THE MARKETER'S

FIELD GUIDE TO

salesforce

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THE MARKETER'S FIELD GUIDE TO SALESFORCE

By Jeffrey Russo

Jeffrey Russo is a Product Marketing Manager at HubSpot, serving as an expert on marketing automation, Salesforce integration, and HubSpot's marketing database application, Contacts.

Previously, Jeffrey worked on the consulting team at HubSpot, guiding hundreds of different organizations to develop inbound marketing strategies, integrate their sales and marketing systems, and adopt the HubSpot platform.

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INTRODUCTION ······································

Over the course of my time as the head of sales at HubSpot, we have gone to great lengths to align our sales and marketing teams around a common goal - growing our base of happy, successful HubSpot customers.

We've realized that as important as the meetings, agreements, and processes we have in place to maintain alignment between teams are, the tools our people use to manage our pipeline of leads are just as important. We've tested, tweaked, and changed things over the years, but two tools have always been a constant - HubSpot of course, and Salesforce.

Salesforce is an essential part of our funnel, and there are few people in our organization who aren't leveraging it in their day-to-day work. Sales reps spend their entire day in it. Marketers use it to deliver information to the sales team and report on their own efforts. Other teams use it to manage countless tasks and coordinate their operations. Salesforce is deeply ingrained in everything we do.

In my conversations with our customers and other people considering a marketing software system, I've come to find that many marketers recognize the value of learning more about Salesforce, but often don't know where to start. Salesforce is a complicated system, and there aren't many good resources out there that explain it, much less from the perspective of a marketer.

At the same time, the shift in control that salespeople and marketers have observed from the company to the prospect has not only transformed marketing, as we discuss quite a bit at HubSpot, but has also transformed sales and their relationship with marketing. Aligning the two teams is more critical than ever.

For that reason, we've decided to write the book on Salesforce, by and for marketers. In these pages, you'll find everything you need to know about the software that fuels your sales team. In the process, we'll cover in detail why sales and marketing alignment (in both tools and in your day to day practices) is an important trait for your company to adopt, and how you can take the first steps.

Mark Roberge
VP Sales at HubSpot

CHAPTER ONE: SALESFORCE 101

In this section, we'll get our hands dirty with the most important details that a marketer needs to know about Salesforce. While every organization uses Salesforce a bit differently, understanding what an out-of-the-box Salesforce setup looks like can give you a framework to better grasp how it's implemented in your company.
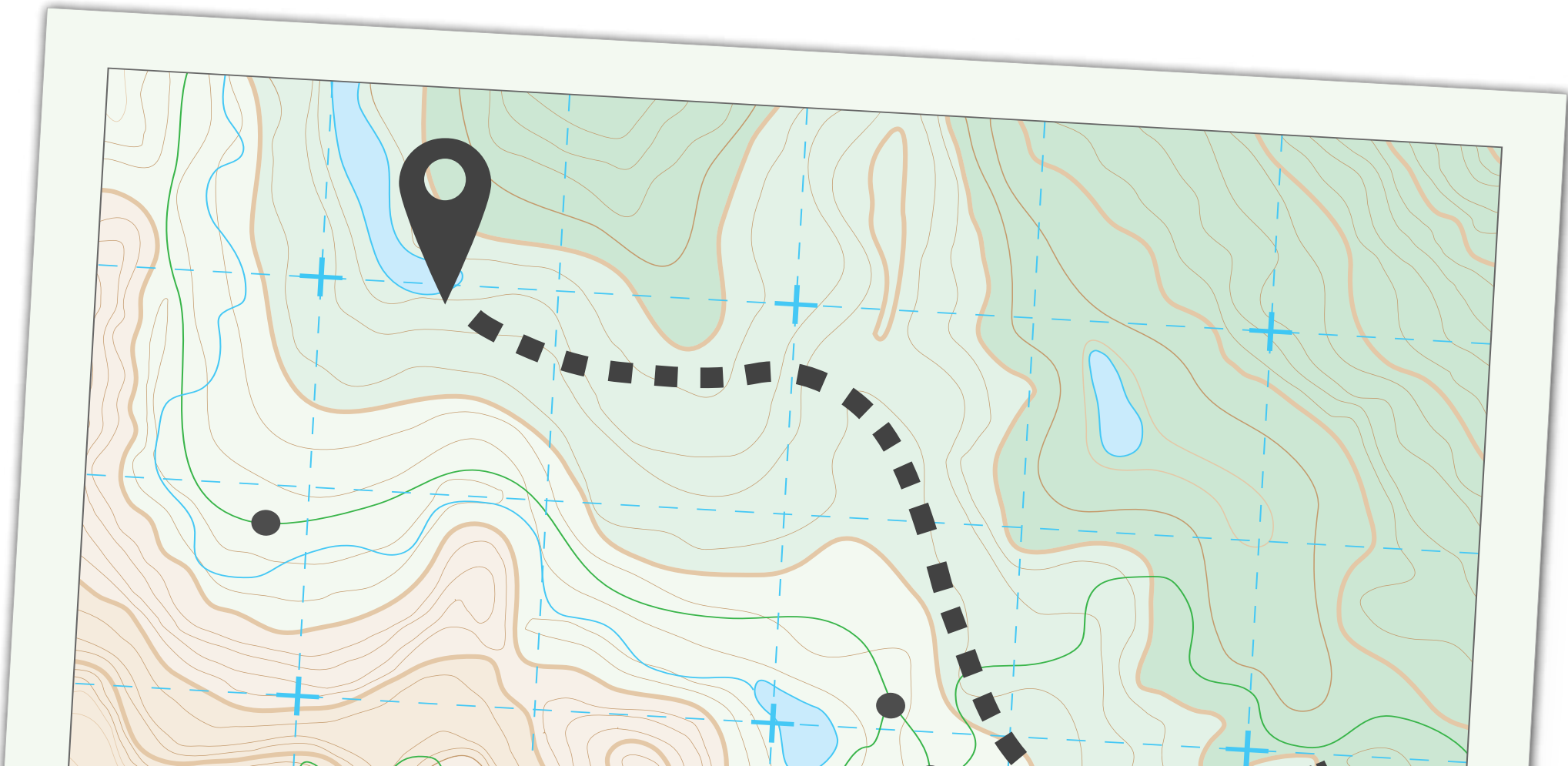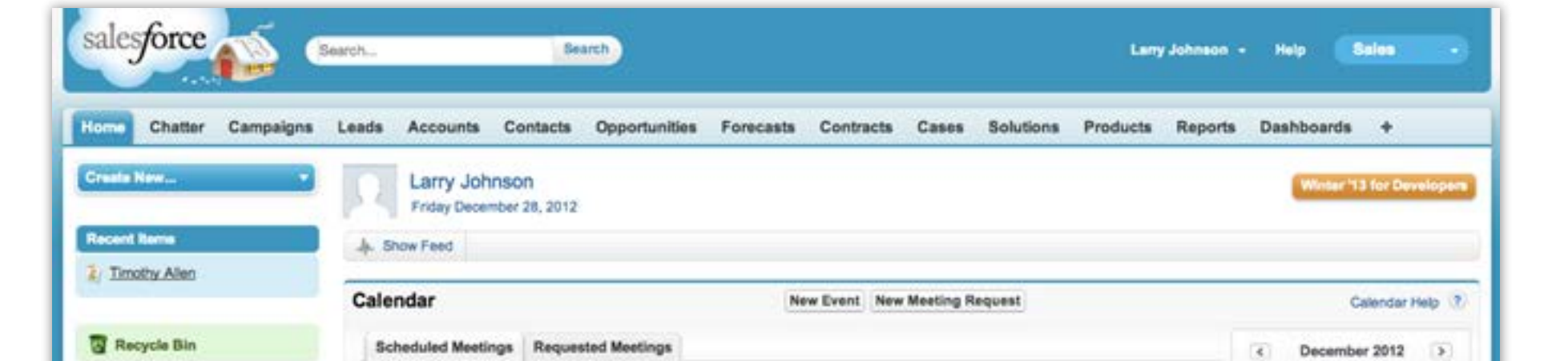
The History of Salesforce

Founded in 1999 by former Oracle executive Marc Benioff, Salesforce started as one of the first cloud-based CRM (Customer Relationship Management) systems of its day. At the time, the Salesforce concept - paying a monthly subscription to use software without the hassles of hardware and installed systems - was revolutionary. The company worked to become synonymous with the term "cloud computing".

Over the years, Salesforce has expanded its offerings to include software that caters to the needs of virtually all parts of an organization, divided roughly into different "clouds" - the sales cloud, its original CRM offering; the service cloud, which contains support and customer service applications; and the marketing cloud, a social marketing application aimed at large enterprises.

TIP

KNOW YOUR SALESFORCE EDITION TYPE
Salesforce is available in several different "edition" types. It's important to understand which edition type your organization uses because your edition type determines which features of Salesforce you have available.

To determine which edition of Salesforce your organization is using, simply look at your browsers' title bar, or hover over the browser tab you have open. You'll see a message that reads something like this - "Salesforce.com - Unlimited Edition".

A Closer Look: The Typical Out-of-the-box Salesforce Setup

Let's get into the details of what an average Salesforce setup actually looks like. Every Salesforce setup is built on a common set of buiding blocks called "objects". Once you understand those objects, their purposes, and how they fit together, you'll have a solid framework for how Salesforce works in your organization. Before we get started, it is also important to keep in mind that Salesforce is often heavily customized and used in different ways that better suit different types of organizations, so it's possible that your instance of Salesforce looks and works differently from what we'll see here.
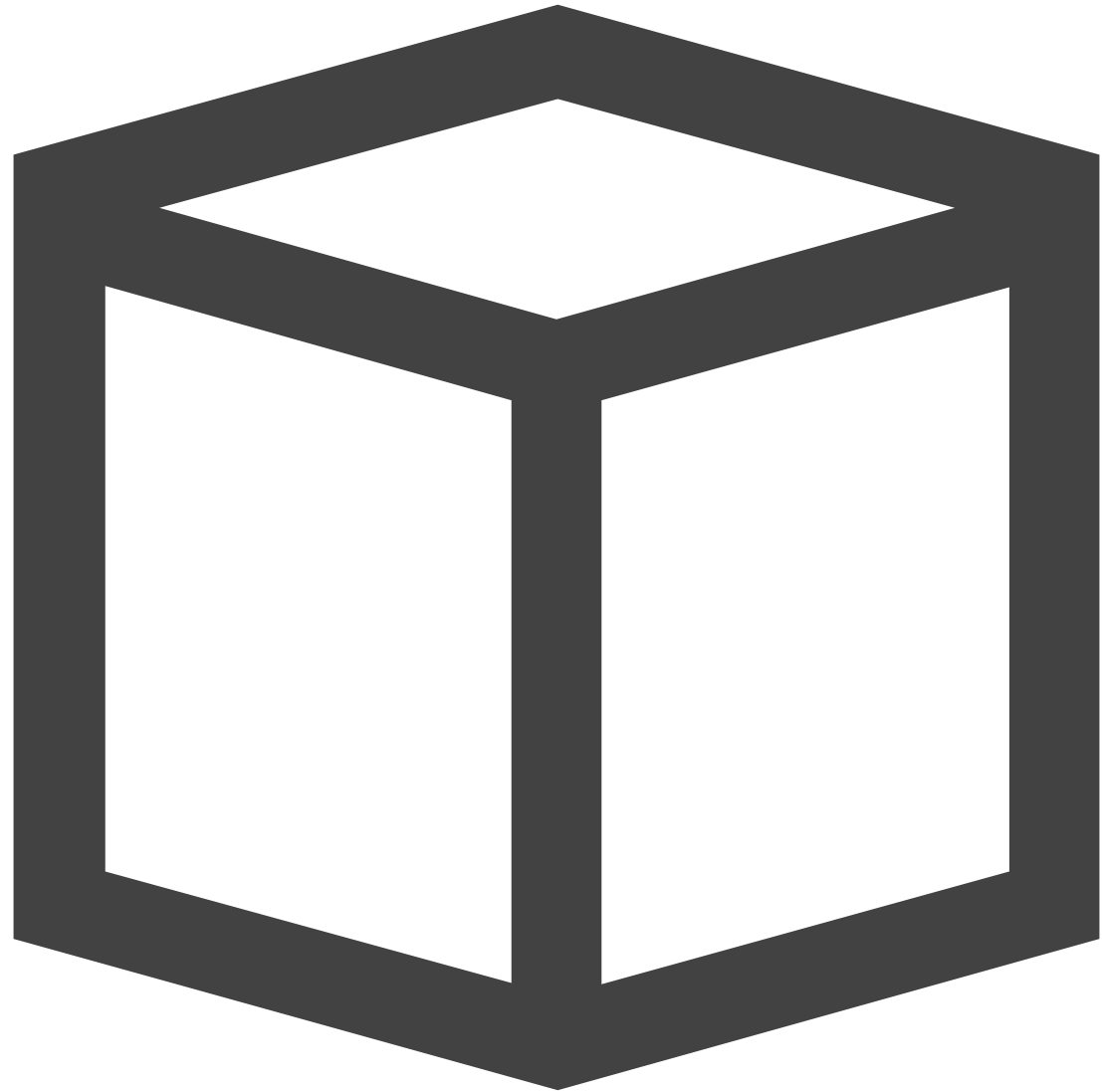
Understanding Objects in Salesforce

In the very simplest of terms, Salesforce is a database that enables its customers to store, leverage, and modify data about its prospects and customers. Those prospects and customers are stored in the database as several different data "objects". (Individual instances of each object are commonly referred to as "records".) Understanding objects - what they are and how they fit together - is critically important for every user of Salesforce.

LEAD OBJECT

A lead is someone who has expressed some general interest in what your business sells or does. It might be someone who a rep encountered at a tradeshow, or someone who filled out a web form. A lead does not yet represent an established opportunity.

CONTACT OBJECT

A contact represents an individual person who is tied to an account. This is where details like phone numbers, job titles, and other personal information is stored. In many cases, you may have multiple contacts per account, one to represent each employee.

OPPORTUNITY OBJECT

An opportunity is where all the details of a potential sales opportunity live. One account may be tied to several opportunities. Salesforce relies heavily on opportunity records to assemble pipeline projections and revenue forecasting.

ACCOUNT OBJECT

An account represents a company you want to track, be it a prospect, a customer, a partner, or something else. An account record acts as the "hub" of the many other record types in Salesforce.

Converting Leads...
...Into Contacts, Opportunities, and Accounts

In addition to having several standard object types within Salesforce, there is a standard process for how these objects are used, where they come from, and when they are created.

1 In a typical sales process, new records enter Salesforce as leads. They may be created manually by a sales rep, imported as part of a CSV file from a tradeshow or other effort, or inserted through other means by marketing.

2 Sales reps will analyze and work leads. How and when this happens varies widely from organization to organization, but when a rep recognizes a potential opportunity, he or she will go through a simple process to "convert" that lead in Salesforce.

3 When a lead is converted, the original lead record is frozen and can no longer be changed. In its place, an account, contact, and opportunity are created. The details from the lead record are transferred to a contact record, and room is made for additional details about the account and opportunity on those respective objects.
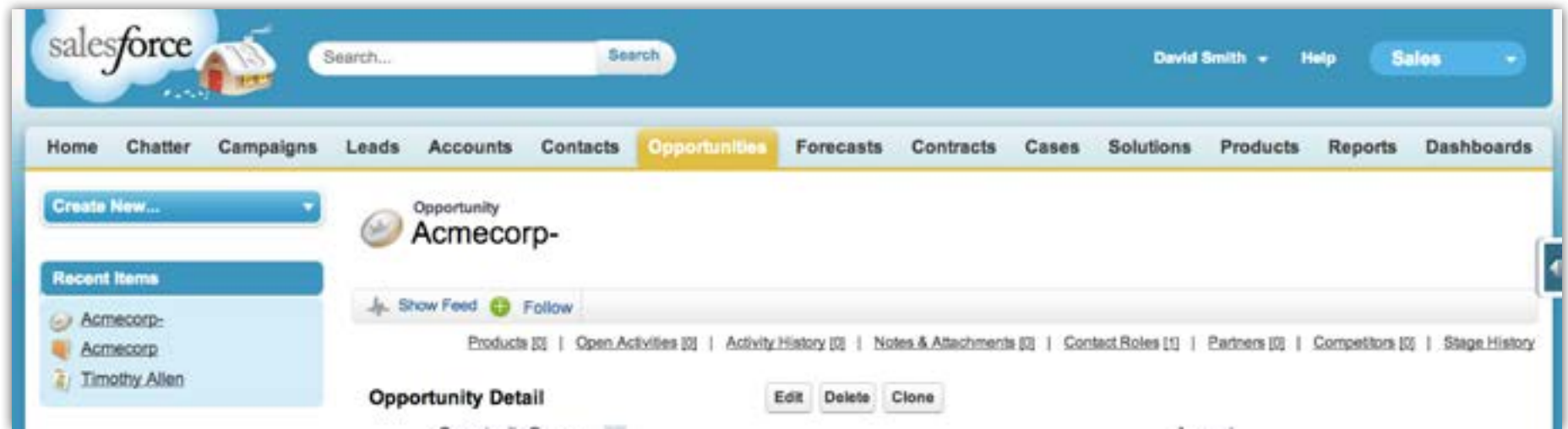
Lead
Record

Conversion

★ Account - Acme Co.

Contacts at Acme Co.

Opportunities with Acme Co.

Other Object Types in Salesforce

Up until this point, the objects we've looked at are commonly referred to as "standard objects" - meaning that they come with the out-of-the-box Salesforce product. There are many different types of standard objects, but we've covered the most important ones in the previous pages. For a more exhaustive list, do a quick Google search for "salesforce standard objects" to find a resource from Salesforce on the topic.

In addition to the many standard objects, your organization may also make use of custom objects. Custom objects are essentially tables of data that can be used to represent nearly anything your company needs to track. An example of a custom object might be an object used by a human resource department to track an employee.

⌖ TIP

BUT WE DON'T USE LEADS!

While every organization uses Salesforce a little bit differently, there are some common alternative ways that organizations use Salesforce. One of the more common scenarios is an organization that doesn't use the leads object in Salesforce. There are many reasons for taking this alternative approach, for example -

- Your organization doesn't need to store a large number of early stage identities
- You use Salesforce exclusively for managing opportunities related to existing accounts

These are just two reasons why an organization may choose to ignore or hide the "leads" object in Salesforce, and your organizations' logic may be different - but know that you aren't alone if you don't make use of the leads object.

Contact Detail

Name	👤 Mr. Timothy Allen	Phone	123-456-7890
Account Name	Acmeco Inc.	Home Phone	
Title	Senior Manager	Mobile	
Department	Marketing	Other Phone	
Birthdate		Email	tim.allen@acmeco.co

Data Fields in Salesforce

Now, let's dive a level deeper and take a look at an object in detail. As you saw earlier, Salesforce is essentially a database that stores many different types of data (organized into different types of "objects"). On each of these objects, you'll find a collection of fields, each of which has the capability to store some data about the object. On a lead record, for example, you would find several "standard fields" - fields that Salesforce comes with setup right out of the box - like fields for the leads' first name, last name, email address, phone number, company name, and more.

You might also have several custom fields set up - for example, the owner of a pet food manufacturer might want to note on each lead record what the leads' "favorite dog breed" is. Adding a custom field is easy, and it makes storing data of all types possible in Salesforce.

Fields on one object or record type are also often mapped to fields on another record. For example, when you convert a lead, the "first name", "last name", and several other fields are mapped to and inserted on the new contact record that is created. The "company name" field is also mapped to become the title of the associated account record.

CHAPTER TWO: THE MODERN SALES & MARKETING SETUP

In this chapter, we'll zoom out and take a look at where Salesforce fits in the larger scheme of your company, and how it works with marketing - specifically how Salesforce is used by your marketing team, and how a marketing software system is used alongside Salesforce in a typical organization. We will also dig into the details of what Salesforce means to marketers - how you can leverage it to improve your marketing efforts, demonstrate the ROI of your work, and how you can provide valuable data to your sales reps through Salesforce that helps them close more deals.
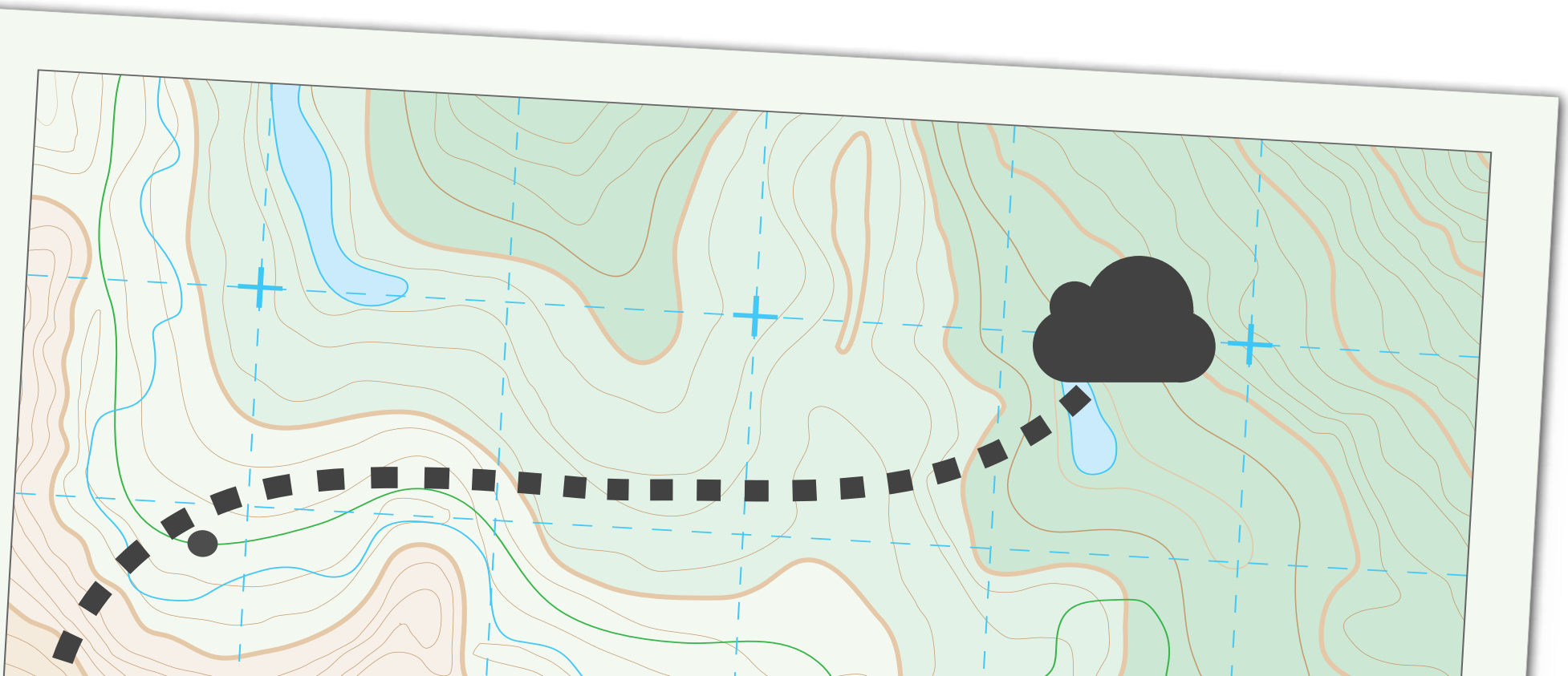
Connecting Your Marketing Database to Salesforce

As a marketer, chances are that you use your own systems to execute campaigns and carry out your day to day work. You may have tools you use to send emails, create landing pages or forms, databases where those pages or forms are sent, a CMS where your website lives, SEO software, a blog, and more. Or, you may have all of those tools contained in one system like HubSpot.

So how should all of these pieces be connected to Salesforce? What can you as a marketer be using from Salesforce to improve all of the things you do? And what can your efforts provide back to your sales team to improve their selling? Let's take a look at a best practices integration of a sales system and a marketing system.

A modern sales and marketing setup should ideally consist of two systems - a marketing platform which you see above on the left, and a CRM system like Salesforce, which you see above on the right.

These two systems are distinct in their capabilities and uses. CRM systems like Salesforce are built for sales teams, and are organized around the day-to-day processes and tasks a salesperson might undertake - making calls, following up with leads, and sending direct personal emails. Marketing platforms like HubSpot are built for marketers around their day to day efforts, like creating content, converting visitors, managing campaigns, and managing the flow of leads to the sales team. Each system contains its own database of identities, and data is ideally shared between the two systems.

When should leads go from my marketing database to Salesforce?

There are many different approaches to managing the flow of leads between marketing and Salesforce. Some organizations choose to have all records in both their marketing and sales databases, some choose to have most in one system or the other. While there is merit to each of these approaches, an emerging best practice is to first insert and contain leads into your marketing database, score and qualify them there, and automatically pass them to the CRM system when they are deemed to be sales qualified. This makes sense for several reasons -

- **Only sales ready leads are sent to Salesforce.** Your sales team isn't wasting their time on early stage leads who need more marketing before they are ready for sales, and they don't have to wade through hundreds of leads to find the ones they should be working.

- **The marketer maintains control over early stage leads, and manages when they go to the sales team.** A modern marketing platform should be connected to your website, forms, blog, analytics, landing pages, and social media presence. From all of these different channels and all of the context they provide, the marketing system can build a more complete picture of how qualified a lead is and when it should be followed up with directly.

- **It's a scalable approach to managing a large pipeline of leads.** In todays' world, savvy marketers get involved with leads much earlier in their buying process by way of things like whitepapers, free downloads and webinars. This is exciting because it means a wider funnel of potential buyers, but it also means that your sales team - an expensive resource - shouldn't be following up with leads who are too early on in the process. A marketing platform (and a marketing automation tool, in particular), can help you scale the attention you pay to these early stage leads.

What determines when a lead is ready for my sales team?

In a system where only qualified leads are passed from marketing to the sales team, it's especially important to make sure that there is some mutually agreed upon logic behind when leads are ready for your sales team. While the answer to this question is unique to your organization, there are some things that you can consider in determining what that threshold should be. Many marketers define that threshold based on several factors that can be grouped into two different categories -

EXPLICIT LEAD DATA

If you know that leads who have a certain company role, company size, or other specific characteristic are more likely than other leads to close, you might use those characteristics to determine when a lead will be sent to sales.

IMPLICIT LEAD DATA

Also consider using information about your leads' activity on your website to qualify them. For example, if a lead downloads product-focused content, requests a demo or consultation, or has heavy activity on sales-focused product pages - that may indicate that they are a higher quality lead.

A robust marketing platform should allow you to easily experiment with criteria that controls when leads are passed to your CRM system and your sales team. In HubSpot, for example, you can choose either specific events to act as triggers for sending leads to your CRM (e.g., send a lead to Salesforce when they request a consultation or download a piece of product-focused content), or combine many explicit and implicit interactions into a lead score that is used to manage the process. (You will learn more about lead scoring in the coming pages.)

Status	Name	Size	Created
●	All Contacts	1362	7/28/2012
●		447	9/10/2012
▢	**Salesforce Filtering** Only contacts in this list will be synced with Salesforce. You can change the list, or disable this feature, by clicking view.	330	9/18/2012
●		295	8/01/2012
●	Marketing Qualified Leads - Nurture w/ MQL ...	270	9/10/2012
●	Marketing Qualified Leads	200	10/09/2012

A lead lands in Salesforce.
What happens next?

It is important to understand what happens on the flip side after you have provided a lead to your sales team. While every organizations' follow up process is different, let's take a look at the mechanics of how most teams work leads.

A lead is passed into Salesforce from your marketing platform. If your organization has automated logic such as assignment rules in place, the lead may have been automatically assigned to a certain member of your sales team, or to an assignment queue (a holding pen for leads in Salesforce who aren't yet assigned to a real person.)

Your sales team reviews the lead, likely from a Salesforce report or dashboard. Salesforce makes it possible for sales reps to organize and review their leads in countless different ways. Some marketing platforms make a list available in Salesforce too, but giving sales reps the data to build their own views and reports is often a better option.

Your sales team works the lead, modifying Salesforce records in the process. As your sales team works their leads, details should be kept in perfect sync between Salesforce and your marketing system. That way, both you and your sales team can treat the lead according to its latest status.

The lead is closed or recycled. Ideally, your marketing system will recognize if the lead has been closed as a new customer, and populate this information back in your marketing reports. If the lead is recycled (i.e., it isn't yet ready to buy, but is still a worthy lead), it should be automatically re-entered into a long term nurturing campaign.

What if I don't have a steady
pipeline of new leads?

By Rosalia Cefalu
Product Marketer at HubSpot

Salesforce is a robust solution for managing and scaling an established pipeline of new leads. But what if you don't have that pipeline in place yet? In the past, a need for leads meant that you as a marketer would have to move mountains (and spend loads of money) to push your message out as far and wide as possible. These methods of lead generation usually involved trade shows, purchasing email lists, cold calling, and traditional print, radio or television advertising.

While these old "outbound" tactics still have some merit, they are quickly becoming less and less effective as audiences have become accustomed to tuning them out, or simply avoiding them altogether (through tools like email filters, DVRs, ad blocking technology, and sheer ignorance.)

There is a solution. It's called **inbound marketing**, and it's all about "getting found" by your customers instead of reaching out to find them. Inbound marketing involves generating content valuable to your target market like blog posts and ebooks, utilizing search engine optimization, and maintaining a presence on social media.

HubSpot is a leader in inbound marketing software and education. In fact, our founder coined the term! If you need help building that pipeline of leads for your sales team, consider learning more about inbound marketing with HubSpot by taking a look at our marketing software platform, checking out the HubSpot blog, or downloading more great marketing resources.

SHARE IT!

CHAPTER THREE: SHARING DATA WITH SALESFORCE

In most organizations, sales and marketing are two huge storehouses of data on prospects... but few companies do a good job of sharing all of the data they collect. In this chapter, we'll take a look at some of the ways that you as a marketer can access and leverage important details on your leads that might be stored in Salesforce. We'll also dig deep into how your sales team can benefit from all the data you collect on leads and prospects through your website, and the best way to surface that data in Salesforce.
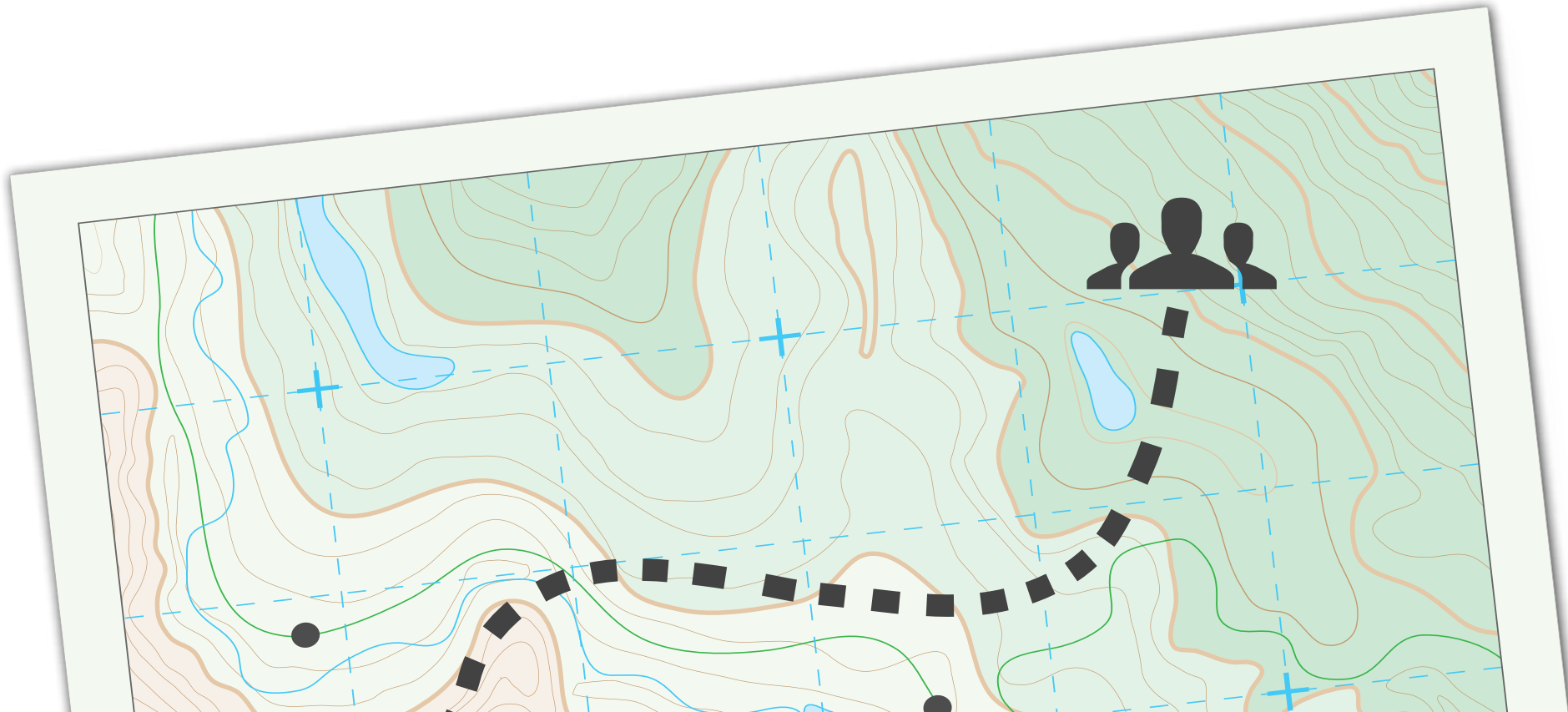
How Can Sales Leverage Marketing Data in Salesforce?

By Meghan Keaney-Anderson
Product Marketing Manager at HubSpot

It is estimated that a lead conducts about 60% of their research before ever talking with a sales person. That's epochs of time spent cultivating their interests, checking out materials and developing concerns all just to get them ready for a phone call with your company. Now, put yourself in the lead's shoes for a moment. How frustrating would it feel if your first phone call after all that research put you back at square one?

That's how sales calls that aren't informed by marketing data go. They feel like cold-calls. And they leave leads feeling cold. Instead, why not leverage marketing data on the interests and behaviors of your leads to help inform that call and make your time together more productive?

The following are marketing datapoints that are useful in shaping your sales interactions.
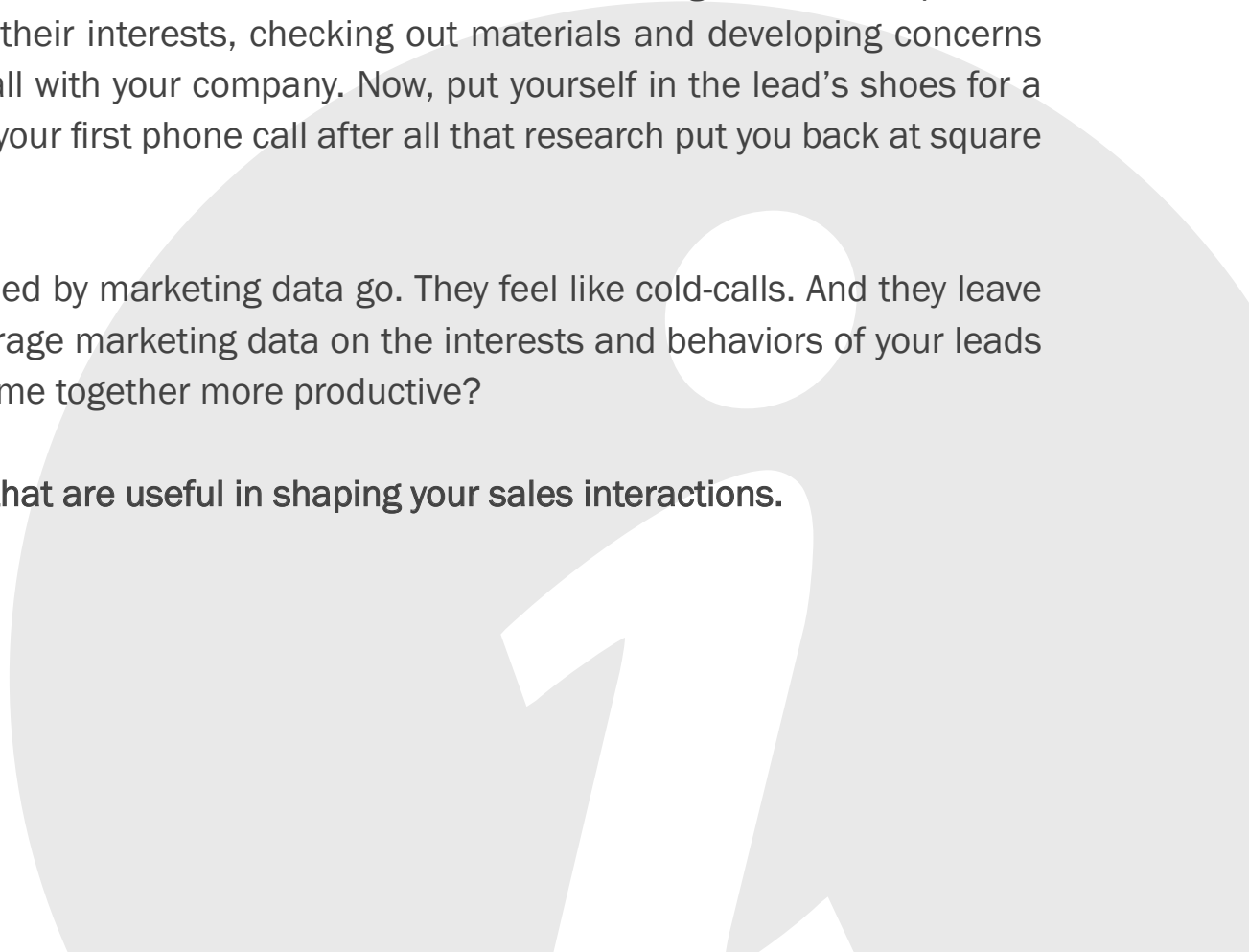
FIRST TOUCH CHANNEL

What was it that first brought your lead into your website? The channels we use say a lot about how we like to consume information. A lead who discovered you through Linkedin or another social channel might require a different approach than a lead who clicked on a paid ad. Perhaps the social lead requested recommendations or the paid lead was particularly swayed by the content of the ad.

FIRST CONVERSION EVENT

Visiting a website and converting on an offer are two very different levels of engagement. A conversion event has much more weight and indicates that your casual website browser has raised his hand to learn more in one way or another. We advise having a variety of offers on your site that map to different stages of the decision process. At the top of the funnel, when the lead is just conducting general research, it may be wise to offer an educational ebook or webinar. Doing so not only gives the lead incremental steps before talking with sales, it also teaches you the topics that are significant to a given lead. On the sales call, look back to the first offer or ebook that prompted the lead to provide his information via a form. Then focus your conversation on that established topic.
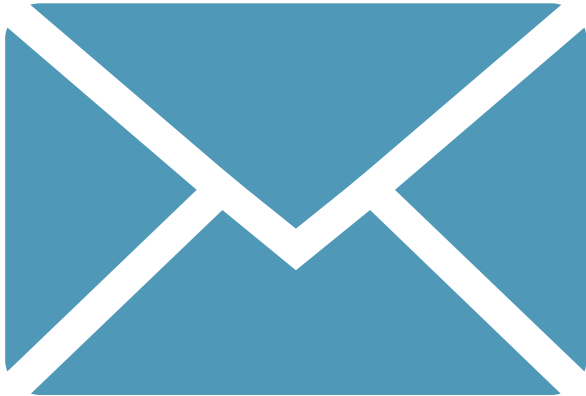
EMAILS OPENED (AND IGNORED)

In a world of inbox overload, it's important to know which emails the lead deemed interesting and which fell by the wayside. If you focus your sales call on the same topic covered in oft-unopened emails, you may lose interest quickly. Alternately - find the emails that your lead cared enough to open or click-through on - then use that data to sharpen your discussion.

PAGES VIEWED

If you've got the right marketing analytics in place, you should be able to see something called a conversion assists report. Conversion assists will tell you the most common pages viewed by leads who ended up buying. Use your marketing software to set up alerts for whenever a lead of a certain caliber or certain lead score - visits one of those pages, for example a pricing page. These alerts can clue you into the moment one of your leads hits upon one of these highly influential pages, so you can follow up quickly thereafter. Even without the conversion assists report, understanding the pages that your leads viewed on your website can help you zero in on their prime interest areas.
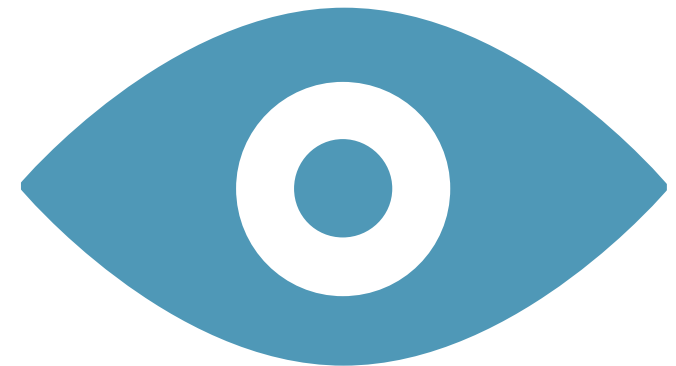
How Can Marketers Leverage Data in Salesforce?

Integrating Salesforce data into your marketing software makes it possible to achieve far more advanced segmentation, nurturing and analytics than otherwise possible. As your sales team adds more information about your leads to each contact profile, that data can serve to strengthen your marketing and make your communications more effective.

The following are sales datapoints that are useful in shaping your marketing interactions.
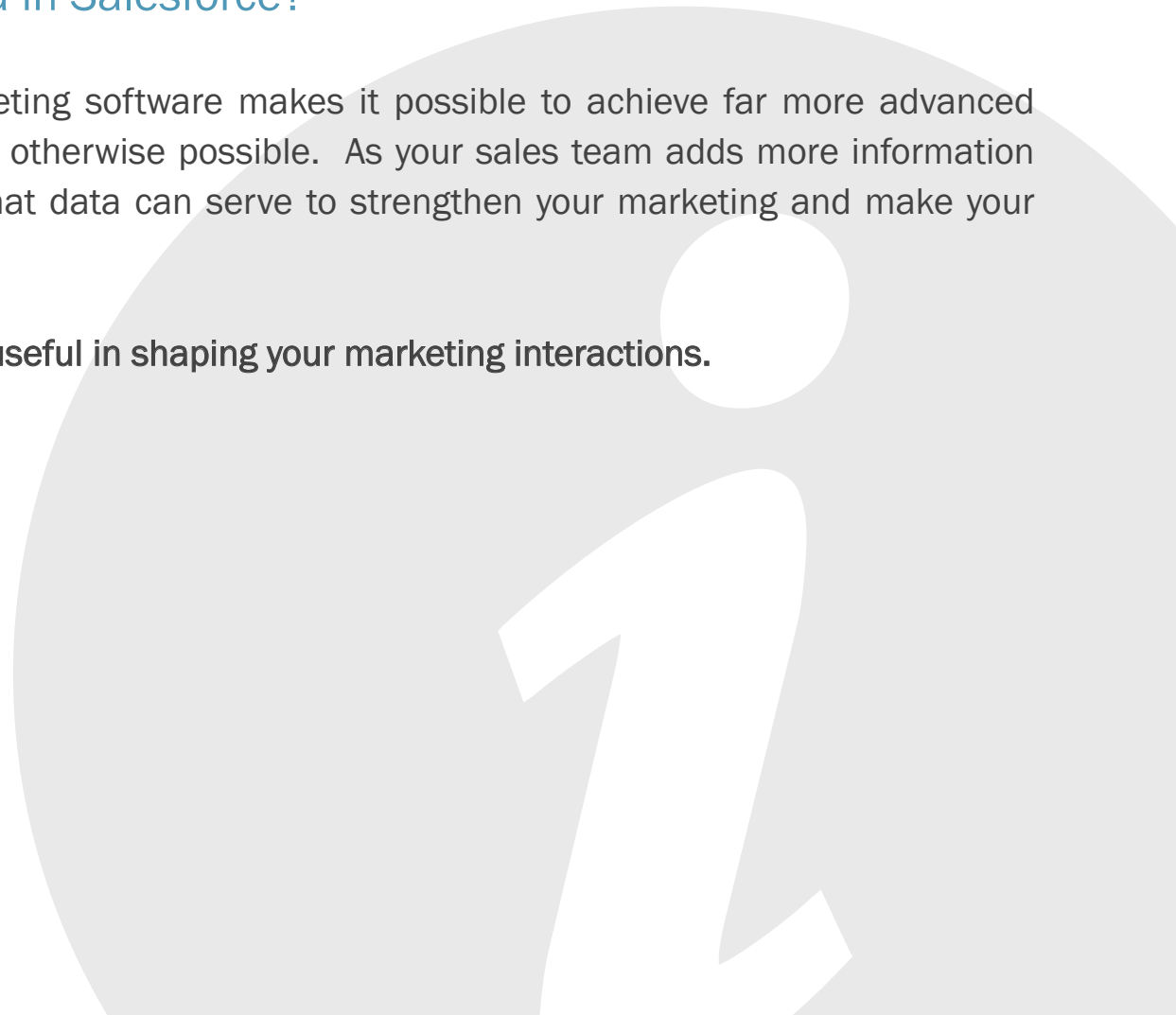
Deliver Personalized Content

Through personalization tags and dynamic content triggers, you can use Salesforce data to make your marketing messages more relevant and tailored to each lead.

- Send marketing emails from the lead's account owner rather than a generic marketing@company.com address.
- Include references to the recipient's company, location or other demographic fields within communications.
- Use dynamic content to personalize more than just the email channel. If you have HubSpot, for example, you can create targeted calls to action or webpage images that reflect what you know about the person looking at them.

Email Creation in HubSpot

Segment & Score Leads

Just because a lead isn't ready to be worked by your sales team doesn't mean your marketing team should ignore it. According to a 2011 report from Gleanster 50% of even the most qualified leads aren't ready immediately to talk to sales. These qualified, but unready leads are a perfect fit for lead nurturing campaigns.

- **Set Custom Lead Scores:** Determine which are the qualities of a lead that make them a good fit for your company and set up your lead scoring to rank those leads highly.

- **Set Lifecycle Stages:** Determine what behavior indicates that a lead is ready to talk with a sales person. Perhaps it's looking at your pricing page or converting on a certain number or type of content offers.

- **Nurture based on Salesforce Data:** Use the recent conversion event to focus your lead nurturing campaigns and send leads who aren't quite ready useful information designed to warm them up.

- **Set up a sync list:** Control which leads are sent to Salesforce and when based on criteria you set, including custom lead score. That way your sales team won't be distracted by unready leads and your marketing team can continue to warm qualified leads up over time.
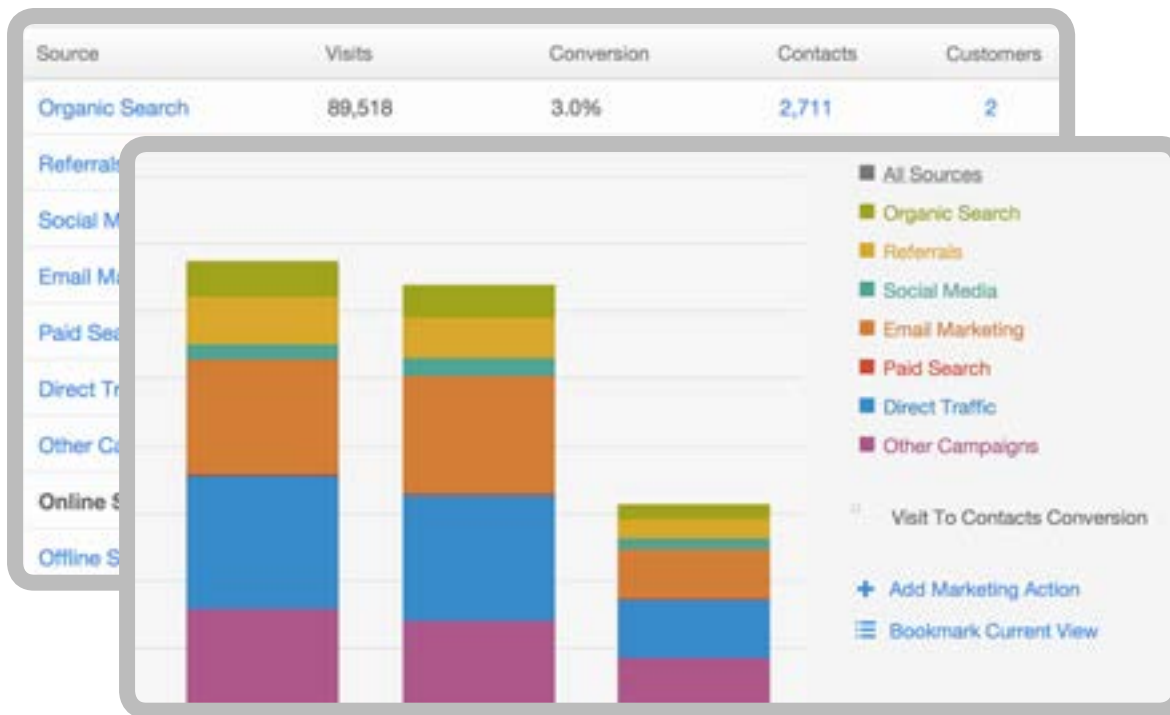

Custom Lead Scoring in HubSpot

Return on Investment

One of the greatest values that integrating Salesforce and your marketing software can give you is information about the number of customers marketing efforts have generated. Analytics on traffic volume and conversion rates can only take you so far. By connecting your marketing software and Salesforce you can see what channels, campaigns, and efforts have provided the best return on investment.

See what channels are most effective at bringing in customers. See what type of content and campaigns lead to the greatest number of customers. Validate the time and funds spent on various marketing activities. We'll dig deeper on this subject in the next chapter.

Source	Visits	Conversion	Contacts	Customers
Organic Search	89,518	3.0%	2,711	2
Referrals				
Social M				
Email M				
Paid Sea				
Direct Tr				
Other Ca				
Online S				
Offline S				

- All Sources
- Organic Search
- Referrals
- Social Media
- Email Marketing
- Paid Search
- Direct Traffic
- Other Campaigns

Visit To Contacts Conversion

+ Add Marketing Action
≡ Bookmark Current View

Closed Loop Reporting in HubSpot

CHAPTER FOUR: MARKETING ROI REPORTING WITH SALESFORCE

As a marketer, one of the toughest parts of your job is often proving the value of your hard work. You coordinate campaigns, travel to tradeshows, and spent countless hours creating content. And not too long ago, there was no central location (other than Excel) to track which of those efforts were paying off, and which were a waste of time and budget. But times have changed. In this section, we will take a look at some of the tools that live in Salesforce that can help you prove the value of your hard work.
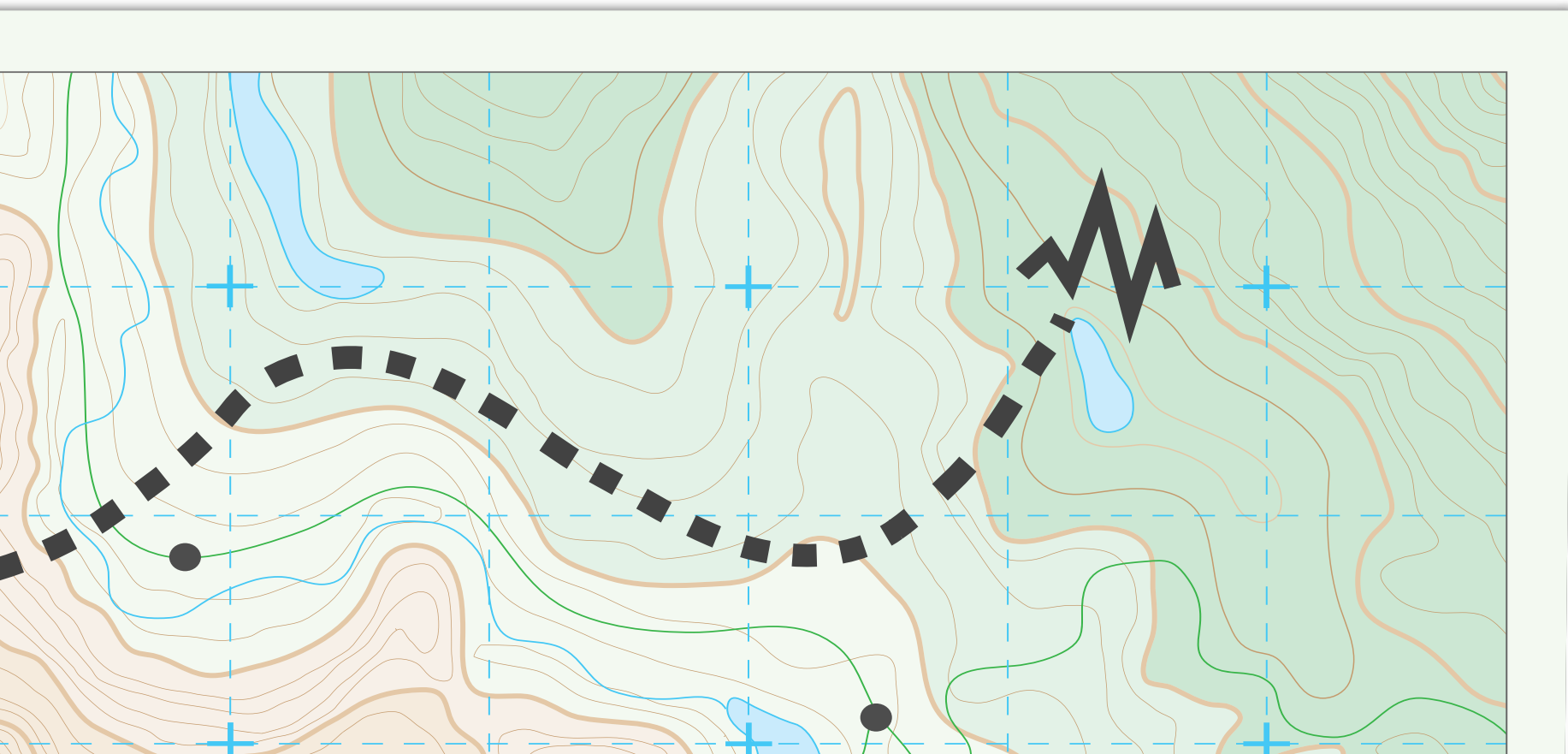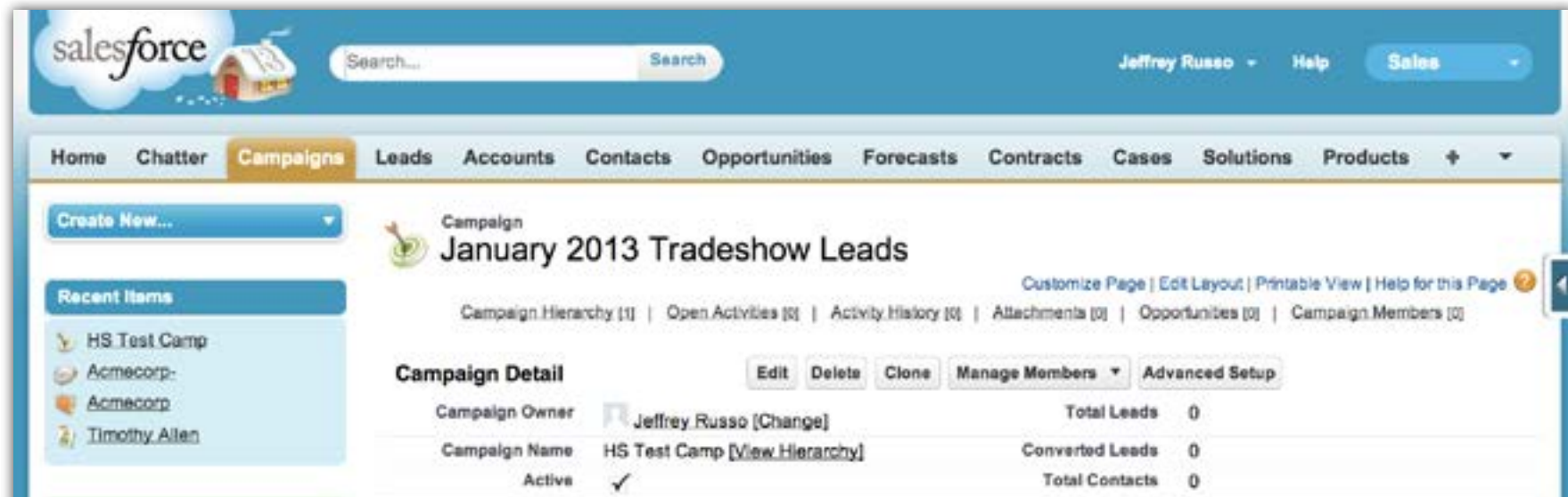
Basic ROI Tracking With Salesforce Campaigns

As a marketer, chances are that coordinating campaigns is a significant part of your day to day work. What a business considers to be a campaign varies widely - it might be a SEM campaign, a media buy, a tradeshow or physical event, or even a massive, multi-year effort to promote a major launch.

In Salesforce, a "campaign" is another type of standard object. A campaign record contains several standard pieces of data - a campaign name, start and end dates, expected revenue, budgeted and actual costs, and more. These simple pieces of data can help you organize, track, and find your campaigns inside of Salesforce.

While Salesforce campaigns have many uses, most marketers use them for reporting purposes. Salesforce campaigns make it easy to report on the number of leads, contacts, opportunities, and the amount of closed won revenue that came either from or was influenced by a specific effort.

How do Salesforce Campaigns Work?

The meat of the campaign object in Salesforce is in how it connects to other records. Inside of a campaign object, you'll find a list of leads, contacts, and opportunities associated with the campaign. (On each lead or contact record, you can also see which campaigns that record has touched.) Leads and contacts can be added to a campaign manually one by one, through a mass import, or automatically through most marketing platforms like HubSpot. (For example, when a lead comes in through a landing page designed for a particular campaign, it can automatically be assigned to that campaign when passed to Salesforce.)

Salesforce campaigns can be a valuable tool to track where leads, contacts, and opportunities originate from in Salesforce, but it's also important to know that campaigns have certain limitations. Associating leads and contacts with a campaign can be a fairly manual process. It requires you to either manually associate leads with a campaign one by one, via an import, or capture those leads through a specialized web to lead form. In contrast, a marketing platform allows you to associate traffic and its ultimate results back to a campaign. (For example, if a visitor comes in through a link publicized through a media buy that is part of a campaign, then converts into a lead and subsequently a customer months later, a marketing platform like HubSpot can still associate that lead back to the campaign that originally brought them in.)

Salesforce campaigns are primarily designed to track the results of your marketing efforts, but aren't "aware" of the different components of your campaign. This means that the impact of each of the many components of your campaign are not tracked separately, as they would be by default in many marketing platforms. Campaigns in Salesforce also do little to help you organize these different efforts and the many pieces of collateral often associated with them.
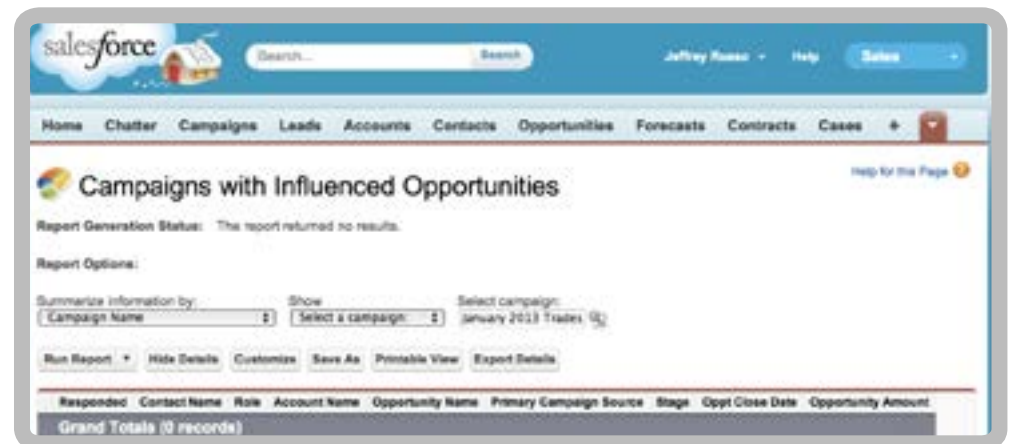
Advanced ROI Tracking with Closed Loop Reporting
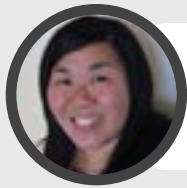
By Juliette Kopecky
Product Marketing Manager at HubSpot

What is Closed Loop Reporting?

An integral part to running a successful marketing campaign is showing how your efforts resulted in actual customers for your company, referred to as "closing the loop" between marketing and sales. However, for many marketers, calculating their marketing ROI can be a daunting task given that it requires tracking a single prospect's path from visitor to lead to customer, especially if you use many systems to manage your marketing efforts. Salesforce has the ability to work in conjunction with a marketing platform like HubSpot to make closed-loop reporting easy and seamless. You'll be able to tie your revenue dollars and customers back to the marketing efforts and individual leads that produced them. As your leads progress through your marketing and sales stages, you'll be able to attribute them back to the channel they originated from (organic search, email, a tradeshow, your blog, or an SEM campaign, for example.) As you begin to understand which of your marketing efforts result in the best visitors, leads, and customers for your business, you can double-down on those activities and cut the ones that aren't working. That's the beauty of closed-loop reporting.
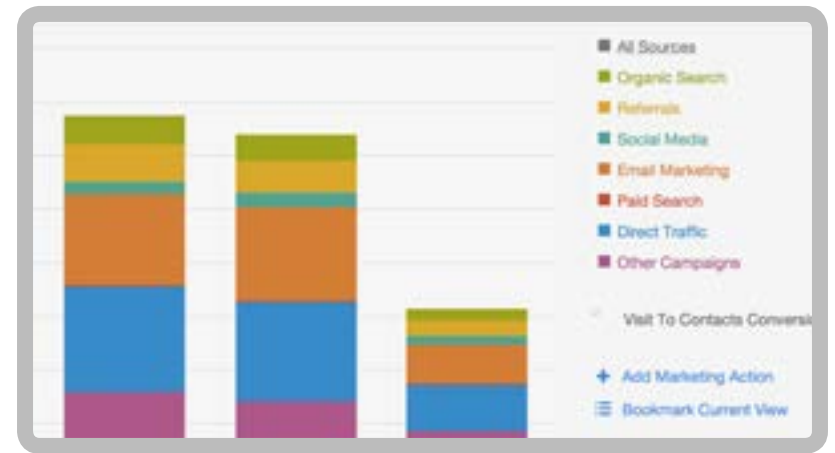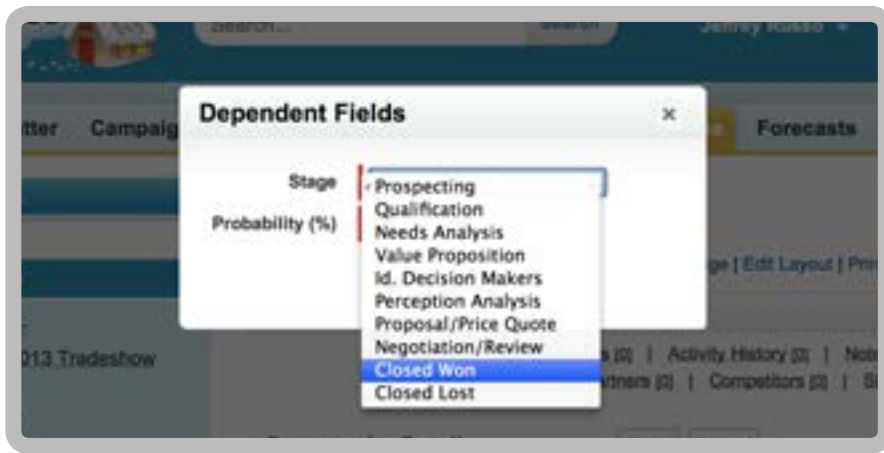
How Closed Loop Reporting Works

Think of closed-loop reporting as a supercharged version of Salesforce's campaign tracking feature. It involves mapping data on closed won deals in Salesforce backwards to all of the marketing activities that touched that lead. When one of your sales reps closes a deal and marks them as "won" in Salesforce, that information updates your marketing system so that you can measure which of your activities brought them to your site, when they converted to a lead, and what content assisted the process along the way - all automatically.

From a technical perspective, closed-loop reporting begins when your marketing platform stores a "cookie" (a small snippet of code) in a visitors browser when they first visit your website. As they continue to visit your site, you'll be able to collect valuable information on what they're looking at and when. When they convert into a lead, the marketing platform automatically matches all of that back data to the persons' identity, and passes this valuable lead intelligence to your Sales team in the Salesforce lead record. When your sales rep marks that lead as "won" in Salesforce, that information will automatically be passed back to your marketing platform, allowing you to see closed-loop reporting in your analytics views.

Closed-loop reporting is one of the most powerful tools that online marketers have in their arsenal. Not only does it allow us to demonstrate the value of our marketing efforts to our team, but it also shows us opportunities for improving our marketing and better aligning our sales and marketing goals.

CHAPTER FIVE: SALES & MARKETING ALIGNMENT

Alignment. Sounds like a buzzword, doesn't it? While alignment might seem like a nebulous idea, don't doubt that aligning your sales and marketing teams can have a huge impact on how you market, sell, and the overall success of your organization.

In this section, we'll ask the hard questions - what exactly does alignment mean? We will also step through how and why alignment is vitally important to a successful deployment of Salesforce or any other CRM system.
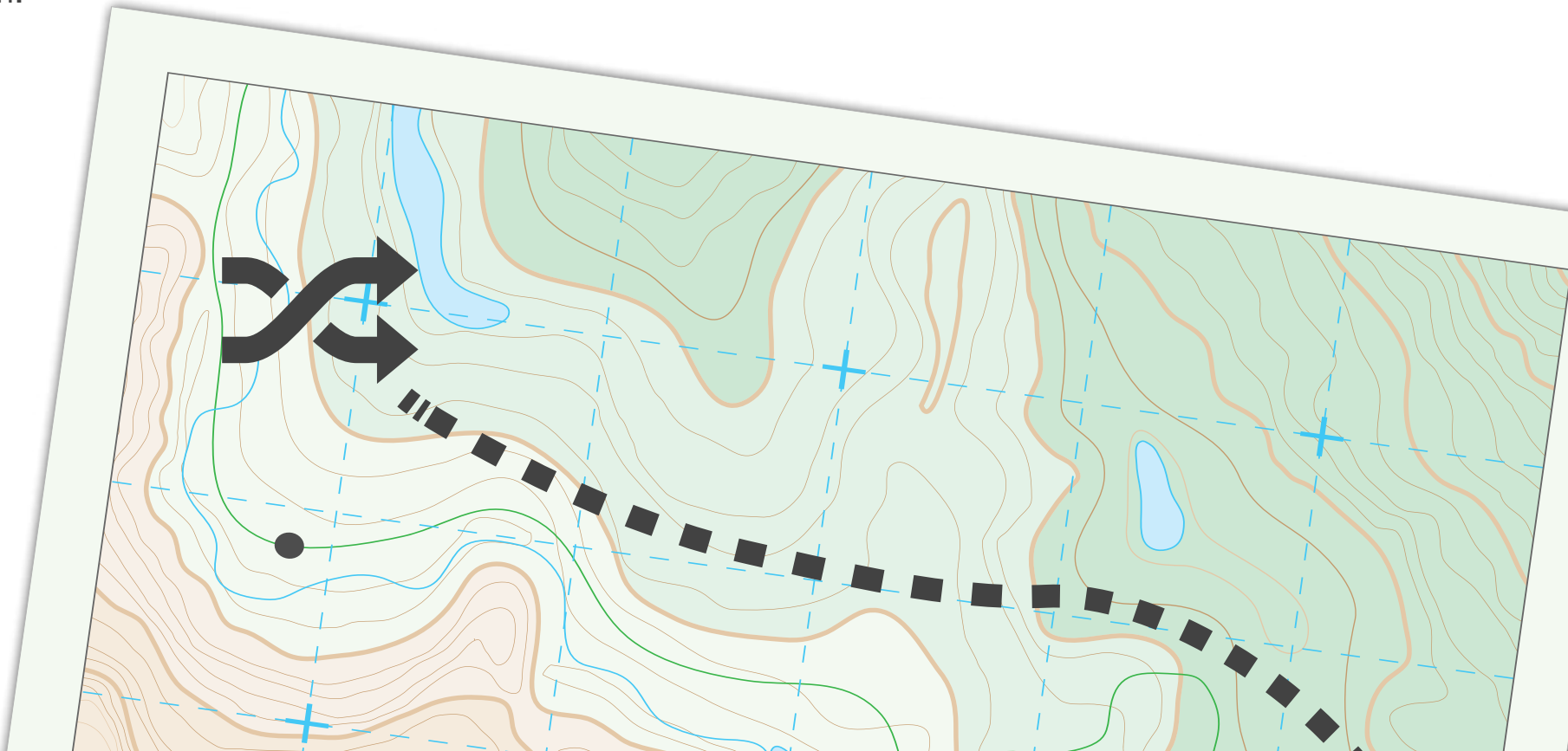
A 2010 study by the Aberdeen Group found that companies with strong alignment between sales and marketing achieved 20% annual revenue growth, compared to a 4% decline in annual revenues for companies with poor alignment.

a·lign·ment
/əˈlīnmənt/

In a practical sense, marketing and sales alignment simply means that both teams have an agreement in place for what they provide to one another, and how they develop and work with leads in the pipeline. While well aligned teams look different in different organizations, here are a few ideas to help you start out towards better alignment between teams.

Service Level Agreements (SLAs)

Many organizations have mostly informal agreements in place between marketing and sales: Sales wants more consistently high quality leads; Marketing wants to make sure that their leads are being worked, and are actually converting into customers. Both teams, at the end of the day, are charged with bringing in more revenue and more customers while meeting acquisition cost goals. Unfortunately, having vague agreements on what both teams provide to one another is where a lot of organizations run into rough patches. A Service Level Agreement (SLA) addresses this issue by formalizing the marketing-sales relationship and hand-off.

Marketing SLAs

For marketing, a good SLA (service level agreement) should consist of two factors - a volume goal (how many leads does marketing agree to deliver to sales in a given month?) and a quality goal.

Setting a volume goal is relatively straightforward. Your volume goal should be guided by the larger goals of your business. If your CEO is shooting for 5% more revenue in a quarter, do the math and work it backwards to a reasonable leads goal.

Setting a quality goal is a little bit more nuanced, but it doesn't need to be difficult. First, work with your sales team to better understand which of your leads are actually closing. Are there any common characteristics amongst those leads? Are they coming from one channel in particular, or are they more likely to be people in a particular role at their company? These characteristics are the building blocks for sorting out what we call a marketing qualified lead (MQL.) Once you have a rough definition for what constitutes an MQL, you can set a goal for delivering more of these type of leads over time.
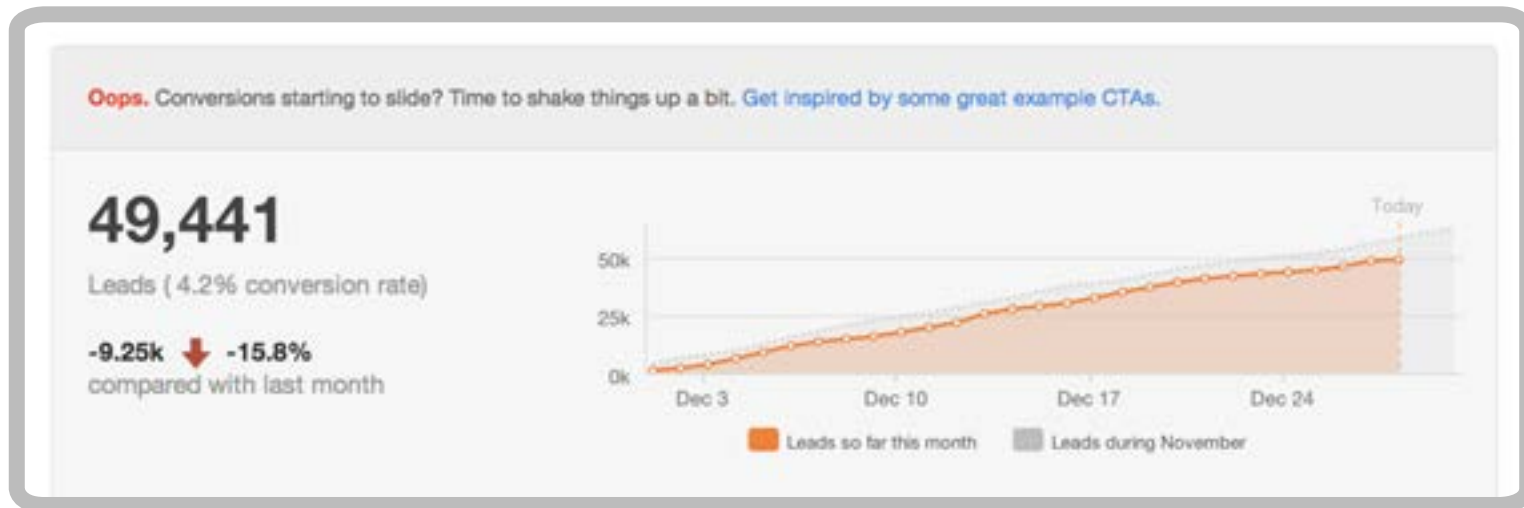
Your marketing software platform should make it easy to track against your marketing SLA
over the course of the month. Above: the HubSpot dashboard.

Sales SLAs

Just as marketing has an obligation to the sales team to deliver a certain volume and quality of leads each month, the sales team should commit to working a certain percentage of those leads, and strive toward a conversion rate goal of turning their leads into customers.

Deciding on close and work rate goals for your sales team requires a back knowledge of your sales team's average work rates, conversion rates, and averages of how many leads marketing provides in most months. Again, you'll want to start with your organizations' larger goals in mind - If your company is shooting for a specific revenue number for the year, work it backwards. What is the average value of a new customer, and how many of those customers would you need to hit the goal? How many leads is marketing providing to sales, and what would the close rate of those leads need to be to hit the revenue goal?

Mutually Agreed Upon Stage Definitions

Another key component of aligning your sales and marketing teams is a mutual understanding about what different types of leads are in your pipeline, and where they are in the process. When you have definitions in place about what constitutes a lead versus a marketing or sales-qualified lead, you can start to structure a process around the actions that both teams take with different types of leads. Let's take a look at a framework for stages that many organizations use.

SUBSCRIBER STAGE
Subscribers have expressed a very early interest in your company or product by taking an early action (i.e., signing up for your newsletter) - you don't yet know enough about them to consider them a proper lead, and they don't yet warrant sales intervention.
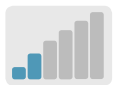
LEAD STAGE
Leads are people who have expressed some general interest in what your business sells or does. Maybe they have filled out a form that asks for more than just an email address, or have downloaded a piece of educational content from your website, like a whitepaper.

MARKETING QUALIFIED LEAD (MQL) STAGE
Marketing Qualified Leads, commonly known as MQLs, are leads who have metaphorically "raised their hands" to signify a deeper interest in your product. Maybe they have downloaded a buyers' guide for the product you offer, or requested a demo or consultation on your product. They are prospective buyers, but haven't yet been qualified as full fledged opportunities.

SALES QUALIFIED LEAD (SQL)
SQLs (sometimes called "sales accepted leads") are leads that your sales team agrees are worthy of follow up from a real person.

OPPORTUNITY STAGE
Opportunities are leads who a salesperson has determined represents a real prospective buyer of your product or service. At this point, most organizations will send the lead from their marketing database to their CRM system.
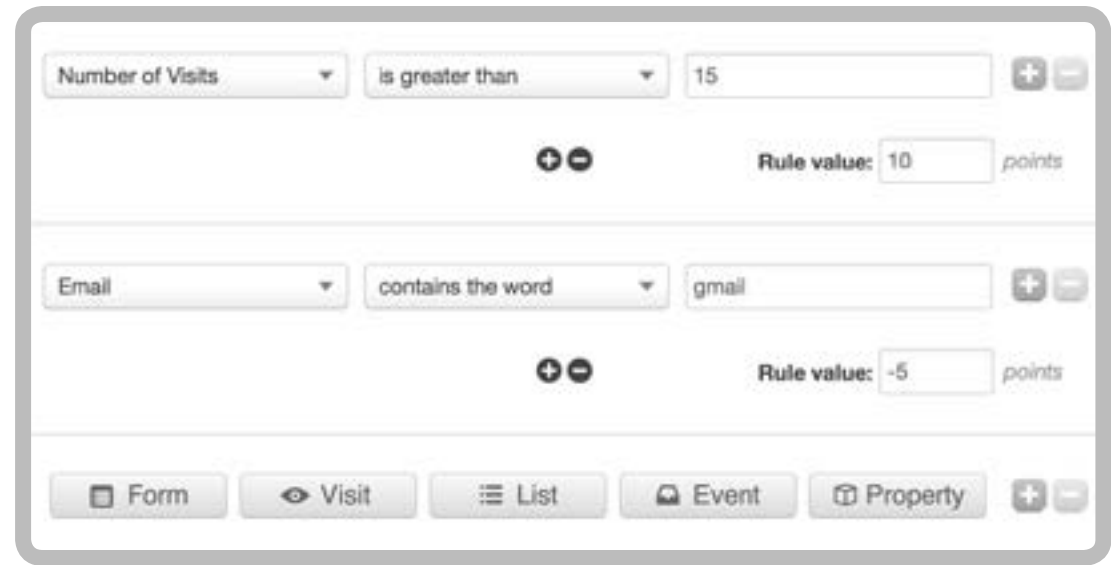
CUSTOMER STAGE
An actual, paying customer.

Lead Scoring

Lead scoring is the practice of assigning points to your leads based on their characteristics and activities. That score is then used by marketers and sales reps to order leads based on their level of qualification, and what action should be taken for an individual lead.

Functionally, lead scoring is most often carried out in a marketing platform, then passed to Salesforce along with the leads when they are ready for the sales team. (In some cases, the lead score is also used as the proxy to determine when a lead is ready to be passed to your sales team.)

Lead Scoring or Lifecycle Stages?

While lead scoring can be helpful to organizations that have a very large volume of leads, it isn't necessarily the right approach to prioritizing leads for every company. Many organizations are better served by using lifecycle stages with some simple criteria to control when a lead should move from one stage to another. Let's take a look at both approaches and how they differ from one another.

Lead Scoring

PROS
- Leads can easily be compared to one another based on their score
- Prioritizing leads, and knowing who to follow up with, is always clear
- Very effective for managing a very large volume of active leads

CONS
- Requires a deep knowledge of what makes leads more likely to close for accurate assignment of point values
- Scores are sometimes misleading (i.e., scores sometimes paint differences between leads that are actually very similar)
- Looking at a score doesn't immediately tell you how a lead got the score they have been assigned

Lifecycle Stages

PROS
- Easier to set up, maintain over time than lead scoring
- Simpler logic behind stages makes assigning lifecycle stages, and understanding why a lead is placed in a given lifecycle stage more intuitive
- Not as prone to mistakes or fluctuations as lead scoring

CONS
- Lifecycle stages don't show the differences that may exist between leads who have the same stage
- Not as effective for very large lead pipelines where many leads may end up in one stage

CHAPTER SIX: SALESFORCE TERMINOLOGY IN PLAIN ENGLISH

If you are new to Salesforce, or work in an organization that uses a more sophisticated or customized Salesforce setup, chances are that you hear a lot of terms thrown around, but may not understand them all. It can be tough to get clear explanations of what each of those terms means, even with the help of Google. This plain english Salesforce glossary explains some of the terms that are most important to marketers when it comes to Salesforce.
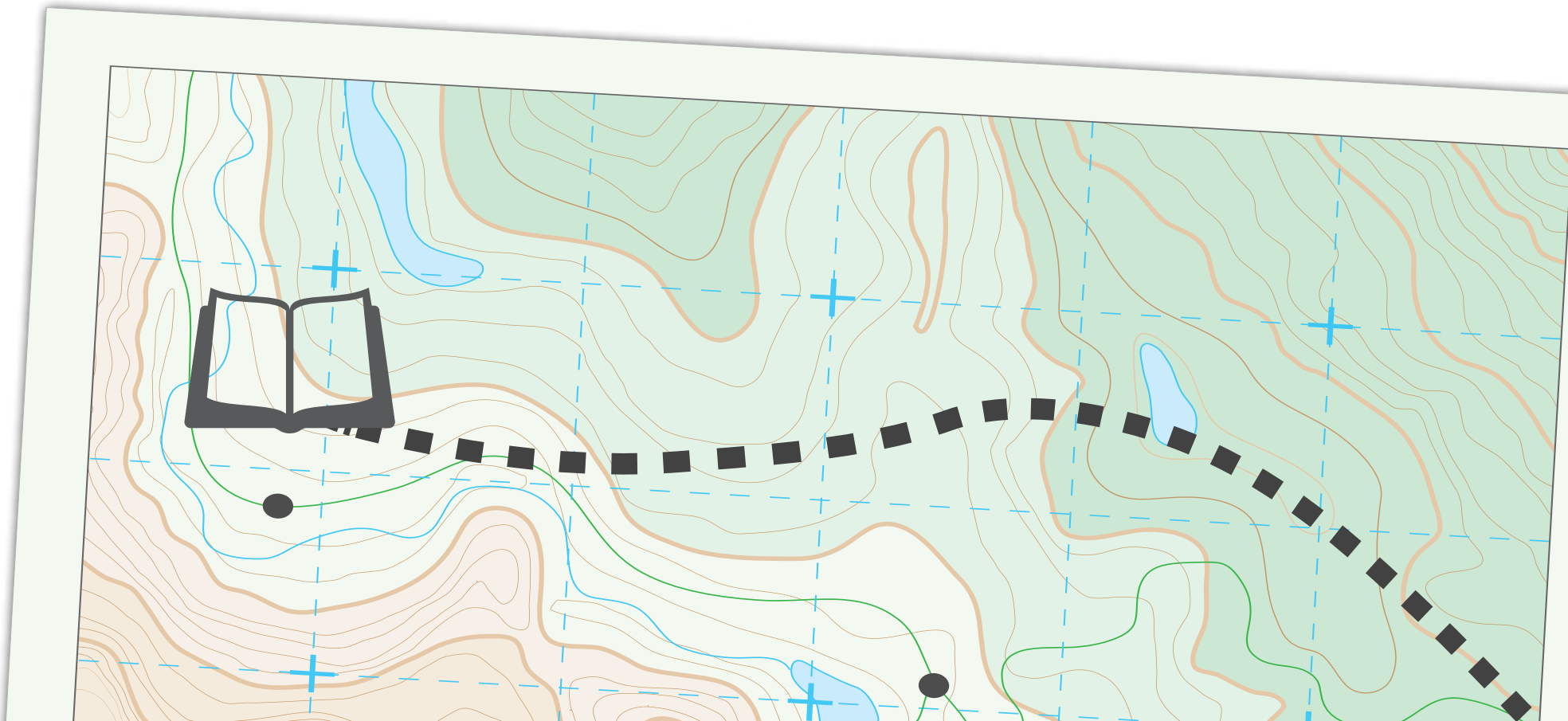
TIP: Press CTRL+F (or Command + F on a mac) to search through the glossary!

A

Account
A standard object in Salesforce that represents a company or organization (but not necessarily a customer). An account may have contacts (individuals or employees who work there), opportunities (potential sales deals), and other objects associated with it. The contact record stores details on the company like the company name, address, etc.

Activities
Records stored on an object that are typically used to represent actions taken on a lead, contact, or account - things like phone calls, emails from a rep, or future tasks that a rep intends to complete. Many marketing platforms can automatically insert activities into the activity history to give a rep context about key actions marketing is taking with respect to a lead (email sends, if those emails were opened or clicked, form submissions made by the lead, etc.).

Activity History
A list stored on a record in Salesforce that shows the history of activities that have been carried out on that object. For example, the activity history section on a contact record may contain a list of actions the sales rep has taken in working that lead - emails sent, calls made, and more.

API
An API (application programming interface) is a system used by a piece of software to talk to other pieces of software. Salesforce offers an API that allows it to be connected to outside systems like a marketing platform or email tool. Some third parties (like HubSpot) have standard "connectors" that makes it possible to connect them to Salesforce's API easily and without any technical knowledge.

Apex
A programming language used by developers to build applications that interact with Salesforce. These applications are often hosted on the force.com platform; there are hundreds of generally available applications in the Salesforce Appexchange.

AppExchange

Salesforce's app marketplace, which contains hundreds of integrations with third party services that allow users to extend the functionality of their Salesforce instance. HubSpot's Salesforce integration, for example, is listed in the Salesforce AppExchange.

B

Bi-Directional Sync

A feature of a third party tool (like HubSpot) that allows it to both read information from, and write information to, Salesforce. (Example: Because HubSpot's Salesforce integration features bi-directional sync, it can both add new leads to Salesforce, and pull leads from Salesforce based on a users' preference.)

C

Campaign

An object in Salesforce used to track a marketing effort. See the "Campaign" section above.

Chatter

A set of collaboration tools that are woven throughout Salesforce, allowing individuals to work together and share information on deals they are working. Users can join different groups, comment on different objects and data, and share details through Chatter.

Closed Loop Reporting

A reporting methodology in which data about which leads/contacts/accounts ultimately convert into sales is passed back to a marketing platform. In the marketing platform, the marketer can then attribute that customer to the various marketing efforts they touched, and better understand the ROI each of those efforts generated.

Closed Won Opportunity

A standard stage in Salesforce that refers to the status of an opportunity. An opportunity is typically set to "closed won" status when a deal is closed and the associated account is now a customer. Systems like HubSpot listen for this "closed won" status in Salesforce to enable closed loop reporting.

Connector

A piece of software that connects another system (like a marketing software platform, or an email tool) to Salesforce.

Contact

A standard object in Salesforce that represents an individual person. The contact record contains details like a name, address, email, and phone number. A contact can be attached to an account and opportunity record.

Contact Role

A standard field included on the contact record that can be used to define the role an individual plays in an account or opportunity (e.g., decision maker, influencer, etc.).

Custom Field

A specialized piece of data stored in Salesforce that is unique to the user's business. (e.g., a dog food manufacturer might create a custom field for "favorite dog breed" in its system to track the favorite breed of each of its contacts.).

Custom Object

A specialized type of record in Salesforce created to meet the needs of an individual business. An example of this might be an "employee" object that contains several details about an employee that is used by an HR department.

Custom Report

A view of data in Salesforce that has been personalized by the user to include exactly the information they want to see. A custom report might use filters to determine which records it includes (e.g., this report should include only lead records in massachusetts who are CEOs) and will contain a set of individually chosen fields, usually as columns (e.g., the name, email address, and lead score of those Massachusetts CEO leads.)

D

Dashboard

A dashboard in Salesforce is a graphical representation of what you might find in a report. Dashboards might include charts, gauges, or other graphics that represent the metrics that underly them. They make it easy for a team to track progress toward a goal or metric.

F

Field

A field in Salesforce is a piece of data stored on an object. An example of a field might be the "First Name", or "Email Address" field found on the lead and contact records. Fields are also often referred to as "properties".

Force.com

A cloud platform service that allows developers to build and host applications on Salesforce's servers. Force.com is widely used to host applications that work in conjunction with Salesforce, like many of the apps available in the Salesforce AppExchange.

Forecast

Generally speaking, a forecast is an estimate of revenue that will be brought in during a given time period. In the context of Salesforce, a forecast is a type of report that shows a tally of data from opportunities expected to close in a specified time period. Your sales managers may use Salesforce forecasts to monitor their pipeline throughout the month.

Formula Field

A formula field in Salesforce is similar to a cell in Excel that contains a formula. The field relies on an equation to populate the data it shows. That equation may take other fields or information into consideration. An example of a formula field might be a field that shows the number of days since sales last followed up with a specific lead.

L

Lead
A standard object in Salesforce that represents an individual identity at an early stage in the sales process. A lead record isn't natively connected to other data in Salesforce, but is "converted" when it represents a valid opportunity (a process which creates a contact in its place, and associates it with account and opportunity records). See the lead object section above.

Lead Scoring
A process typically carried out in a marketing platform that assigns a numeric value to a lead to represent how qualified it is. Every organization typically devises its own scoring criteria based on factors that determine the likelihood of the lead to be well qualified. See the section on lead scoring above.

Lookup
A field that references the data in another field, possibly on another object. A lookup field can be identified by the clickable magnifying glass icon that appears alongside it. An example of a standard lookup field is the "Account" field that appears on a contact - this field is set to reference the "Account Name" field on the associated account object.

M

Marketing Cloud
A suite of social analytics tools offered as an add-on to Salesforce that help large enterprise organizations monitor and leverage social media.

O

Object

In the context of Salesforce, an "object" is a type of record that Salesforce uses to store your data. There are several standard objects that every Salesforce instance comes with out of the box - an account, a lead, an opportunity, a contact, and many more. It is also possible to set up custom objects to reflect custom pieces of data or custom parts of your process.
See the section on objects above.

Opportunity

A standard object in Salesforce that represents a potential sales deal. An opportunity record typically contains details about the potential deal like expected deal size (a dollar amount that cascades up to Salesforce forecasts), expected close date, probability, and opportunity stage. See the section on the opportunity object above.

Opportunity Stage

A standard field found on the opportunity object that is used to track the status of an opportunity. The opportunity stage may be set to one of several values such as "Prospecting", "Negotiation/Review", or "Closed Won", which represents that the opportunity is associated with a customer or won business.

Q

Queue

A queue in Salesforce is akin to a "holding pen" for objects that aren't yet assigned to an individual. An example might be a "Recycled Leads Queue" where your sales reps send unqualified leads to if they determine that the lead isn't ready for sales.

R

Report

A report is what it sounds like - a view in Salesforce of a specific subset of records and fields of data. Salesforce comes with several standard report types out of the box (e.g., the Campaign ROI Analysis Report, the Lead History Report). It is also possible to create custom reports in Salesforce.

S

Standard Object

A type of record where data is stored that Salesforce uses out of the box. Examples of a standard object might be a lead object, a contact object, an account object, or an opportunity object. Also see the definition for "object".

T

Task

Tasks in Salesforce represent an action that has been taken or will be taken with respect to a record in Salesforce. An example of a task might be a phone call to a lead, or a marketing email that was sent and opened to a contact. Tasks are listed out on individual records, and are used by sales reps to manage their day to day actions for each lead. Managers can track tasks to measure the activity of a rep via reports.

Trigger

A piece of Apex code that is used to kick off actions in Salesforce when a change to a record, or creation of a new record, happens in Salesforce. An example use of a trigger might be to change the "company type" field on an account record to "enterprise" if an account is set to have more than 500 employees in its company size field.

V

View

Think of a view as a predefined set of filter criteria that can be applied to a list of data from a dropdown menu. Many lists of data come with a preset list of helpful views - for example, you might choose to filter a list of contacts to see only "My Contacts", which would surface a list of only contacts that you are set as the owner of. You can also create custom views in Salesforce.

W

Web to Lead

A tool in Salesforce that allows you to create simple forms that you can place on outside websites. When a user fills out the form, a lead is created in Salesforce. Note that most Salesforce Web to Lead forms will only accept up to 500 submissions per day.

Workflow Rule

A tool in Salesforce that allows you to automate certain actions like sending notification emails, updating fields in your database, adding tasks to a record in Salesforce, and more. An example use of workflow rules might be setting up a rule that sends an email to a specific sales manager when a deal comes in that needs their approval, based on the company size (or any other characteristic) of the associated opportunity.

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