
CHAPTER 10

Best Practices in Marketing

*Half the money I spend on advertising is wasted.
The trouble is, I don't know which half.*

—John Wannamaker

THIS CHAPTER IS FOR every member of the marketing team, because every part of the Salesforce.com system holds data and tools that can make your job easier. The Marketing department is usually the first or second organization in a company to adopt and effectively use SFDC. But the marketing team almost always makes mistakes in how they set up and use SFDC because they haven't really looked deeply enough at their business process—what can be called “the life of a lead.” Consequently, marketing looks bad—and undermines system credibility—when SFDC reports are misleading.

Marketing Organizations

Across the range of company types and industries served by SFDC, the marketing operation is organized in very different ways. Sometimes it reports to engineering, sometimes to sales, sometimes directly to the president—and sometimes sales even reports to marketing). So there's no way to organize this chapter around marketing *job titles*. Instead, it is structured around *job functions*, which may or may not report to the marketing organization.

The First Order of Business

Most of marketing's interactions with SFDC surround the early stages of pipeline formation—lead generation, processing, cultivation, nurturing, and qualification. This is the early part of the revenue generation business process, which is spearheaded by sales.

Although I'm a card-carrying marketing guy, my first bit of guidance is that the marketing group should almost never be the owner of the SFDC system. This system is called *Salesforce* for a reason, and you have to admit that the sales animal is a lot different from the marketing wonk. The SFDC system should be owned by the team that owns the revenue number—almost always, that's the sales department.

That said, marketing *must* be very actively involved in the design, usage, and analytics of SFDC. The core of many marketing functions will live in SFDC records. Marketing must own leads and campaigns, and should have control over several policy areas in the system. Marketing personnel will play a critical role in creating some of the fanciest reports and spearheading several of the key integrations between SFDC and supporting systems, such as the Web site, the content management system, the license management system, and the eCommerce system.

Further, marketing will design the database characteristics that lie at the core of closed-loop marketing¹—where every customer touch, from first mailing to customer support to PR, is logged and monitored through SFDC. Closed-loop marketing focuses on the feedback loops between the marketing message, sales activities, customer behavior, and customer response. Because SFDC will be used by marketing, external service bureaus, sales, customer support, and professional services, the system can hold *all* the data about a customer relationship, and be the touch point for all customer-facing activities. Add the elements of listening and adjusting the responses to input, and you have closed-loop marketing. Such a seamless operation means huge wins in conversion, loyalty, and profitability.

Developing a Model of Sales and Marketing Interactions

Before you can apply any of the recommendations in this chapter, you need to develop a model of how the company's revenue generation process works, and how sales and marketing need to interact. The goal is to create a service level agreement (SLA)—that is, a contract between sales and marketing about who does what to make revenue happen. Read the section “Define and Document the Sales Model” in Chapter 9, and participate with the sales team to get the details of this model nailed down and documented. This task can be achieved in an afternoon if you're serious, but it's one of the most highly leveraged things you can do to ensure that the marketing staff is on the same page with the sales team (as well as helping marketing personnel get on the same page with each other!).

Lead Generation and Collection

Before any lead generation starts, it's important to have a common understanding with sales about the life of a lead—how leads evolve, who handles them at various stages, and how the workflow triggers the conversion or demotion of leads. Read the discussion of this topic in Chapter 9, if you haven't already done so. Also check out the articles on www.SFDC-secrets.com for further discussion and tricks.

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1. To find out more on this topic, check out *The CMO Strategic Agenda: Automating Closed-Loop Marketing*, published in March 2008 by the Aberdeen Group. Several wonderful consultancies will also help you implement closed-loop marketing systems for a nominal fee (nominal as long as you sell expensive stuff).

Some issues need to be argued through in detail. One of the critical decisions is “Which information should we collect at the start of the prospecting process?” Almost always, marketing wants to collect a lot of information about the customers’ demographics and the competitive products they are considering. Sales typically wants to collect the customer’s title, purchase timeframe, and other qualification questions. While these are all valid requests, it’s not practical to collect these data at initial registration time, for three reasons:

- The collection form isn’t always under your control, particularly for tradeshow and videoconferencing services that allow the collection of only their standard fields.
- In almost any collection medium (but particularly the Web), the more information you ask for, the higher the likelihood of user drop-off. Typically, having more than five fields will cause a significant reduction in the number of leads and an equal increase in bogus responses (such as emails of asdf@asdf.com).
- Many target audiences get really irritated by nosy questions about purchase intent. In market segments where prospects hate sales calls, asking these questions can dramatically lower the quantity of leads.

In debating which data to collect, always ask what the information will *really* be used for, who is going to take the time to enter it and validate it, and whether the information could be inferred from some other data that can be purchased or obtained in the public domain. You’ll probably get to ask for only five items, so make sure they’re the best five. The questions should provide the minimum information needed to route/process the next step for the inquiry. The rest of the information that people would love to have should be collected during the first step of the qualification and lead nurturing process.

The next issue that needs to be argued about is “What constitutes a lead?” Best practices are to focus more on lead *quality* than on lead *quantity*. Low-quality leads are simply a waste of everyone’s time and money. Why market or try to sell people who don’t have genuine interest? The first step to lead quality is to distinguish leads from “Names”:

- A Name is merely the contact information for a person believed to be part of the target audience. Names are typically purchased from lists or are obtained from outside, but have not explicitly indicated they want to know more about the company, its products, or its services. Names are the lowest-quality leads and should almost always be relegated to mailing-list status and excluded from the telesales call-down list.
- A true lead, who is a respondent to marketing efforts, has explicitly requested more information about the company or its products. These leads should immediately be scored (a topic discussed later in this chapter) and put on the telesales call-down list. Check out the discussion on this topic in Chapters 8 and 9.

Once these basics are agreed to (and documented in the project wiki), the SFDC screens and variables need to be customized to fit the company's model. Almost always, a few custom fields (such as a calculated field for the sales region) need to be added to the lead object, and pick list fields for status, industry, and rating should be replaced by custom ones. Field history tracking should be turned on to provide an audit trail for the 20 most interesting fields in the lead object.

In addition to the SFDC modifications, it's important to modify the user registration screens on the company's Web site. Use drop-down pick lists for as many fields as you can (e.g., country, state, and job title) and use multiple landing pages to obviate the need for entering certain items (e.g., product interest area or vertical industry). Don't use a lead source, but instead populate the relevant campaign for the action the user has taken (more on this topic later in this chapter). If you decide to collect phone numbers, do so after you've collected the country information (so the user doesn't need to enter the country code for the phone number) and have a field for city/area code separated from the actual number. To avoid the infinite variety of misentered phone numbers, put example formats in small font immediately under the fields in the Web page. These tricks can dramatically increase both the data quality and the form-completion rates on your Web site.

Even if your company doesn't use email for marketing, it is *imperative* that its Web page forms collect the user's email address and validate it. Email addresses are essentially the *only* universal identifier that exists on the Web (and even they aren't completely reliable), so collect this information and validate it as early as you can. The strong form of validation is to send the user an email at the address the user provided, with the mail containing a unique URL² that must be clicked for the user to get access to the desired information, download items, or other goodies. A weaker form of validation is to simply send the user an email including the links to the documents or other goodies they've requested. This technique has become less effective as more users learn to block HTML mail, and each new release of Outlook raises filters to higher and higher levels. Either way, you need to let the registrant know what will happen when the user clicks "submit" (typically with a splash page on the Web), so he or she knows what to do next. Inevitably, some people will employ "single-use" email addresses for their registration, but in most markets they usually constitute only a tiny percentage of the total audience, and you still know that the registrant is a human, rather than a Web bot.

If you want to get really fancy, create an "account" page on your Web site where users can select and maintain their preferences. When a user registers, your Web server software creates the account and drops a cookie on the user's system so you can track all of that person's actions on the site going forward. Every few months, when the user returns (assuming you have a highly informational site, or lots of short-term offers), you ask the user for

2. By making this URL unique, you can measure which individuals follow through and when their actions occur. This information can be used to trigger some detailed lead scoring, or assist in web site redesigns.

just a bit more information. Such a request is typically couched in terms of “Our records aren’t quite complete . . .” and asks for only one or two new items each time. This progressive registration technique allows you to collect quite a bit of information about visitors without irritating them. Of course, you need to make sure that all this information is completely integrated with the company’s eCommerce site, so that users don’t ever have to reenter any of their information. As discussed in Chapter 2, do *not* collect or store highly personal financial information (credit cards, Social Security numbers, health ID numbers, or the like) in SFDC.

Special attention needs to be given to email opt-in/opt-out preferences. For a good discussion of general principles of user privacy and email preferences, check out www.SFDC-secrets.com. The key point is that the lead-capture page should really be a *user account creation* page, so that when users come back to the site in the future, their information and personal preferences will be remembered. On the registration page, give visitors clear guidance about what registering will do, which kinds of communications they can opt in/opt out for, and how they can change their preferences later.³ A new CAN SPAM requirement mandates that opting out must be achievable from a single Web page, so keep the design simple. What you *don’t* want is have a single opt-out check box, as offering just one choice greatly increases the probability that users will tell you to leave them completely alone—and you would then have to honor that overly broad request.

The following sections describe best practices surrounding typical lead generation activities. For all tactics, make sure to read the “Lead Capture and Insertion” section later in this chapter.

Tradeshows and Conferences

At tradeshows and conferences, you have almost no control over the data the show operator will collect. The data are usually provided in a one or more spreadsheets or CSV files, and you need to watch out for and fix the following problems: states and countries that are misspelled and do not conform to ISO standards,⁴ phone numbers with erratic formats (particularly with international attendees, who forget to include their country codes), and foreign character sets that become garbled (particularly for individuals’ names and street addresses). Often, the data are not made available to sponsoring companies for several days after the event: get them in the system immediately thereafter!

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3. These choices are typically implemented as short HTML links that point to help/FAQ pop-up pages.
 4. When importing or entering data into SFDC, it’s a good idea to *not* spell out country and state names, but instead to use ISO-standard three-character country and state codes. Using these short codes makes it much easier to develop and maintain lead routing rules, formulas, triggers, reports, and other SFDC features. You can find references to this best practice at www.SFDC-secrets.com.

Tradeshows and conferences will sometimes deliver a bunch of information you didn't ask for, and probably won't get again. For example, questionnaires may ask attendees, "By what percentage will you be expanding your office/operations in the next 12 months?"—this could be great background information, but you don't collect this kind of thing for everyone. Don't throw this information away! You can either store it verbatim as a note associated with the lead, or you can abbreviate it in some way and put it in the lead's description field (in the preceding example, the information might be stated as "Growth in next 12 months: 8%").

Webinars

Webinars—whether recorded or live—are typically conducted through a service such as WebEx or GoToMeeting. These services collect relatively fixed types of data. The spreadsheets or CSV files they send to sponsoring companies have all the same problems as the data collected at tradeshows and conferences, but at least these services provide the data more quickly. Get these data cleaned and put into the system right away. Write a standard import template with macros in the spreadsheet that prep the data quickly and in a repeatable fashion.

Events

Seminars, meetings, dinners, and other lead generation events can deliver much better data quality for leads, particularly if attendees are required to register for the event on the company's Web site. If your registration page follows the guidance given earlier in this section, you're good to go. Plus, the leads will be entered into the system immediately, thanks to the web2lead automation; thus the lead response times can be very short.

Banner Ads, Site Sponsorships, and Other Internet Advertising

Banner ads and their brethren will typically generate traffic to your company's Web site, with no intrinsic lead or other tracking information. The only lead-related data that can be gleaned from this traffic is anonymous (unless users happen to have a browser cookie you're tracking) and of no real relevance to SFDC. If, however, there is a referring user ID embedded in the URL (as happens with big ad networks), store this information as part of the campaign record for each visitor.

Of course, if the site visitor is interested enough in your offerings to fill out a registration form, you have a lead to which you should attach all the "anonymous" information that HTML traffic provides. It is a best practice—although fairly complex—to correlate the lead's information with his or her page-visited history (using Web analytic software) so you can understand more about the nature of the prospect's interest. Pass this user-profile information into SFDC via hidden fields, so that your lead records are as rich as possible.

Google AdWords

Like other online ad media, Google AdWords can generate traffic for a company's Web site. Unlike more primitive online ads, AdWords traffic can be tightly correlated with SFDC campaigns and tracked through the conversion and sales-cycle process. Use the Salesforce for Google Adwords features—they really work and improve the visibility into your ads' effectiveness.

To increase lead quality⁵ for AdWords' ads, follow these guidelines:

- Organize your campaigns around your product's *use cases* or *target segments*. If you create a database accelerator, create campaigns around online transactions versus data warehousing, or financial versus telecom comparisons.
- Once you've focused your messages on these use cases or segments, create coherent content for the AdWords keywords and ad text. Keep the coherence going throughout the landing page content and the call to action.
- On the landing page registration area, encode the campaign name in hidden fields that will be transferred into SFDC along with the rest of the registration details. By default, SFGA does not map Google AdWords campaigns to SFDC campaigns. You'll need to handle this chore yourself by writing some APEX code or creating a workflow.
- Tune the entire set of content (keywords, ad text, landing page text, and landing page call to action) as a whole, trying to optimize for *the total number of converted clicks*. There is no point in trying to increase just the number of clicks or the conversion ratio in isolation—those statistics aren't meaningful. First, optimize the click-through rate by matching the keywords to the ad copy. Next, optimize the conversion rate by matching the keyword/ad to the landing page content. Collect at least a week's data for each tuning cycle (shorter periods of data are misleading, due to the variable nature of Web site traffic).
- Use Google's ad-rotation feature to do A/B "split testing" of content sets; do split testing of landing pages as well. These comparisons will help you systematically analyze the effectiveness of the content and improve the results; do it right, and you can double your high-quality lead flow at no extra advertising cost.
- Review the content sets on at least a quarterly basis, and preferably biweekly. Your competitors will be making improvements to their ads when you aren't paying attention, and lead flow (measured in terms of both quality and quantity) can degrade rapidly in highly competitive situations.

5. Even though lead quality is king, many advertisers focus instead on the bid value for AdWords. While doing so can make your budget go farther, it's much *less effective* than most people think, and it will do nothing to improve the company's lead quality and yield. Focus on these issues—that is, on the results—rather than concentrating solely on lowering your costs.

An important caveat: each SFDC instance can only link to one AdWords account. As a consequence, if you are working for a large organization, you will need to consolidate all of your AdWords activity into a single AdWords login. This requirement has several ramifications (e.g., for budget-splitting issues, politics, and marketing organizational needs) that can make SFGA a bit impractical. There is an alternative approach, which involves splitting your SFDC instance (one for each AdWords account) and using `Salesforce to Salesforce` to bridge them. While this strategy will work, it's really not advisable.

Search Engine Marketing

Despite all the justified excitement about Google AdWords, getting results in the *left* column (the natural search results, as opposed to ads) is more effective (and far more *cost*-effective) than brute-force advertising (in the right column). A number of search engine marketing (SEM) tools and books are available, although none of them is specifically targeted at SFDC usage. Follow these guideline to get the most out of SEM techniques in conjunction with your SFDC system:

- Invest a small amount of time almost continuously (rather than doing big bursts of effort infrequently).
- Examine what the competitors are doing on their Web sites, and copy what works in their strategies. (You don't want to copy them verbatim, but learn from their results and do them one better.)
- Drop "cookies" as early as possible in the Web visit, and analyze the visitors' page-view metrics carefully.
- Start to use landing pages for visitors who fit certain profiles, and tune the landing pages for best results.
- Pass visitor profile data into the SFDC lead record when the user completes a registration (or information-request) page.

Email Marketing

As for SEM, AdWords, and other online marketing techniques, dozens of books have been written about email marketing. As with those other tomes, however, none focuses specifically on SFDC. There are two main methods of email marketing relevant to SFDC: the broadcast ("mass email blast") and the vertical campaign ("individual drip sequence"). No matter which of these approaches your company employs, the same key success factors apply:

- Use an email marketing tool that integrates with SFDC's campaign, contact, and lead objects, and that presents useful information on the system's screens. Several

companies have done a great job in creating such tools, with new entrants and product upgrades happening all the time. As these products come with a wide range of features and price points, there is no universal best choice—but it is imperative that you use the email system on a trial basis for at least a month before buying, to make sure that its features and concepts fit tightly with your company’s needs.

- Make sure the content the company is sending out via emails is relevant to your list. If you don’t know whether the prospect would be interested, you’re not ready to send the mail yet! Sloppiness here is the root of most spam complaints (which could cost you \$10,000 in fines per incident).⁶
- Recognize that the best list to email to is the one you already have—the one you’ve been nurturing and cleaning all along. While you can certainly buy email names by the millions, those data are virtually worthless and emailing those addresses puts your company at risk of spam complaints. Leverage partners’ and industry associations’ lists, but do a full opt-in cycle before you add those prospects to your list of blast names.
- Depending on your audience, as many as one-third of the emails will be read on a mobile phone. For this reason, keep the emails brief, clean, and “upper-left-corner optimized” so the readers can get the point without panning or scrolling. Make the subject line compelling!
- Make sure that any links in the email point to a unique URL, or pass a hidden field into the registration process for identifying where the lead came from. Make sure all the landing pages feed data directly into SFDC.
- Don’t use images for anything important in the email—they should just be decoration for those email clients who let images through. In some audiences, more than 50% of the recipients will not see any images in the email—or may never receive the email at all because the embedded images trigger spam filters.
- Don’t email the entire list at once. Instead, roll out emails in phases (separated by a day or so) to catch errors in your copy and make minor improvements as you do. You don’t want to burn your list out with too-frequent mailings (monthly seems to be the de facto limit unless you’ve *really* got fast-changing information or offers). Mail those individuals too often, and you risk a dramatic surge in unsubscribe requests and complaints.
- Use your partial-list mailing strategy to support A/B split testing of format, content, and calls to action. *You can’t know* what will be effective with your audience: you will find out only through testing and tuning for better email response rates.

6. Even though the FTC has chosen to leave this regulation nearly unenforced, such a law actually makes good business sense. Sending email to people who don’t care about the content is a *waste of your brand*, as well as your time. Just say no.

For drip marketing campaigns, there's a big twist: the recipient has declared interest in a topic, which means you can have a much more relevant and frequent email conversation with this prospect. Instead of consisting of just one generic email per month, a drip marketing sequence should be highly specific, with a series of messages that move the customer along the learning curve for the company's product.

Drip marketing entails an additional best practice (which involves an email system feature). If the individual target is contacted by anyone in the company (pre-sales, sales rep, or post-sales support) during a drip sequence,⁷ the sequence should be terminated. This event is triggered by a task or note in SFDC, so the inside sales people need to be briefed on the importance of putting even an empty note into the records of the leads or contacts with whom they talk. If a human conversation has occurred, the robot-generated emails are rarely appropriate and can be quite confusing.

Drip marketing campaigns can be the core of automated lead cultivation and nurturing, and the fancy systems provide dynamic lead scoring based on recipient behavior and click-throughs to the Web site. Marketing systems such as Eloqua and Marketo are great starting points for this kind of closed-loop marketing.

Lead Generation Campaigns

The power of marketing comes from repetition—a series of prospect contacts that gets increasingly more relevant and effective over time. The whole point is to carry out a series of touches that educates the lead and moves the prospect closer to purchasing the company's offerings. SFDC provides a simple lead source field (a pick list) to indicate the origin of each lead. But for any serious marketing company, lead source is a “training wheel” that will rapidly get in the way. If you create a lead and use lead source when that person responds to a second outreach from your company, what are you supposed to do with the lead source? Ignoring the new lead source or overwriting the existing one destroys information. Conversely, creating a duplicate lead to hold the new lead source causes confusion and lowers data quality.

The solution is to not use lead source in the first place.⁸

The SFDC campaigns feature⁹ allows you to capture much better information about target audiences and respondents for your marketing activities. If you've been using lead source until now, your data can be converted to campaigns with no data loss.

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7. Typically, emails are sent out on a sequence of days after the initial registration, such as on days 1, 3, 5, 7, 10, 15, 21, and 30. Different audiences and industry preferences may make the sequence more or less frequent.
 8. Actually, lead source is a system field that you can't delete anyway, so it's okay to store some interesting information there—but it will be a redundant field whose semantics you need to manage carefully. It's particularly important to not use lead source in reports unless you really know what you are doing.
 9. Included in the Enterprise and Unlimited editions; an extra-cost item in the Professional edition.

Once a campaign is set up, SFDC tracks which leads and contacts are target participants (for example, they are sent email invitations) and respondents (they replied via email or HTML links) and stores the sequence of all participation and response. When campaigns are configured properly, looking at lead or contact pages will reveal the entire history of every prospect touch the company has attempted or completed. Further, SFDC's new campaign Influence feature lets you identify all the campaigns that had some impact on each of the opportunities in the company's pipeline. This capability makes it easier than ever before to calibrate the ROI of marketing activities.

The campaigns feature is really a management tool, not an execution tool. It is used in conjunction with third-party marketing automation tools to organize, monitor, and report on the company's outbound marketing activities. This magic requires some planning and careful execution. The good news is that after the first few weeks, working with this feature will be second nature. The bad news is that virtually every company I've ever seen does *not* use campaigns correctly—so some explanation is in order here.

Naming Campaigns

Before you start using SFDC's campaigns feature, you have to examine all the ways you collect leads, whether directly generated by marketing activities or not. All of these streams—even cold calls and customer referrals—need to be represented as campaigns. It's best to create a list of every way that customers may contact the company (and every vehicle that the company uses to find them). The list is best organized on a spreadsheet that looks like Table 10-1

Most of the information in Table 10-1 is self-explanatory, but the campaign naming convention needs some special attention. You will want to be able look back over campaigns years after they were done, without getting them confused with one another (if you want to understand more about naming issues, check out “What's in a Namespace” in Chapter 2). You should think of a naming convention that is intuitive, short, and easy to

TABLE 10-1 Campaign Summary Information

Type	Name	Description	Start/End Date	Audience	Number of Leads	Expected Budget
Ad	2008-Goog-NA-Svcs	Services promo	Sep 08/Jan 09	USA execs	200	\$2000
Event	2008-Dinner-NYC	Exec dinner	Oct 08/Oct 08	NYC execs	50	\$5000
Show	2008-GGSymp-USA	Symposium expo	Nov 08/Nov 08	USA execs	300	\$30,000
Email	2008-Email-upgrade	Upgrade promo	Dec 08/Dec 08	Customers	50	\$500

identify even if you weren't involved with running the campaign. The exact parameters of this namespace will depend on your company's marketing and target markets, but generally the names should look something like this:

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<year>--<event/activity abbreviation>--<geography>--<product line or message>
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The year should be at the head of the name, so that you can rapidly sort campaigns by year in HTML or Excel list views. The double-dashes are needed in the name so that they can be unambiguously parsed¹⁰ by reporting software. The overall name is long, but it ensures that humans can rapidly identify the campaigns that they're looking for in reports or long other listings.

You will need to have campaign names for every single lead source you use in the system today, and every one you can conceive of using in the next few years. Expect your list of campaigns to be somewhere between 50 and 500 lines long—even more if your company does a ton of highly variable or experimental campaigns. This amount of data sounds daunting, but summarizing this list actually goes pretty quickly once you put your mind to it. Besides, this list is simply representing an already-complex reality.

The campaigns list needs to include things that go on indefinitely, even for leads that are inbound calls. In addition to the traditional outbound activities marketing explicitly does, make sure that your campaigns list includes items for natural searches, newsletters, customer referrals, employee referrals, press articles, analyst recommendations, call-ins, word of mouth, and other data streams. These never-ending campaigns should be named with the year field as "20XX."

Setting Up Campaigns

You already do some planning before you execute a marketing campaign. It's important to extend this planning a bit and put the information into the SFDC system, as it will become the system of record for all campaign information.

First, you will probably need to add some custom fields to the campaign page to hold the following data items:

- The business unit, target market, or product line for the campaign
- The value proposition, message, or call to action
- The geographic reach

10. This is fancy-talk for "filtered and sorted."

- The media channel
- The Web site landing page URL or other registration vehicles
- The offer or promotional item
- Venue, timing, and logistics
- The organizations and agencies involved.

You'll also almost surely want to expand the campaign response pick list to reflect the expected response workflow surrounding the campaign.

When preparing for a campaign, identify the qualitative goals and quantitative metrics for it. Summarize the costs (include internal labor allocation as well external agency/materials costs). Identify the call to action for the campaign, and think through any special handling that might be required. For example, a campaign for a local prospect dinner would need specific action to deal with the restaurant for headcount, and a reminder call-out activity for the telesales group. These special actions should be embodied as either SFDC tasks or workflows associated with the campaign.

Enter the campaign information into the SFDC system, and make sure to set up appropriate campaign sharing rules so your colleagues have visibility into the campaigns. Also set up campaign hierarchies to reflect relationships among campaigns (such as geographic, product line, or target market groupings) for easier analysis and roll-ups over time. Make sure to fill out the description field with as much relevant information as possible about the target audience, goals, and call-to-action sequence. At the time, all this information will seem completely obvious and boring—but six months after the campaign ends, no one will be able to remember any of these details that make the campaigns relevant to generating real business.

Add all of the creative pieces (whether an email or a PDF file of paper deliverables) to the campaign record as attached files. If any coupons or discount offers were made available, make sure that they include an expiry date, have been reviewed by the legal staff¹¹ prior to sending them out, and are attached to the SFDC campaign record.

If the campaign has experimental or innovative elements, the telesales group will need tools for follow-up to responses. Include scripts and pointers to follow-up email templates in the campaign description field. SFDC has a free AppExchange call-scripting feature that will make it easier for your phone jockeys to say the right things to campaign respondents, no matter how new the messages or offers might be.

You might also store ideas about best responses to certain situations (e.g., competitive objections, unable to travel to your event) as attachments to the campaign.

11. Of course, these bits of advice are not unique to SFDC. But I can't tell you the number of times I've discovered illegal or unethical elements accidentally included in marketing offers.

A HISTORY LESSON

Campaigns are *the way to handle the full variety of prospect interactions*. But in many cases, campaign membership records are unwieldy for workflows or formulas. So here's a trick: create a download history as a single ASCII field (in leads and contacts) that grows indefinitely. The history field has brief codes that you can use in filters, formulas, workflows, and reports. Here's an example:

Product download = P
Subsequent product download = p
Whitepaper download = W

So your download history field might look like this:

P12.10.08-p01.05.09-W01.07.09- . . .

Note the use of "." rather than "/" for date separators, and "-" as an event separator. Using these characters makes it easier when doing regex and string processing in your scripts, spreadsheets, formulas, and workflows. Also note the use of leading zeroes for day and month numbers, which facilitates parsing and character counting (each download uses exactly 10 characters).

This history field can become arbitrarily long, but if its length gets unwieldy you can have a workflow formula that truncates the field to remove any history more than two years old.

Running Campaigns

The first step is to make sure the system administrator has set up the campaign member report¹² as a custom link in the campaign, contact, and lead pages. This AppExchange freebie is worth its weight in gold and will make it much easier to see what's going on with the campaign in real time.

The next step is to set up a campaign-specific landing page (for registration, confirmation, or download) on the company's Web site. Add the campaign ID value (the last 15 digits of the URL for the campaign page in SFDC) as a hidden field in the appropriate Web registration page, email link, or name-import spreadsheet template for the respondents.

Make sure that you've set your campaign to active status before you do any test runs of the registration and other user interactions. Unless the campaign is activated, no data will be recorded.

12. Make sure your administrator sets up the special link for campaign membership reports, as shown by SFDC at https://www.salesforce.com/appexchange/detail_overview.jsp?NavCode__c=&tid=a033000000j50dAAI.

Test the campaign response system (typically, the Web landing pages) before you fully implement the outbound elements of the campaign, to make sure that all “sent” and “responded” data end up in the right bucket. The whole point of campaigns is to keep these data properly separated, so make sure that everything works correctly before you go live.

Before you push the campaign offer out, send an email to the relevant sales reps, tele-sales people, and product marketing folks so they know the campaign is about to begin. Include the URL for all collateral, “hot tips,” objection-handling, and promotional documents (these documents should be placed on your internal wiki so that any partners’ sales reps can get to them as well). Also send out the URL for SFDC’s campaign page and the relevant drill-down reports. You’ll want to train everyone to look in the SFDC system first for all the real-time information about campaigns because, well, that where’s the information will appear first.

The larger the campaign, the more appropriate it is to send out the campaign offer in batches. Batching allows you to do tests that compare the wording of emails, layout of Web landing pages, and a dozen other details that can dramatically improve response rates. Using A/B testing on every part of a campaign will help you discover what works best for your target audience, so that you can improve campaign designs while the campaign is in progress. But you must track your A/B tests very carefully, and ideally you should manage each batch as a separate sub-campaign (with a common parent, but with all the change details recorded separately). Although this involves some effort and complexity, over time it can easily double the effectiveness of your campaign dollars.

Once you’ve reached the end date of the campaign, you must manually deactivate it. There’s no real harm in leaving it active beyond the scheduled end-date, but it’s good housekeeping (for reporting and other analytics) to turn campaigns off once you don’t expect any more responses.

Lead Handling

One of the areas ripe for the highest leverage by marketing people, which can help them enhance their own credibility as well as that of the SFDC system, is proper lead handling. Although managing leads properly does not involve any additional effort, it *does* require preparation and discipline—which is why lead handling is all too often done wrong.

Read the “Creation Science” sidebar in Chapter 9 right now.

First, Make Sure It’s a Lead

As discussed in Chapter 8, the best operating definition of a *lead* is an individual who has asked for information or some level of contact from the company. Job one is to make sure that the data you’ve been handed really are for leads.

The first thing to watch for is Names purchased from industry associations, memberships, or attendee lists. Unless the list is brand new, there will be substantial information rot: typically email and phone numbers degrade between 1% and 10% per month. Because the Names have not expressed any interest in your company or its offerings, the unsubscribe (or worse, complaint) rate will be quite high when you try to contact them. Consequently, this category of Names should not be imported into SFDC at all, because the bad data will merely muck up the system and produce misleading metrics.

Instead, we recommend that Names be entered into the hopper of your email blasting system (see the “Split Brain” sidebar), where their quality can increase over time until they eventually graduate to real leads. Although mailing to Names is a high-risk strategy, you have to start from somewhere when you’re going after a brand-new market. First, select a list that has a decent chance of being interested. For example, if your company sells a dental laser, you would look at the membership list of the American Dental Association but not the American Association of Orthodontists. You would go to a list broker and rent email addresses for a blast, and deliver information or an offer that was specifically interesting to dentists (such as a case study about how dental lasers improve the patient flow through dental offices). For the email recipients to get the offered information, they would have to go through an opt-in process so that they are legitimately part of your ongoing list. Typically, if you don’t have any connection with members of a given list, very little additional yield is produced after hitting them three times (typically a month apart), and the costs of list rental can make it too expensive to go even that far.

SPLIT BRAIN

At first blush, you might expect the SFDC database to hold everything having to do with prospects and customers. In reality, sophisticated organizations often use a split-brain approach that separates the *marketing* database from the *sales* database. There are two reasons for this separation. First, the marketing database contains a large number of low-quality leads (really, they’re little more than Names) that aren’t relevant to the sales folks. Second, some marketing automation tools need to operate from their own copy of the data.

If you’re already using a tool such as Eloqua, Vertical Response, or Exact Target, you’re on the split-brain path. You don’t really have a choice.

If you aren’t using this kind of tool, you do have an architectural choice to make: do you need to have all of your leads—regardless of quality—in one place, or do you want to create a category of leads that are of such low quality that they’re handled externally? While there’s no overwhelming cost or operational advantage to going in either direction, changing the path you take after deployment will involve considerable one-time costs. So choose wisely, grasshopper.

The next thing to look out for is sales reps who have used SFDC's Outlook connector to import their entire contact lists into the system. These data are really dangerous (which is why we recommend that no one except the marketing staff ever be allowed to import leads/contacts into the SFDC system) because the information is of unknown quality, provenance,¹³ and age. Expunging these kinds of mass imports from the system isn't especially difficult (with careful use of SFDC's free Data Loader or Excel connector), but it's a chore you would rather avoid and the bad data may mess up reports for a while. Most of these imported contacts will show up as "private contacts," but some may not and (through deduping) may corrupt data already in the system.

Some other messy symptoms can occur if the same contact is synched from two different reps' Outlook address books. Life becomes even more fun when different versions of Outlook are involved. Obviously, this area requires some careful thought and testing before you try to establish a federated (shared, yet distributed) contact management system.

Lead Capture and Insertion

From the moment a lead has been collected, it is already starting to go stale. Recent studies have shown that in our fast-paced world, prospect response rates fall off dramatically within hours of initial registration. Indeed, within 48 hours most prospects will not even remember having visited a company's Web site, let alone have a clue about its value proposition or competitive advantage. Use SFDC's auto-response rules to send an email to the lead the instant that they register.

The "freshness date" of leads is calibrated in hours! Add automation at every step to get leads over to the inside sales teams right away. But the sense of urgency should not be limited to speed: it has to be about accuracy. It is much easier to fix data before they are entered into the system than afterward, and it's worth an extra couple of hours to really get things right before importing leads.

Part of accuracy is "the lead is routed to the right person." The SFDC system provides automatic lead routing, but some lead entry points (particularly manual ones) don't automatically trigger the system's lead assignment rules. If a large proportion of your leads are not being routed properly, ask the SFDC development team to create an APEX trigger to catch the exceptions and route them in real time.

The system's lead assignment rules are easy to set up—and even easier to set up incorrectly. The rules are similar to the email filter rules used in Outlook: they're simple Boolean matches, with no `case` or `if` statements. The rules are evaluated one at a time, and as soon as one of the matches occurs, the now officially assigned lead is routed to the individual user or queue¹⁴ in the territory. All subsequent rules are ignored for that lead. Most

13. Are these names even legal for your company to have? If the rep's list "fell off a truck," you might have a customer privacy issue on your hands, as well as some other company's confidential information.

14. See the discussion of queues in Chapter 9.

companies can live with a few dozen well-structured rules, whereas other companies might have 150 of them. Rule sets this large will almost always have bugs, and they're basically unmaintainable. If your sales organization is really *that* complicated (with lots of overlays, national accounts, special markets, and other sources of complexity), you might do better using a bit of APEX code or an external module to do the routing. This strategy would be implemented by configuring a queue that's used only as the input for all leads going through routing, and using a workflow to invoke the routing code. See www.SFDC-secrets.com for more details.

Now, let's take a look at the various sources of leads that need to be inserted into the system.

Manual Data Entry

I know, it's hard to believe that anyone types in leads any more. But it does happen, particularly when reps collect business cards at cocktail parties. Fortunately, there are only a few things to look out for when entering such data. First, never enter a name without searching for it first. A business card name may be in the system as either a lead or a contact: if it's there as both, go to the contact record and update the data there. For the state and country fields, best practices state that these items be presented as pull-down pick lists of two-character ISO codes¹⁵ that minimize typing. For the person's employer, search for that business name (using multiple tabs in a browser is really helpful for this kind of thing) before you enter it; don't forget to search for both the friendly name (discussed later in this chapter) and the formal one (just in case). Creating duplicate companies or accounts is even less amusing than creating duplicate leads or contacts in the system.

Leads also come in via inbound phone or email. It's particularly important to get back to these inbound touches right away, as they are more likely to have a conversation that will enable their quick qualification and conversion.

Web Leads

With leads that come in over the Web (from one of several registration pages on your company's Web site), the lead entry is automatic and nearly instantaneous. Unfortunately, the basic Web2Lead functionality in SFDC is satisfactory only for very small companies. Most SFDC customers use a third-party Web entry application from companies such as RingLead or CRMfusion. These AppExchange add-ons confirm that the Web registrant isn't

15. These codes are found in ISO standard 3166. In most cases, a two-character code is all you need. However, if the company has a worldwide operation that does business in really obscure places, you'll need to use the three-character versions of these codes. When you make the switch, make sure you enforce it everywhere, and normalize the existing two-character codes to their three-character versions.

already in the system as a lead or a contact, and update existing records rather than creating a duplicate.

More highly sophisticated marketing operations may want to develop their own code to create multiple campaign memberships per registration, call a lead enrichment service to validate and extend data, create an activity for the user's download history, create a "friendly" version of the company name (see the sidebar on this topic later in the chapter), create custom object record entries for users' page-view sequences, update a "last campaign date" field in the lead/contact record, or append topic-interest strings to fields in that record. These are all best practices for preventing duplicates while assuring full visibility into the customer's behavior, both in real-time views and in reports. Implementing these capabilities will require a bit of code in the company's content management system or Web page logic to push the data properly into SFDC, and a bit of retry and logging logic to handle the times (typically one hour per month) when SFDC is down for scheduled maintenance.

Spreadsheet Imports

Virtually all SFDC customers need to deal with external lead sources that are presented only via spreadsheet or CSV files. It is best practices to allow only a few individuals (all of them in the Marketing department) to perform imports because of the number of steps involved in doing an import correctly. Before the spreadsheets are imported into SFDC, the marketers need to complete the following tasks:

1. Fix the individual entries to correct spelling problems, number format problems, foreign character sets, data in the wrong fields, and other issues.
2. Normalize the data (particularly state, country, and phone numbers) so they are in the correct format and match the system's pick-list values.
3. Add columns for fields that can be inferred from the source of the spreadsheet (e.g., this spreadsheet came from WebEx, therefore the product-interest field should be filled in with the topic of our most recent Webinar), and create a friendly name for the company.
4. Remove duplicates from within the Excel list.
5. Change the column ordering to fit with SFDC's template.

Create a standardized template including Excel macros to streamline and automate as much of this process as possible. You need to get the import done in minutes, not hours or days.

FRIENDLY NAMES

The company names that appear in `Leads` (and will eventually be propagated into account records) typically start out as “whatever the user typed on the registration page.” But sometimes the user types stuff that’s frustrating to search for or view in a report. A user might have typed in “GMAC,” but really mean “General Motors Mortgage.” With some companies, foreign or domestic, the names aren’t recognizable (e.g., E. I. DuPont de Nemours) or have characters that make search difficult (e.g., Nestlé). This goes double for companies whose names are also acronyms (e.g., Badische Anilin und Soda-Fabrik [BASF] or Bayerische Motoren Werke [BMW]).

A best practice is to use the system-standard name field to hold a “friendly” name that people will easily search for and recognize. Initially, this name will consist of whatever the user originally typed in, but over time your lead cultivation people should change it to the form (usually an abbreviation) that is most likely to be searched for. Friendly names are *always* in the native language of the headquarters office of your company, and they need to be free of foreign characters, accents, apostrophes, and corporate suffixes (e.g., “Inc.,” “Pty,” “Ltd”).

In addition to the friendly name, create a custom field called “Legal Entity Name” that is initially filled in (via automation) with the user’s original entry. Over time, the Accounting, Legal, and other departments will change the legal entity name to indicate the formal legal name for the customer (for example, “Pixar Animation Studios division of The Walt Disney Company”).

During the import of these spreadsheets, it is imperative to use a deduping tool such as RingLead’s or CRMfusion’s tool,¹⁶ as SFDC’s deduping feature for spreadsheet imports is very basic. As mentioned earlier in this chapter, using `lead source` is really for amateurs, so *don’t* use that field. Instead, once you’ve imported or updated the `leads` with the deduping tool, you import the entire list (*without* deduping) as a set of campaign `Members`, using the wizard within the campaign main page.¹⁷

The import procedure should be set up to route new `leads` to the proper queues or users via the standard `lead assignment` rules. But what about registrants who were already in the system as `leads` or `contacts`? The SFDC system will not send emails to the appropriate sales people to indicate that one of the people they are tracking has participated in a new

16. These are different products, but use the same kind of logic as the companies’ `web2lead` dedupers.

17. Different deduping tools will import these `leads` in different ways, so it’s not possible to describe a universal procedure here. What you are trying to achieve is (1) a set of `leads` that is truly new, (2) a set of updated `leads` and `contacts` for people already in the system, and (3) all the individuals (new or updated) added to the campaign member table for the marketing campaign in question.

campaign. However, there are a couple of steps that the marketing staff can take to provide appropriate cues to the sales people:

- Modify all lead and contact views that the sales folks use to set “recently modified” (rather than “recently created”) as the filter criteria.
- Modify any reports that the sales folks use to filter on modified date rather than created date.¹⁸
- Create a workflow that automatically sends an alert email to the owner when one or more of that person’s existing leads or contacts are modified by a marketing employee.¹⁹
- Manually create a task for any sales person whose individual records have been modified or who has received new leads. This approach is more time-consuming for marketing, but is a best practice because it sends *a single alert to each sales person*, irrespective of the number of new or modified leads that individual has received.

Lead Scoring and Aging

By default in SFDC, leads are given a rating of A/B/C or Hot/Medium/Cold. Unfortunately, these ratings don’t hold up well in sophisticated organizations, particularly if the company uses the Named Account model of selling. Further, the SFDC system doesn’t let you score contacts as well as leads to indicate their current level of interest.

Prioritizing leads and contacts (to answer the sales rep’s inevitable question, “Which ones do I call first?”) is better done with a sliding-scale score that is automatically recalculated with each significant update to the lead or contact record. The scores typically range from 0 to 100, with a cutoff of 60 (below which leads are retired or demoted to “remarket” and contacts are demoted to “dormant”). The score should reflect the lead’s readiness to hear the company’s message and convert. It is used to sort and filter leads and contacts in views, reports, and dashboards.

There are three important things to look for in a lead scoring system:

- **Profile scoring** (or explicit scoring) assigns a static number based on the individual’s demographic or descriptive information, such as job title, company name, industry, department, or product interest. Points are typically added for “more fields filled

18. When a record is first created in SFDC, the created date and the modified date are the same—so there won’t be any apparent change to the views. But when a record is updated, only the modified date changes—so only the modified views will work properly.

19. Be careful in designing this workflow, as it can generate hundreds of annoying emails if not set up properly.

out on the page”²⁰ and are subtracted for data that are contradictory (the ZIP code doesn’t match the state), irrelevant (the person says he or she is from a country your company doesn’t sell to), or unattractive (the company doesn’t think leads with a Yahoo email address are likely to be qualified). Profile scores should be adjusted to reflect where the company is strong (competitive superiority, more references, better track record with sales). Profile scoring is a good start, but is subject to a lot of faulty assumptions (particularly regarding attractive versus unattractive entries).

- **Behavioral scoring** (or implicit scoring) yields a dynamic number that results from the individual’s choices and patterns in interacting with the company. Points are added for any action taken by the individual (e.g., responding to an email, registering for a Webinar, attending a seminar), and special points are added for desired behavioral sequences (e.g., the most-qualified prospects will view the demonstration video and request a trial download within the same week). Points are deducted for behaviors that indicate “tire kickers” or other low-yield people (such as students). In some markets, behavioral scoring is *way* more effective at predicting the most interesting leads. However, setting the point values and triggers requires a lot of experimentation, configuration, and even coding.
- **Decay scoring** (or time-based scoring) is a refinement of behavioral scoring that demotes the score value every week or so, thereby moving stale leads farther down the priority list over time. After 30 or 45 days, inactive leads or contacts should disappear from view because of these scores. This system is fairly simple to implement with APEX code or external marketing automation applications.

A number of free, simple, lead scoring tools are available from the AppExchange. In any event, SFDC’s formulas and validation rules can set you fairly far down the path for pure profile scoring. If you are just starting out, begin with those features.

Fancier lead scoring algorithms are often embedded in advanced lead cultivation/nurturing applications such as Eloqua and Marketo. Even though using one of these packages is simpler than coding the algorithm yourself, configuring these off-the-shelf systems is relatively complicated and can cause buggy interactions with other systems. In other words, there’s no free lunch.

Even the best tools require time to fine-tune the lead scoring. During the first few months, the scores will almost certainly be misleading because they’re based on theory, rather than the behavior of the actual target customers and sales folks. Put time into understanding your target customer behaviors, working closely with the sales team to steadily improve the realism and accuracy of the scores. Expect that tuning and enhancing the lead

20. It doesn’t matter where the information comes from—whether manually entered by the prospect or imported from a reference database. In the case of contacts, most of the information will have been entered by employees. Of course, any contact who is a customer receives an instant and permanent score of 100.

DIAGNOSING BAD DATA

Whenever a record is marked as bad data, someone needs to examine the patterns of data input in an effort to understand which process, system, or individual is causing the bogus records. It is all too common to have hundreds or thousands of bad records pile into the SFDC database every month, particularly when external systems are inserting data into the SFDC system.

There are two major classes of bad data: duplicate records and spurious fields. Duplicate records are dangerous because they rapidly confuse people and can be very difficult to rout out. Work on those first. Duplicate records most commonly derive from the following sources:

- Incorrect importing procedures
- Untrained or sloppy users
- Incomplete or poorly implemented external logic or integration
 - Poor naming standards or semantics

The most prolific and dangerous sources of duplication are those that you cannot control, such as an eCommerce system, a partner's database, or an internal accounting system. One SFDC customer's external integrations systematically created hundreds of duplicate accounts every *day*, and the company couldn't turn the source system off. This way lies madness.

The only real solution for this kind of situation is to create a message buffer system that takes in the external "new record" requests, runs deduplication logic, and properly updates the existing SFDC records. This kind of message buffer is needed in any case, to handle the times when SFDC is down for planned maintenance. Nonetheless, creating this "holding pen" requires some fairly expensive custom code.

The problem of spurious fields can be interesting as well. Look for patterns: when are the fields correct, and when are they bogus? Common issues are mishandling of foreign characters, coding errors, and mishandling of spreadsheet data (particularly when somebody sorts only *some* columns of a spreadsheet).

When you've identified the needed data corrections, it's usually better to update existing records than to delete trashed ones and reinsert new records. Using updates preserves history and provides important clues for future data forensic analysis, should it be needed.

scoring system will be an ongoing responsibility of the marketing staff, and recognize that the scoring factors and thresholds will need to be updated on a quarterly basis.

In addition to sliding-scale scoring, several helpful tools do filtering to immediately eliminate garbage leads from view. These lead garbage collectors range from free stand-alone plugins (such as JunQue from SalesLogistix) to features available in more sophisticated add-on products.

When Leads and Contacts Need to Disappear

As discussed earlier, leads and contacts (like accounts and opportunities) should never be deleted from the SFDC system. But there are plenty of situations where you want individual records to disappear from view. For example, a record that holds bad data and a contact that will never go anywhere should be removed from the marketing and tele-sales lists.

The mechanisms for hiding records are ownership values of the lead or contact, in conjunction with the roles and sharing settings for those users you want do not want to see as leads or contacts. By setting a lead's owner to a queue named "Remarket" or "Newsletter," the lead will disappear from view except for the Marketing department users. If the lead *doesn't* disappear, adjust the filters on users' views and reports. Using the status or type pick-list values for the leads or contacts can just as effectively cause disappearance, but of course the specifics are a little different.

What about leads and contacts that haven't been touched in years? I have to confess that I'm an information pack-rat. It is very rare for leads or contacts to cause real problems or excessive storage use in the system. At some point, of course, there's a limit: even the IRS doesn't care about information that's more than seven years old. Leads that are far too old can be archived (into a CSV file—Excel can't handle large data sets as well as other tools can). Because contacts are linked with many other records in the system, it's much more complicated to extricate them: it's probably not worth the effort to create a contacts archive.

Opt-Out

As discussed earlier, it's essential to company credibility—and common sense—to comply with CAN SPAM email requirements. You may be fairly aggressive about allowing people to opt *in* to your email campaigns, but you need to provide them *several* ways to opt *out*, including email response, Web links, personal profile editing, and even phone calls. Once the opt-out request has been made, you need to service it quickly and thoroughly.

Most email blasting systems handle this task automatically, and they should be used as the system of record for opt-outs. But these systems can only know about opt-out requests made from within their emails or opt-out pages. You'll need to import opt-out requests from your external systems and sources on a regular basis.

Further, you'll need to export the opt-out requests from the email system, and update them in SFDC. Even if the email system doesn't perform this task automatically as part of its SFDC integration, the export/import cycle can be completed in a few minutes via spreadsheets or CSV files using the Data Loader or other tools in batch mode.

An additional step is needed to do things really right. SFDC maintains an email opt-in flag, and it enforces the right behavior—but only for emails that are sent from within the

SFDC system. What if a sales rep runs a report from SFDC, or exports an SFDC contact into his or her desktop version of Outlook? The opt-in flag will be ignored, and the email will go out to customers who specifically asked you to stop contacting this way.

To protect against this possibility, create a formula field in the lead and contact records that automatically corrupts email addresses. These addresses are guaranteed to bounce, yet still preserve the original email information. Check out www.SFDC-secrets.com for a checklist that explains how to create the email address auto-corrupter in your own system.²¹

Lead Enrichment

In many cases, the only thing you know for certain about a lead is an email address, which you can (should!) validate through an email-response cycle. Depending on your target audience, many of the other data entries may be empty or clearly bogus—but that doesn't mean you should throw all of the leads into the remarket bucket.

Several services are available to enrich, correct, or supplement data that have been entered into the SFDC system. Services like Hoover and Dunn and Bradstreet provide information at the account level (e.g., number of employees, headquarters address and phone number) and can be invoked when the company name is obvious from the email domain. Other services, such as iProfiles, provide account overviews and organizational charts. Finally, services such as ZoomInfo and EmailAppenders provide supplementary information about individuals.

The telesales folks typically want to know more at the *individual* level (such as job title, location, phone), but unfortunately this is where the available information becomes notably less accurate. Further, the ability to match entries based on the individual's name or email address can be quite poor (depending on the audience, far less than 25%) even for the B2B areas these data sources cover. B2C lead enrichment is even more sketchy.

Some of these lead enrichment services are nicely integrated into SFDC, and more of them will likely become integrated over the next year or so. The bottom line: the best information you can get applies to the people already in your database, and the best way to improve this information is to get it directly and voluntarily from those individuals. Use the progressive-registration techniques discussed earlier in this chapter to get “just a little more information” in exchange for providing the user with some relevant information or a small incentive (it's surprising how much information people will give you in exchange for a chance in a sweepstakes contest). Hit your entire database with progressive-registration requests at least once a year so the information is as complete and up-to-date as possible.

21. Yes, the address auto-corruption will undo itself if SFDC's email opt-out check box is unchecked to reflect a “re-opt-in.”

Demoting a Contact

As discussed in the “Split Brain” sidebar earlier in this chapter, leads can be effectively demoted to Names, but can later be promoted back to being a lead when their behavior indicates a rekindled interest. The same logic can be applied to contacts as well. Maintaining them in the database in some fashion is worth doing because industry sources estimate that half of all leads in the “remarket” or “dead lead” area will be viable purchase candidates—you just don’t know when or what will trigger them to actually buy your company’s product or service. You can’t afford to send these prospects all of your high-cost marketing items, but you can’t afford to ignore them either.

Contacts are not so easy to demote as leads are, because the lead conversion process is a one-way street: once a lead is converted to a contact, several changes are made that cannot be undone. Even so, it makes sense to have contacts go stale if they are unresponsive for a year or more.

Demoting a contact in a way that preserves all history requires the following procedure:

1. Change the contact’s type or status pick-list value, or its ownership, so that it disappears from view. Be particularly attentive to the views and filters used by your deduping tool, so that the contact is truly invisible to the deduping process.
2. Create a lead from the contact’s information, with a score that’s low enough that the prospect falls into the remarketing process. Record the contact’s universal object identifier (UUID)²² as a hidden field of the cloned lead.
3. Create a workflow that is triggered by leads when they reach qualified status. If a lead has a hidden UUID that’s not empty, the workflow will bring the hidden contact back into view. Reverse the type, status, or ownership value changes you made in step 1 to bring the old contact back into view. During the next deduping cycle, the deduping tool will automatically merge the two contacts and all history will be preserved.

Lead Handling in the Named Account Model

Generally speaking, there is very little for marketing to do with leads in the Named Account model of selling, because this model doesn’t use the traditional lead generation and

22. SFDC’s UUID is pretty clever, in that it consists of the last 15 characters of the record’s URL. If you look at your browser URL field, most of the time it will show something like this: <https://na1.salesforce.com/001000054UxeyTER>. The UUID is “001000054UxeyTER.”

nurturing process. However, at least once a year the NAM reps will come to you and ask to add new contacts into their accounts.

Read the section in Chapter 9 entitled “Named Account Model of Selling” for the specific things you need to help the NAM reps with.

Lead Cultivation and Nurturing

While automated systems (such as Eloqua) that assist in lead cultivation are best owned and run by marketing, the manual process of lead nurturing—moving the prospect from awareness to interest to desire—is almost always done by someone outside of marketing. Even if a telemarketing group handles this duty in your company, that group usually doesn’t report to the marketing department. Because of this natural hand-off, the success criteria and service level agreement between marketing and inside sales must be clear and detailed.

If you haven’t already done so, read the section on lead cultivation and nurturing in Chapter 9. Pay particular attention to the discussion of the “life of a lead” timeline.

On the lead page, make it easy for the inside reps to get supplemental information. Smart reps will want to do a little research before they call a new lead. Use the page layout tool to put links to Google Search and Google News for general information about the company, and Hoover, Dunn and Bradstreet, or some other service for financial and business information. For information about the individual lead, put in links for LinkedIn, ZoomInfo, or your favorite lead database service.

In the lead cultivation and nurturing process, marketing is responsible for creating a significant amount of content: email campaigns, special offer response Web pages, call scripts, qualification questions, objection responses, and competitive FAQs. These content elements should all be stored in SFDC, both as general documents and as attached files to campaigns. Further, call scripts and qualification questions should be baked into the SFDC screens used by inside sales. A free plugin available from the AppExchange makes it easy to set up these screens, and with clever use of dependent fields and record types the system can become a good prompting system for the reps. Even though this solution is certainly elegant, don’t overdo it: if your messaging isn’t stable (because it’s not mature, or because the competitive environment is changing too fast), the benefits derived from perfect screen sequences may not be worth the effort.

For a wide range of reasons, the best way to improve the lead cultivation and nurturing process is to meet frequently with the inside sales team. Understand their challenges, find out what’s working in the real world, and measure every part of the process. When evaluating metrics, make sure the conversation focuses on achieving objectives and improving the number of first sales meetings—stay away from words that sound like a performance review, over-measurement, or the assignment of blame. Inside sales is the natural partner of outbound marketing, so do everything to foster good communications and a tight working relationship between the two groups.

Lead Qualification and Conversion

Marketing isn't directly involved with the lead qualification and conversion process. Nevertheless, it should be involved with setting the criteria and the process steps involved, because these elements are the materialization of the target market description, value proposition, and messaging that are the results of your work.

Some companies talk about having a “marketing qualified lead,” in the sense that marketing personnel think the lead is good enough to deserve starting the manual lead cultivation/nurturing process. In my professional opinion, there is no good reason to have such a label, and there are several good reasons *not* to use it. Real qualification means that the company has a communication cycle with the prospect where the inside sales folks determine the match of needs and values, and assess the prospect's readiness to buy. This conversation is *not* handled by the marketing function. What marketing *can* do is screen and score leads, and pass only high-scoring leads to the inside sales team.

The real qualification conversation should be *scripted* by senior people in marketing and sales. Typically, there will be 5–10 qualification questions with yes/no answers, and a lead is qualified when 80% of the answers are yes. Some companies use a sliding scale (High/Medium/Low or 1–10) and set a composite score as the qualification criterion. Even if members of the sales team actually write all of the scripted questions, the marketing guys and gals need to know what's being said about the product. The marketers also need to see where prospects are falling out of the funnel, and why, so they can quickly identify areas for improved retention and conversion.

Once the qualification criteria and scripts are stable, they should be built into the SFDC lead screens. SFDC offers a free AppExchange plugin to facilitate call scripting, but you may want to go beyond its baseline capabilities if your company has multiple product lines with different target markets and qualification criteria.

Once a lead is fully qualified, it is usually converted almost instantly. Several details of conversion need to be nailed down from the beginning:

- How will the custom fields be mapped from the lead to the account, contact, or opportunity?
- Who does the conversion process, and under which conditions?
- What are the naming standards for opportunities?
- How will duplicate accounts or opportunities be flagged or handled if discovered during the conversion process?
- What are the stage and probability values for the new opportunity?
- What is the task resulting from creating a new opportunity, and who receives it?
- Under which conditions can a sales rep reject an opportunity? How does inside sales learn from the rejected opportunity?

These details are discussed in the lead conversion section of Chapter 9. The SFDC system should be set up so that field history tracking is turned on to provide audit trails for the 20 most interesting fields in the lead, contact, account, and opportunity records. Doing so will help you see what's going on and allow the marketing staff to base improvements on data from real sales cycles instead of folklore.

Partners

The marketing team almost never develops or owns partnerships, either on the technology side or on the revenue side. Nevertheless, the company's marketing staff must interact with partner marketing folks and supply their sales teams with collateral, information, and leads.

As discussed in Chapter 9, the way to get the most out of partners is to treat them as much as possible as being an extension of the company's own sales team. This means giving partners access to the sales tools, testimonials, product training, and other documents that are in the company's marketing arsenal.

If the company does cooperative marketing with its partners (e.g., joint advertising, shared tradeshow booths, cooperative Webinars), make sure that each partner's information is included in the campaign description in the company's SFDC system. Depending on your lead-sharing arrangements, you will want to create a campaign member report with special filters for each partner.

Customer References

Customer references are the most essential ingredient of company credibility, and are required elements for many marketing deliverables. Analyst relations, PR, Web marketing, and the sales team all depend on quotes, reference customers, and testimonials. Perhaps surprisingly, most marketing departments show an amazing lack of aggressiveness and discipline in collecting and managing this key resource.

Before discussing ways to handle references in SFDC, we need to consider how the customer happiness and usage information is collected. The main problem with most reference marketing programs is that they jump too quickly to "Can we get your quote?", thereby scaring off the customer. It's far better to develop a large population of customers who have provided core information about their businesses and the way they use your company's product or service. Once these people have told you something about themselves, it's easy to extend the conversation with very specific requests based on who they are and how they benefit from your product.

To build this pool of customer information, several processes need to be tapped to collect the highest-quality reference information:

- Customer support, technical support, and consulting personnel are the most underutilized sources of customer reference information. These people are on the phone (or even on site) with the customer base more than anyone else in your company, and they should be finding out as much as they can about how the customer is using your product. While they're helping the customer, they can be asking subtle questions that can reveal interesting information about the number of users, the business impact, and factoids about the customer's business and how it has benefited from using your company's product. When done correctly, this kind of data collection won't feel like prying, yet it will gather at least one "gee whiz" story each week. This information should be added to opportunities, as it is relevant to the project or purchase, rather than the individual contact or the account overall. Marketing should write these questions and format them as prompt screens, using the free call scripting plugin from the AppExchange.
- Product marketing personnel may conduct periodic customer surveys that collect great demographic and usage profiling information. The key is to ask the right questions and provide an incentive for the customer to respond. Use an embedded URL with a unique identifier so you automatically know who generated each response. This advice applies equally to customer satisfaction surveys sent out by the customer service department, and even to warranty registration cards.
- The company's PR team may conduct customer phone surveys to collect quotes and testimonials, and they should be designed to collect customer usage information even if customers are totally unwilling to have their names published. Set these surveys up with subtle incentives to provide information that will be kept private, as the majority of customers will be unwilling to have any contact with reporters or analysts. These survey results should be attached to the contact record for the individual involved.
- The company's support or account management team contacts customers at product or service renewal time (assuming the company has some sort of ongoing service element). Have the renewal cycle begin with an "application" that collects demographic and usage information. While this information will be useful for the support organization, it's pure gold for the marketing team. Attach these data to the opportunity that is being renewed.
- If your company runs a blog, online forum, or Web-based user community, require users to register (only with a valid email) to read the content located there. When users want to post or add to the comment trail, ask them for further registration information that gives you a better profile of who they are and how they use your company's product. This information should be attached to the person's contact record in SFDC.

Once you've thought through this issue, the key is to add—in a disciplined way—specific information from these sources to the relevant contacts, accounts, and opportunities. Of course, you can attach surveys and emails to the records, but they will not very easy to search, manipulate, or report. Instead, the essential elements of “referencability” should be added to the records as custom fields or custom objects that answer questions such as the following:

- Which products is the customer using? How long has the customer been using the product, and which departments are using it?
- Which other products did the customer evaluate? Why did the customer decide to go with your company's offering?
- How many users are there, and how many *non*-users benefit from the product?
- What are the economic benefits of the product? How soon did the product pay for itself, and what's the long-term ROI?
- What is quotable about the customer's experience, and what are the names and titles of people who would be willing to talk about their experiences?
- How happy is the customer? Would the customer buy again?
- Would the customer be willing to take a call from a prospect? An industry analyst? A reporter?

The exact design of the reference management system will depend on how the company wants to use the references, but the guideline is to store the information as close to the user or project as possible. Use page layouts or collapsible sections to keep clutter down. To make the information easier to see from a top-down perspective, use roll-up fields or workflows to provide referencability indicators (e.g., “total potential references”) at the account level.

All of this implies that everyone in sales, marketing, customer support, and PR has an SFDC login and uses the system to store the customer data. This is the way life should be anyway, but proper customer reference management turns SFDC usage into a requirement.

To prevent anyone at the company from burning out a reference through overuse, it's important to track every time the reference has been used. Create a custom object that records when references were used, who used them, and what the purpose was. Generally speaking, using a reference more than once per quarter will probably irritate the individual, and it may get the reference in trouble with his or her company's PR department.

In many organizations, it's best to use record types and page layouts to hide the customer reference information from prying eyes. Because customer references are coveted resources, sales reps try to hide the good ones. To protect the customer's trust level, it's best

practice to handle customer reference requests through SFDC as an approval process, and to have the reference marketing person be the unbiased decision maker who approves and allocates usage of this precious resource.

Public Relations

Most PR departments wouldn't dream of having an SFDC login. Most PR departments are also behind the times.

In addition to the reference marketing functionality described in the preceding section, PR departments need to know how SFDC can help them in their day-to-day tasks. PR departments are in touch with reporters, editors, and industry analysts, and they need to manage their contact information. They need to track action items. They launch campaigns and want to track their results. Sounds sort of like the SFA functionality with a twist—right?

SFDC developed a free add-on for the AppExchange designed around the needs and workflow of PR teams. This add-on provides the basics for the PR function, and it can be easily extended to match the workflow of nearly any PR team. Assuming the company uses a PR agency to supplement its internal team, SFDC's Web-based functionality is a great way to coordinate all of the organization's PR efforts.

The PR Manager plugin works well if what you are really trying to do is replace shared contact and task lists in Outlook. As always, SFDC does a great job of handling shared tasks and exposing the history of tasks and conversations across a distributed user base. The integration via SFDC's Outlook connector is a bit clumsy, and the scheduling²³ of repeating events (such as conferences or meetings) is ugly, but it works.

In using the plugin, there are a couple of things to think about. First, the PR agency (or agencies) used by your organization may have its own in-house systems and may not be willing to keep the blow-by-blow details in SFDC. While this proprietary attitude is understandable for the senior partner in the agency or specialists who are not dedicated to your company's account, the account manager or the dedicated underling should be able to use your company's SFDC system without any double entry or interference with the agency's system.

The second issue is keeping the reporters, editors, and analysts separate from your customer contacts. This segregation is most easily accomplished by setting the owner of the contact to someone in the PR group and by setting the type to be "reporter," "press," "analyst," or another appropriate indicator. If you set up the filters in views and reports properly, the PR targets will be kept totally separate from your prospects and customers. In a similar way, you want to keep the companies they work for separate from your accounts,

23. You may find that SFDC's integration with Google documents really helps with calendar management.

typically by having a special form of company naming (e.g., “PR–TimeWarner–DO NOT TOUCH” versus “TimeWarner Music,” a real customer) and establishing an account type value with which to tag these special accounts.

Once the basics are under control, use SFDC campaigns to monitor the pitches, events, and outreach you have done to all reporters, as well as the responses they have given to your pitches. Of course, you need to keep these PR campaigns separated from the standard prospect campaigns, but doing so provides you good metrics on what works.

You’ll need to adjust pick lists to reflect the status of reporters and editors, as opposed to evaluators and buyers. You’ll almost certainly want to use record types and page layouts to customize the look of SFDC for the PR users.

Another consideration is the handling of press citations, blog threads, and other reporter’s content. If what you *really* wanted was Vocus or a custom PR database, you’ll need to adjust your expectations downward a bit. Because document attachments aren’t searchable in SFDC, this kind of content is typically stored in a file server, with a pointer to it from within SFDC’s reporter record. Although this structure means that content searching must be done entirely outside of SFDC, it also means that searchers don’t need to have SFDC licenses.

Product Management/Product Marketing

The product manager, vertical market manager, and product marketer roles are classically held by people who love the product and have no problem writing. Typically, they are also starved for real data about customers, prospects, and markets. SFDC is an amazing resource to help these personnel ply their trade in the following areas.

Marketing Collateral and Documents

SFDC has an internal documents section that can act as a central store for all of the company’s marketing collateral. If a ton of documents need to be stored, you should probably provide just a high-level guide to what’s there—and when each document should be used—in SFDC’s internal store. By contrast, the actual documents should probably be stored on an intranet or file server to save space in SFDC.

SFDC’s Content edition provides a great way for marketing and sales personnel to better manage marketing collateral, and it’s almost essential for any multidivisional sales team that has to sell a wide range of products. In addition to providing more economical storage, the Content edition provides a very intuitive way to organize large libraries of documents; it even includes a voting system that allows readers to rank which are the most relevant documents. For the product manager, this voting system provides important feedback regarding which documents should be enhanced or retired.

Analytics and Business Intelligence

SFDC is a godsend to the numbers-driven marketer, providing that the data are organized properly and support analysis and reporting.

As discussed in Chapter 2, the most advanced reporting and analytical requirements will involve an external reporting system. Of course, the data must be entered into SFDC in the first place, which is why product marketing needs to be involved early in the design process.

That said, it is imperative to keep screens simple and data entry as unintimidating as possible. Customers and sales folks alike get annoyed when they are asked to enter too much data.²⁴ If the product marketing folks say that they will require a bunch of data, always ask, “Who’s going to type in and validate the data?” Also ask, “What’s the likelihood that half of these records will be empty?” If there’s a fair chance of empty records, *don’t* ask people to manually fill the desired information in—get the data some other way.

This recommendation goes double for competitive information. In theory, your sales reps should know who the competitors are and what messages they are using against your company. In practice, it’s rare when reps really have this knowledge base and even rarer when they are willing to fill in more than one field in the SFDC database with the relevant information. That said, it may be very easy to get system integrator, consulting, or customer support personnel to provide detailed competitive intelligence. Use page layouts to facilitate this data collection without annoying users with clutter.

Price Lists

The price list is the most basic marketing deliverable: every rep needs to use it, and every product manager needs to contribute to it.

Price lists don’t have to reside in the SFDC system, but they should. Maintaining the price list in the system enables `line-item level` quotes, product-level forecasting, and integration with your order-entry and accounting systems.

SFDC’s price lists are fairly simple SKU-based tables; they do not allow BOM structures for bundles. Essentially, SFDC’s `Price Books` and `Product` tables contain a single level of SKU: bundled products are simply handled as new SKUs with no hierarchy or pointers.

SFDC doesn’t handle discount schedules natively. Most companies simply store the discount level as a `custom field` for each SKU in the price list (perfect for per-product discounting). Other companies create a SKU called “discount” with a negative value that is applied to the entire order.

International price lists are simple, yet profound data structures. If the company’s system is set up to handle only one currency, you must create foreign price lists that override the home-country price, expressed in the company’s home currency. If you are running SFDC’s

24. Too much can be as few as five fields per page. Keep it simple!

multi-currency mode²⁵ (you'll definitely want to use the advanced option), the foreign price lists are given in their own currency (£, €, \$, ¥, and so on) and the home price list is given in the company's home currency. The translation across currencies occurs at quote time, using the then-current exchange rate. Reports and views of orders will show all information in the local currency of the individual who's viewing the data. Pretty fancy stuff.

Polling and Customer Feedback

Out of the box, SFDC gives you solid information on leads and contacts, but no direct interaction with *customers*. Over time, as the system is configured with more and more options, it will likely begin to include touch points for several kinds of customer interaction:

- The PRM module includes a Partner Portal that can provide good metrics on the company's interactions with its intermediary "customers." If the marketing group owns some of the partner relationship, add a survey link to the portal page so that marketers can get feedback from the partner on a continuous basis.
- The Customer Self Service Portal provides an obvious place for interaction with those customers who are actively using the company's support services or are in warranty periods. Add a survey link to this page as well. In addition, it's smart to have the Web-tracking analytics engine inspect traffic through the Knowledge Base; this setup enables you to quickly spot troublesome areas related to the product and its documentation.
- SFDC's Ideas module is an ideal way to get feedback from customers about new feature ideas and priorities. If you plan to use this module, make sure to prepopulate the ideas list with items that you suspect could be killer customer issues—if the customer eventually discovers them. Also, add idea items for product attributes that the customer might reflexively ignore: reliability, performance, fit and finish, documentation, international issues, level of support, pricing options, and features to remove. If these items are omitted from the list, all the feedback statistics will be misleading and over-focused on bells and whistles that *aren't* critical to customer satisfaction.
- As discussed in the "Customer References" section earlier in this chapter, SFDC should be configured with several custom fields to track and manage customer happiness and testimonials. By using these data carefully, you survey your customer base to help guide the company's product development roadmaps and strategy exercises. If you are trying to set up a customer review board, this effort should be tracked through SFDC as well.

25. Turning on the multi-currency feature in SFDC is a one-way street: once it's on, it can never be turned off. Turning it on will also break some of your reports, calculated fields, S-controls, and other customizations. For this reason, it's best to turn this feature on at the beginning if you know you will need it.

- A few of the popular survey engines have plugins that support SFDC, and you should strongly favor using them. Be willing to sacrifice a few advanced features to get the data fully integrated into the “customer system of record.” The pain of trying to keep data synchronized between SFDC and an unintegrated tool will quickly overwhelm any advantage that some other “perfect” survey tool might have.
- Rally Software offers an Agile requirements collection/management tool that plugs into SFDC. If your internal product development team is focused on Agile practices, this tool can be a huge asset for both marketing and engineering personnel.

Marketing System Administrator

As discussed previously, a common mistake among SFDC customers is to give full system administrator privileges to too many people. Best practice calls for having two or three administrators, unless the company has a huge SFDC installation.

We recommend that someone in the Marketing department be one of the administrators, because marketing personnel typically are intimately involved with new-product launches and understand what’s coming in the next several quarters. Marketers can make pretty good guesses about what the sales folks will need in the future—and they have the most analytical thirst for numbers.

The marketing-based SFDC administrator should coordinate his or her efforts with those of the administrators of other marketing tools (such as the email blaster, content management system, customer portal, and customer data warehouse products). As these systems become increasingly integrated over time, the administrators will need to interact fairly frequently.

THE DATA ADMINISTRATOR

Someone in marketing needs to be the God of Data. This person needs to be an SFDC system administrator (or at least be trained up to that level) so that he or she can make good decisions about data standards, new fields, expanded pick lists, and lead-handling processes.

There is no universal best practice for data management, because there are just too many market and company variances. Even so, *somebody* has to set your company’s standards and enforce the rules. *Somebody* has to be the owner of data definitions. *Somebody* has to play referee in internal arguments about data ownership. The best kind of *somebody* will be involved with lead handling, cultivation, or nurturing; will know people in both sales and marketing; and will be systematic and detail oriented.

Check out the discussion of the data architecture review board in Chapters 3 and 4 to understand the duties a little better.

While this role could theoretically be outsourced, it’s typically not economical to do so. The good news is that it’s nowhere near a full-time job, even in the largest company.

Privilege Restriction

Some of decisions related to privilege restriction are policy issues that can have political overtones, but the following really are best practices:

- Delete and merge buttons should be hidden from all standard users.
- API and import-wizard access should be turned off for all standard users.
- Reports should be turned off for all sales reps (but not managers).

Chapter 13 describes a number of general best practices related to permissions, which should be reviewed by marketing’s designated SFDC administrator.

Report and Dashboard Logistics

One of the biggest problems with SFDC’s reporting capability is the huge pile of prefabricated reports found in the system. It is so easy to get lost and overwhelmed.

The first order of business is to clean out the “unfiled public reports” that come with the system and put them in folders meaningful to you. If a particular report doesn’t seem especially meaningful, create a report folder called “Ignore Me” and put it there. As always, I do not recommend deleting reports from the system: you never know when one will provide a good idea for solving a future reporting problem.

Create another new folder called “<Company> Special Reports,” and put this folder on the top of the list. Make this folder read-only, so users can’t accidentally mess it up. For any reports that are really important, create duplicate copies and put them in a new read-only folder called “Backups.”

Create yet another read-only folder called “Dashboard Reports—DO NOT TOUCH.” Put the reports that feed dashboards there.

Check out the AppExchange for prebuilt reports and dashboards. Dozens of freebies can be found there, and they can save you a bunch of time when you are trying to set up your own SFDC system.

There’s some good news on the report logistics front: the Force.com Eclipse plugin includes ways to view, archive, and upload report definitions. It’s a much cooler way to get the job done and avoids the tedium of mouse driving that SFDC users have had to endure for the last eight years.

Ongoing Tasks

The marketing SFDC administrator needs to become very comfortable with the deduping tool that your company has bought. Because these tools typically need to be run on at least a weekly basis, the administrator needs to understand all of the chosen tool’s

detailed settings (e.g., fuzzy logic fields, thresholds) and the workflow of deduping a large batch of leads.

Although SFDC runs continuous backups on all system data, recovery of data is neither free nor fast (it requires a small consulting project). The marketing SFDC administrator should take a weekly system “snapshot” of the system’s entire contents. This task can be carried out as an automatic scheduled event through the system itself, or the administrator can use an external batch-oriented tool from Informatica or another vendor to do the job. While the snapshots can get really large with all the attachments, it is not necessary to back up absolutely everything every week. Anyway, disk space is cheap, and the peace of mind that comes with having your own backup will more than compensate for the 10 minutes per week devoted to this chore.

Before attempting any significant amount of data manipulation in SFDC, it is always best to take an immediate “before” snapshot of the data object(s) you’re working on. This is most easily done with SFDC’s free Data Loader plugin, but you need to be trained before you use this software. For more on this topic, check out the sidebar entitled “Backups and Snapshots and Replicas, Oh My!” in Chapter 13.

Marketing Executives

SFDC provides the foundation for many important improvements in the way marketing works. Its use requires behavioral changes of the marketing team, but it can mean dramatic improvements in marketing’s effectiveness, relationship with sales, and overall corporate reputation.

Many of the SFDC best practices immediately translate into marketing best practices. Further, SFDC brings into focus the real cost of customer acquisition and the importance of repeat business—the most profitable revenue that any company can have. By aligning the marketing effort with the most profitable revenue sources and improving sales cycles, the marketing team will automatically align itself with the goals and objectives of the sales team and the stockholders.

After a few months of proper use, the SFDC system should be able to screen out low-quality leads, identify low-yielding sources, and help tune marketing messages so that they yield the biggest bang for the buck. It will take a few months longer to lower the cost of lead generation (or at least increase the bang for the buck) and increase the sales pipeline. Because of seasonality effects, SFDC will likely continue to reveal new opportunities for marketing improvements more than a year after it goes into production. However, the only real cost reductions that most companies will find are in eliminating “dud” marketing vehicles; do not expect the SFDC system to reduce the company’s headcount.

The best practices for marketing team members have been discussed throughout this chapter. As a marketing executive, you need to reinforce marketers' behavior with incentives and pep talks:

- Don't ask for data items that you won't really use, or that won't fundamentally change the outcome of any decision.
- Add instrumentation to as many customer points of contact as you can, involving customer-facing individuals in support, service, and consulting.
- Involve the customer in as many marketing processes as you can,²⁶ and record the data in SFDC so that the information becomes a shared resource.
- Strive for closed-loop marketing, where you can track a single customer's interactions through every "touch" by your company. That said, don't bite off more than you can chew: work incrementally, starting with email and click-through behaviors. Test messaging and refine it with email threads for specific customer segments. Add behaviorally targeted offers as you learn more about the customer's preferences and responses.
- Integrate as many marketing systems as you can afford to with SFDC. This seamless operation will reduce errors and dramatically increase visibility into the customer's behavior.
- Use SFDC and other systems to conduct A/B split testing at every level of customer interaction. From word choice in messaging and scripts to the design of the purchase button in the company's online store, testing can significantly improve the results and power of the marketing effort. There is simply no substitute for real-world testing with the company's own prospects and customers.
- Use workflows and alerts to support management by exception. SFDC can streamline the majority of marketing processes, while giving you better data for more solid decisions.

Read the last few pages of the Executive Summary in this book to find out about the general behavior changes and mandates you personally need to make—they're all quite pleasant, actually, but it's important for the troops to hear and see coherent behaviors directly from you.

26. If you haven't already done so, read *The Cluetrain Manifesto* by Christopher Locke (Basic Books, 2000). You can also read it online for free at www.cluetrain.com/book/index.html.

Marketing Best Practices

When it comes to marketing in general, several critical success factors seem to be ignored all the time—often because of internal politics, board-level beliefs, and company culture. Here are the things I find *missing* most often in marketing management:

- Lead quality is *much* more important than lead quantity. It is very easy to generate tons of low-quality leads that will waste a lot of everyone’s time. What’s the point of handing over to sales a stack of leads a foot high if there’s an infinitesimal chance of those leads being converted to a sale? Focus on *reducing* the total number of leads while increasing the number that convert and start sales cycles! You’ll definitely want to set up SFDC metrics and incentives to bring this issue into focus.
- Lead response time is *much* more important than branding, persistence, and lead scoring. It is almost impossible to be too quick in responding to a lead, and recent studies by Professor James Oldroyd of MIT indicate that lead response rates drop dramatically within *minutes* of a Web registration. Providing a professional response to a lead in near real time *really* sets companies apart. Statistics show that a prospect’s attention moves on to other things very soon, and the vast majority of Web site visitors will have no recollection of a company within 48 hours of visiting its site. Make sure that leads get into SFDC very fast, and that a drip marketing sequence starts the same day. Set up SFDC metrics, escalations, and incentives to optimize “first touch” response times.
- Generally speaking, field sales reps should not touch leads. Marketing and inside sales should be converting the leads before they are ever handed over to the field. The field reps should be focused on opportunities, and any contacts and tasks associated with them.
- Although leads are quite perishable, paradoxically they don’t have a real “expiration date.” Generally speaking, leads that are unresponsive or uninteresting should be moved from the active-working list into the “remarket” list within 30 or 45 days. But with the right kind of newsletter marketing, a lead that first signed up with the company two years ago may come to life and be immediately ready to purchase.²⁷ You can never know which specific lead will prompt this reaction, or when the prospect will be ready to make a purchase. So the only time you should give up on a lead is when (1) all of the contact information is no longer valid or (2) the lead has explicitly asked you to go away and die.²⁸

27. One of my favorite customers came to me after three years, saying “Taber and his incessant marketing have finally worn me down.”

28. Okay, so they rarely ask for this exactly. But unsubscribe requests and opt-outs *must* be immediately and permanently honored.

- The match of your marketing message to the target audience is much more important than the inherent power or uniqueness of that message. *Of course* you want to have a unique, powerful, and eloquent message, but if it really isn't all that relevant to the target audience, why should they care? Properly segmenting your target audience is job one, and it's almost exclusively a marketing responsibility. SFDC's data will be the foundation for that segmentation, and as a marketing executive you should demand that any target market analysis be based on customer and prospect data in the system.
- Related to the previous point is the importance of the design of the company's Web site: the first page a visitor lands on will qualify or disqualify the company from consideration. Web visitors will rarely get to the proof points and the company's value proposition if they weren't motivated by the home page or the landing page they first saw. Keep the word count down and the call to action straightforward on these critical pages—and that goes double for B2C companies.
- Marketing doesn't focus enough on customer loyalty and upselling. Marketing to customers really is like shooting fish in a barrel: although these campaigns will never generate a single lead, they'll generate plenty of revenue. It is sublimely important to set up metrics and standards for marketing to the installed base, because this is an area where the marketing department can truly shine. It also is the most profitable kind of revenue your company can have.
- Customer reference information is the highest-value data the SFDC system can possibly hold. Marketing should spearhead the collection, updating, and management of customer references so that (1) the company gets the highest marketing impact from them and (2) the references are not burned out from overuse.
- It's critically important that marketing, inside sales, and outside sales agree about the company's sales model. Get the following things right: the leads-to-opportunity workflow, the division of labor, the number of contact attempts to be made, the stages of lead development, the criteria for qualifying and converting leads, and the semantics of the SFDC data fields. If you can't agree on what a qualified lead is or what triggers the creation of an opportunity, how can you optimize or streamline anything?
- SFDC can become an important point of collaboration between marketing and sales. Improving the quantity, quality, and usability of the customer information in the system is one of the critical ways marketing can show how it's adding value to the sales process.
- The Sales department clearly runs on a monthly or quarterly cycle—that's the rhythm of their work. Be keenly aware of this schedule (there's no point in generating a ton of leads in weeks 11–13 of the quarter), and make sure that the sales

personnel aware of *your* rhythm—that is, planned marketing campaigns and product launches. It's a best practice to establish a wiki for marketing that publishes exactly what marketing will be doing for sales on a month-by-month basis, and to supplement that with a weekly (or biweekly) email²⁹ highlighting the things the marketing team is doing.

For more exciting news in this area, check out newsletters like the free *Taber Report* (www.taberconsulting.com/download/archives.htm).

Metrics and Analytics

I've worked at the VP level in marketing for more than 10 years, and a lot of things have changed over the years. But in high-tech marketing, some bad habits seem to be evergreen. Much of the time, marketing is measured (or measures itself) by metrics that aren't very meaningful to the business. SFDC, when properly configured and used, can move companies to much better behaviors.

Here are some measurements that are simple to ask for, quick to measure, easy to fake or game, and almost pointless:

- Number of activities
- Number of mailings
- Number of new collateral/creative pieces
- Number of attendees and size of lists
- Visibility, buzz, and attitude indicators about your company
- Number of press releases
- Number and reach of ads
- Number of click-throughs and Web site visits
- Number of registrations or downloads
- Number of leads
- Cost per lead

The last two items on the list are sacred cows in many companies, but unless you measure something about the *quality* of the lead, its convertibility, and its readiness to be qualified—well, these aren't sacred cows, they're just a bunch of bull.

29. Do not expect the sales reps to read your wiki—give them tidbits in the email to motivate them.

WATCH OUT FOR MULTIPLE REPORTS AND DASHBOARDS

It is very common for organizations to inadvertently create several versions of a report or dashboard. This is almost always dangerous, because SFDC reports are easy to create, and even easier to create incorrectly. There are too many ways to filter and sort data incorrectly, and too many assumptions that can differ. Contradictory reports become a big source of politics when sales, marketing, and the executives are looking at "the same metric" with very different numbers.

The only antidote is to use one official set of reports that are designed and implemented by a single team. Using the requests from sales, marketing, and the executives, a business analyst (typically in the Marketing or Finance department, but perhaps on loan from IT) should create the company's official management reports for lead generation, pipeline, and forecasting metrics. All other report versions should be disparaged and hidden from users.

Instead, match your measurements to the prospect's evolution in the pipeline/funnel—visibility and awareness are relevant only at the start of the relationship between customer and company. Use your revenue model (described at the beginning of this chapter) as your guide about what to measure, and when. Here are example metrics that can be quite meaningful:

- Time to first touch
- Number of converted leads
- Average time to convert
- Accuracy of lead scores
- Ability to segment customers and predict behavior
- Conversion ratio
- Number of fully qualified leads accepted by sales
- Number of sales cycles started due to marketing efforts
- Proportion of leads rejected by, and neglected by, sales
- Marketing cost of acquiring a new customer
- Value of sales pipeline started due to marketing efforts
- Value of sales pipeline influenced by one or more campaigns (SFDC's new campaign influence feature that makes this much easier to measure)
- Profitability of new customers due to marketing efforts
- Loyalty of new customers
- Percentage of repeat business

Each of these metrics can be analyzed on a per-campaign basis, so you can identify which activities really drive the business. The same items can also be analyzed by region, vertically, and by product line so you can determine which parts of the marketing message are working in different geographies. There are usually some great surprises on this front.

Most of these reports can be generated entirely within SFDC's reporting system, although some will likely require some external help. For example, a "time to first touch" report requires either clever use of SFDC's custom report types, exporting of SFDC data to a spreadsheet with a bunch of VLOOKUP functions, or join processing by an external database engine.

The "jewel in the crown" of marketing is strategic analysis. Naturally, you'll want to team up with executives in engineering, customer support/services, and finance to look at the big picture and answer questions such as these:

- What are the company's most profitable products, and why? What are the correlations among product purchases, and which "loser" products actually help move the winners? What are the most likely situations for upsells and repeat business?
- What are the characteristics of the most profitable customers? What are their behaviors and growth patterns? What can the company do to find more likely candidates and stimulate their purchasing patterns?
- How is the competitive battlefield changing? Does the company need more product, better promotion, or a pricing or packaging change? How is the company's brand and reputation faring in the marketplace?
- What are the inflection points during the sales cycle? Is there a key success factor, or a failure pattern we need to fix?
- Which customers seem to be more trouble than they're worth, causing huge costs and rework in customer support? Can the company identify product or sales problems by understanding the situations involving whiners and troublemakers?
- Which marketing tactics are paying off, and how are they helping sustain the company's products and ease the sales cycle? What's the profitability of the marketing promotions?
- Which channels and partners are working, and which are just a waste of time?

Answering these kinds of questions will take solid analysis and almost certainly use of a multidimensional business intelligence tool. But the fanciest tools in the world will do no good if the source data are incomplete or misleading—and that's why it's imperative that the marketing team invest in making SFDC the authoritative source for "all things customer."