns? Webinars? Trade shows? Here's how to find out:

- **Identify and track lead sources** – Find out where you get most of your leads. Enter the lead source for each opportunity coming into the funnel so you can track ROI as it moves through the funnel.

- **Use the lead history report to analyze revenue and pipeline** – The lead history report can tie lead criteria such as lead source, industry, or annual revenue to opportunity amounts, giving you the power to slice and dice revenue and pipeline for different leads.

- **Use campaigns for deeper metrics** – Campaigns are a great tool for tracking the success of different lead-generation efforts using metrics such as # leads, # converted leads, $$ pipeline, $$ pipeline influenced, and ROI.

- **Use reports and dashboards** – Create a clear view of your funnel by defining the stages of your sales process—for example, # leads, # marketing qualified leads, # sales qualified leads, # opportunities, and $$ closed revenue. You can then slice and dice these numbers to best measure success, whether that's by industry, lead source, product, or geography.

Follow these 5 steps and you're on your way to getting more leads and closing more deals.

For More Information

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Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700

9 tips for using lead scoring to close more deals

All leads are not created equal. According to analysts, a small increase in lead quality can result in a huge increase in sales productivity. With lead scoring, sales reps can focus on the high-quality leads and not waste time on prospects that aren't right—or ready. Better lead scoring means higher close rates.

Lead scoring is the process of assigning a value to a particular lead based on defined criteria and behaviors. These criteria will vary from business to business. Think of lead scoring as a complex formula that takes multiple values and combines them into a single value to help your reps make good business decisions.

Abstract
Properly scored leads mean higher sales productivity. Learn to effectively score and qualify new business to make the most of your leads.

By Kirti Patel

For example, lead scores help reps focus on hot leads and those most likely to result in a closed deal. To score a lead, you generally give it a score on a scale of 1–5 or 1–10, based on criteria you define. To reach "hot" status, the total of all scores must reach a defined threshold. You can see common criteria in the sample lead-scoring system below.

▼ Lead Scoring System			
Know Decision Maker	✓	Score1	5.00
Decision Timeline	✓	Score2	3.00
Annual Revenue	$99,000,000	Score3	10.00
Has Budget	✓	Score4	7.00
Lead Rank	High Priority	Lead Total	25.00
Description			

Here are 9 tips to help you come up with an effective lead-scoring process:

1. **Keep it simple** – When you set up your lead process, decide whether fields are required or optional. Keep it simple at first—only ask for a name, company, email address, and phone number. Asking for too much detail on first contact often results in lower form completion rates. Instead, use additional prospect touches to get more information.

2. **You can't go wrong with "BANT"** – If you're just getting starting with lead scoring, use BANT (budget, authority, need, timing) data as a preliminary assessment of lead quality. Although you can capture some BANT data with forms, this data is best gathered through interactions with your prospects.

3. **Any data can be good data** – Categorize your lead data into two categories—explicit and implicit. Explicit data is information volunteered in Web forms, at events, and during interactions. You can directly control your explicit lead data by selecting specific fields on your forms as well as by call scripting.

   Implicit data includes online behavior such as emails opened, click-throughs, form submissions, and downloads of marketing collateral. Of course, all behavior doesn't rate the same. A visit to the corporate Web site probably deserves a different score than downloading a white paper.

4. **Evaluate explicit and implicit data together** – To come up with the best possible lead score, evaluate both types of data together. Don't depend only on profile data such as job function or title. For example, a lead with the right target profile, but who has never attended a Webinar or downloaded a white paper, may score lower than a prospect with an identical profile who has been more engaged. Similarly, just knowing someone has repeatedly engaged with the corporate site is not enough. You also want to make sure the prospect's profile shows he or she can make purchasing decisions.

5. **Understand your target prospect's profile –** When targeting prospects, look for "ideal" profiles, depending on your industry. For example, if your company sells computer equipment to other businesses, someone with the title IT Director might be the best profile for making purchasing decisions. As a result, you'd assign such a lead additional points.

6. **Get creative with Salesforce CRM –** Use the application's native functionality to score leads using custom formula fields. To learn more about custom formula fields, see this [resource.](#)

7. **Automate, automate, automate –** Once you identify qualified prospects with lead scoring, automate the process by adding workflow and alerts. For example, when a lead reaches a certain score, set up an email alert to notify a sales rep to follow up immediately.

8. **A cold lead today can get hot tomorrow –** The nature of business is that it's always changing. That means a lead that doesn't qualify today based on a low score should perhaps be nurtured for the future. Instead of simply setting the lead status to "Disqualified," update your fields with details about why the lead isn't qualified at this time. Depending on why the lead was disqualified, you may want to follow up with targeted marketing efforts.

9. **Leverage the AppExchange** – When you're ready to take lead scoring to the next level, check out the scoring applications in the AppExchange directory.

5 steps to running your campaigns in Salesforce CRM

Marketing campaigns can take many forms. Traditional approaches include advertising, seminars, and trade shows. Newer tactics also include online technologies—such as Webinars, email, search engine marketing (SEM), and social media—to connect directly with prospects.

Traditionally, marketers ran their campaigns and crossed their fingers. Because campaigns couldn't be connected to actual sales, it was difficult to tell how a particular campaign performed. That changed with technologies such as the campaign management feature in Salesforce CRM.

Instead of having campaign information in lots of different documents, it's now in one place. Plus, you can see how a campaign performs every step of the way; for example, how many people were invited to an event, how many registered, and how many actually showed up. Most important, you can analyze how many leads, deals, and associated revenues are generated by a campaign. As a result, you can create more, higher-quality leads and make smart decisions about where to invest your marketing dollars.

Abstract

Getting quality leads and knowing how they perform is key to business success.

The campaign management feature takes the guesswork out of campaigns, so you always know which campaigns result in the most leads—and the highest revenue.

By Sylvia Lehnen

This document provides an overview of campaigns and describes the 5 steps for managing a campaign in Salesforce CRM:

1. Plan campaigns
2. Create campaigns
3. Execute campaigns
4. Track responses
5. Measure campaigns

About campaigns

Campaigns are usually the responsibility of the marketing department. Because a common campaign goal is to generate leads for the sales department to use, it's important to align marketing and sales. That includes defining how leads are handed off and pursued. Salesforce CRM is flexible—because both departments use the application, companies can decide what process works best for them.

Tip: At salesforce.com, we use the Comments field in the campaign object to communicate with the sales team about how to best follow up with leads. For example, the campaign manager may suggest an email template to use.

The campaign object holds all the information associated with campaigns, including picklists, fields, and page layouts for tracking responses and other campaign details. You can customize this object to add details you want to track—for example, the partners for an event—and remove those you don't. The goal is to have a single location for tracking all the information associated with a campaign, in an interface that's easy to use.

Because campaigns are part of Salesforce CRM, marketing activities can be tied to sales data and tracked by the application's built-in analytics. You can use the resulting data to analyze how each campaign performs in reaching its goal.

5 steps to running a campaign

If you're interested in improving your lead conversion rates, read on for an overview of how to create and run a campaign in Salesforce CRM. You'll work closely with your administrator, who will enable the campaign feature, set up it up, and then customize it for individual campaigns.

Step 1: Plan your campaign

Identifying your goals and target audience are the basis for any successful campaign. You'll need this information when you actually create the campaign in Salesforce CRM.

- **Define your goals** – Common goals include creating new leads, retaining existing customers, and cross-selling or up-selling. These goals determine every other aspect of your campaign, including your offers and your channels, such as Webinars, email blasts, conferences, or SEM campaigns.

- Decide whether you need **custom picklists, fields, or page layouts**. For example, to analyze by campaign goal, ask your administrator to create a custom campaign picklist called Campaign Goal, with values such as Awareness, Lead generation, Customer retention, or Customer up-sell—whatever makes sense for your goal. You can set up unique page layouts by channel, so you see only the data relevant for that channel.

- **Decide what to measure** – For example, you may want to measure how different campaign types, channels, or offers perform. By tracking these metrics within the campaigns, either with existing or custom fields, you can evaluate and report on the success of each of these tactics.

- **Determine your process** – The process is about how sales and marketing are aligned. For example, what happens to generated leads, who qualifies them, and how are they routed? For more information, see the Best Practice "5 steps to effective lead management."
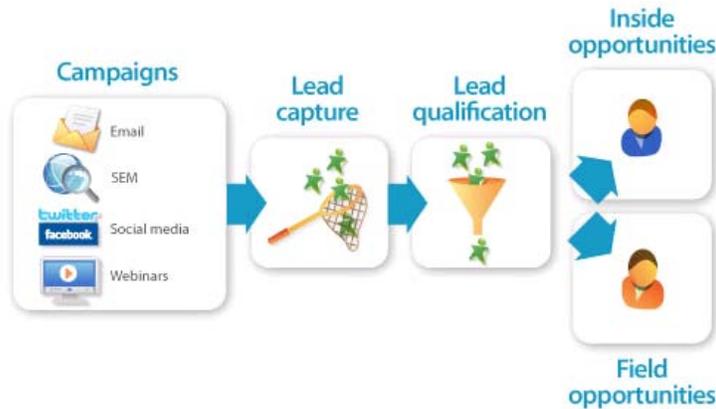
- **Define campaign responses** – What counts as a response? For example, for an event, do you count just registration or registration and attendance? The graphic below shows an example of member status values for an event.

- **Decide who can access a campaign –** Your administrator sets up permissions, as described in the previous article. To expand or restrict these permissions, discuss your needs with your administrator.

Step 2: Create the campaign

The next step is to define your target(s) either with target lists or by having people find you with SEM or social media campaigns. Your campaign goals will determine your targets; in most campaigns, targets are new leads, existing leads, and existing customers.

There are two primary ways to create target lists:

- **Using existing contacts or leads** – You can use the Add to Campaign button on reports and list views to manually add contacts or leads as campaign members. You can also tag the contacts you want and have a third-party mailing house actually add them to the campaign once they respond.

- **Using rented or purchased names** – We recommend that you not import these names into Salesforce CRM. Simply use them as your target list and import them only once they respond.

With SEM or social media campaigns, you want to *attract* leads. For such campaigns, it's critical to identify keywords your target users are likely to enter and use those keywords in your ads. By driving your ads to a landing page, you can then capture your visitors' contact information directly from the Web. Ask your administrator to set up the Web-to-lead forms that will capture prospect information and associate it with your campaign.

Step 3: Execute the campaign

Most campaigns will be executed outside of Salesforce CRM, either because they don't involve online media or because they use third-party tools. For example, you'll run your ads, host your conference, or partner with email vendors to run high-volume email campaigns.

However you execute your campaigns, you can use the import capabilities in Salesforce CRM to bring your leads and reporting data into the application. As a result, there's a single system for lead reporting across all campaigns, so you can follow up on leads quickly and appropriately. Finally, by using Salesforce CRM as a central location for tracking campaign execution you'll be able to see the true ROI for your campaigns.

One type of campaign that's best implemented in connection with Salesforce CRM is Google AdWords. For more information about SEM campaigns in general and Google AdWords in particular, check out the following Best Practice documents: "How to make the most of search engine marketing" and "4 steps to getting started with Salesforce CRM and Google AdWords."

Step 4: Track responses

To take advantage of the tracking capabilities of Salesforce CRM, consider categorizing your campaigns. For example, you may want to track which products are most popular, which publications perform best for your ads, and which Webinars result in the most leads.

You'll also want to track what your prospects do and whether that action counts as a response. Did they download a white paper? Register for an event? In addition to tracking responses with the member status field, you can use custom fields to prioritize responses or launch workflow alerts and tasks.

Use the following mechanisms to track different types of responses:

- **Automatic updates** – Use Web-to-lead functionality to capture leads from online forms on your landing pages into Salesforce CRM. To associate these leads with specific campaigns, include a Campaign ID value and use the member status field to assign generated leads to a campaign.

- **Individual manual updates** – Track individuals who respond by phone or email by manually updating the Campaign History of the corresponding lead or contact.

- **Mass updates** – You can use reports or list views to quickly update the status of multiple campaign members all at once.

Step 5: Measure campaign effectiveness

The final step is to analyze your campaigns and generate reports and campaign statistics. By tracking this information over time, you can keep improving the quality of your campaigns. You'll learn what works, what doesn't, and where to invest.
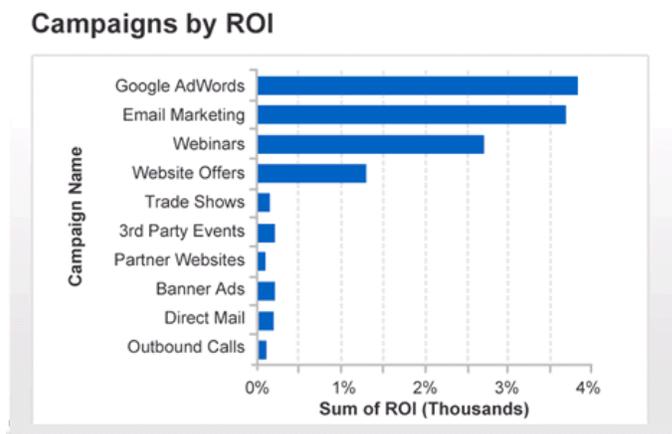
There are two steps to evaluating campaign ROI:

1. **Review campaign statistics** – Salesforce CRM automatically recalculates campaign details every time you save a campaign. Common campaign statistics include Responses, Number of Opportunities, and Amount of Won Opportunities.

2. **View campaign reports and dashboards** – Examples of standard campaign reports and dashboards are listed below. You can also create custom reports and statistics.

Report Name	Description
Campaigns with Members report	Shows information about leads and contacts for multiple campaigns
Campaign Member Analysis report	Summarizes information about who responded to campaigns
Campaign Revenue report	Analyzes which opportunities resulted from a campaign. You can also analyze products and revenue schedules
Campaign Member report	Displays campaign members
Leads by Lead Source dashboard	Shows all leads sorted by the source that generated them
Campaign ROI dashboard	Shows ROI reporting for all campaigns in a single chart

Advanced campaign tools

In addition to the basic steps associated with running campaigns, advanced tools make the campaign management feature even more powerful.

- **Campaign hierarchies** – You can pull together multiple campaigns with a single goal by tying them to a parent campaign. For example, you may hold a single event but drive people to that event with online ads, emails, or phone calls. By creating separate campaigns and relating them to a parent "event" campaign, you can to see the overall results as well as those for the individual tactics.

- **Campaign influence** – Understanding which campaigns result in a closed deal is not always black and white. Instead, several touch points are typically involved in generating a deal. For example, someone may visit a Web site and download a white paper before registering for an event. The campaign influence feature makes it possible to credit more than one campaign for a deal.

- **Workflow** – You can use workflow features to automate certain aspects of campaigns. For example, you can set up a campaign to alert a manager when a member takes an action—or use workflow to trigger an automatic email to up to 50,000 people when a condition is met.

Summary

With Salesforce CRM, you can get more leads, get better leads, and reduce the number of leads lost by seeing exactly which marketing campaigns are most successful. Instead of blindly creating and disseminating offers and hoping for the best, Salesforce CRM helps you know exactly how each campaign performed to contribute to the bottom line.

9 tips for creating successful email campaigns

Email marketing can overcome many traditional marketing challenges because you can target audience segments effectively, it's cost-effective, and the results are easy to track. Consider email marketing to be part of an holistic marketing strategy.

This document provides an overview of established best practices and the newest strategies for improving email response rates. Don't waste your marketing dollars—or your credibility—on email campaigns that don't produce results. Instead, improve your list-building techniques and email marketing process in ways that generate the greatest ROI by following these 9 tips.

Abstract
Don't waste marketing dollars on email campaigns that don't produce results.

Discover and make the most of new trends that optimize email marketing, for maximum return and highest open rates.

By Daryl Spreiter

1. **Use targeted lists** – Start by creating lists that segment your audience into target groups. Use criteria such as locale, company, industry or size, job titles, past purchases, and demographic information. If you can't segment your leads and customers along those lines today, start by creating custom fields on the lead and account records to come up with these or other meaningful segments.

2. **Target your content** – You'll want to send out a lot of emails—but not the same email to everyone. You'll get the best results by tailoring your message and content to appeal to each audience by following these tips:

   - **Don't send out generic emails** – Use short, personalized messages without graphics, sent by the salesperson or lead owner.

   - **Include a call to action** – For example, provide a link to an article, whitepaper, or recording. You want to get the prospect to your Web site by providing something that's valuable to him or her.

   - **Use industry-specific key words** – Speak to the audience in their language.

   - **Experiment with rich text HTML and plain text formats** – See which gets the best response.

3. **Alert sales** – Whenever you execute a campaign, alert sales so they're ready to respond quickly and appropriately to the resulting leads.

4. **Integrate with your Web site** –Use Web-to-lead forms to capture prospect information from visitors to your site. And check out the marketing automation apps on the AppExchange to discover other ways to shorten the time between an inquiry and response. For example, Eloqua makes it possible to score prospect activity and send hot leads to sales through Salesforce CRM.

5. **Develop a social media strategy** – Use social media to increase visibility, reinforce your brand, educate prospects, and establish yourself as a trusted advisor and expert. Encourage prospects to participate in your social media channels and use those channels to drive opt-ins for your email database.

6. **Drive traffic to your social media channels** – Use the networks you use every day to share messages with friends and your larger network. Ask members of your communities to participate in groups and discussions.

- Engage with prospects through LinkedIn groups.

- Facebook groups are becoming widely used for business marketing. Consider starting a group for your company.

- Use Tiny URLs on Twitter to redirect prospects to a micro-site or landing page.

- Start a blog. It's one of the best things you can do to help search engines find you. Then use that blog to generate leads and activities for sales. Include links in your emails to drive prospects to your blog.

7. **Don't spam** – Respect your prospects. Your goal is to have a conversation over time—a single email is not a conversation. And pay attention to local laws. For example, the United States has the CAN-SPAM Act, which sets the rules for commercial messages and gives recipients the right to opt out. Every country has its own laws banning email spam. Check out these resources on the topic of spam and permission marketing.

8. **Track results** – To keep refining your tactics for increasingly results, you must measure how users respond. Think about what you want to measure and then identify the key performance indicators (KPIs) you want to track. Common metrics for evaluating email campaigns include unique open rates, unique click-through rates, delivery success rates, lead conversions, unsubscribes, and spam complaints. Please note that although you can get insight into lead conversion rates via standard reports, many companies work with AppExchange partners such as Birst and Omniture for more advanced ROI analytics.

9. **Nurture campaigns** – Lead nurturing can have a dramatic effect on your sales pipeline. Of course, it's important to alert your reps to follow up on leads being nurtured. One method to use is lead scoring, which assigns every lead a score, depending on activities such as opening an email, going to your site, or responding to calls to action (CTAs). For more information about lead scoring, see the Best Practice "9 tips for using lead scoring to close more deals."

Be sure to share high-scoring prospects with your reps. Or simply track such activities and then notify the reps when someone responds after receiving an email; for example by downloading a whitepaper.

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4 steps to getting started with Salesforce CRM and Google AdWords

Are you driving traffic to your Web site? Do you know what keywords work? Are you turning visitors into leads and customers? And do you know how all that translates into pipeline—and revenues? With Salesforce CRM and Google AdWords, you can answer these questions.

Google AdWords is an online advertising service for creating ads specifically on Google. It works with Google Analytics to track Web site visitor behavior, effective search terms, the number of marketing leads generated, the cost per lead, and more. Where Salesforce CRM adds value is by extending those reporting capabilities to include how many sales leads are generated and the effect that has on your pipeline and revenues.

Abstract
Salesforce CRM and Google AdWords can help your organization track and measure the success of your Google advertising efforts.

By: Eran Agrios

Together, Salesforce CRM and Google AdWords let you to track the both the effectiveness and the return on investment of your online advertising spend.

To get started with Salesforce CRM and Google AdWords, follow these 4 steps:

1. Advertise your business on Google
2. Create landing pages
3. Link Salesforce CRM data to Google AdWords
4. Measure campaign ROI

Step 1: Advertise your business on Google

Begin your advertising journey with a Google account and give some thought to the keywords you want potential customers to recognize and associate with your business.

- **Create a Google AdWords account** – If you don't have a Google AdWords account, create one—just go to Setup and choose Google AdWords. If you already have an account, go to Setup, go to Google AdWords and enter your AdWords customer ID. Then link Salesforce CRM to your AdWords account. Once your account is linked, you can start tracking new and existing Google AdWords campaigns in Salesforce CRM. For more information, see the Help & Training link creating accounts and linking accounts.

- **Find the right keywords** – Keywords are the terms entered by visitors in a search engine to find related sites. As you get started with Google AdWords, you must identify keywords that are relevant to your company—and that users are likely to enter.

    Here are some great tools for finding keywords:

    - AdWords keyword tool – Enter any word or phrase and the tool returns similar words or phrases.

    - Google search-based keyword tool – If you don't know where to start, enter your Web site into this tool. Google "crawls" the site and suggests relevant keywords and Web pages.

    - SEOBook keyword tool – Sign up for an account. Then enter a potential keyword and SEOBook displays keyword research from a variety of sources.

- **Create the ad** – Once you have your keywords, create you ad. In the ad, you typically have a title and about two lines of copy.

    Your goal: To get visitors to your landing (aka "lead capture") page. Make the title brief but very specific, and try to include both a benefit and a call to action (CTA). The CTA takes them to the landing page. For example, your title might be "Most Popular Tax Software" and the copy and CTA might read, "Get the biggest tax refund, guaranteed. Try it now!"

Step 2: Create landing pages

Once visitors click on your ad, they go to a landing page. This page needs to be compelling. It should tell them what you have to offer and contain a form so you can capture their contact information for follow-up.

On the landing page, your goal is to make the sale—however you define that. Make sure the landing page supports the message in the ad and delivers what you promised; for example, a way to try the tax software. Don't include any links other than those that move visitors toward the sale.

- **Create simple landing pages** – Remember to keep your landing pages simple and your forms short. You'll risk losing your visitors if you make them work too hard.

    The examples below show how Yamaha transformed a confusing landing page, with too many choices, into an attractive, easy-to-follow page that includes a Web form for capturing visitor information.

- **Set up a Web-to-lead form** – To capture visitor information automatically, set up a Web-to-lead form. In Salesforce CRM, select the fields for your form. The application generates the HTML code for you as well as a JavaScript tracking code you need to add to your landing page. This code ensures the information from the form and from Google AdWords is linked correctly in Salesforce CRM. Click to find out more about setting up a Web-to-lead form.

- **Create a clear call to action** – A call to action says "do something." It's the next step a visitor takes toward choosing your product or service. In the Yamaha example, you can see how adding a call to action (in red) gives the page a focus and purpose.

  Examples of effective calls to action include "Buy Now," "Free Trial," "Get Info," "Act Now," and "Save Money."

- **Test your Web site** – Be sure to test different keywords and calls to action on your Web site to see how those changes affect your results. Salesforce.com also provides a framework for testing your pages to make sure your Web-to-lead forms work and that Google AdWords ads are being tracked. Click for more information about testing your Web site.

Step 3: Link Salesforce CRM data to Google AdWords

Once your landing page and forms are complete, you can track your leads with a dashboard to help measure the result of your advertising efforts.

- **Track leads** – When a lead is submitted to Salesforce CRM from the Web-to-lead form, the lead source is populated by Google AdWords, so you can see which leads are coming from Google versus from other channels.
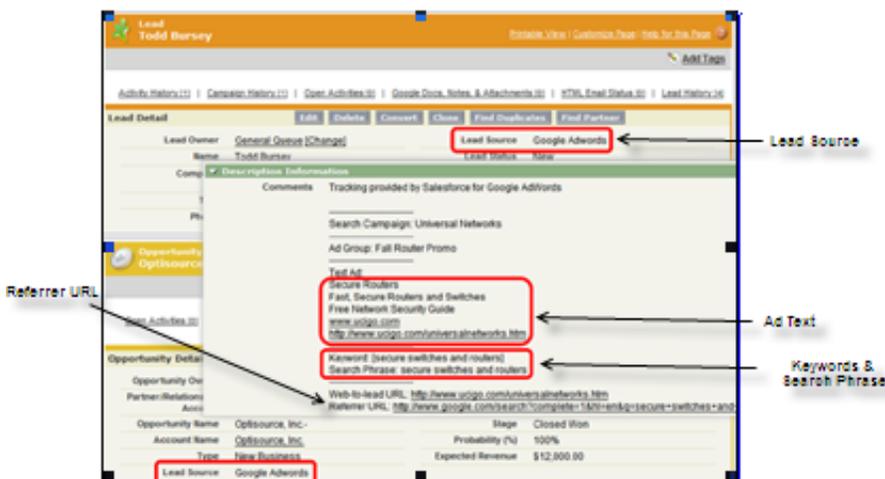
Salesforce CRM creates an activity record on the lead, which contains information about the text ad displayed to visitors (including the text copy), the search term used, and the URL visitors came from. The record also includes a Referrer URL that shows whether visitors came directly from Google or from another channel such as a blog.

Step 4: Measure campaign ROI

Once your process is set up and you are tracking results, your next step is to analyze your data using the Google AdWords dashboard.

This dashboard includes standard components and metrics to help you understand how your campaign performed, including:

- How many leads were generated

- How many of those leads turned into opportunities

- Top keywords, phrases, and headlines that generated those leads

Use this information to fine-tune your advertising efforts and site content to attract more visitors, generate more leads, and convert more leads to opportunities.

For an overview of effective strategies related to search engine marketing (SEO), see the Best Practice document "How to make the most of search engine marketing."

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America   +1-415-536-4606
Japan   +81-3-5785-8201
Asia/Pacific   +65-6302-5700
EMEA   +4121-6953700

How to make the most of search engine marketing (SEM)

If you build it, will they come? When it comes to your Web site, answering that question with a resounding "yes" has become a key requirement for success.

That's where search engine marketing (SEM) comes in. Traffic from search engines has become more effective in converting leads to customers than traditional advertising media. Why? Mostly because with SEM, you're not looking for customers—they're looking for you. And because the people who find you are already interested, they're more likely to respond to a persuasive message. Plus, with SEM, it's possible to measure exactly what works, what doesn't, and change course accordingly. So you always know whether you're getting your advertising money's worth.

A recent Forrester Research survey confirmed the popularity of online media. It found that half of the surveyed advertisers were cutting spending on traditional channels such as TV and print to pay for online ads. SEM, in particular, has more than tripled in the last few years.

Abstract

Get in on SEM, one of the hottest trends in online marketing.

Find out how to slash your marketing outlays by delivering qualified prospects at a reasonable cost. Learn how to fine-tune your product messages.

Do it all from within Salesforce CRM using Google AdWords or other applications from the AppExchange.

By: Sylvia Lehnen

With SEM booming, achieving good search engine rankings has become highly competitive. Of course, getting surfers to your site is just the first step in a process that includes converting prospects to customers, tracking SEM campaigns, calculating ROI, and improving your campaigns.

Read on to get the big picture. Then find out how to use Salesforce CRM and Google AdWords to be a winner in the SEM game.

- Get an overview of SEM strategies
- Optimize your site to improve organic rankings
- Create successful "pay-per-click" campaigns
- Leverage SEM with Salesforce CRM and Google AdWords

Overview of SEM strategies

Most search engines respond to user searches with two types of results—paid-for, sponsored listings and organic listings that are found, ranked, and listed according to the search engine's algorithms. Some search engines also provide "paid inclusion" listings that display sponsored sites high within the organic listings, but without visually identifying them. A notable exception to this practice is Google, which believes that such listings would conflict with its relevance rankings.

Move up in organic rankings

Optimization is the key to getting high organic rankings. Optimization includes a number of specific techniques, all geared toward helping search engines find and index your content in a way that results in a high ranking. Page 1 is best—research shows that if you're not on the first two pages, your chances of being found are slim. To get a good spot in organic search results, you have to optimize your Web site.

One advantage of this approach, of course, is that it's free. And if you can pull it off, a high ranking gets better results because customers click on organic links more often. According to a Jupiter Media research study, most commercial purchases came from organic search results. The major disadvantage of the optimization approach is that it may take months to rise in the rankings.

Bid your way to the top with pay per click

By choosing a pay-per-click (PPC) strategy, you'll ensure that your listing will be highly visible. How much that will cost depends on how many others are bidding for the keyword(s) that, when clicked, will display your ad. To set up your campaign, create an account with your search engines of choice and bid on keywords. The key advantage of a PPC strategy is that you're guaranteed a top spot. And a key advantage of Salesforce CRM is that it can help you design, deploy, and measure a PPC campaign.

Most businesses use some combination of both strategies to profit from the tremendous lead-generation potential of SEM. By tracking and fine-tuning your SEM campaigns you can vastly increase the ROI associated with them. For example, because you can track which keywords or ads get the best response, you can easily drop those that don't deliver and focus your efforts elsewhere. And as rankings improve as a result of your optimization efforts, you may want to cut back on paid ads.

Optimize your site to improve organic rankings

Although most people use the term "search engine" generically, three different types of technologies— search engines, directories, and portals—all deliver results based on keywords a user enters.

Each technology uses a different approach to find sites and determine the display order. For example, most of Google's ranking algorithm is based on link analysis, where the number and quality of the links to your site are hugely important. Yahoo! is more focused on page copy, but also uses link analysis in its algorithm. Optimization includes techniques that cover all the bases.

Designing, creating content, and launching a site is a major undertaking. Still, many organizations optimize their sites only when they're outranked by competitors. Of course, it's always possible to "fix" the problems that are responsible for poor rankings. But by making optimization part of the initial site creation and testing processes whenever possible, you can avoid duplicate work and rise faster in the rankings.

To optimize your site, follow these steps:

1. If you already have a site, **measure and compare your ranking**. Are you on page 1? How do you compare to your competitors? What keywords and organizational strategies do they use? Use this information as a benchmark for your efforts.

2. **Define the keywords** that will bring up your listing when entered. One reason to define keywords *before* you start writing copy is that it's important to use these words in your titles, headers, and body text.

   - **Test possible keywords** and explore competitors' sites to identify theirs.

   - **Experiment with narrowing the keyword list** to those that both return good results and strongly position your product, including words for which there is less competition.

   - **Avoid using too many keywords**, which will reduce your site's relevance.

   - **Take advantage of tools** to find good keywords, such as the Google tool that suggests words after scanning your copy.

3. **Optimize each page**, using the keywords you defined. This step is all about giving spiders—the part of the search engine that "crawls" the Web looking for keywords—lots of opportunities to find and index your site.

- **Avoid designing pages** with just images or flash animations—spiders only recognize text.

- **Don't make a log-in page the first page** a user encounters—spiders won't go any further.

- **Check with your Webmaster** to find out how "deep" formats such as tables are—spiders typically ignore anything deeper than three levels.

- **Create meta tags for each page**. The Title tag is the most important, so make sure this tag captures the essence of your product or service. The Description tag is also used by all search engines. Create a unique Description tag for each page—if you use the same tag on all pages, the search engine will ignore those pages.

- **Use headers liberally** to orient users and move them quickly through text. Headers are also good for optimizing pages—spiders see header text as more important than text. The same is true of the anchor text that's used as hyperlinks.

- When creating **body text**, be sure each page has a narrow focus and strong message. **Never use underlines**, which can be confused with hyperlinks. Make sure the content of the page maps closely to the Description tag and that the headers and hyperlinks reinforce the page focus.

4. **Create a link campaign** to solicit links from high-quality sites. Because search engines such as Google use the number, quality, and type of pages that link to your site to determine relevance, this is *the* **single most effective technique for improving your ranking!**

   To solicit links, identify sites that are highly relevant to yours and personally request they link to you. Avoid general "dear Webmaster" requests and be clear about why you think their sites are valuable to you. Also, be specific about which pages you want them to link to and the keywords you prefer.

5. **Optimize the technical aspects** of your site. Make sure your technical staff knows how search engines work. If you outsource development, consider such expertise when you select a vendor.

- **Get a unique IP address** to improve your results. Find out how your server reacts to page requests—make sure it does not return redirects. And don't have multiple domain names pointing to the same Web site—search engines penalize duplicate content.

- **To exclude some directories** from indexing, use the robots.txt file. But make sure you don't inadvertently exclude content from being indexed.

- **To find out what a spider sees**, run a simulator and use the results to fine-tune your optimization. Several tools are available for free.

6. **Submit your site** to search engines. Although your site will be indexed most quickly when an engine finds many high-quality links to your site, it's still a good idea to submit your site.

- **Submit your site manually**—it's more likely to get listed than those that came through a submission service.

- **Don't just submit** to the "major" search engines. Smaller engines and directories can get you good traffic, and some of them are free. **This traffic also counts as incoming links to your Web site—the magic bullet for improving your ranking.**

7. **Analyze and fine-tune your site.** URL rankings change from week to week, so monitor keywords frequently to decide when you need additional optimization.

Create successful pay-per-click campaigns

When you use paid ads, you get a head start in the race for visibility, so you can focus on moving prospects through the sales process. The following tasks are key to successful PPC campaigns:

- **Create one or more ads** and the associated landing pages. Think of the ad as the bait and the landing page as the line you use to reel customers in.

  - **In the ad,** include a title and two lines of copy. Make the title brief but specific and include a benefit and call to action.

    For example, if you sell athletic shoes, don't use "Athletic Shoes" as your title. Instead, create several ads with different titles, such as "Tennis Shoes" or "Walking Shoes." Be brief and specific in the copy as well; for example, "Run faster, longer" or "Find your perfect fit."

  - **On the landing page,** your goal is to make the sale. Make sure the landing page supports the ad's message and delivers what you promised; for example, information about how to run faster and tools to determine a good fit.

    Eliminate distractions such as links to other pages (except those that move the customer toward the sale). Finally, include a clear call to action and incentive to act now.

- **Analyze and fine-tune** your campaign. As with an optimization campaign, you want to measure results. In this case, however, you want to measure conversions rather than rankings.

  - Determine which ads and landing pages are the best performers based on search engine statistics. Use this information to target your efforts and resources.

  - Consider testing new design ideas or text phrases. One way to test performance is to use the current page as a control and create additional pages with different designs and text. Then evaluate which designs and phrases work best, to constantly improve the return on your campaign.

- **Manage the bidding process** to make sure that you get and maintain a good ROI.

  - **Assign a value** to each conversion and then calculate the maximum cost per click that results in a profit. This is the highest number you'd want to bid. If that number is too low to get a good ranking, consider alternative keywords. (Hint: Salesforce CRM can help you determine the cost per click.)

  - **Segment the total funds** for various keywords when you set up your account. When you deplete a segment, the ads stop, so keep close track of your balances. A faster-than-usual depletion may be a tip-off to possible click fraud.

Leverage SEM with Salesforce CRM and Google AdWords

Campaigns that use Google AdWords currently account for more than two-thirds of all SEM PPC campaigns. With this tool, you can bridge the gap between the wealth of information available from Salesforce CRM and the statistics available from Google. For example, with Google alone, you can see **which words generate clicks**; by integrating with Salesforce CRM, you can also see **which words generate the highest revenue**. By combining this information, you can get the most from your marketing budget.

Google AdWords takes you through the entire process of creating a campaign, from keyword selection to closed deal, all from within Salesforce CRM. You'll know exactly **which keywords and ads generate leads**—without having to paste back and forth to Excel sheets or juggling multiple reports. In addition, knowing which keywords and ads got the best responses gives sales representatives valuable insight into those prospects before making the sales call.

Because you get details about every lead or opportunity generated from your Web site, you can track organic search results from Google. You can then drill into the Salesforce CRM activity history to view all the details. What's more, the available information goes beyond clicks and conversions. By attaching conversions to opportunities, you can follow them through the sales funnel and use the resulting information to analyze ROI and justify campaign spending. You can also see how individual campaign elements—such as keywords, emails, and banners—flow through the funnel.

Working with Salesforce CRM and Google AdWords typically involves the following tasks:

- **Link your existing Google AdWords account** to start tracking your ad campaigns, ad groups, and keyword buys in Salesforce CRM. You can also correlate your SEM efforts with leads and opportunities.

- **Create, place, and optimize ads**. Set up a campaign in Salesforce CRM, write your ad, and choose your keywords. Your ads will be live within minutes. Then experiment to see what gets the best results based on the response to particular keywords and ads.

- Sit back and **watch in real time** as your ads generate leads.

- **Correlate search efforts** with inbound leads and opportunities. You can see the exact leads generated by your campaigns and follow any leads through the sales process.

- **Measure ROI** by measuring the return on particular campaigns and tying revenues back to campaigns. For even more insight, use Salesforce CRM to build or customize reports and dashboards to continuously monitor your SEM campaigns.

Also, check out how various partner applications in the AppExchange can complement your SEM campaigns.

Summary

Get in on SEM, one of the hottest trends in online marketing. Slash your marketing outlays by delivering qualified prospects at a reasonable cost and use the process to fine-tune your product messages. You can do it all from within Salesforce CRM—using Google AdWords or other applications from the AppExchange.

Additional resources

- Salesforce.com Consulting: www.salesforce.com/consulting

- Google's Conversion University (for Google AdWords users): www.google.com/analytics

- Search Engine Marketing Professional Organization (SEMPO): www.sempo.org

8 steps to creating a social media strategy

With Salesforce CRM, you can run your business in the cloud, with no hardware or software to buy or maintain. And by also using social media and collaboration tools, you can join the conversations of customers, prospects, and users in the cloud. With a well-designed social media strategy, you can leverage those conversations to advance your business. Without such a strategy, you run the risk of falling behind.

The benefits of social media campaigns are extensive—from increasing customer satisfaction, to keeping tabs on the competition, to marketing your latest products. In this document, you'll get an overview of common tools. Although these tools were designed for different uses, each can serve to increase your profile and connect with prospects and customers. And because many of these tools are free, why not take advantage of them?

Abstract
Find out how to use social media tools for business—and how to tie in Salesforce CRM.
By Kirti Patel

Once you know what tools are available, follow the 8 steps to get started with *your* social media strategy.

Overview of social media tools

There's no escaping social media—or the news about social media. Here's an overview of the most common tools you can use to achieve your business goals.

Although the following tools weren't designed specifically for business, people use them that way very effectively. For some of these tools, salesforce.com created integration points with Salesforce CRM to make them even more useful to our customers.

- **Facebook** – Use Facebook to reach consumers of all demographics. With more than 500 million users globally, this tool can be extremely effective for building your brand and marketing yourself.

  To get started with Facebook, simply create a business profile for your company to share company information and events. When Facebook users become "fans" of your business, they get automatic newsfeeds or other updates from your company. Facebook can be a great multiplier of your message; as users become fans, you automatically reach each user's network as well. Fans can also write on your "wall," which facilitates ideas and discussion.

- **Twitter** – With Twitter, you can send "tweets"—messages with fewer than 140 characters—to all your "followers." When these followers "retweet" your posts, it spreads your message to new audiences. That reach makes Twitter an incredible tool for making announcements or promotions and profiling your heroes.

  But Twitter isn't just for outbound messaging. Many companies use it to listen in on what others are saying about them—or their competitors—and then intervene immediately. With tools such as Salesforce for Twitter from the AppExchange, it's also possible to capture leads directly from Twitter. And you can't afford to ignore Twitter's 50 million users, with new ones added daily.

▪ **YouTube** – With nearly 70 percent of the online video market, YouTube is a great opportunity to get out high-impact messages. Although YouTube first became known for funny home videos, it's an effective tool for business because visual messages are particularly engaging, with great potential for "going viral." YouTube videos can be emailed, embedded in Web sites, or added to documents.

Use these videos for product demos, brand marketing, Webinars, and training materials. If you have a global business, consider providing videos in other languages as well. **Tip:** Place a lead link in your YouTube videos to eliminate some of initial lead qualification steps of demoing a product or service. That way, your prospect already knows about your business before you ever talk to them. Now *that's* one qualified lead.

To learn how salesforce.com uses YouTube, visit this link.

▪ **LinkedIn** – Use LinkedIn to tap into the professional networks of your customers. As a business, you can also create a group that individuals can join to participate in discussions and to connect with other customers. And because LinkedIn is a professional networking tool, it's a great place to post job listings and corporate news, launch beta products, and promote events to your most interested users.

8 steps to a social media strategy

The tools discussed in the previous section are just that; they're not a strategy. To be successful, it's vital to have a plan. Here are the steps to take to make sure social media fits your business and your business plan:

1. **Create a community manager role** – The community manager will serve as your point person for all social media and collaboration activities, including evangelizing your product or business. This person will also serve as your company's official voice on social media sites and be tasked with staying on top of new capabilities and tools.

2. **Create a social media steering committee** – In addition to the community manager, define other stakeholders in your social media strategy to create a cross-functional steering committee that includes public relations, product management, customer support, and marketing. This committee should drive your social media initiatives.

3. **Define objectives** – What do you hope to achieve with your social media campaign? Each tool offers different benefits. For example, if your objective is to reduce case volume for your support team, consider extending your self-service offers by using Twitter and the knowledge and answers capabilities of Salesforce. Other objectives might include increasing qualified leads or building customer loyalty or awareness. Define very specific objectives and then choose the tools that can help get you there.

4. **Decide on success metrics** – The true impact of social media can be hard to measure. Social media tends to be word of mouth or "viral," which is challenging to measure quantitatively. However, many social media sites offer fairly robust analytics. For example, YouTube lets you track video views by number and geographic region. And counting the amount of activity on your Twitter feeds or Facebook posts gives you a good idea how those programs perform. As part of your plan, decide what metrics are important, set your goals, and determine how to track results.

5. **Set up social media guidelines** – In most cases, you want to encourage many employees to participate in your social media campaigns. Be sure to establish guidelines that specify the "do's and don'ts" of participating in online communities. Information shared through social media sites is public. Before employees start interacting with customers and prospects, be sure everyone knows that financial statements and private information are off limits for your community sites.

6. **Create easy-to-remember URLs** – To encourage customers and prospects to participate in your communities, make it easy to access your links. With most social media tools, you can select a personalized URL. When setting up your Facebook or Twitter accounts, make sure the URLs are a natural extension of your businesses Web site and that they'll work in emails and marketing collateral. For example, Salesforce users and customers can access our Facebook page with the URL www.salesforce.com/facebook.

7. **Be active** – The volume of customer interaction through both external and internal tools is an important success indicator for your social strategy. To build and keep followers, update content—including comments, status, and tweets—regularly to keep it fresh and to interact with your users. Not responding to posted messages has the potential to not just damage your social media programs, but your company as well. Check out the Salesforce CRM workflow tools to make sure the right person gets every message.

8. **Be flexible** – Social media and strategy are moving targets; new functionality and new tools are introduced all the time. Review and revise your social media plan regularly to keep up with—and make the most of—those changes. To keep up with news from salesforce.com, bookmark the Salesforce blog for social media.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700

Turbo-charge customer communications with email templates

Following up with an email after meeting a prospect or customer is a basic courtesy—and a welcome chance to reinforce important points and keep the communications channel open. Of course, some reps are better at writing than others, and some would rather not write at all.

With email templates, you can make sure all your reps have high-quality, consistent responses to various situations at their fingertips. When reps use email templates with the Salesforce CRM Mass Email capabilities, they can easily communicate with their entire customer base. In addition, product managers can use email templates to communicate about new products and features, and marketing users can promote regional customer events and invite prospects to events such as Webinars. There's also a built-in dynamic tracking feature that lets you track which emails were opened, how many times, and when each recipient last opened the email. And finally, email templates reinforce your corporate look and feel and ensure that the messaging in all your communications is accurate and up to date.

Abstract
Make your sales reps more productive, enforce your corporate look-and-feel, and ensure your messaging is always consistent and on point.

By: Oliver Demuth & Carman Chan

You can create professional, high-impact HTML templates even without knowing HTML. With HTML expertise, you can create exactly the kind of email you want. And with the pages functionality of Force.com, you can even merge fields from multiple records or objects in the email.

Make the most of email templates

To help get the most out of email templates:

- Know the pros and cons of different types of email templates

- Ensure a consistent look and feel

- Leverage mass email for targeted communications

- Take advantage of tracking

- Protect templates from being changed by users

- Consider partner products for email marketing campaigns

- Keep templates organized

For detailed instructions on how to create email templates, go to Help & Training.

Choose your templates

Salesforce.com provides four types of email templates:

1. Text

2. HTML with letterhead

3. Custom HTML

4. Force.com pages (Visualforce)

The table below summarizes the advantages and disadvantages of each email template type.

Type of template	Pros	Cons
Text	Does not require Edit HTML permission Requires no HTML knowledge Few/no issues with email filters	No tracking for mass emails No customization or corporate branding No visual elements
HTML with letterhead	Tracking Consistent branding across organization Quick add targeted messaging	Requires Edit HTML permission Requires letterhead setup Limited customization May get caught in email filters
Custom HTML	Tracking Consistent branding across organization Fully customizable; you get exactly what you want	Requires Edit HTML permission Requires HTML knowledge May get caught in email filters
Force.com pages (Visualforce)	Makes it possible to merge fields from multiple records or objects	Requires Force.com pages/Force.com code experience Not available for mass emailing

Ensure a consistent look and feel

You can ensure a consistent look and feel by creating a single letterhead to serve as the basis of all your HTML email templates. Your letterhead can define the following attributes of the header and footer of your HTML emails: background color, header properties (including logo), a top line, body colors, a middle line, footer properties, and a bottom line. The template itself determines the format of the email's main body. If your corporate identity changes frequently, simply changing your letterhead automatically changes all HTML templates based on the letterhead.

Tip: Keep the number of letterheads to a minimum. Multiple letterheads are useful for companies with multiple divisions that use different corporate brands or companies with logos in different languages. Most companies just need a single letterhead, however.

Leverage mass email for targeted communications

Depending on your Salesforce CRM edition, users can send between 250 and 1,000 emails at a time, with just a few clicks of the mouse. Sales reps can leverage personal or corporate emails templates to efficiently communicate with leads and contacts about new products, promotions, and upcoming events.

Take advantage of tracking

Salesforce CRM lets you track emails, both at the level of an individual contact and for all accounts, including an overview of the exact date, time, and number of times your email was opened. If multiple emails are never opened, Salesforce CRM flags the contact so you can check whether he or she is still with the company.

Protect your email templates

One of the benefits of using email templates is that you get a consistent look and feel and control over messaging, while still letting individual users personalize their emails. However, you may want to prevent users from changing sections of the template, such as pricing information, dates and locations, specific corporate disclaimers, policies and procedures, and of course logos and corporate branding.

Consider partner products for marketing campaigns

The Salesforce CRM Mass Email capabilities make it possible to deliver 1,000 emails per organization per day. Although that's fine for individual reps, check out the partner products in the [Marketing](#) section of the AppExchange to create sophisticated email campaigns and other demanding projects. Here you'll find more full-featured apps for creating mailing lists of any size, tracking campaigns in progress, and getting post-campaign statistics to evaluate the effort.

Keep templates organized

Keep your templates up to date and easily accessible. Make sure to keep public and personal templates separate.

- Ask users to place all self-created templates in a personal folder. Use the Clone button to copy public templates into a personal folder.

- Deactivate old templates by unchecking the Available for Use checkbox. Note that deleted email templates are not stored in the recycle bin, but are permanently deleted. If you think you may need these templates again, deactivate rather than delete them.

5 simple steps to reports and dashboards

Reports and dashboards show how you performed in the past and what's happening at the moment—they're key to driving success and adoption for any CRM project. The information provided by reports and dashboards is especially important in today's environment, where it's critical to be proactive, rather than reactive, in your approach. You want to be able to spot trends and act on them immediately.

For example, a sales organization wants to know which deals were lost, which competitors are gaining ground, and whether the average time to close is increasing or decreasing. For a customer service organization, it's important to track the average days or time to close and satisfaction. And marketing organizations want to track campaign effectiveness and ROI.

Abstract
To track and improve business performance, you need reports that show trends as well as real-time dashboards for up-to-the minute information about your business. Salesforce CRM makes it easy to create both.

By Leahanne Merritt

To make the most of Salesforce CRM's reporting capabilities, it's important to plan carefully and then follow these 5 proven steps to making reports and dashboards part of *your* business process:

1. Know what keeps your executives up at night
2. Capture the right data
3. Build your reports
4. Build your dashboards
5. Use data to change behavior and drive results

Step #1: Know what keeps your executives up at night
Finding answers to critical business questions and making good decisions is vital to executives—and to their companies' success and competitive position:

- **Ask questions and start at the top** – When designing reports and dashboards, first define what your executives—your CEO; the VPs of Sales, Marketing, Support; and your channels—need to know to run their business. What are their key metrics? What behaviors do they want to encourage?

- **Align metrics with your company vision** – Take your business objectives, determine the metrics that measure those objectives, and map those metrics to the capabilities of Salesforce CRM. For example, if forecasting and tracking large deals are important to the VP of Sales, make sure you understand the key data points that give insight into those tasks and the best frequency for reporting that data. Or if your VP of Marketing needs to track response rates, sales, trials, meetings, or campaign awareness, you need to capture that data at the campaign, campaign member, lead, and opportunity level to return meaningful metrics.

  Tip: Salespeople thrive on competition. If you make it possible to track their progress in relation to their peers, your overall adoption rates will go up.

Step #2: Capture the right data

Your reports and dashboards are only as good as the data behind them—planning is the key to capturing and displaying the correct metrics. Identify your sources early. Consider working backwards: plan your reports first and then configure the application by adding custom fields, formulas, and so on.

If your marketing team wants to see campaign effectiveness over time, for example, you'd want to track which campaigns lead to leads, opportunities, and closed/won deals. Every week, you could use snapshot reports on *lead status by campaign* and *opportunity status by campaign* to show how many leads and opportunities were received and converted from each campaign.

- **Manage what you measure** – Pick a limited number of key performance indicators (KPIs) or metrics. A third-party survey of the number of metrics used by CEOs showed that 52 percent use 5–10 metrics to manage their entire business.

- **Limit the number of reports/dashboards** – Focus on those tied to specific business objectives.

- **Develop a clear, concise naming strategy** – That approach will make report and dashboard folders easy to find. Use labels that are meaningful to your users; for example "MW Sales Team," "Premier/Gold Support Analysts," or "Converted Leads for Verticals Team." For dashboard folders, start with the word "Dashboard" (Dashboard – MW Sales Team," "Dashboard – Premier/Gold Support Analysts").

- **Determine security and access** for the report and dashboard folders and give users access based on their job functions or roles.

Step #3: Build your reports

Most customers start with a current report tracked in Excel or Access and use it as a baseline. As you begin to build reports in Salesforce CRM, there are several resources to help you get started.

- **Start with out-of the-box reports**. Salesforce.com offers standard reports across all standard objects. You can use these reports as the basis for your custom reports.

- Understand the three different report types and how they're used:

  - **Tabular reports** are the simplest and fastest way to return your data in a simple list view format. Keep in mind that tabular reports can't be used to create dashboard components.

  - **Summary reports** return your data with subtotals and other summary-level information. Summary reports are great for showing average dollar values for *closed won opportunities by salesperson* or *number of cases by status by support representative*.

  - **Matrix reports** show data summaries against both horizontal and vertical criteria; for example, *total sales per sales rep per year by quarter*.

- Bookmark the [Analytics blog](#) on the Salesforce.com Community Web site. Check back on a regular basis (especially prior to each release) for tips, tricks, and use cases for new analytics features and product enhancements.

Step #4: Build your dashboards

When you finish planning after asking all the right questions and building your reports, you're ready to build your dashboards. The key to building dashboards your VPs, managers, and users can't live without is to match the dashboard metrics to a compelling business metric.

- Understand the different dashboard formats and what type of data is best displayed in each format:

  - **Horizontal bar/vertical column charts** are great for showing geographical data, stage or status information, or any data that's part of a single grouping.

- **Pie and donut charts** are useful for displaying data that shows proportions of a total, such as the number of leads by lead source.

- One of the newest chart types, **the funnel**, is best used for showing ordered picklists such as *opportunity stage*, *case status*, or *lead stage*.

  For more information, go to Help & Training and search on chart types.

- Don't reinvent the wheel! Go to the AppExchange, download the free, pre-built dashboards—such as the Lead and Opportunity Management dashboard—created by [Force.com Labs](#), and customize them to meet your business needs. Use these dashboards to track and measure adoption, sales productivity, campaigns, lead generation, and service and support.

Step #5: Use data to drive behavior and produce results

Reports and dashboards are designed to be iterative—it's important to keep them current and relevant. To successfully roll out business metrics, good communication is key. Make it easy for your users to find, view, and access the dashboards relevant to them. Use the schedule refresh feature to ensure your users see the most recent data. And use schedule and email reports and dashboards to remind your users that their business-critical metrics are in Salesforce CRM.

- **Manage from the top down** – Encourage managers to run forecast calls directly from their dashboards. Many customers also have the following mandate for sales: "If it's not in Salesforce, it doesn't exist." This directive proves to be extremely motivating for salespeople.

- **Include adoption and data quality metrics** – Include a dashboard component that tracks faulty data, such as all accounts without an industry, contacts without valid email addresses, or leads with a status of "qualified" that haven't been converted. Again, publishing such metrics can be extremely motivating.

- **Engage your user community** – Don't make the mistake of tracking such metrics only at the executive level—make sure your users see the same metrics on their personal dashboards. What do your users want to see? What will help them do their jobs faster and smarter? Those are the metrics that matter. For example, you could create reports and dashboards that rank salespeople by top deal or top salespeople per quarter.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices

Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700

For business success, mind your metrics

"You don't have to track all your customers. Just those you want to keep." That's how one CEO recently summarized his rationale for tracking the metrics that show how his company gets new customers, sells more to those it already has, and retains customers despite increasing competition. Like many other executives, he insists on measuring performance and using those measures to continually raise the bar and ensure accountability.

Companies have spent millions on software to manage corporate performance. The umbrella term Corporate Performance Management (CPM) is often used to describe these methodologies, metrics, processes, and systems. By making the most of the CRM metrics in your Salesforce CRM system, you can get many of the benefits of a CPM solution for free.

In the past, companies primarily looked to stock market valuation and perhaps market share as the key indicators of their success. But many managers outside the financial areas saw their departments' contribution as more of an art than a science. One marketing manager famously said he knew half of his advertising budget was wasted, he just didn't know which half. Three developments have made such attitudes unthinkable today. The first is a focus on corporate governance as a result of legislation. The second is increasing pressure on managers in all areas to prove the contributions of their departments. Finally, the metrics that quantify those contributions have become easier to capture, interpret, and visualize.

Although a business must be profitable to be successful, there is increasing awareness that there's more to success than the bottom line. By tracking not just the standard metrics that make up corporate balance sheets, companies can greatly increase their chances of success. It's easy to see the benefits and competitive advantages of such a strategy: By continually tracking performance you can spot both potential problems and new opportunities early and take appropriate action. What's harder is knowing exactly how to apply this knowledge to your organization.

To successfully use CRM metrics, you'll have to address the following questions: What metrics are most important for you to track? How do you get them and distribute them? And how do you make the most of them? This document will get you started on answering those questions.

Abstract

Metrics are measurements that quantify business performance Metrics are also your ticket to increasing that performance, improving planning and control cycles, and ensuring accountability. Initially driven by a need for corporate transparency and legislation such as the Sarbanes-Oxley Act, businesses are embracing a trend toward identifying and measuring key metrics. They are aided in this task by tools that help to analyze and visualize data in a way business users can understand.

There are key metrics for just about any corporate function. This document highlights metrics relevant to CRM—particularly in sales, marketing, and customer service—and shows how salesforce.com helps to make that information available to all who need to know.

By: Wendy Close

Best practice

Why bother with CRM metrics?

Performance. Improvement. Accountability. If these are the mantras of today's business world, metrics are the means to achieving them. Metrics ensure that decisions aren't made on the basis of one person's wishful thinking or another's sinking feeling. In addition to these general goals, here are some specific contributions metrics can make to your organization:

- **Achieve your company vision** – You know what sets you apart. By choosing metrics that measure your progress in the areas that differentiate you, you can grow toward your vision.

- **Evaluate and plan acquisitions** – Whether you're shopping for new software or a new company, defining success metrics will help you search for the best candidates, recognize them when you find them, and calculate the return on investment (ROI).

- **Calculate and improve effectiveness** – Knowing what works and what doesn't is crucial to success. By evaluating which campaigns or investments pay off, you can invest resources in those areas with the biggest payoff and learn from your mistakes.

- **Look out for problems** – Consistently following success metrics will alert you to trends that could spell trouble. You can also identify additional metrics to temporarily monitor special situations, such as a new product introduction.

- **Improve communication** – Everyone has an opinion. Making the same concrete facts available to all the stakeholders helps to focus and facilitate discussion and decision-making.

- **Spot opportunities** – Spotting trends early gives you a jump-start on your competitors.

- **Get executive buy-in** – Executive support has been identified as crucial to a successful project. Using metrics to make your case of why a solution is needed, explaining what it will cost, and showing how the company will benefit will help you prove your case—and keep on proving it.

- **Justify your existence** – In today's corporate culture, resources go to those who can show how their projects contribute to the bottom line and to the company's vision.

Which CRM metrics should you track?

There are hundreds of CRM metrics you can track, so select them carefully. Best practice is to monitor about 7 ($\pm$ 2) metrics for any particular area. The key is to get good insight without becoming a slave to metrics.

One approach is to tie CRM metrics to your organization's other financial and business objectives. Also, keep in mind that the CRM metrics you choose should be specific to your company, its size, the product lifecycle, and your corporate mission. For example, a new company with a promising but unknown product will need to invest heavily in marketing campaigns to solicit customers, build product awareness, and establish its brand. Such a company would want to keep close track of metrics such as number of new leads per marketing campaign, number of sales opportunities per campaign, and opportunities closed per campaign. On the other hand, a company with a well-established brand, a large customer base, and a portfolio of products would want to focus on metrics that identify its most profitable customers and those programs that motivate them to further increase their spending. Such a company would want to track up-sells and cross-sells with metrics such as number of products/services per customer and profit per customer.

Metrics to measure customer loyalty

Regardless of product or company size, measuring customer satisfaction and loyalty is crucial. Customer satisfaction has been consistently linked to superior stock performance and sales growth. Four satisfaction metrics that work together to measure loyalty include *overall customer satisfaction*, *likelihood to continue to do business*, *likelihood to recommend you*, and *likelihood to expand business with you*. The Harvard Business Review's "Apostle Model" uses the *overall customer satisfaction* and *continue to do business*

metrics for segmenting customers into four groups (Loyalists, Mercenaries, Hostages, and Defectors) and recommending specific strategies for appealing to each group.

Metrics to measure sales performance

Other metrics most companies will want to track are those related to sales performance, including increasing revenues, sales effectiveness, and market share. Sales metrics let you track sales trends over time and measure the impact of programs designed to improve them. For example, when executives were asked about improvements in key "sales success metrics", the survey found an average improvement of 38 percent in forecast accuracy and a 29 percent increase in lead conversion rate since adopting Salesforce CRM1.

To determine sales effectiveness, you can track metrics available through Salesforce CRM, such as average deal size, length of sales cycle, number of calls required to close, percentage of deals that close as forecasted, and close rate. In addition, metrics that show results at various stages of the sales funnel can help improve your sales close rate. By tracking new leads by product, percentage of leads resulting in meetings, percentage of meetings resulting in presentations, percentage of presentations resulting in proposals, and percentage of proposals resulting in sale, you can identify at which stage your sales process may be breaking down. For example, if many customers request presentations, but few presentations result in requests for proposal, you'll want to find ways to improve your presentations. Having such information helps to define where to invest resources; in the past, many managers trying to increase sales simply kept creating additional awareness campaigns.

Getting metrics

There are several sources for metrics:

- **Internal systems**, such as your financial systems or your Salesforce CRM system. Most of the rest of this article is about metrics available through Salesforce CRM.

- **Surveys** related to customer satisfaction and loyalty—check the [AppExchange](#). Regardless of the frequency of your surveys or the tools you use, store the results in Salesforce CRM by account.

- **Commercial marketing data providers**. For example, to measure market share you need to compare your performance to that of your peers and competitors—such information is available through AC Nielsen.

- **Calculations** involving individual metrics that result in "aggregates" that provide insight about trends.

Salesforce.com puts many key metrics at your fingertips:

- **Sales metrics** – Based on the capabilities of salesforce.com's Sales Cloud—including sales management, forecasting, win-loss analysis, and pipeline analysis—sales metrics provide insight into overall sales trends as well as into the performance of particular channels, sales teams, and individual representatives.

- **Marketing metrics** – Based on the capabilities of Salesforce CRM's marketing functionality—including campaign management, email marketing, lead management, contact management, and marketing analytics—marketing metrics help you determine which marketing activities are most effective, adjust campaigns accordingly, and serve as a basis for determining marketing budgets.

- **Service metrics** – Based on the features of salesforce.com's Service Cloud— including cases, solutions, ideas, and customer portal—service metrics show how well your service organization is performing overall and analyze the performance of specific service centers and individual customer service representatives.

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1 "Salesforce.com Customer Relationship Survey," conducted April 2010 by independent third-party vendor MarketTools Inc.; 4,000+ customers were randomly selected. Response sizes per question varied.

Sales metrics	Service metrics	Marketing metrics
# of prospects # of new customers # of retained customers	Cases closed same day	# of campaigns
# of open opportunities	# of cases handled by agent	# of responses by campaign
Close rate	# of service calls	# of purchases by campaign
# of sales calls	# of requests by type	Revenue by campaign
# of calls per opportunity	Average time to resolution	# of new customers by campaign
Amount new/recurring revenue	Average number of calls per day	Cost per interaction by campaign
Time to close by channel	Percentage compliance SLAs	# of new leads by product
Margin	Percentage service renewals	Customer satisfaction level
Sales stage/sales cycle duration	Complaint time-to-resolution	Propensity for customer defection

Table 1:   This table shows sample metrics available through Salesforce CRM. Of course, many customers create additional metrics by adding custom fields and then including those values in their dashboards and reports.

Distributing metrics

Until recently, metrics outside finance and accounting were uncommon and the people who created them worked in what was, for most people, a mysterious area known as "business intelligence." With complex analytical tools or complicated spreadsheets their findings were out of reach to the average manager or business user. However, with the advent of tools that make it easy to extract metrics from business data and to visualize it in Salesforce CRM reports and dashboards, business intelligence was democratized. As a result, access to an organization's most important metrics is no longer restricted to those with special training and tools. Ordinary business users can easily customize reports and build dashboards to create and monitor those metrics that are most important to them.

Figure 1:   This sample pipeline dashboard shows the type of real-time, graphical reports that can be created from Salesforce CRM data.

Making the most of metrics

To make the most of metrics, determine how to best aggregate them to show trends, identify specific events where metrics can provide one-time decision support, and distribute metrics to mobile devices.

Make better one-off decisions

In addition to tracking trends, you can identify specific event-driven metrics and add them to a Salesforce CRM dashboard to track how an event is evolving and make adjustments accordingly. For example, you could monitor the number of service calls related to a new product introduction and look for spikes in call volumes that would show that additional resources are needed. Another example, shown below, shows an actual dashboard created by a marketing operations manager who plans and manages more than 75 marketing events each year.

Figure 2: This dashboard shows progress toward the goal of total registrations, lists registered clients (blanked out because it is propriety information), and provides a breakdown of client segments.

Make better long-term decisions

Context counts. Besides choosing individual metrics, it's important to choose metrics that work well in relation to one another, such as the metrics that show results at each stage of the sales cycle. By identifying what decisions you need to make, you can identify those metrics that work together to deliver the information needed to make those decisions. Also, keep in mind that the "raw" metrics from your data may not show those trends that will impact your organization's overall financial and business objectives over time. To achieve that goal, consider combining metrics to calculate higher-level metrics in the sales, marketing, and customer service areas.

Metrics on the go

Another way to make the most of metrics is to make them available to your field staff, so that being out of the office won't mean being out of the loop. With mobile access to Salesforce CRM, users not only have access to all the latest data, but they can enter data that updates critical metrics as well. And because all leading mobile devices and operating systems are supported, you won't have to invest in new devices. Visit www.appexchange.com for dozens of mobile applications that are ready to go.

Summary

- Select metrics that measure each stage of the sales funnel to determine where intervention may be needed.

- Tie metrics to business goals and choose about 7 metrics per area (±2). Choose metrics most helpful to your particular business situation. Collect customer loyalty metrics with surveys and store that data in salesforce.com by account.

- Survey semi-annually if you have fewer than 500 customers with one or two contacts per customer. Survey quarterly if you have more than 500 customers and multiple contacts per customer.

- Leverage the AppExchange for sample dashboards, survey tools, and other resources.