

Salesforce.com for Marketers

What does Salesforce.com offer Marketers?

Salesforce.com includes features and functionality that make B2B marketing more efficient, effective, and measurable, including: campaign management, lead management, demographic scoring, workflows, triggers, approvals, analytics, reporting, dashboards and more.

Salesforce and Marketing Automation

These marketing-focused features in Salesforce.com, when combined with marketing automation capabilities, make for a great partnership in the “revenue cycle”—a concept that transcends the traditional sales cycle of handing off leads from marketing to sales and, instead, involves coordinating marketing and sales activities to generate maximum revenue impact. When marketers use Salesforce.com in conjunction with marketing automation tools, companies can benefit from all the campaign execution and analytics requirements of today’s marketing departments combined with the powerful pipeline creation functionality necessary to meet the demands of the sales team.

Top Metrics to Measure Marketing ROI with Salesforce.com

- Increased response rates per campaign type
- Increased conversion rates from each stage of your revenue cycle to the next stage (inquiry to lead; lead to qualified lead; qualified lead to opportunity; and so on)
- Increased qualified leads, opportunities and revenue per campaign type
- Increased sales productivity (e.g., speed at which deals are closed, values of these deals, etc.)
- Decreased cost per qualified lead
- Decreased cost per opportunity

Sales and Marketing Alignment - Analyst Facts

“As more executives are being held accountable for process and sales optimization, bridging the gap and aligning sales with marketing is a critical imperative versus a luxury of company culture.”

— *Closing the Gap: The Sales & Marketing Alignment Imperative*, CMO Council, 2008

“Access to prospect information, done right, helps sales understand how buyers buy and makes the sales process more efficient.”

— **Laura Ramos**, B2B Marketing POSTs Blog, 2009

“Without formal definitions for lead stages and a process to nurture, prioritize and pass leads back and forth between the two functions, organizations will struggle with issues between sales and marketing.”

— **Ian Michiels**, *Anatomy of a Best-in-Class Organization: Best Practices in Sales and Marketing Alignment*, Aberdeen Group, 2008

Glossary Terms

Account – Companies or organizations; can be prospects, customers, partners or even competitors

Campaign – Any marketing program to be tracked in Salesforce.com or Marketo

Cloud Computing – A term referring to a development platform in which applications are delivered as services in the “cloud,” requiring no hardware or software to maintain

Converted Lead – A lead that has been deemed qualified for sales and that converts into a Contact

Contact – An individual belonging to an Account

Custom Field – A field outside of the preconfigured fields provided within Salesforce.com created to fit the specific needs of a business

Custom Object – A custom Salesforce.com database table that enables organizations to store information unique to them

Custom Report – A report outside of the standard set of Salesforce.com reports created to measure and analyze data in a specific way

Dashboard – A visual display of a company’s performance metrics based on one or more custom reports

Lead – An individual or company that has the potential of doing business with your organization

Lead Management – The process of generating revenue from leads by collecting, qualifying and interacting with individuals and/or organizations in relevant ways throughout the buying process

Lead Nurturing – The process of building relationships with qualified prospects regardless of their timing to buy, with the goal of earning their business when they are ready

Lead Scoring – The process of determining the sales readiness of leads using a pre-determined scoring methodology and ranking them accordingly

Marketing Asset – A piece of marketing content (e.g. whitepapers, videos, newsletters, webinars, etc.) used to educate and generate interest for a company’s products or services

Opportunities – Deals that constitute a sales pipeline and contribute to forecast

Parent-child Campaign – A campaign that involves an umbrella “parent” campaign record (e.g. “2010-Q1-Email”) that is comprised of numerous “child” campaigns (e.g., “2010-Q1-Email-Introduction,” “2010-Q1-Email-First Follow-up,” etc.)

Revenue Cycle – A new way of looking at the traditional sales cycle. The revenue cycle starts from the day the organization first meets a prospect and continues through the sale and beyond to the customer relationship

Sales-Ready Leads (SRLs) – A lead that is ready for sales interaction, often decided by a lead score

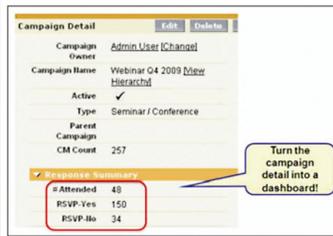
Software-as-a-Service (SaaS) – A way of deploying software so that users access the software “on-demand” as a web-based service, and the software vendor hosts the application on its own web servers

Trigger – An event based on a change or update in status, demographic information or user behavior that causes a lead to proceed along a specific workflow branch or new path

Workflow – A pre-determined path of interactions for individuals to experience based on their profile, demographic and/or behavioral data with the goal of nurturing and building relationships

The Building Blocks of Salesforce.com for Marketers' Campaigns

A campaign is any marketing program or project. It is also the fundamental marketing vehicle for driving new business and increasing revenue. More than just a framework or way to classify marketing activities, campaigns are essential to targeting segments in the most relevant way possible and ultimately build relationships with prospects as they proceed through the revenue cycle. Characteristics of a campaign include name, type (e.g. email, webinar, advertisement), start/end dates, number of responses and more. In addition to tracking execution, campaigns can be used to measure the response of campaigns, providing important insight into the how you should market to your prospects.



Lead Management, Nurturing and Scoring

Salesforce.com enables marketers to capture and track leads, automatically routing them to the right sales team by territory, industry or other criteria. The system provides the parametric data to do demographic lead scoring. Campaigns and activities provide the basis for behavioral scoring and ranking. Consequently, prospects will be prioritized so that sales-ready leads are assigned in real-time and the less mature leads are handled by marketing for ongoing nurturing campaigns.



Dashboards

Dashboards in Salesforce.com offer marketers a way to consolidate, and access in real-time, custom reports and metrics, and visually represent this data using charts, graphs and other tools. A dashboard will usually cover a broad area of performance (e.g., Email Marketing Campaign Performance in Q1) and will consist of various custom reports that give further insight into this specific area (e.g., Leads by Lead Source, Opportunities by Campaign Type, etc.). By double-clicking on dashboard elements, users can get immediate "drill down" views on filtered data (such as "show me all the detail of Sam's stage-3 opportunities").



Reports

Salesforce.com reports enable marketers to manipulate and analyze data in various ways in order to measure marketing ROI. The application provides a standard set of best practice reports, as well as the ability to create custom reports to fit specific business needs. Salesforce's Custom Report Types let you define your own "table joins" to create powerful custom views of your data.

Name	Title	Other Fields
John Doe	VP Sales	...
Jane Smith	Marketing Manager	...

Salesforce.com Chatter

The Salesforce.com Chatter social platform enables companies to better collaborate through their own private social networking site. With Chatter, organizations benefit from a single platform that provides access to people (e.g. profiles, status updates), applications (e.g., Salesforce.com, Facebook, Twitter), and content (e.g. documents, spreadsheets, presentations).



Salesforce.com for Twitter

Salesforce.com for Twitter enables companies to search and monitor Twitter in real-time, attach tweets to specific lead records in Salesforce, join Twitter conversations and create a Twitter support channel, increasing value and insight throughout multiple departments. B2B marketers can create predefined searches by keyword or create individual Twitter accounts to cover specific topics, identifying key individuals and conversations that may provide insight into the buying process.



Salesforce.com for Marketers – Advanced Techniques

- Assign lead scores according to implicit data such as the online behaviors of both anonymous and known visitors.
- Create parent-child campaigns to provide greater insight into the marketing ROI of both large-scale initiatives and the specific marketing programs that comprise them.
- Give greater detail to your campaign response types (e.g., for a webinar, measure responses for "Registered," "Attended," "Did not attend," "Left early") and use this information to enable more targeted, follow-up marketing.
- Don't just look at campaign results by individual campaign. Instead, use campaign influence reports to understand the key marketing activities needed to develop a lead, and the impact of your campaigns on the pipeline.
- Upon importing members into a campaign, create an automatic workflow trigger to be sent out to every campaign member, such as a standard email template.
- Provide even greater levels of detail in your dashboards by combining two different chart types into a single chart layout, or by preventing small amounts of data from being classified as "Other" in your visual representations.
- Use Salesforce.com for Twitter to bring greater insight into your lead nurturing and sales conversations by attaching relevant tweets to lead records.

Top Resources

- Modern B2B Marketing Blog: www.emarkable.ie
- Salesforce: www.salesforce.com
- SalesLogistix: www.saleslogistix.com
- Funnelholic: www.funnelholic.com
- Lead Sloth: www.leadslotch.com
- Demandbase: www.demandbase.com