GETTING THE MOST FROM YOUR LEADS

Summary

With leads in Salesforce, you can track and manage your potential business.

Creating Leads

Select **Lead** from the **Create New** drop-down list in the sidebar or click **New** on the Leads tab.

You can set leads to different statuses based on your progress, for example, Open, Contacted, Unqualified, or Qualified.

What is a Lead?

Using leads gives you a streamlined way to manage your business flow from potential customer to closed deal. Leads are:

- Prospects or potential opportunities, for example, a person you met at a conference who expressed interest in a possible deal.
- Sources of potential deals that need more background work before they can be defined.
- Visitors to your website who filled out a form requesting more information.
- Other interested parties whose information your administrator imported, as described in the tip sheet for lead administrators.
- Respondents to a campaign, as described in the tip sheet about managing campaigns.
- Separate from your company's accounts, contacts, and opportunities.

Why Start with Leads?

Start with leads when you do not know if the prospective customer will actually generate business for you. Using leads, you can:

- Assign leads to individual reps or lead queues to make sure potential customers are getting the attention they need.
- Merge two or three leads if they are duplicate records for the same person.
- Use the Leads tab to qualify incoming leads.
- Automatically convert qualified leads into an accounts, with an associated contacts and opportunities.
- Run reports to:
  - Evaluate marketing campaigns based on the leads they create
  - Track the effectiveness of different lead sources
  - Monitor the time it takes to convert leads with the Lead Lifetime report

Managing Your Leads

To manage your leads:

- Use the My Unread Leads view to locate your new leads.
- Take ownership of unassigned leads from the list views of queues of which you are a member.
- Use the Open Activities section of a lead to schedule events and tasks related to the lead.
- Change the lead status as your work on the lead progresses—this is important for reporting.

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Converting Your Leads

How are Leads Different?

- An account is the company information for a deal
- A contact is an individual associated with an account
- An opportunity is the related deal information
- Accounts, contacts, and opportunities present a total picture of a customer relationship—a lead is the introduction to that picture

As soon as you qualify a lead, you can convert it into an account, contact, and opportunity so you can start to close the deal. To convert a lead:

1. Click **Convert** on the lead detail page.
2. Verify the owner of the new records and optionally send him or her an automated notification email, set the status of the converted lead, schedule a follow-up task, and click **Convert**.

   We try to match the new account and contact to existing accounts and contacts if possible. You can choose to use the existing items or create new ones.
3. Activities related to the lead are now associated with the newly created account, contact, and opportunity.
4. Converted leads can no longer be viewed in the Leads tab but they will contribute data to reports. When customizing your report, enter a filter option of “Converted equals True” to view converted leads.

When leads are converted:

- The `Company Name` from the lead becomes the `Account Name`.
- The `Lead Name` from the lead becomes the `Contact Name`.
- The opportunity and contact are associated with the account.
- If enabled for your organization, universally required custom fields, workflow rules, validation rules, and Apex triggers are enforced.