CRM Lightning Cheatsheet

LIGHTNING

GENERATE
MORE LEADS

- Capture leads through a variety of channels, including your website, purchased lists, events, and social mentions
- Add those leads to Salesforce

CONVERT
MORE LEADS

- Establish a lead qualification process to make sure all sales reps use the same consistent methodology
- Use Sales Path to guide sales reps through your sales process

CLOSE
MORE DEALS

- Close deals faster with the opportunity workspace, a productive user experience where sales reps use the composer to make quick updates, get contextual coaching with Sales Path, and see details on related records on hover with quick view
- Easily analyze your sales pipeline to quickly identify and eliminate bottlenecks in the sales cycle

Key terms and concepts

CRM
Boost your success with Salesforce Customer Relationship Management (CRM), which allows you to manage relationships with your customers and prospects and track all of your interactions.

SEARCH
Make searching data easy with powerful search features, including filtering, recent items, and customizable search results layouts.

ACCOUNTS
Accounts are companies, entities, or organizations you do business with. Accounts can be businesses or individuals. Use accounts to track important information, including name, address, phone number, and related information like opportunities, activities, cases, notes, and more.

CONTACTS
Contacts are the people who work at or are associated to accounts. Using contacts in Salesforce, you can track key details such as phone numbers, addresses, titles, and more. You can also indicate a contact's role in a particular opportunity, such as decision maker or influencer.

HOME
Use the Home page to sell smarter! View a performance chart, read News, and get a daily update on important tasks and opportunities from the Assistant.

NOTES
Enhanced notes tool, with autosave, rich text capabilities, and the ability to relate a note to multiple records in Salesforce.

KANBAN
The Kanban view shows opportunities, leads, contracts, and campaigns organized by stage. Simply drag and drop deals to move them through the sales cycle.

LEADS
Leads are prospects or potential opportunities, such as a person you met at a conference who expressed interest, or someone who filled out a form on your company's website. Use leads to move prospects through stages to qualification, guided by the lead Sales Path.

OPPORTUNITIES
Opportunities are leads you've qualified to buy. Use opportunities to manage your pending deals in the pipeline, with Sales Path guidance at each stage in the sales process.

TASKS
Tasks are to-do items that require follow-up. They can be assigned to you or someone else, and are related to leads, contacts, accounts, or other records.

ACTIVITIES
Use Activities to log calls and other touch points with prospects and customers, so you can keep a complete history of your interactions.

EVENTS
Events are meetings you've arranged with your prospects and customers, all tracked in Salesforce.

REPORTS
Summarize and analyze your data with reports, which you can display, share, collaborate on, export, and print. Use standard reports or create custom reports. Using a modern, sleek user interface, you can subtotal and add easy filters to see exactly what you need.

DASHBOARDS
Visualize metrics and key performance indicators through sets of charts and graphs. Using a modern, sleek user interface, you can display multiple reports on a single dashboard, using pie charts, bar charts, and more, all in a flexible layout.

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WEBSITE & SOCIAL
- Organic web traffic
- Email responses
- Social mentions

WEB-TO-LEAD FORM
- Free trial
- “Contact me” request
- Event registration

INBOUND CALLS
- Referrals
- Google Maps

CREATE NEW LEADS
- Search first, then create a new lead in Salesforce

LISTS
- Purchased list
- Trade show
- Legacy data

IMPORT DATA
- Use the import wizard or data loader

LEAD CAPTURE
- Set up auto-response emails: “Thank you for your interest”
- Your trial information
- Event details
- Set up lead assignment rules
  - Geography
  - Company size
  - Product of interest

MY OPEN LEADS
Set up different views to manage your leads. For example, today’s leads or leads sorted by lead type. Easily visualize data on the fly with list view charts.

DUPLICATE LEAD?
Set up duplicate management to prevent duplicates at the point of entry. Manually merge legacy records.

ARCHIVE YOUR DEAD LEADS
Use email marketing and call downs to re-market to unqualified or no-contact leads

Sales

Support

WORKING LEADS
When you’re working a lead, set up a series of tasks based on the type of lead.

For example:

Day 1: Personalize mass email

Day 2: Call/voicemail

Day 3: Call/voicemail

Day 4: Personalize mass email

QUALIFIED?
Create a set of qualification questions, such as current situation, product of interest, timeframe, key decision makers.

If the lead is qualified, convert it to a contact, with an associated opportunity and account.

OPPORTUNITIES
Monitor your opportunities reports and dashboards to keep track of top deals and prioritize your time. Visualize and manage your deals using the Kanban view.

PRESENTATION, PROPOSAL, NEGOTIATION
Use Sales Path to support your sales processes, making it easier to monitor your pipeline and provide contextual guidance to sales reps.

WON
Salesforce gives your entire company a 360-degree view of your customers and facilitates collaboration across your organization, helping you build strong, lasting customer relationships.

ARCHIVE YOUR DEAD OPPORTUNITIES
Use email marketing and call downs to re-market to Closed Lost opportunities