Clipper MAGAZINE

salesforce

Orientation

1. Tips
2. Definitions
3. Search / Navigating
4. Intro to Leads
5. Prospect Finder

AGENDA

6. Working Leads
7. Task/Event Entry
8. Managing Tasks
9. Helpful Resources
10. Salesforce 101 Wrap-up
11. Next Steps

TIPS

TIPS

- We use 2 versions of Salesforce – **PC & Mac/iPad**
- Best Internet browser for Salesforce on a PC/Android is **Chrome**
- Best Internet browser for Salesforce on a Mac/iPad is **Safari**

TRAIN ENVIRONMENT TIPS

- When creating Leads, please use Valpak of Kings County as the Franchise.
- When adding Clipp Distribution to a Quote, use Clipper of PA – Pittsburgh .
- Make sure you check your test Lead/Account email address before trying to send emails in Salesforce Train.

Definitions

TYPES OF RECORDS

Salesforce is based on an object model – that basically means the data is grouped in "buckets". Each object or bucket holds a specific set of data – leads, accounts, contacts, etc.

At 1st glance, you see "tabs' that represent the different buckets. When you go into a specific tab like Leads, you are diving into the bucket of lead data.

TYPES OF RECORDS: **LEADS**

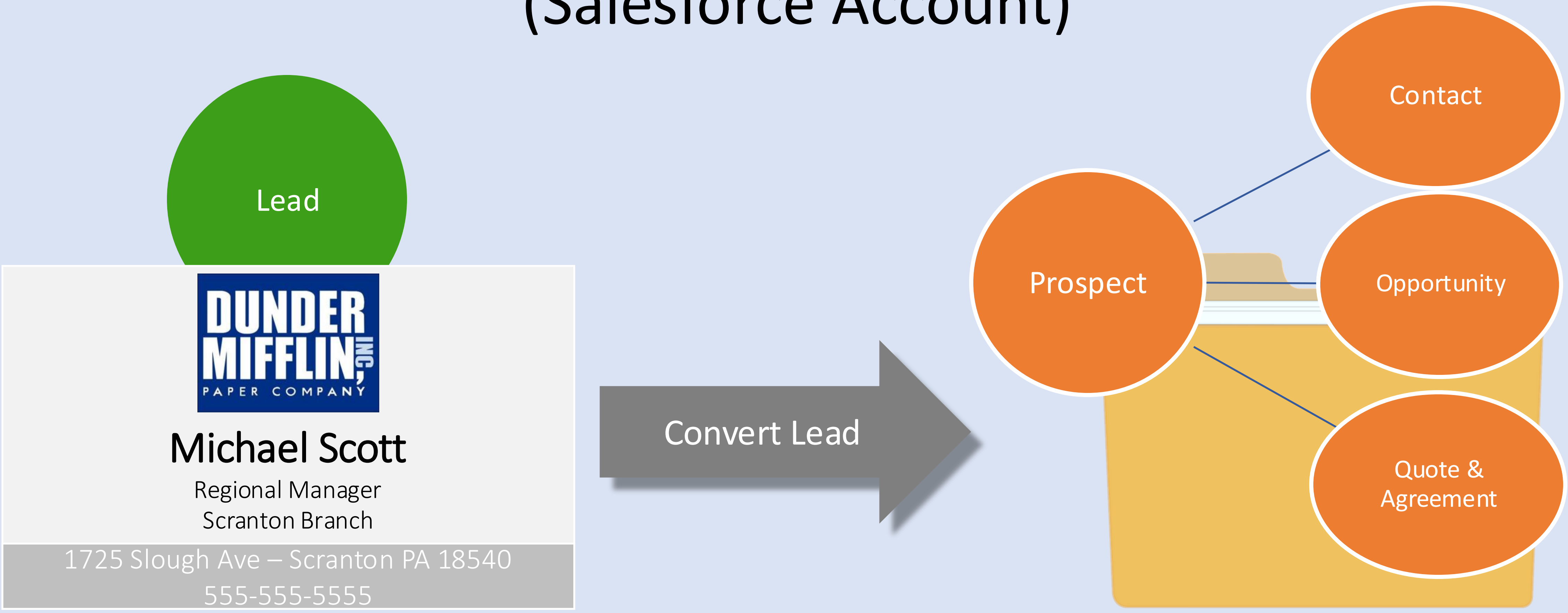
A lead is a person or a company that might be interested in our product or service. Think of a lead as a business card. Business Cards are associated to 1 business and 1 person's contact information. Salesforce is the bowl at the front desk that has all your leads or "business cards" in it.

As you reach out and try to set an appointment, you will move the lead through the attempt process. We will go over these steps in a few slides.

Once you have set a meeting with the Lead, you convert it into a Prospect Account.

TYPES OF RECORDS: **PROSPECT ACCOUNTS**

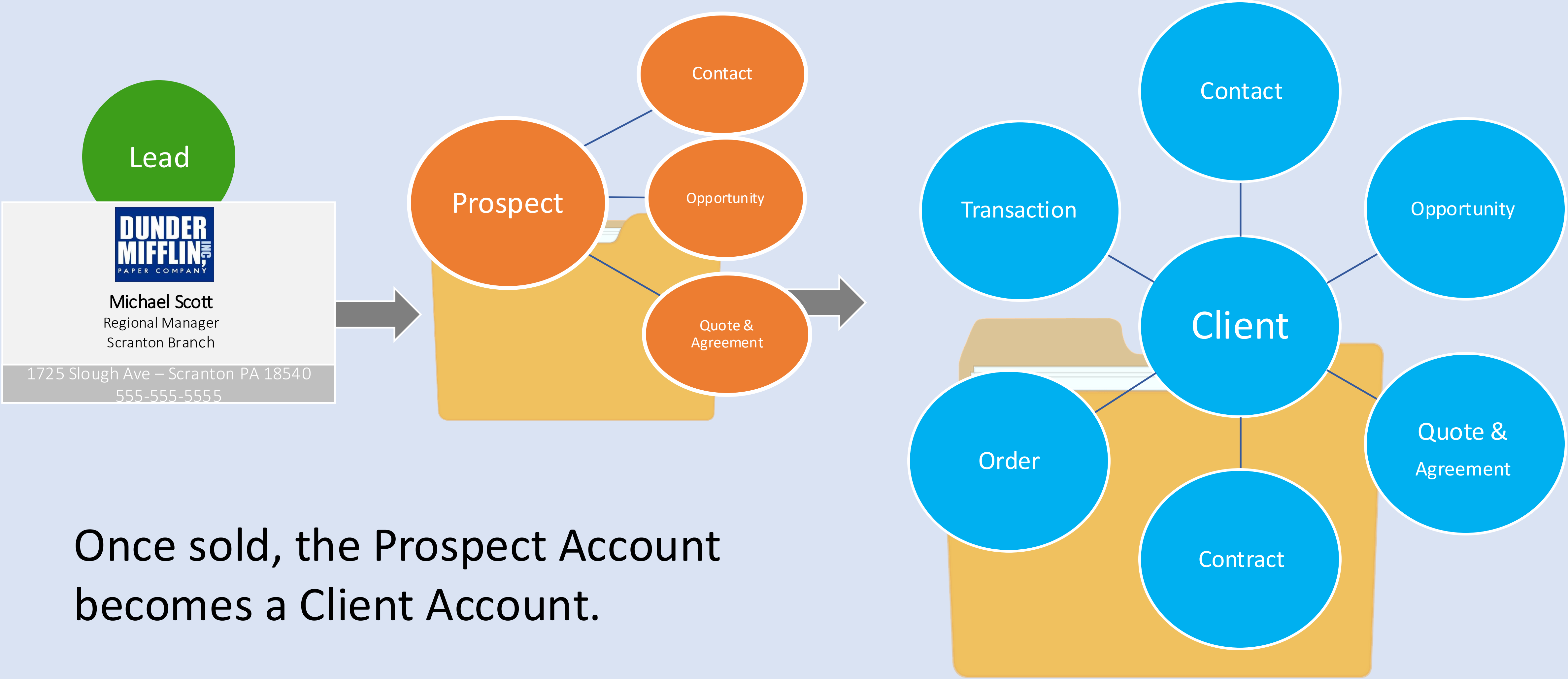
(Salesforce Account)



Prospect Accounts are converted Leads that you have an appointment with but have not yet sold.

TYPES OF RECORDS: **CLIENT ACCOUNTS**

(Financial Account)



Once sold, the Prospect Account becomes a Client Account.

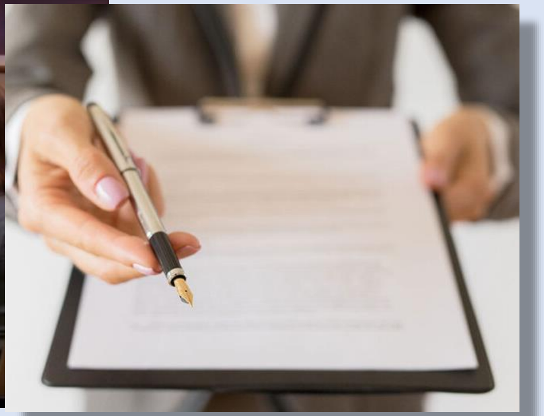
RECORD FLOW

Lead

Prospecting Attempts

(Calls, E-Mails, In Person, Social Media & Texts)

Prospect Account

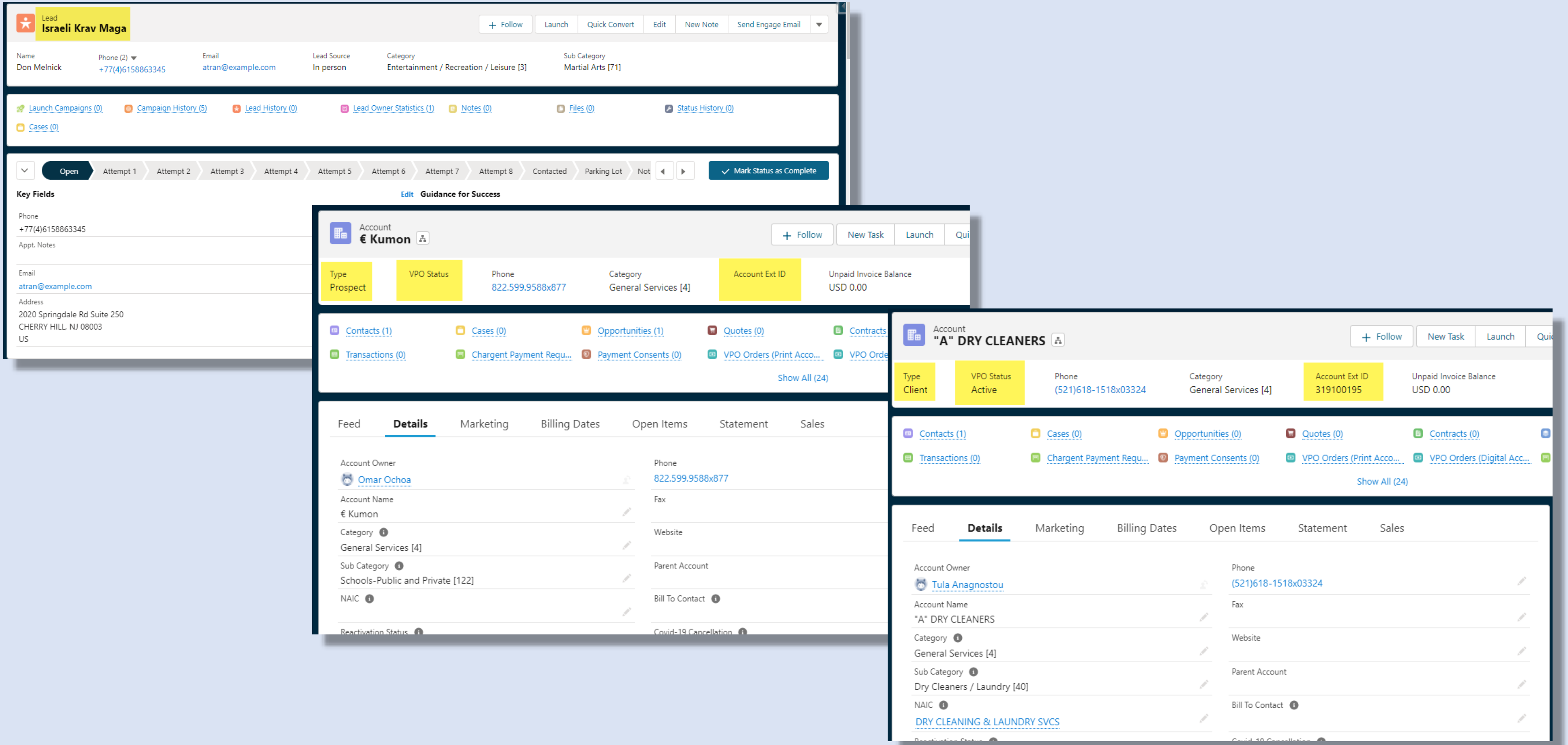


Client Account

Tell a story…

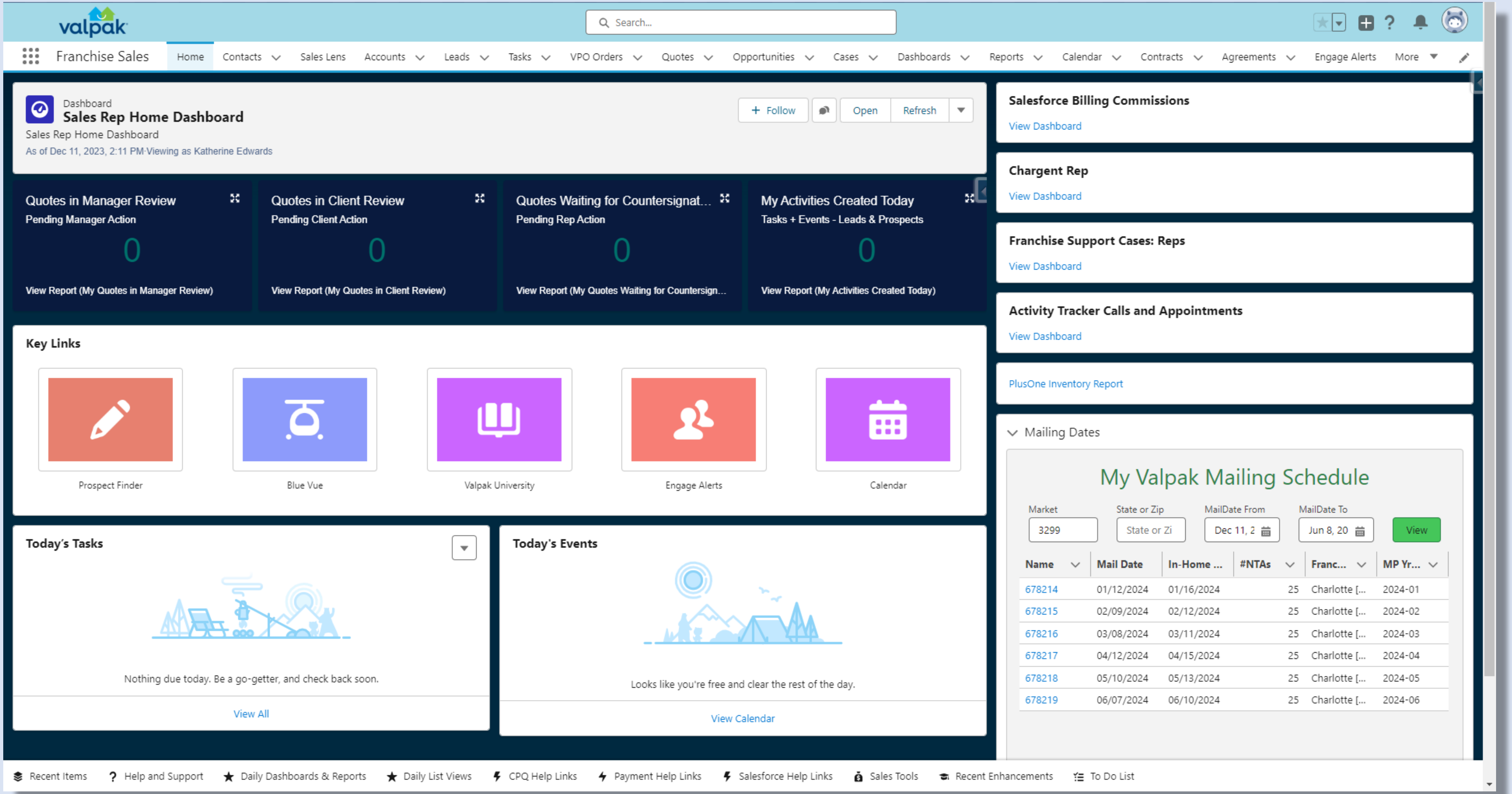
- Your LEAD is Dunder Mifflin and you're trying to reach Michael Scott. He's very busy…often in long meetings or out trying to find a cure for rabies. It takes several ATTEMPTS via calls, emails, texts and stop ins to set an appointment. Luckily, Pam was helpful and got you a meeting.
- Dunder Mifflin is now a Prospect Account. You meet, wow him with pictures of our print facility and sell him a 6X agreement for 100M homes. YAY! He's now a CLIENT ACCOUNT

TYPES OF RECORDS: **EXAMPLES**



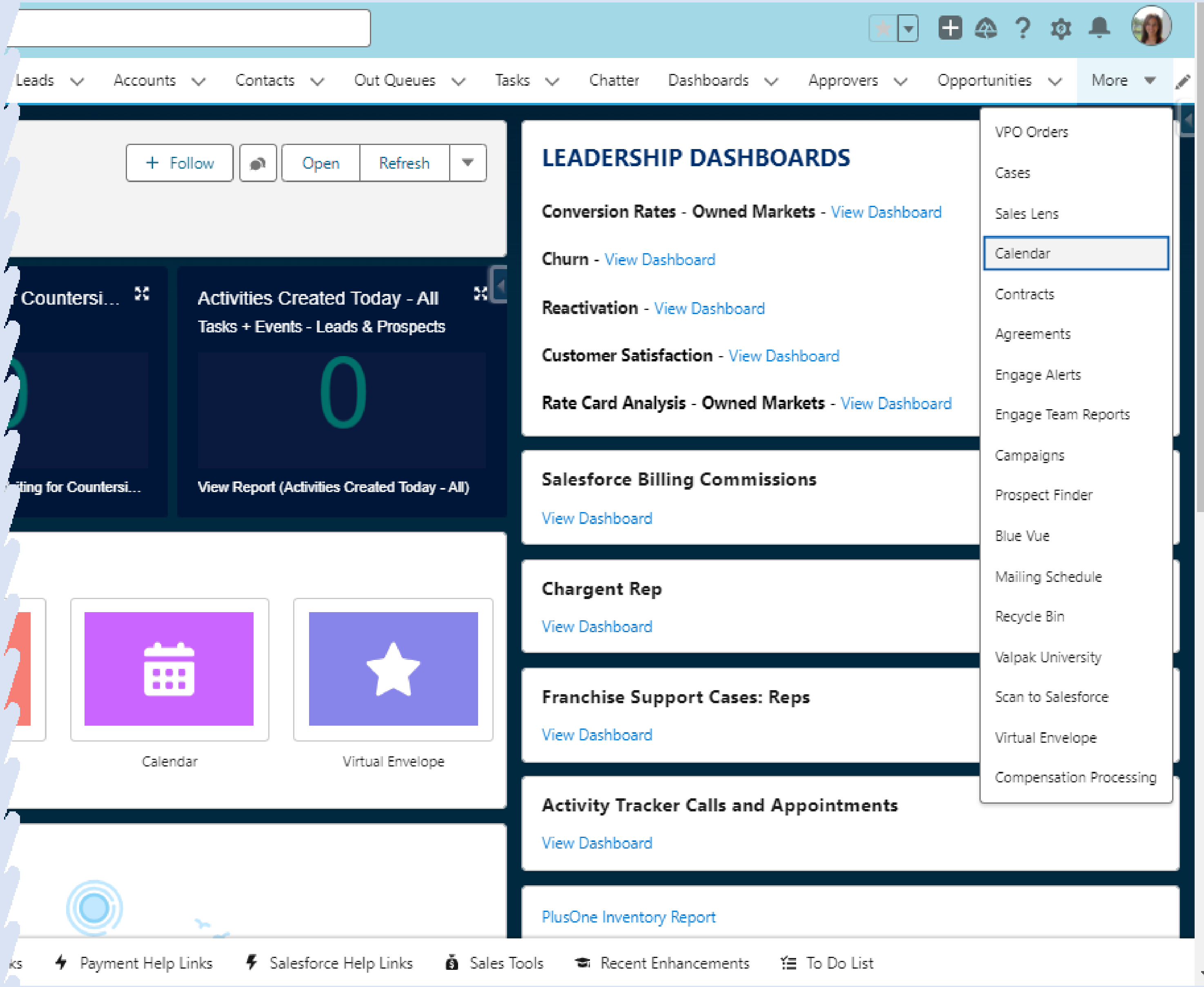
Search & Navigate

HOME PAGE

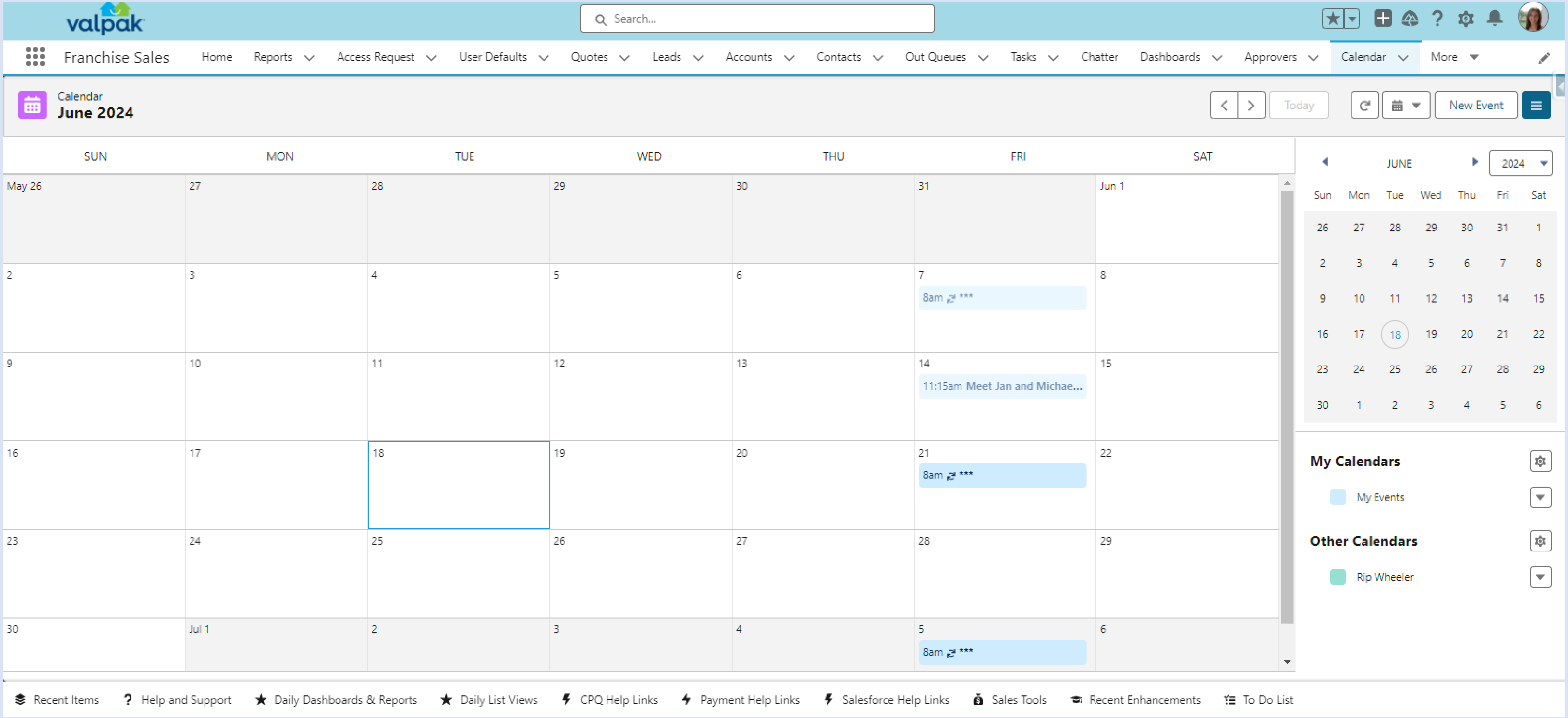

valpak
Search...
Franchise Sales
Home
Contacts
Sales Lens
Accounts
Leads
Tasks
VPO Orders
Quotes
Opportunities
Cases
Dashboards
Reports
Calendar
Contracts
Agreements
Engage Alerts
More
Dashboard
Sales Rep Home Dashboard
Sales Rep Home Dashboard
As of Dec 11, 2023, 2:11 PM·Viewing as Katherine Edwards
+ Follow
Open
Refresh
Quotes in Manager Review
Pending Manager Action
0
View Report (My Quotes in Manager Review)
Quotes in Client Review
Pending Client Action
0
View Report (My Quotes in Client Review)
Quotes Waiting for Countersignat...
Pending Rep Action
0
View Report (My Quotes Waiting for Countersign...
My Activities Created Today
Tasks + Events - Leads & Prospects
0
View Report (My Activities Created Today)
Key Links
Prospect Finder
Blue Vue
Valpak University
Engage Alerts
Calendar
Today's Tasks
Nothing due today. Be a go-getter, and check back soon.
View All
Today's Events
Looks like you're free and clear the rest of the day.
View Calendar
Salesforce Billing Commissions
View Dashboard
Chargent Rep
View Dashboard
Franchise Support Cases: Reps
View Dashboard
Activity Tracker Calls and Appointments
View Dashboard
PlusOne Inventory Report
Mailing Dates
My Valpak Mailing Schedule
Market
3299
State or Zip
State or Zi
MailDate From
Dec 11, 2
MailDate To
Jun 8, 20
View
Name | Mail Date | In-Home ... | #NTAs | Franc... | MP Yr...
678214 | 01/12/2024 | 01/16/2024 | 25 | Charlotte [... | 2024-01
678215 | 02/09/2024 | 02/12/2024 | 25 | Charlotte [... | 2024-02
678216 | 03/08/2024 | 03/11/2024 | 25 | Charlotte [... | 2024-03
678217 | 04/12/2024 | 04/15/2024 | 25 | Charlotte [... | 2024-04
678218 | 05/10/2024 | 05/13/2024 | 25 | Charlotte [... | 2024-05
678219 | 06/07/2024 | 06/10/2024 | 25 | Charlotte [... | 2024-06
Recent Items
Help and Support
Daily Dashboards & Reports
Daily List Views
CPQ Help Links
Payment Help Links
Salesforce Help Links
Sales Tools
Recent Enhancements
To Do List

CALENDAR

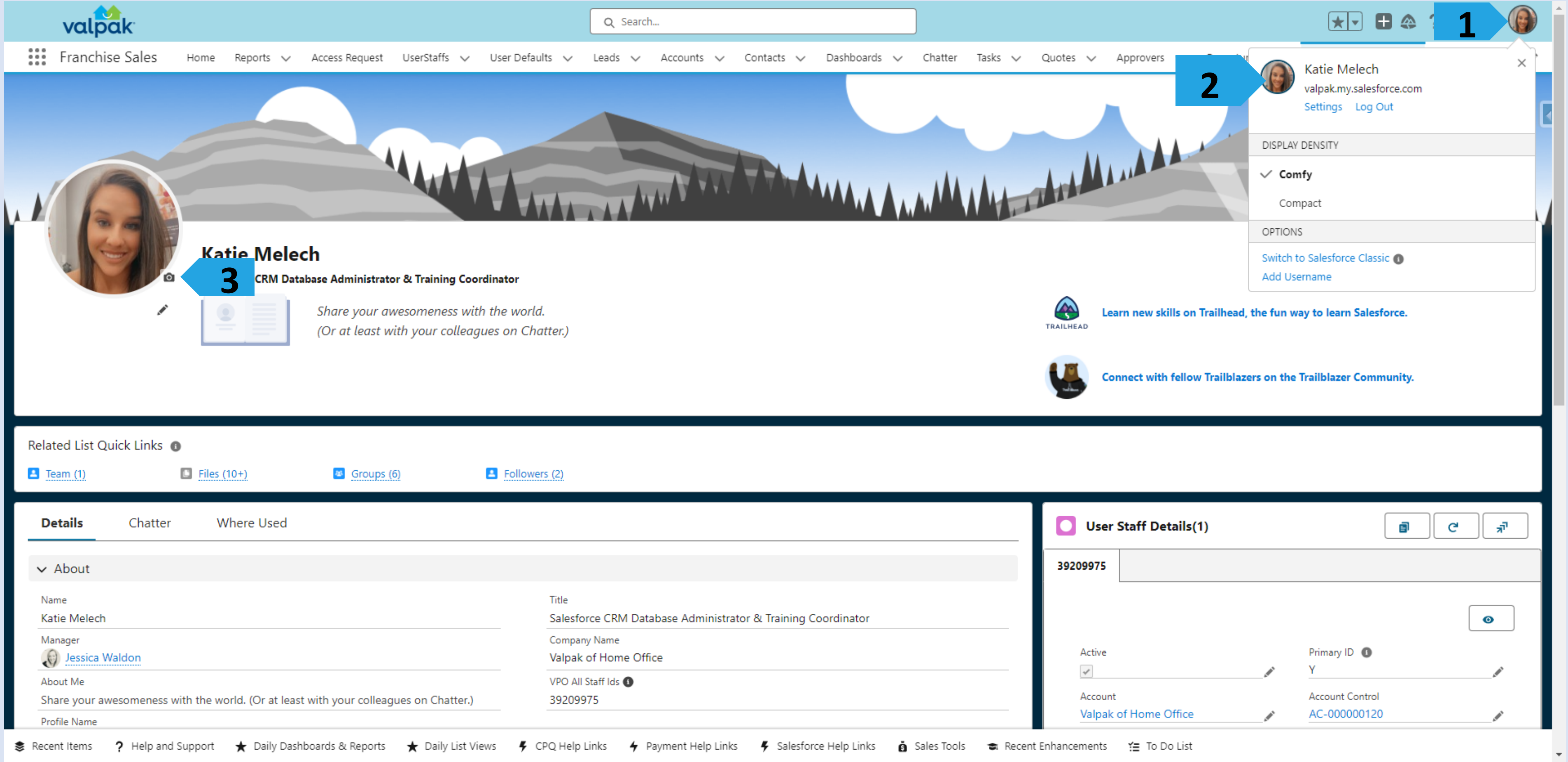
You can access your calendar from your Home Page Key Link section or on the Navigation bar.



CALENDAR


valpak
Search...
Franchise Sales
Home
Reports
Access Request
User Defaults
Quotes
Leads
Accounts
Contacts
Out Queues
Tasks
Chatter
Dashboards
Approvers
Calendar
More
Calendar
June 2024
Today
New Event
SUN
MON
TUE
WED
THU
FRI
SAT
May 26
Jun 1
8am ***
11:15am Meet Jan and Michae...
Jul 1
JUNE
2024
Sun
Mon
Tue
Wed
Thu
Fri
Sat
My Calendars
My Events
Other Calendars
Rip Wheeler
Recent Items
Help and Support
Daily Dashboards & Reports
Daily List Views
CPQ Help Links
Payment Help Links
Salesforce Help Links
Sales Tools
Recent Enhancements
To Do List

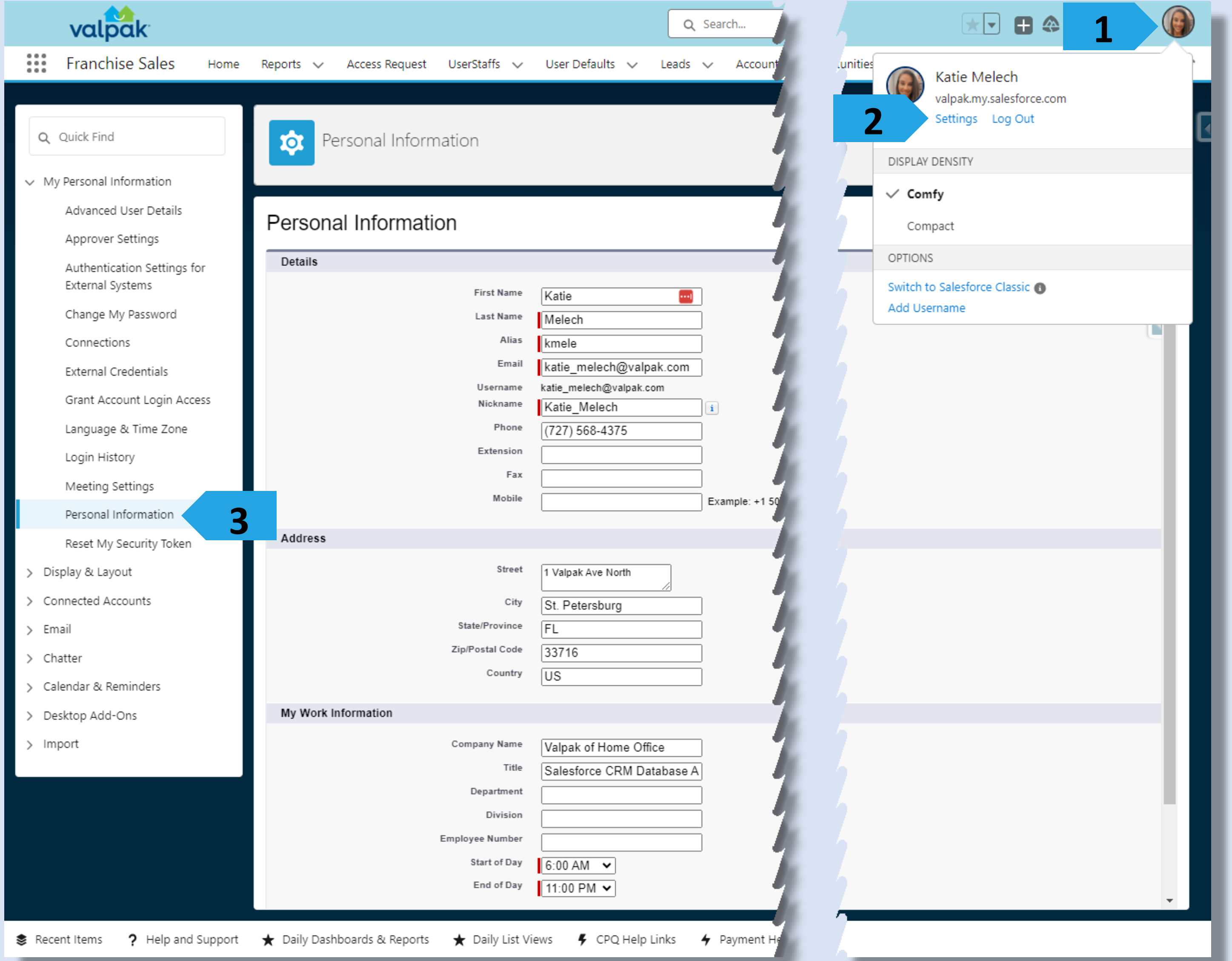
UPDATE YOUR SALESFORCE PICTURE



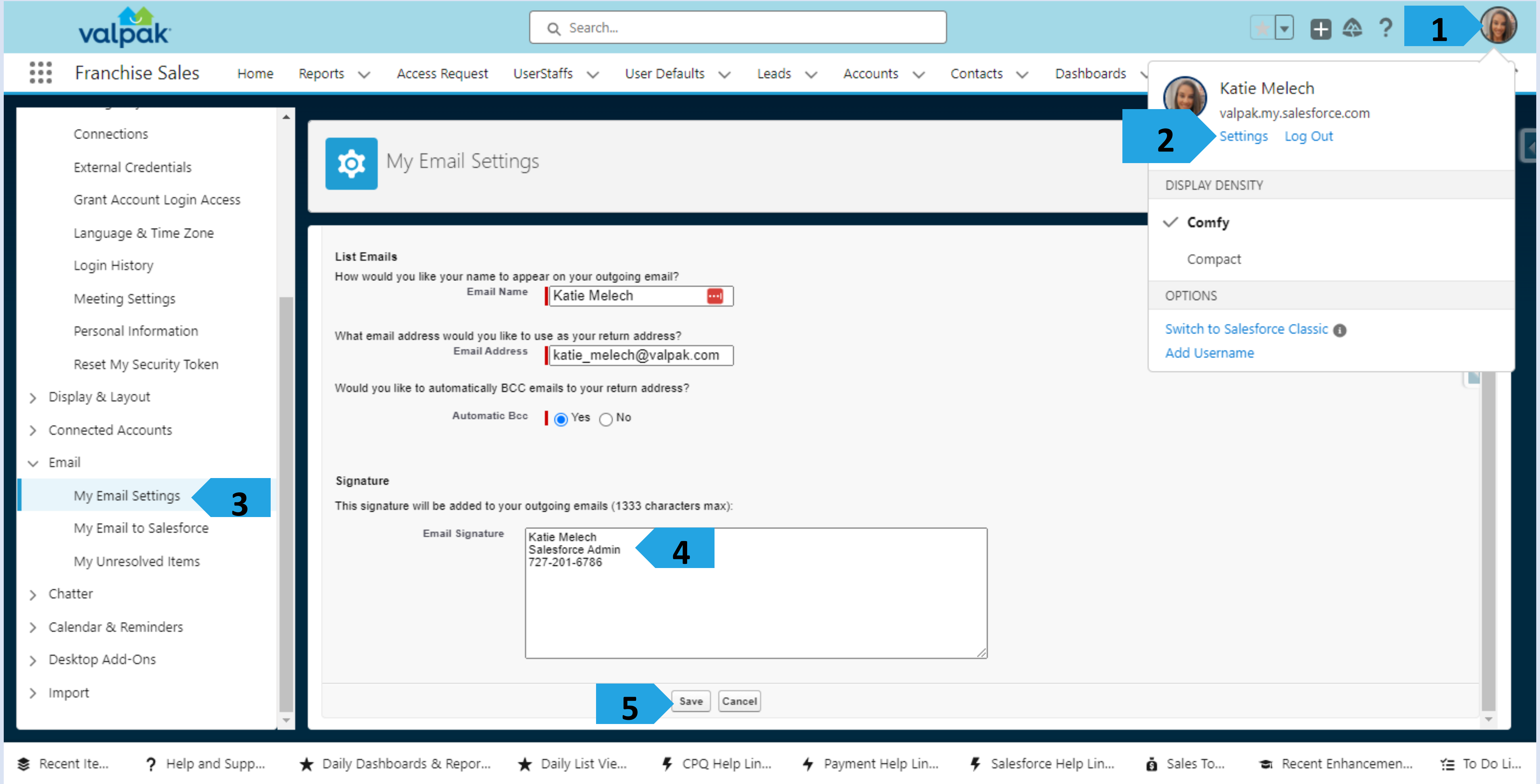
You can update your Salesforce picture by going to your profile and click on the image again.

UPDATE YOUR USER PROFILE

You may wish to add your cell number or change your first name to an abbreviated name, you have access to make these changes to your user profile. However, please use your legal name – Mike instead of Michael is fine, but don't use nicknames or preferred names. Salesforce uses the name fields for the CPQ agreements that we'll learn more about later. Agreements are legal documents; therefore, we need your legal name. You must also use your @clippermagazine email address, no exceptions.

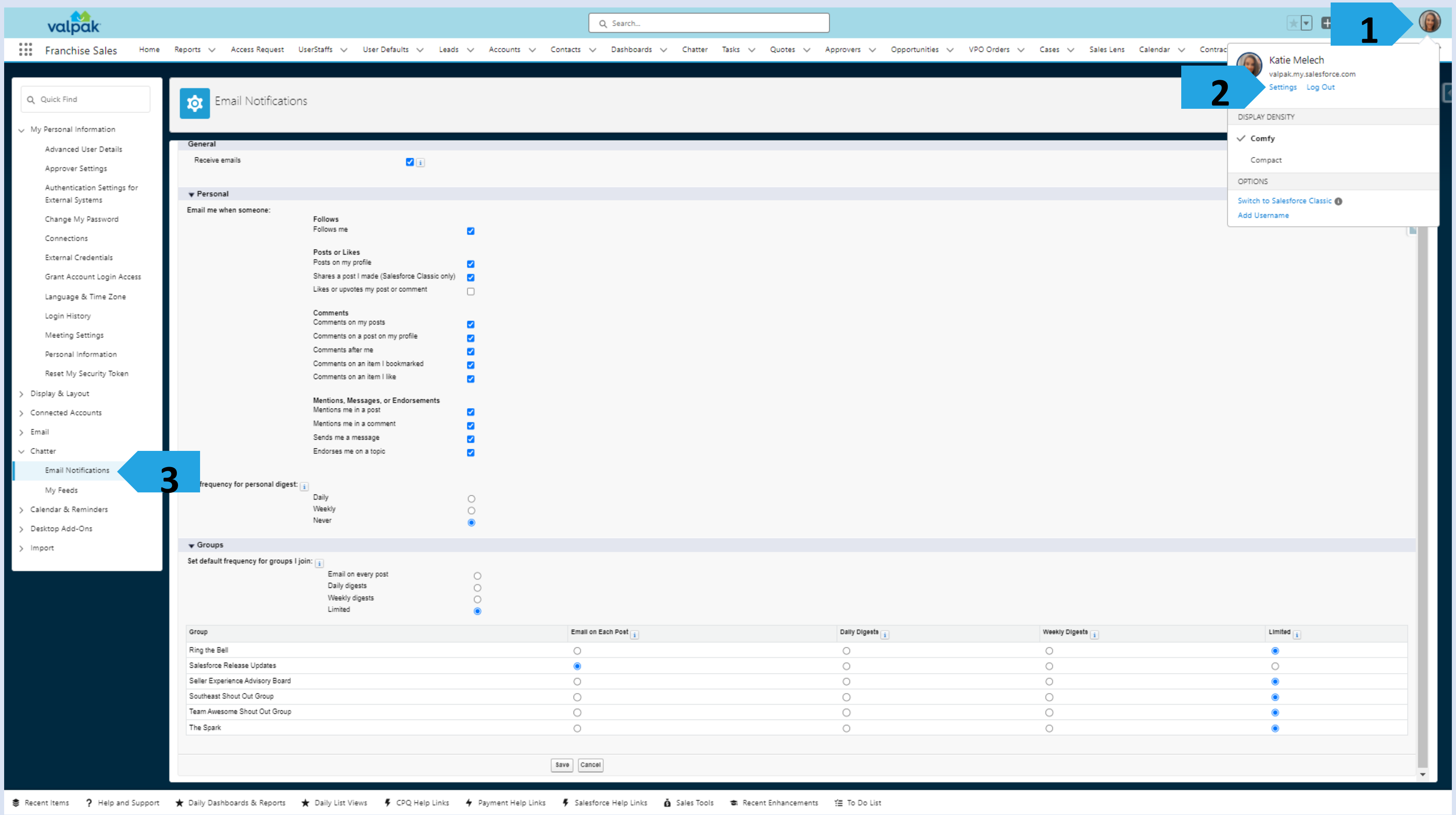


UPDATE YOUR SALESFORCE SIGNATURE



You can update your Salesforce signature by going to settings, email settings, and adding your email signature.

UPDATE YOUR CHATTER SETTINGS

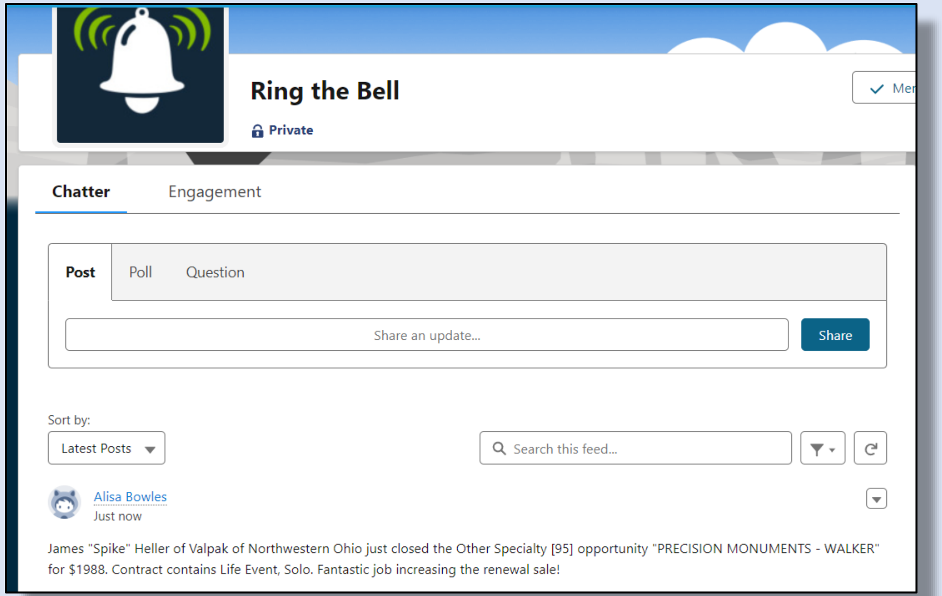


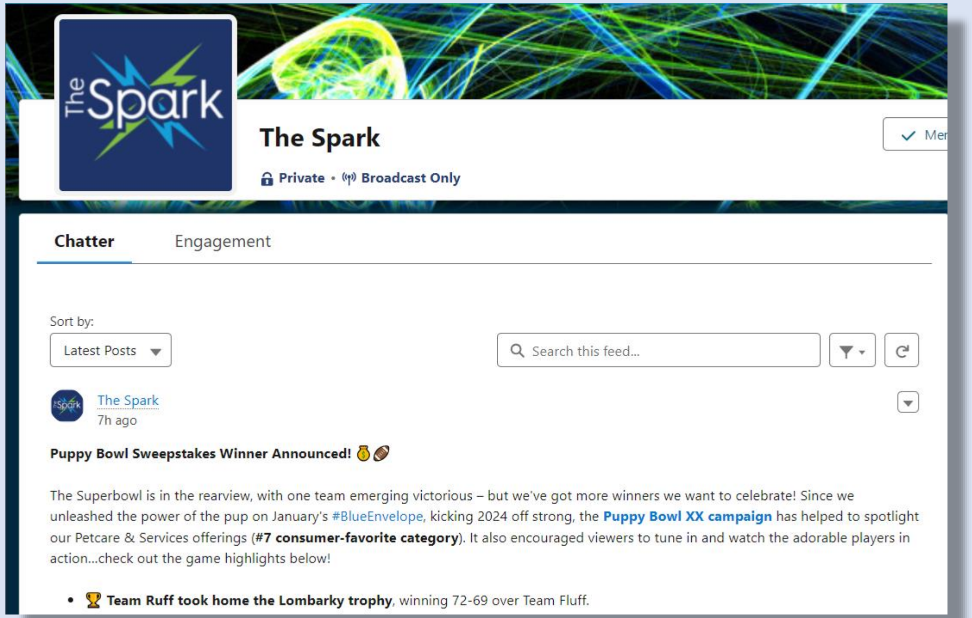
To change the amount of Chatter emails you receive, Under your settings, go to Chatter, Email Notifications. Here you can choose how often you want to receive chatter notifications.

For Spark, make sure you receive these emails DAILY

CHATTER GROUPS

Salesforce Chatter is a real-time social collaboration application that lets employees talk to each other, share information and work together.





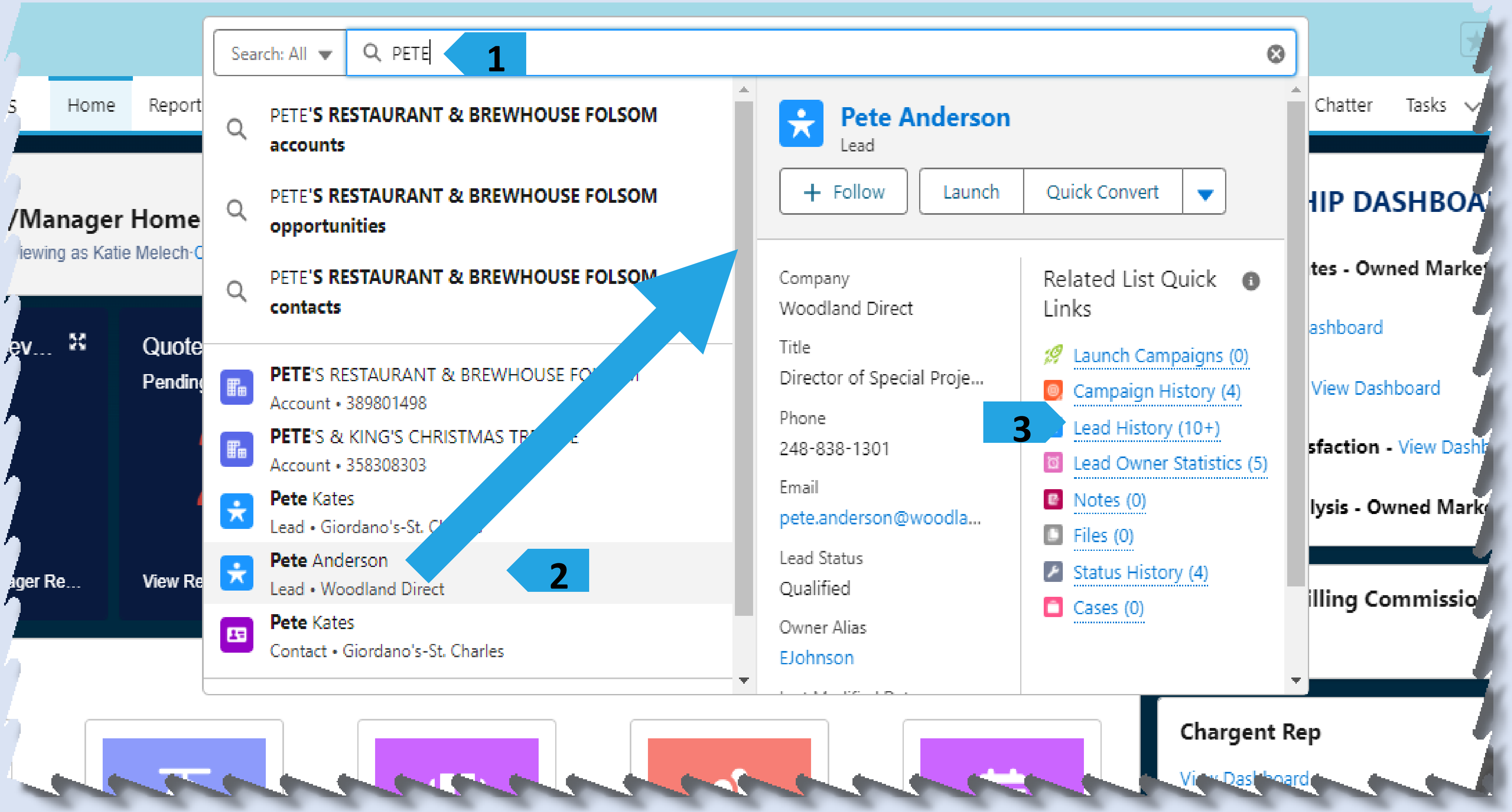
RING THE BELL – "Ring the Bell" is a group that gives visibility to sales as they happen in the network. As a sale is converted to closed/won in Salesforce, a notification is triggered in the group, showing sales information such as sales rep name, franchise office, business name and category. This group gives our sales reps the recognition they deserve as well as provides the opportunity for other reps to ask questions and gain sales strategy intel.

SPARK – This is our daily communication to everyone in the network. Welcome to The Spark! A forum to ignite ideas, thoughts and actions!

EINSTEIN SEARCH
(Global Search)

Salesforce has an artificial intelligence called Einstein that learns your search behaviors. Clicking on the search box displays the most recently touched records and tips from Einstein. As you continue to use Salesforce the searching becomes more intuitive.

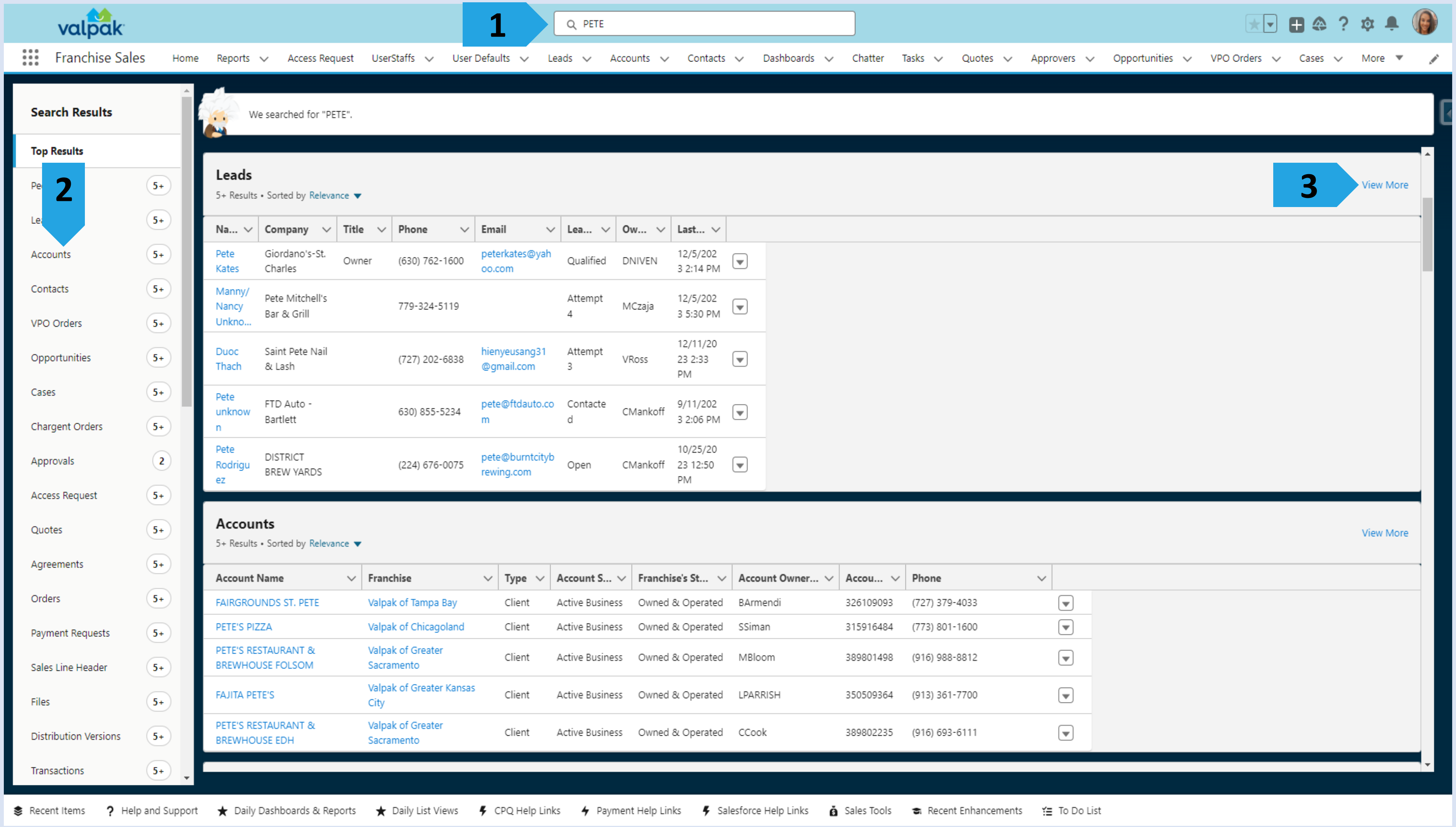
1. Begin your search by typing in the search box.
2. Hovering over the search results displays the basic record information, related record information, and action buttons.
3. Hovering over the related links displays information from the related records.



EINSTEIN SEARCH

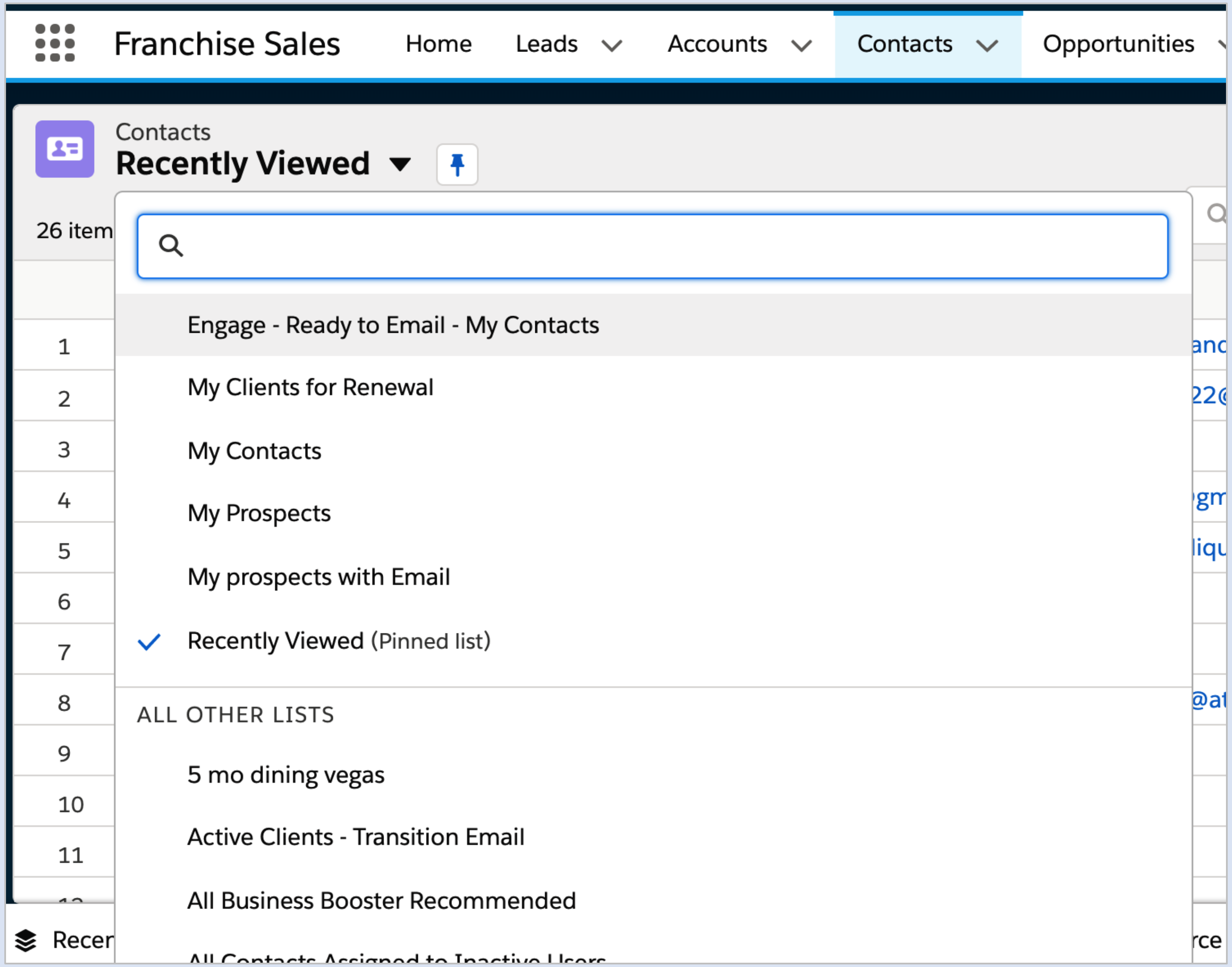
(Global Search)

Start typing and hit enter to pull an organized list of records that contain your search word.
You can also select a specific record type if you are looking for a specific record.
You can click view more so that you can see all associated records.



WHAT ARE LIST VIEWS?

A list view is a **filtered list of records** where you can view records for one object at a time. For example, a list of Contacts, Accounts, or Opportunities.

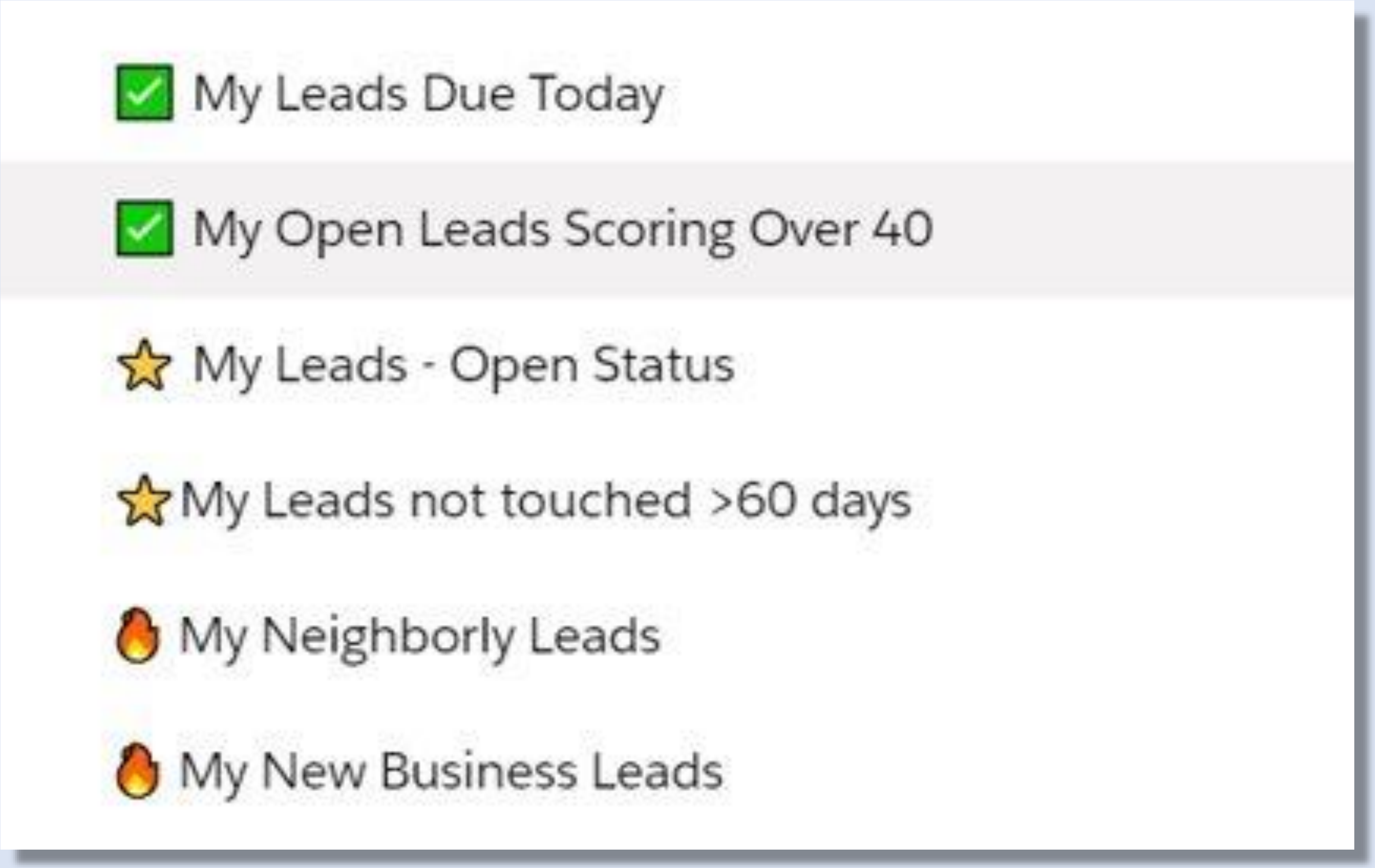


QUICKLY IDENTIFY LIST VIEWS

The lists you should be touching everyday

Lists reps commonly ask for

Hot lists typically resulting from a special corporate initiative



LIST VIEWS TO USE DAILY

Leads
✅ My Leads Due Today

Leads
⭐ My Active Funded Leads

Leads
✅ My Open Leads Behavior Score Over 40

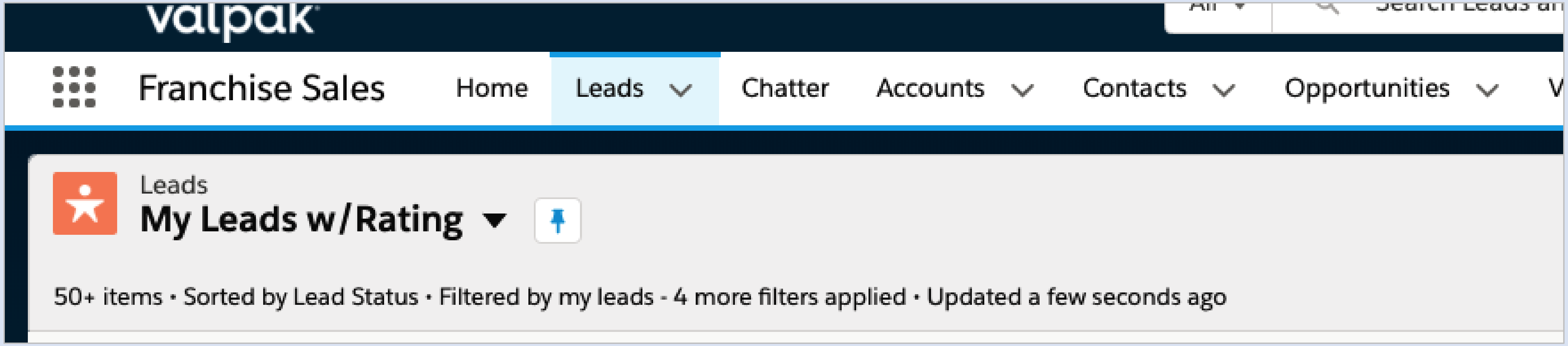
Tasks
✅ My Tasks Due This Week

Contacts
⭐ My Active Clients

Contacts
✅ My Clients to Renew - 6 Months

Contacts
✅ My Prospects - Not Touched > 60 Days

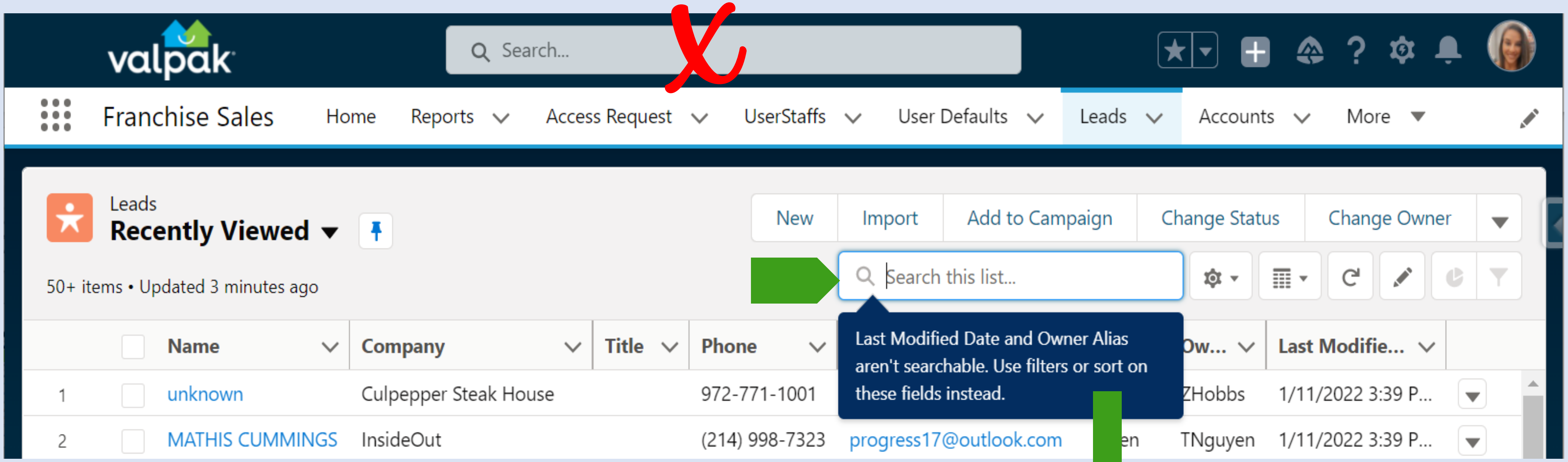
PIN A LIST VIEWS



1. Select the **list view drop-down** to locate your favorite list view.
2. Push the **pin** to store that list view to display every time you click on that tab.

Tasks	My Tasks Due Today -or- My Tasks Due This Week
Leads	My Leads Due Today
Contacts	My 6 Month Reactivation Clients -or- My Prospects Not Touched > 60 Days
Cases	My Active Cases – Owned & Requestor
Quotes	My Quotes in Client Review

SEARCH LIST VIEWS

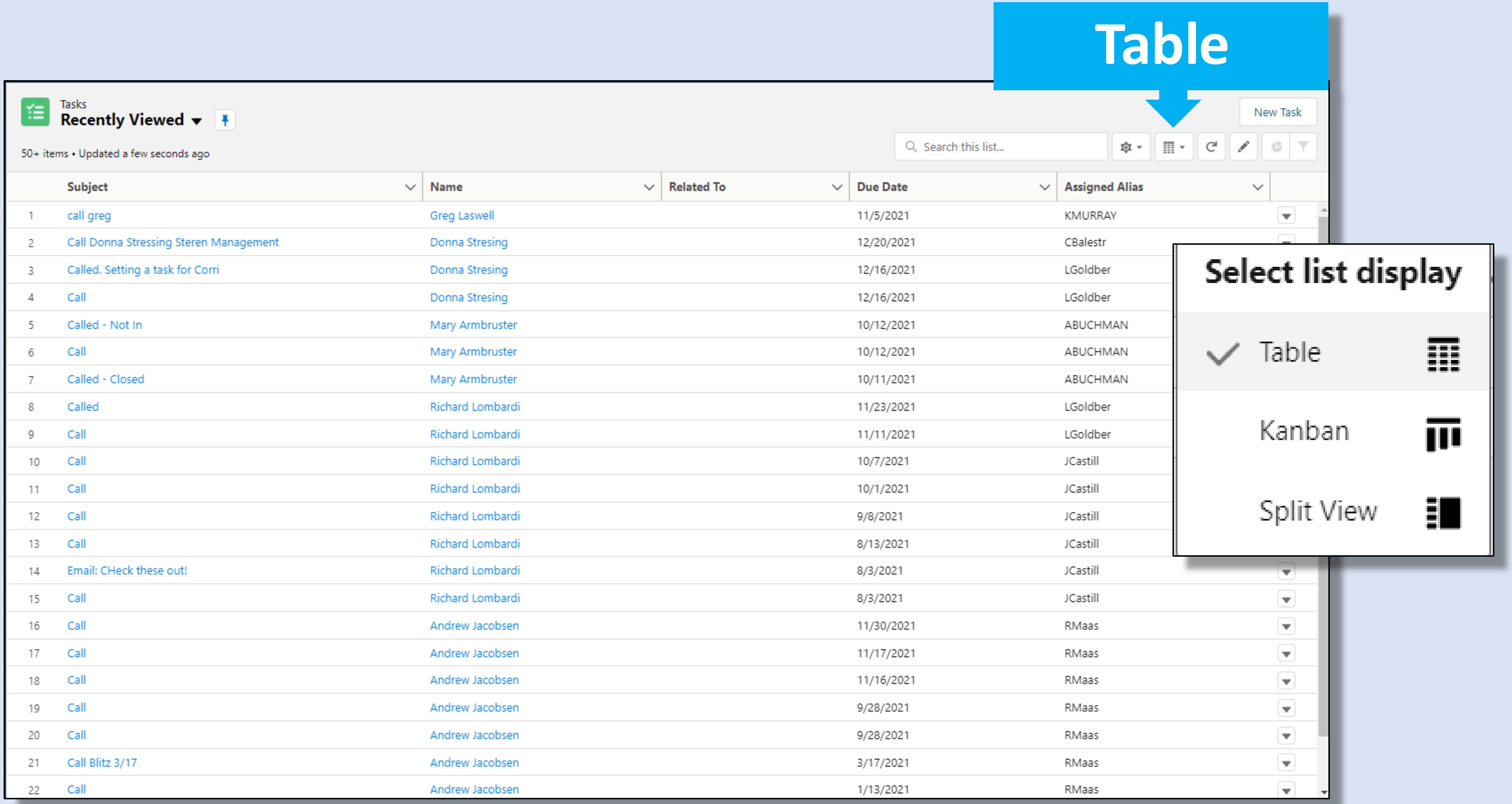


Common search criteria:

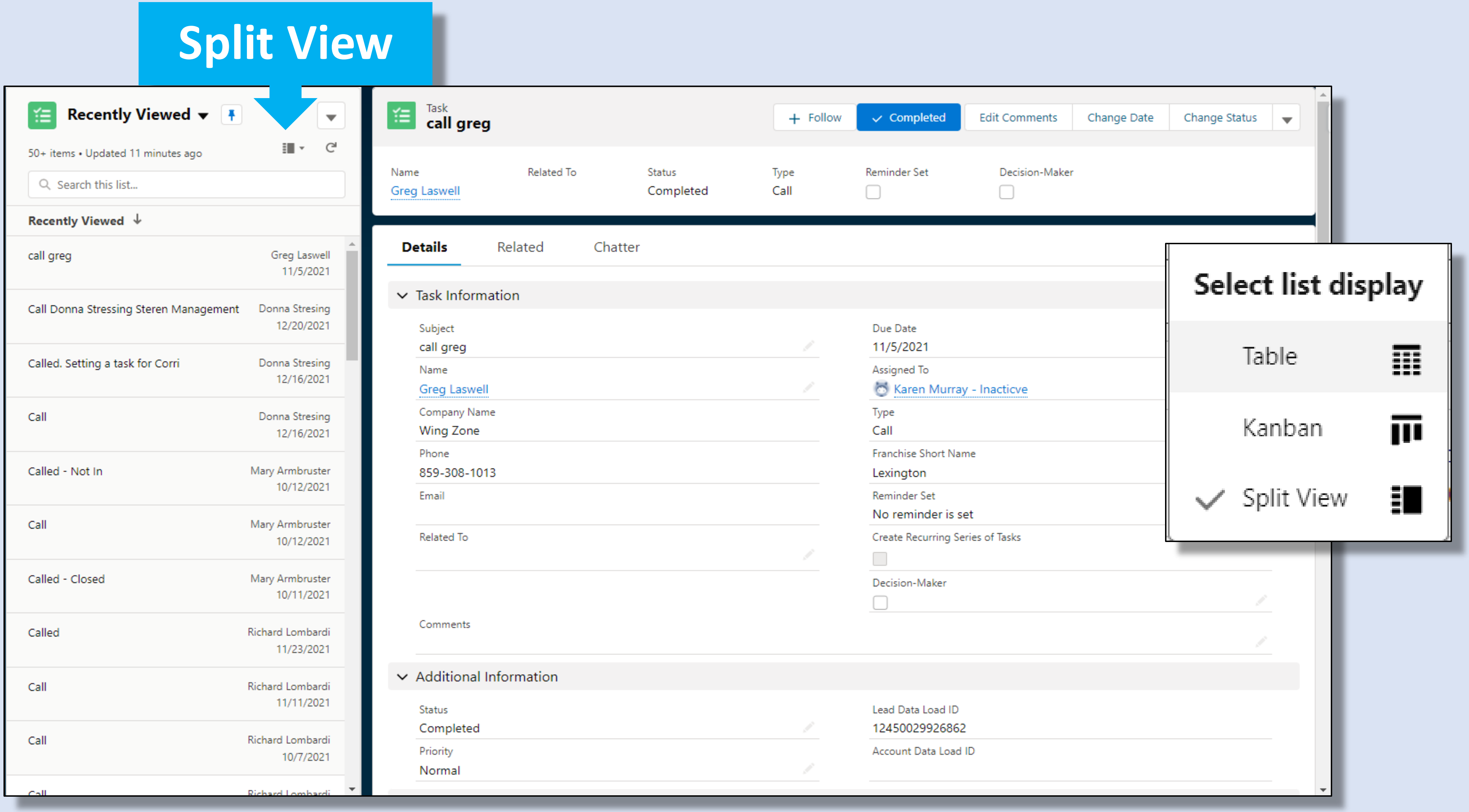
- Email
- Zip Code
- Contact Name
- Company Name

The search window displays a pop-out window describing which fields are not searchable for the list.

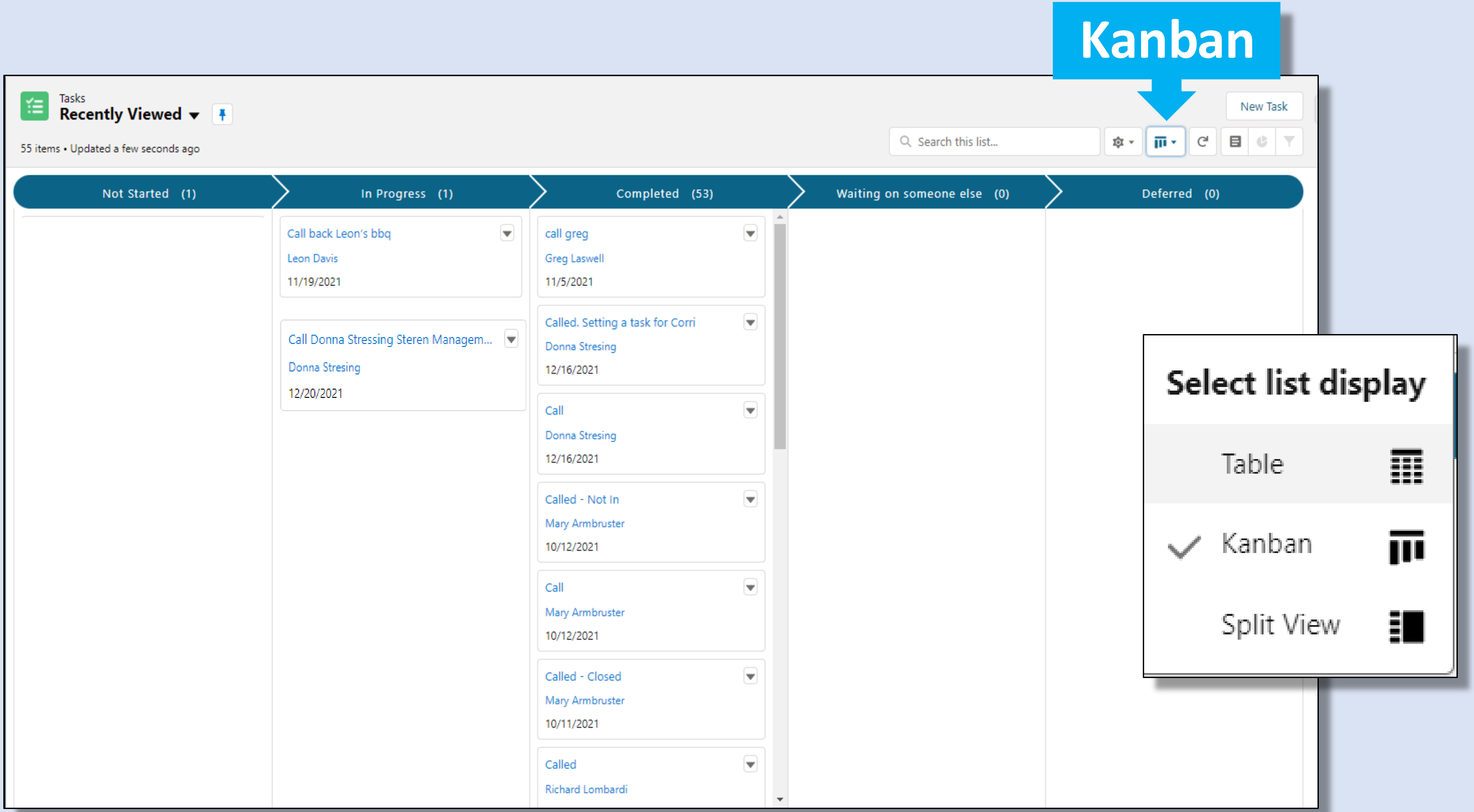
CHOOSE YOUR VIEW – Option 1



CHOOSE YOUR VIEW – Option 2



CHOOSE YOUR VIEW – Option 3



INTRO TO LEADS

WHERE DO LEADS COME FROM?

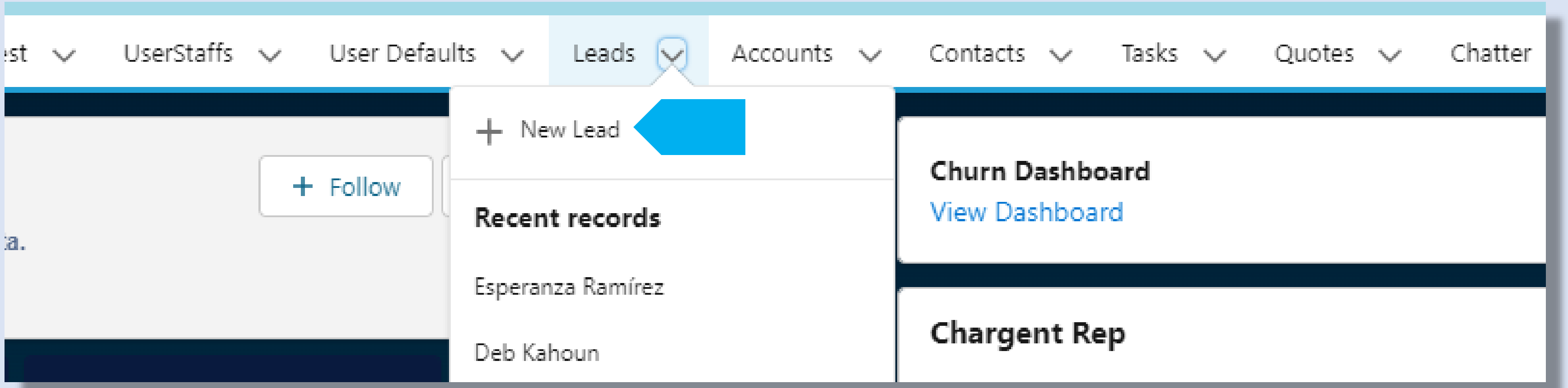
Self-Generated = YOU

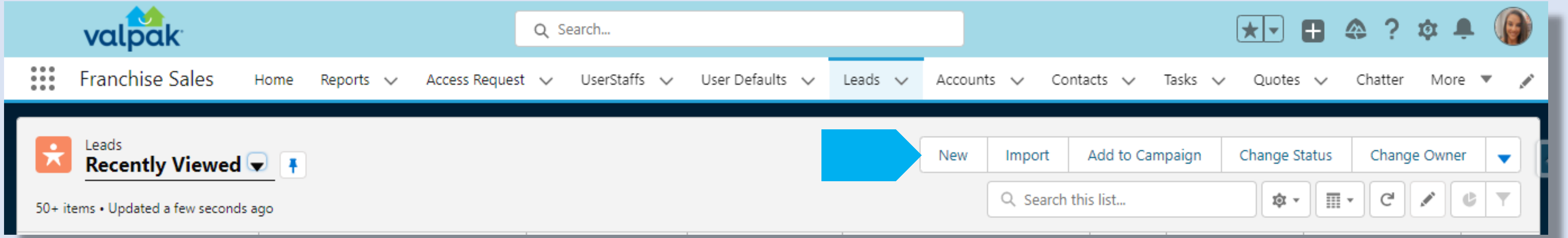
1. Canvasing your Territory
2. Prospect-Finder app
3. AdMall

Online Marketing Efforts

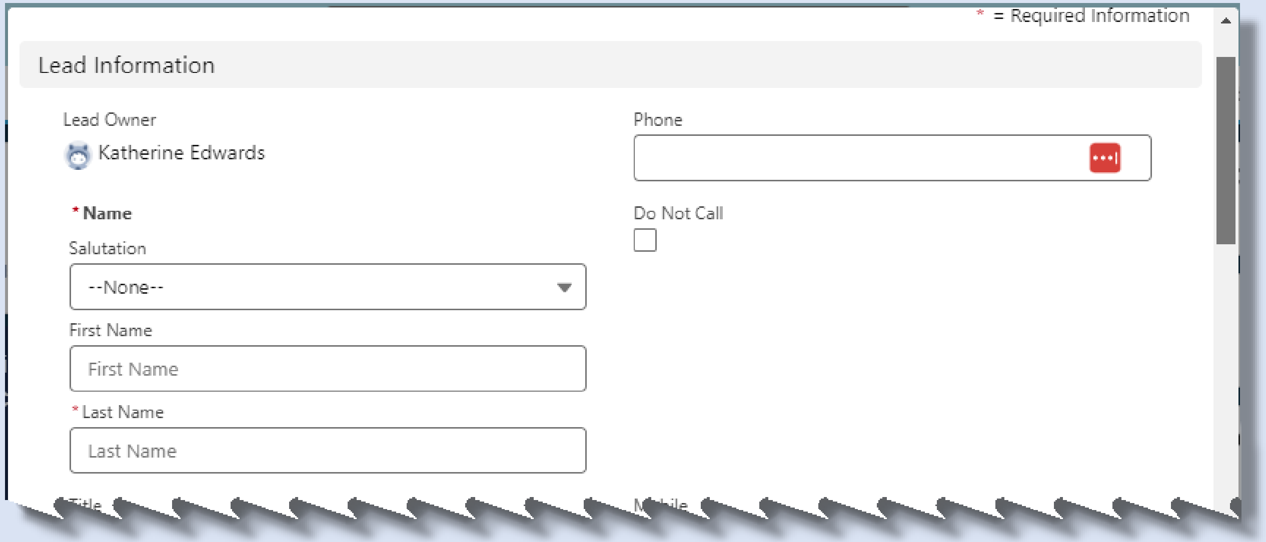
1. Franchise Home Page form fills
2. Google Ad Word searches/form fills
3. Insert Program
4. Other marketing efforts

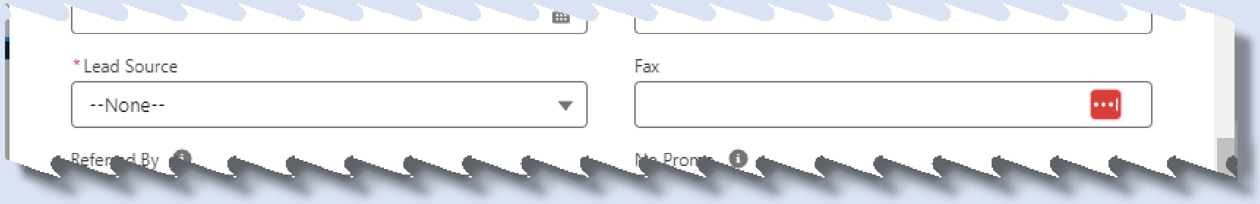
CREATE A LEAD

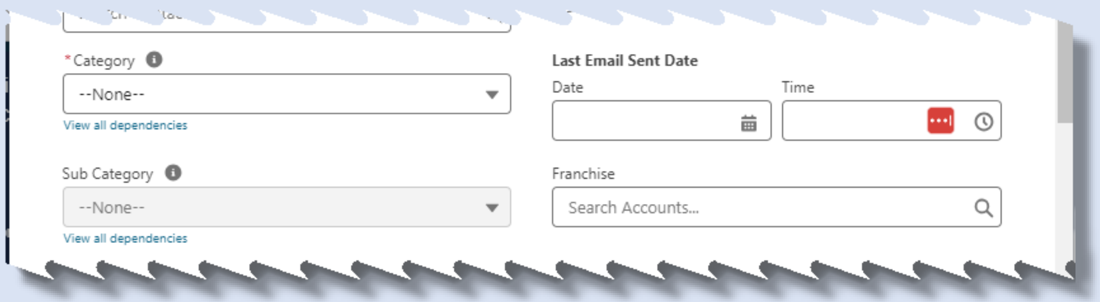


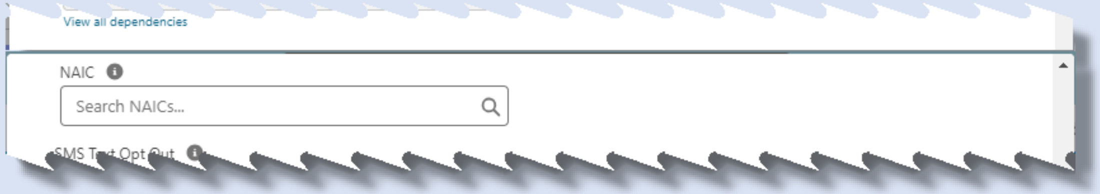


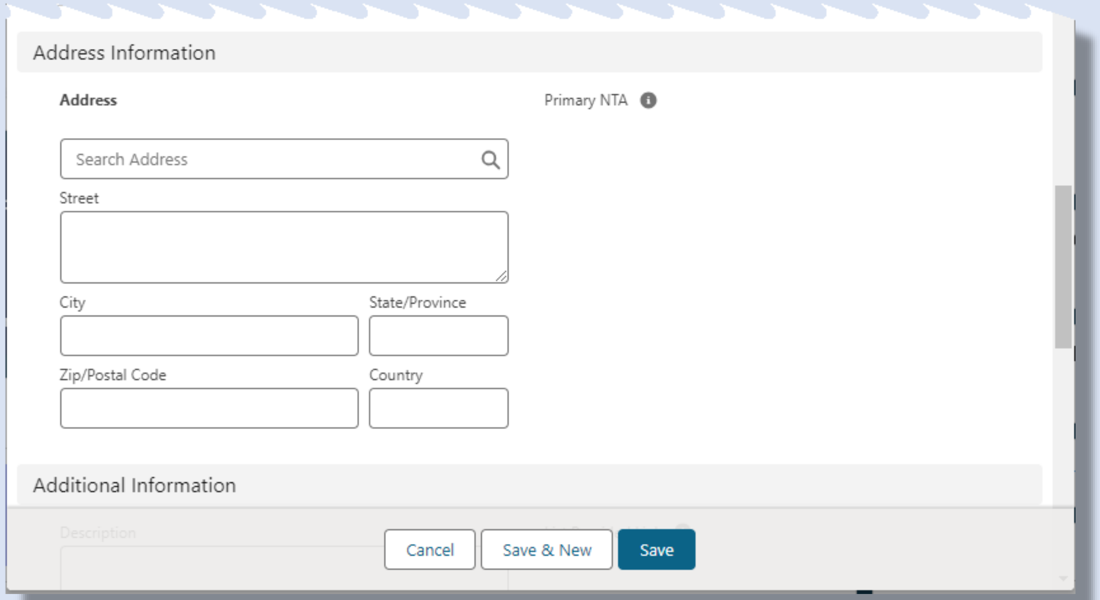
NEW LEAD FORM







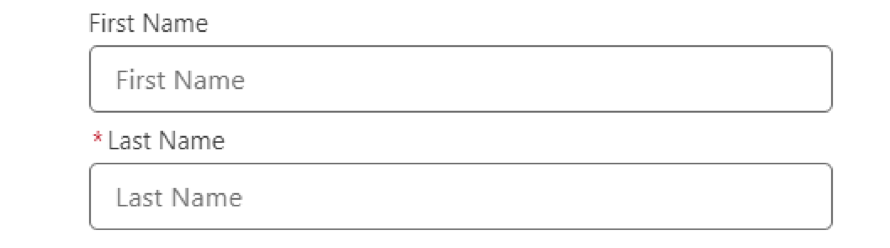




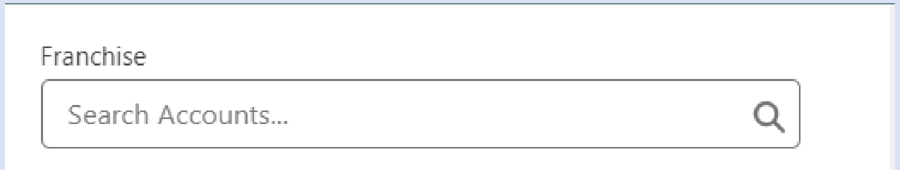
NEW LEAD FORM – TIPS!

- Note that all fields with a red asterisk are required fields.

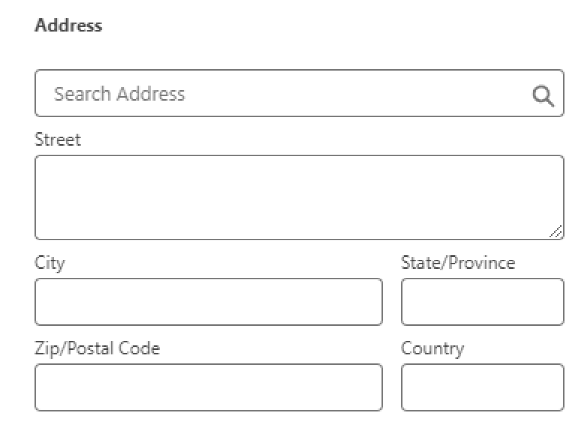
- If you don’t have a First Name, leave it blank. **If you don’t have a Last Name enter Unknown.** Do not enter N/A, Don’t Know, or other text in the name field.

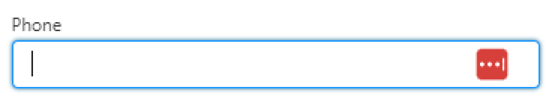


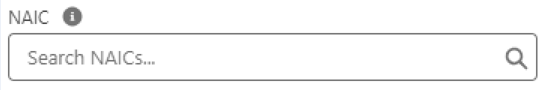
- You will need to add a Franchise based off the Business’ physical location.



- Optional fields you should fill in:
  - Phone
  - NAIC
  - Address
  - Email



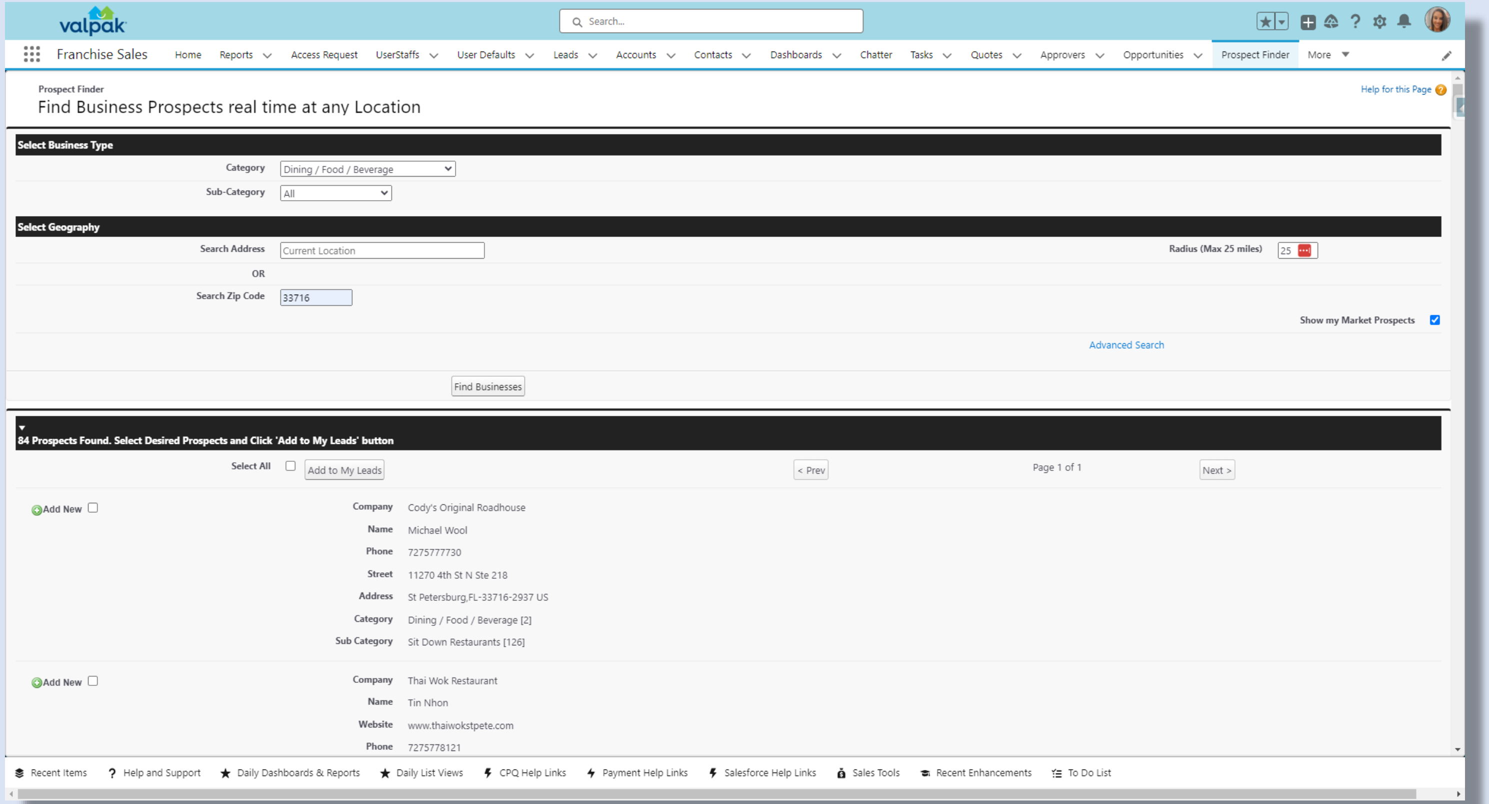




PROSPECT FINDER

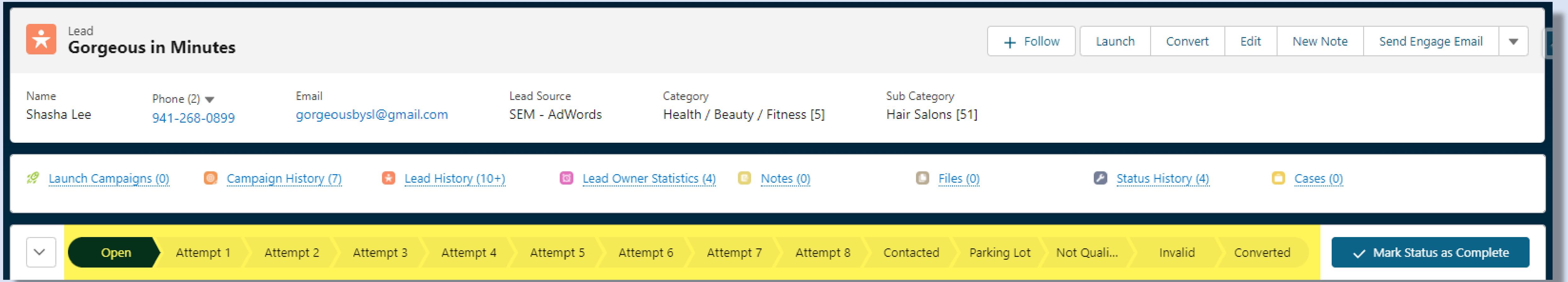
WHAT IS PROSPECT FINDER?

- A business-to-business application for locating and downloading business listings from combined data sources managed by Valpak home office.
- Search, select, and transfer data from Prospect Finder directly into Salesforce.
- NOTE: We remove Prospect Finder Leads with no Activity in the last 90 days.

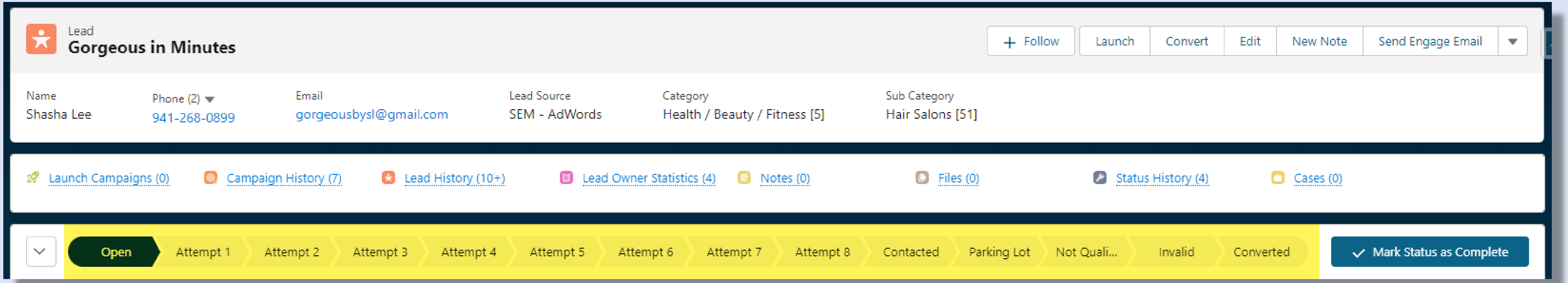


WORKING LEADS

LEAD PROCESS



WHAT IS AN “ATTEMPT”?



Inside Salesforce, we’ve built logic behind each **prospecting call attempt**. You don’t have to set a reminder on your phone, write it on a sticky note, or think about it until you go to your “My Leads Due Today” List View the next day.

THE ATTEMPT PROCESS

GREEN ATTEMPT
=
Automatically updates the due date

Attempt 1
*Wait 1 Day

Attempt 2
*Wait 1 Day

Attempt 3
*Wait 1 Day

You don’t have to set a task, write it on a sticky note, or think about it until you go to your list view “My Leads Due Today” the next day. The same thing happens with Attempt 2 & 3.

THE ATTEMPT PROCESS

GREEN ATTEMPT
=
Automatically updates the due date

Attempt 4
*Wait 4 Days

Attempt 5
*Wait 7 Days

Attempt 6
*Wait 7 Days

At attempt 4, the wait time in between calls extends to 4 days – and keeps extending as you make more attempts. Each time you move to the next attempt it is automatically removed from your My Leads Due Today list and is set to show back up after the designated wait time.
At attempt 5 & 6, the wait time in between calls extends to 7 days.

THE ATTEMPT PROCESS

GREEN ATTEMPT
=
Automatically updates the due date

Attempt 7
*Wait 9 Days

Attempt 8
*Wait 15 Days

Contacted
*Create a Task

BLUE =
You will decide next steps

At attempt 7, the wait time in between calls extends to 9 days.
At attempt 8, the wait time in between calls extends to 15 days.
Contacted – You finally got the someone on the phone, or they replied to you email. However, they say now is not a good time and want you to call back on Friday after 2pm. Mark your Attempt as Contacted and create a task to call them back on the date and time requested.

THE ATTEMPT PROCESS

BLUE =
You will decide next steps

Parking Lot *Has an Email → **Not Qualified** *No Email → **Invalid** *Out of Business

Parking Lot vs. Not Qualified– The client tells you no. At Valpak, we take no as “no for now”. So how do you determine if they go into the Parking Lot or as Not Qualified. It’s easy. Do you have an email address on the Lead? If yes, put it in the Parking Lot. If no, put them in Not Qualified.

Invalid – You call the client, and their phone number is out of service. You take a drive to their location and see an OUT OF BUSINESS sign in the window. These Leads need to be marked as Invalid.

5 WAYS TO CONTACT LEADS/CONTACTS

1. In-Person
2. Phone
3. E-Mail
4. Text
5. Social Media
   - LinkedIn, Facebook, Instagram

MIX YOUR TOUCHES

By using a planned follow-up schedule and mixing up your contact approaches, you can increase the chances of getting to the decision maker and getting the appointment.

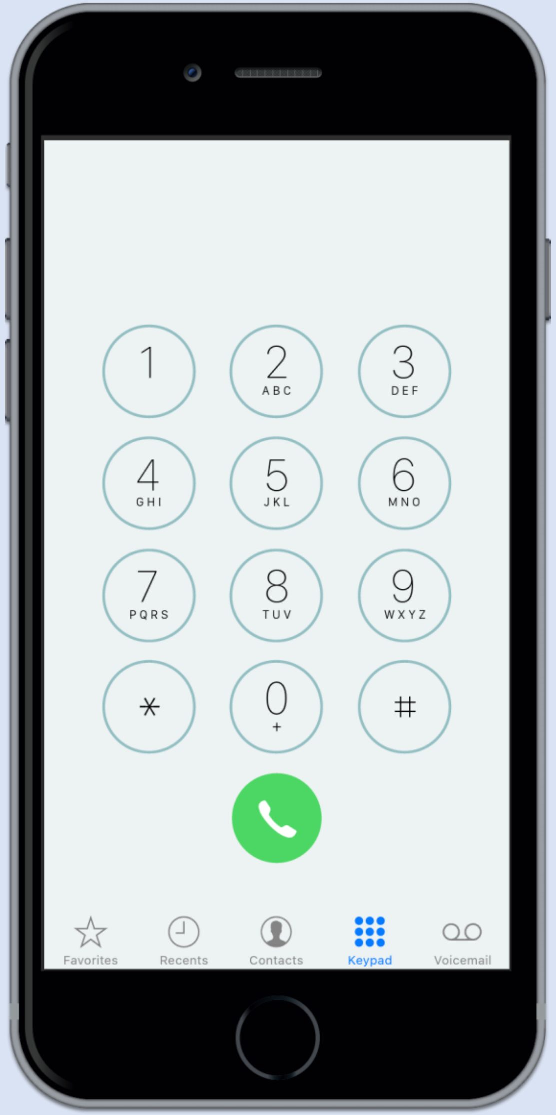
LEAD PROCESS CHEAT SHEET

SALESFORCE LEAD PROCESS

Open › Attempt 1 › ... › Attempt 8 › Contacted › Qualified › Parking Lot › Not Qualified › Invalid › Convert...

SCENARIO	ACTION	BENEFIT
Call Lead: No Answer • Leave a voicemail • Status = Attempt 1-8 • Activity – Log a Call	☑ **Log a Call** ☑ **Move the Lead Status from the current Attempt to the next Attempt.** Attempt X › Attempt Y	This removes the Lead from the Leads Due Today list and automatically updates the due date to a future date, so the Lead reappears on the list in a few days.
Call Lead: Objection • Status = Contacted • Activity – New Task	☑ **New Task** ☑ **Move the Lead Status from the current Attempt to Contacted.** Attempt X › Contacted	Moving the Lead to Contacted removes the Lead from your cold call list (My Leads Due Today). You will now be able to tell the system when you want to be reminded to follow up with the Lead. Plan your next step based on the prospect's feedback.

SCENARIO – **CALL – NO ANSWER**

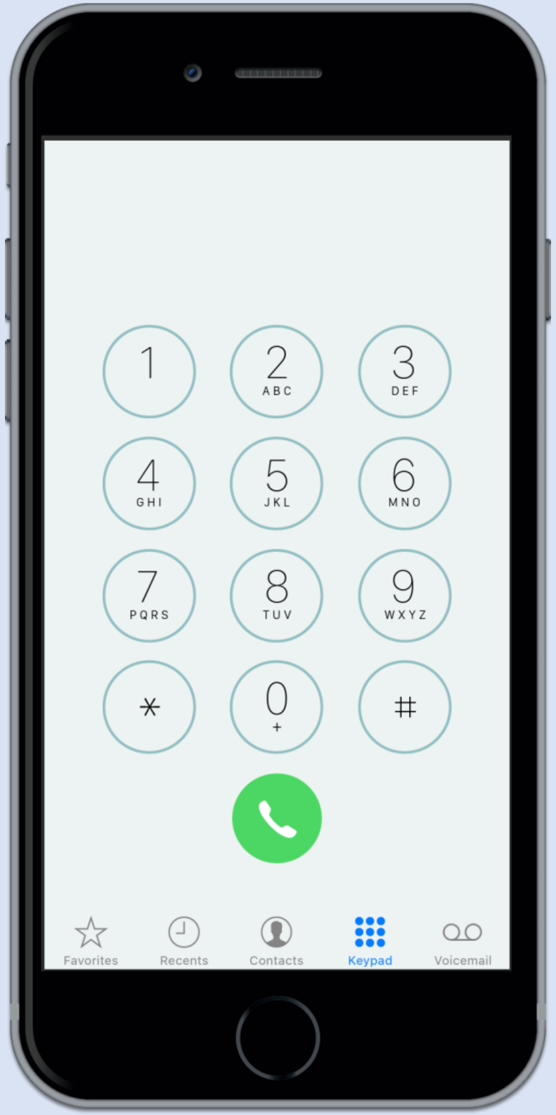


- Leave a voicemail
- Status = **Attempt 1-8**
- Activity = **Log a Call**

SCENARIO – **CALL - OBJECTION**

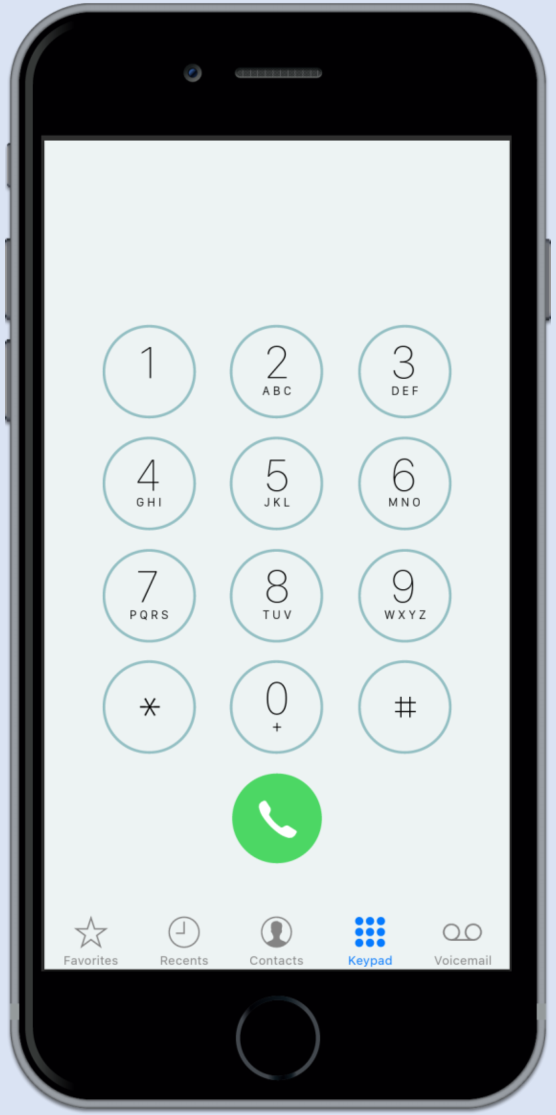
- Status = **Contacted**
- Activity = **New Task**
  - Set a task to reach back out to them at a later date. (a week or 2 in the future.)

SCENARIO – **CALL – "CALL ME NEXT WEEK"**



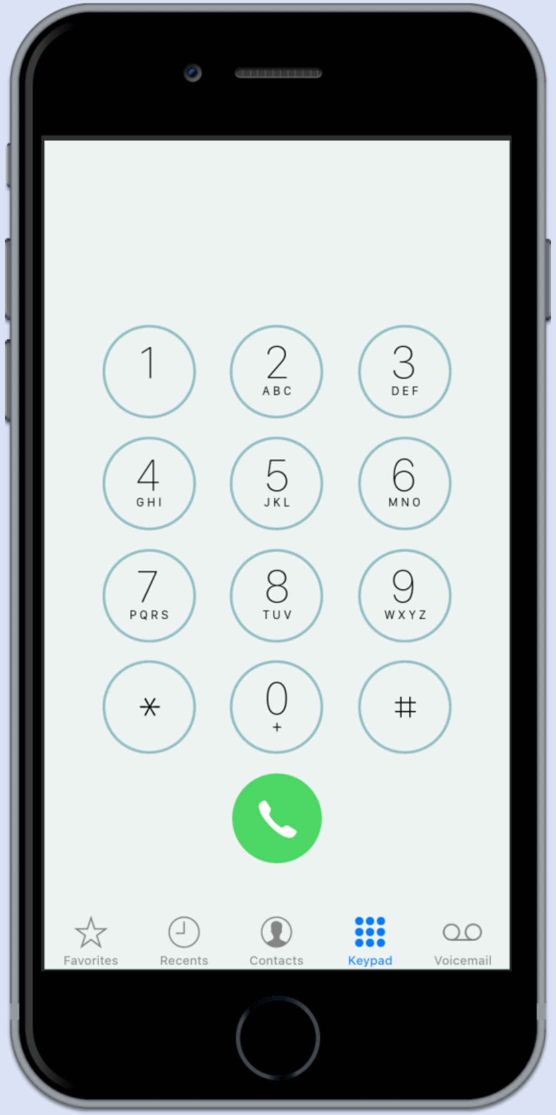
- Status = **Contacted**
- Activity = **New Task**
  - Should be set for some time next week to remind you to call them back.

SCENARIO – **CALL – “YES, LETS MEET TOMORROW”**



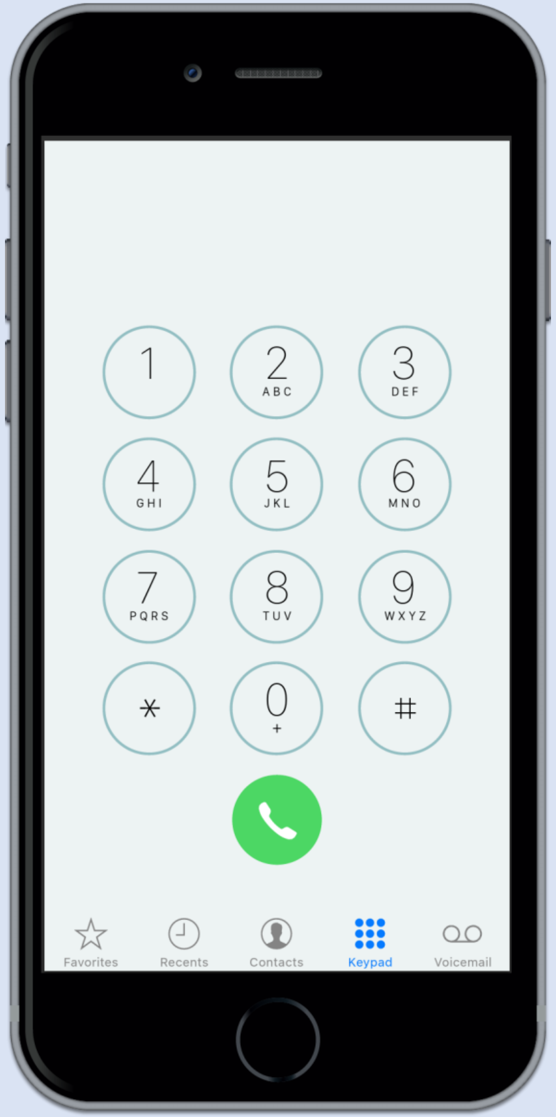
- Activity = **New Event**
- Convert the Lead to Prospect Account.

SCENARIO – **CALL – GET THE BOOT**



- Lead has email:
  - Status = **Parking Lot**
- Lead does not have email:
  - Status = **Not Qualified**
- Activity = **Log a Call**

SCENARIO – **Call – OUT OF BUSINESS/SERVICE**



- Status = **Invalid**
- Activity = **Log a Call**

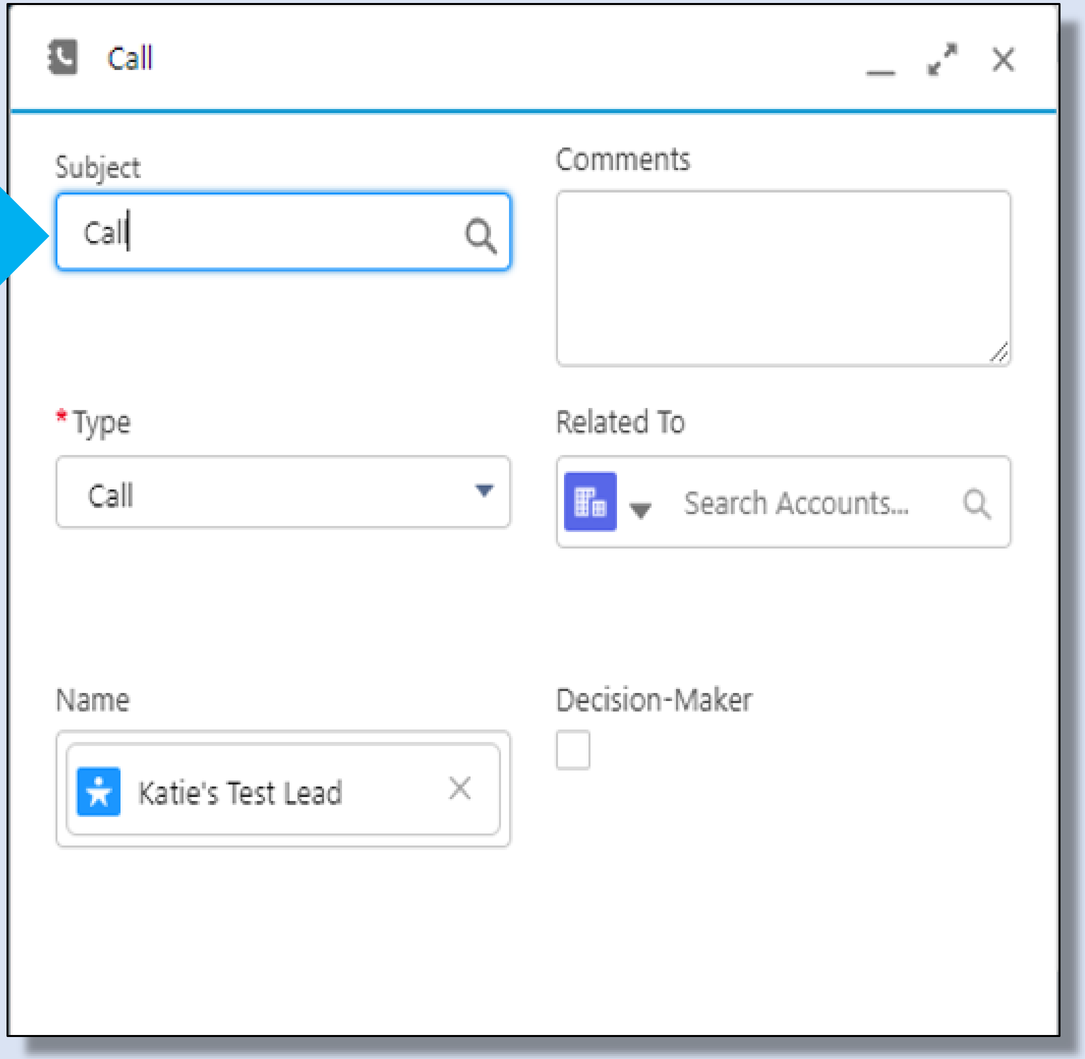
Task/Event Entry

LOGGING ACTIVITY

Activity	Where to Log	Type Choices
Log a Call	Leads & Contacts Preferred	Call
New Task	Leads, Contacts, Opportunities Preferred or Accounts	Call, Follow-Up, Send Quote, Email
New Event	Leads & Contacts Preferred. Opportunity O.K.	Appt, Non-Sales, Production, Prospecting
Engage	Leads & Contacts only	N/A

ACTIVITY TIPS

In **Subject** - Enter enough information that will help you remember the outcome of that touch. Leave any additional notes in the **Comment** section.



“Stopped by with ad samples”

“Called but he’s on vacation - back on Monday”

“Come back with auto repair success stories”

“Called and Jane said look for his red truck on Weds”

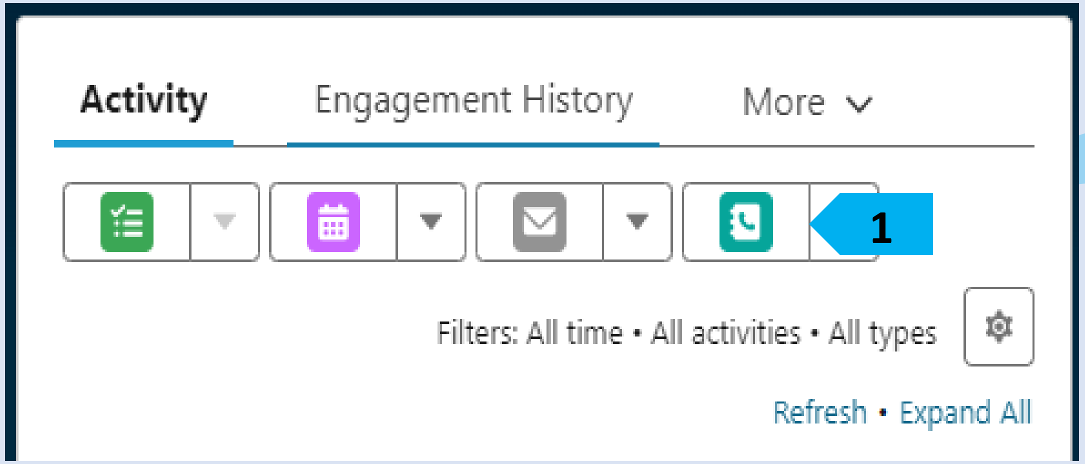
LOG A CALL

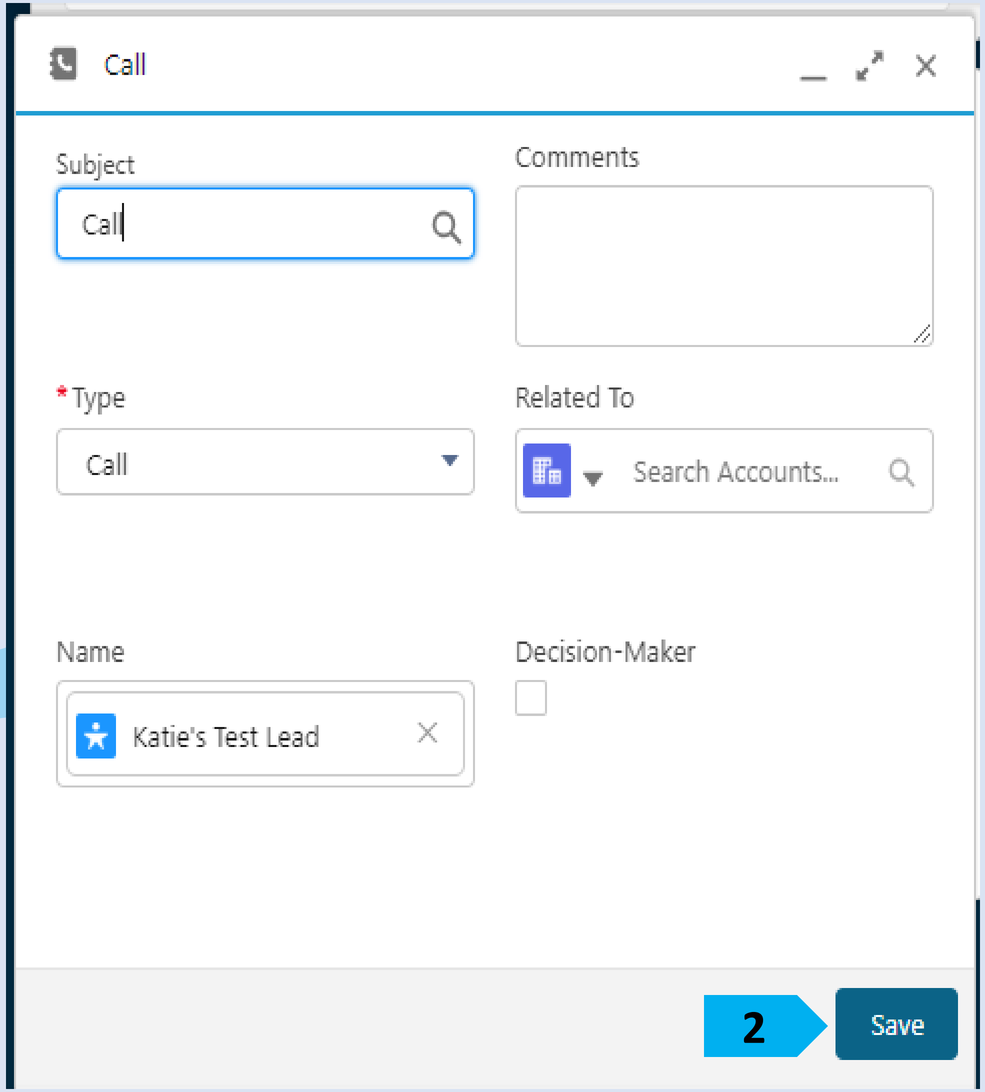
*When you log a call, it will have a prefilled choice of Call as the subject. Best practice is to put enough information that will help you remember the outcome of that touch. If you reached their VM, the *Subject could read: Called and Left Cliff a voicemail. If you stopped by your Subject could read: Stopped by. Reception said to look for the red truck outside on Wednesdays.

*Leave any additional notes in the Comment section.

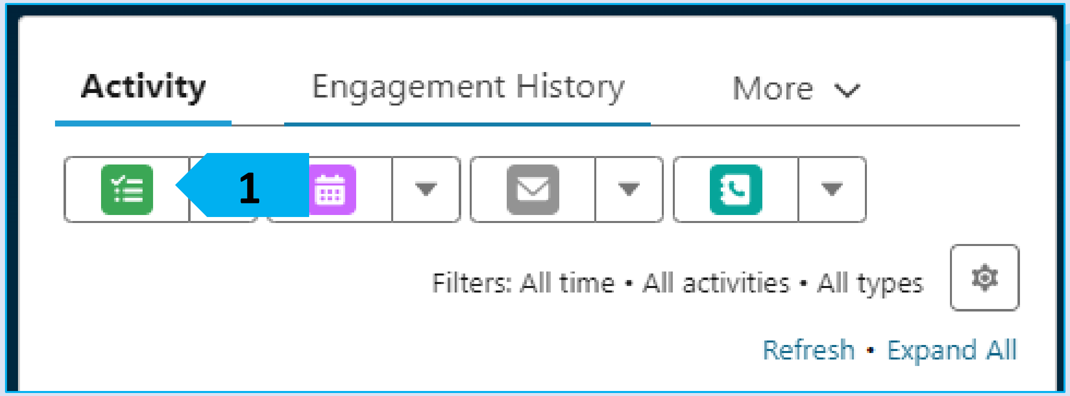
***Type** – Choose one of the following: Call or Email

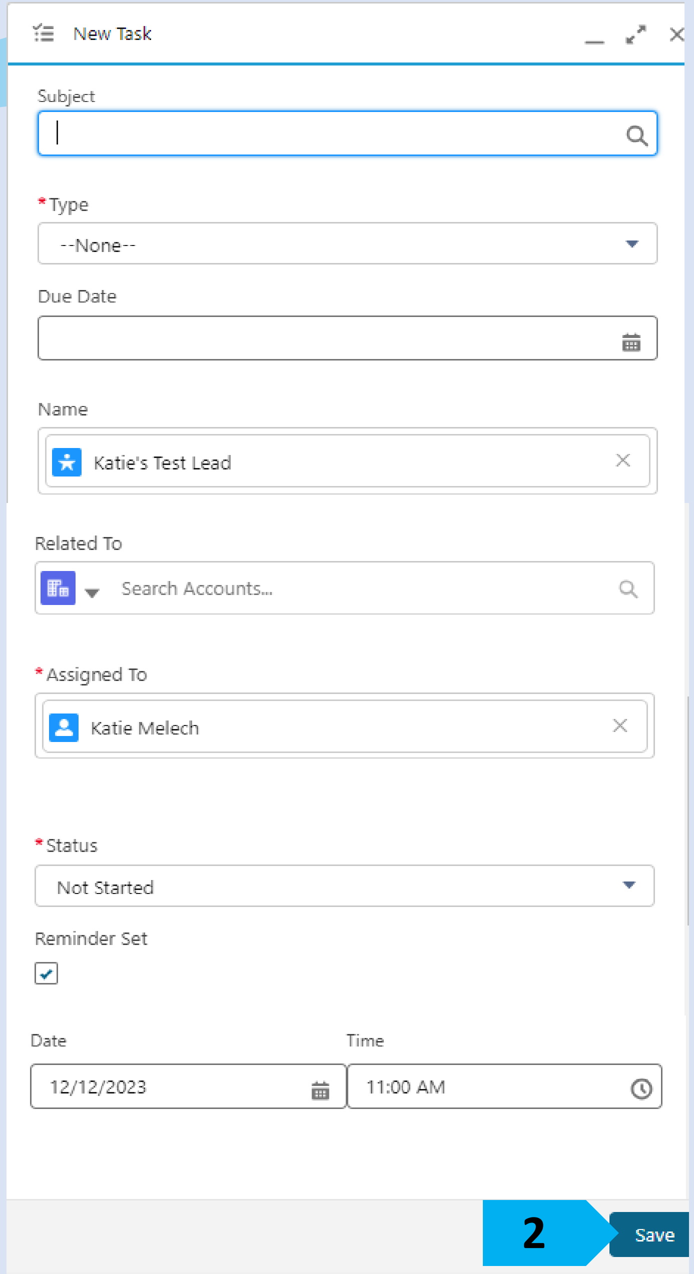
*Then Save.





NEW TASK





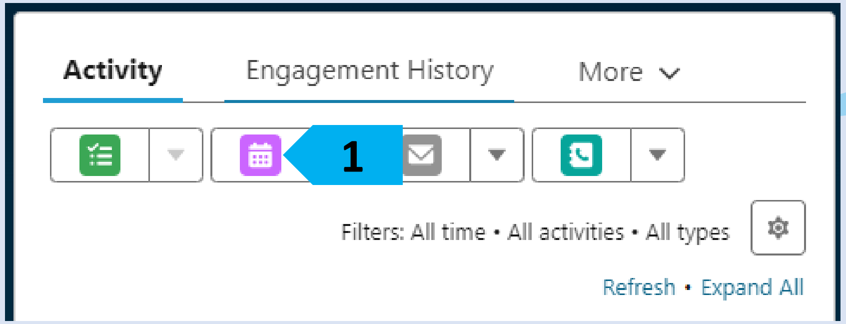
BE SPECIFIC in your subject lines – give yourself memory joggers, because if the task is far enough in the future, you certainly won't remember the details of the original call. The subject field can hold several lines of text, so it doesn't hurt to give yourself details.

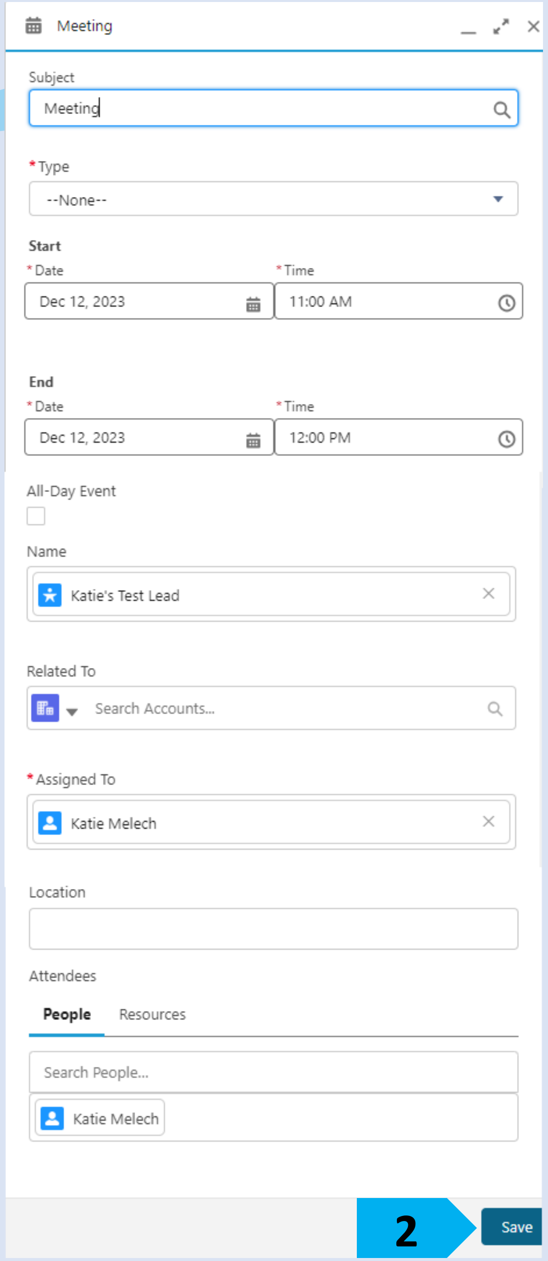
Select a Type.

DO NOT FORGET the Due Date – Salesforce isn't a mind reader. It can't remind you to do something in the future if you don't tell it when to remind you!

If you don't like the little pop offs remembers, you can control when they appear – 8 a.m., noon, etc. or turn them off entirely.

NEW EVENT





1. **Subject** – The subject line defaults to MEETING. Make sure you change this to something relevant like who you are meeting, where you are meeting, and what you are meeting about. Again, be specific – this will help you quickly prepare the day of the meeting.

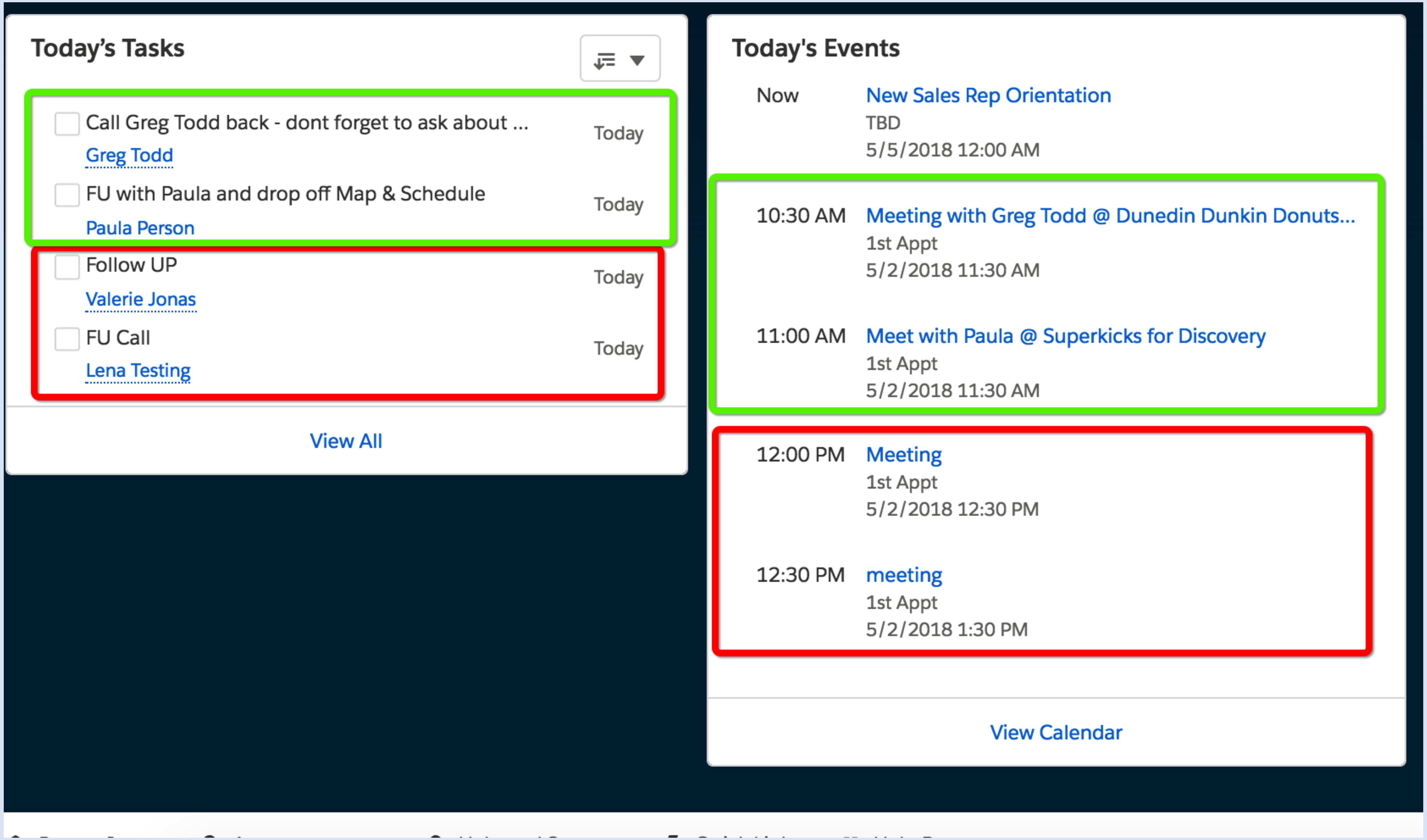
2. **Type** - You must give it a type (9 times out of 10 it's appt)

3. **Start** – Set your Start and End Date/Time

4. **Location** – If you are meeting at the local Starbucks, you may want to enter the address here.

5. **People** – Maybe your manager wants to come with you on your 1st meeting. You can add them to the Event. You can also add the client here as well.

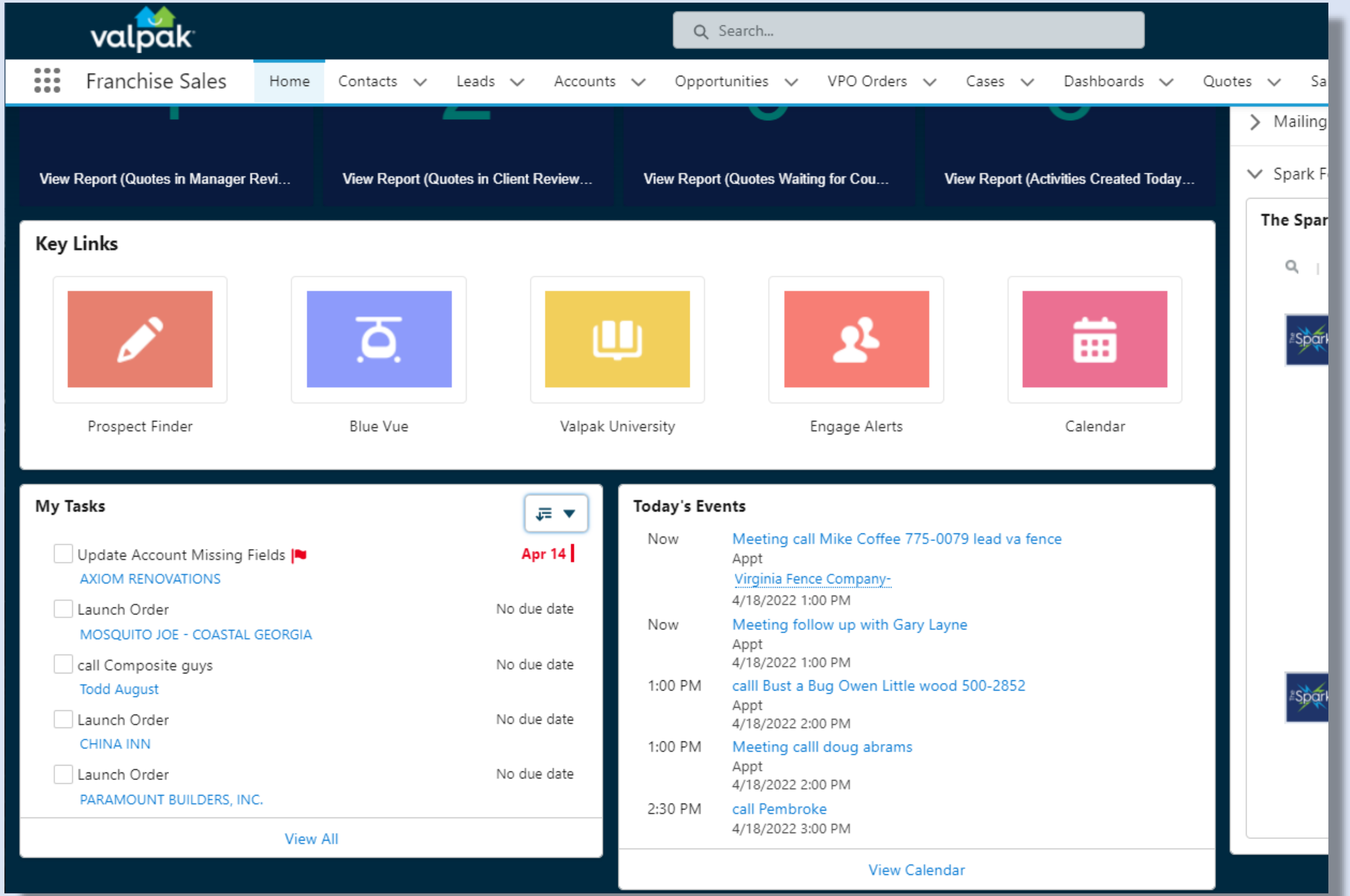
GOOD vs BAD SUBJECT LINES



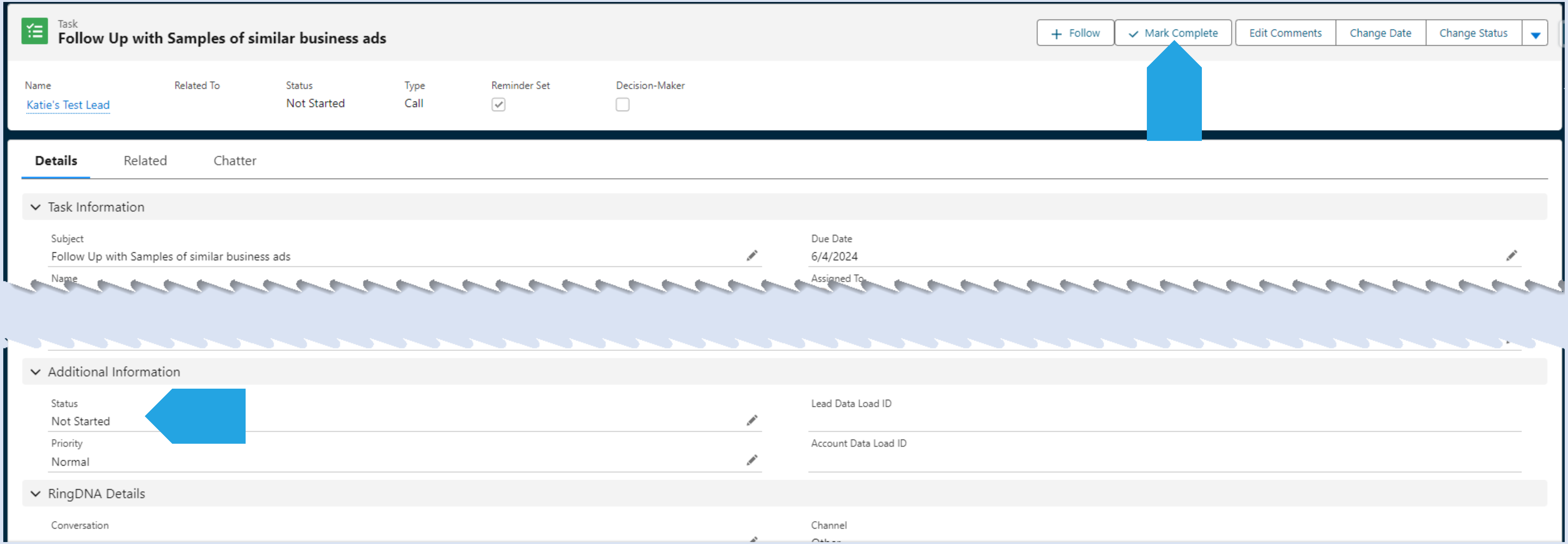
Managing Task

TASKS HOME PAGE

You can view your Task and Today's Events on the Home Page. You can also change the Task that appear on the Home Page by clicking on the drop down next to My Task.



TASK RECORD



Make sure you are changing the status of your Task as needed.

Once you have completed the Task, click the Mark Completed button.

HELP RESOURCES

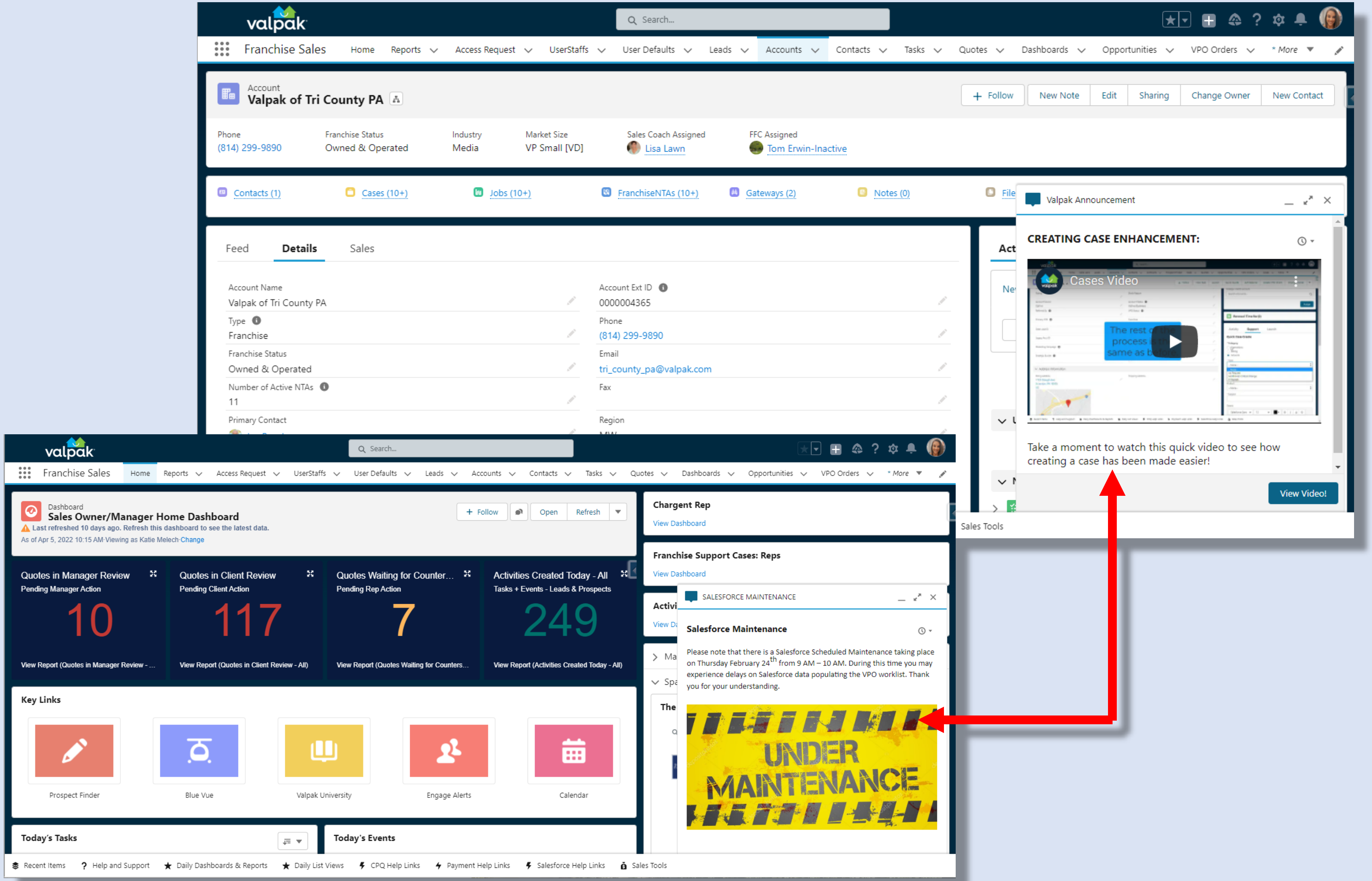
Questions?

valpak®

fast@valpak.com

800-825-7259

ANNOUNCEMENTS



SALESFORCE 101 WRAP UP

STAY ORGANIZED WITH SALESFORCE

- Use the Daily List Views to guide your activity.
- Enter new Leads daily.
- Don’t wait to log calls, stop ins, and conversations. you’ve had. Do it right after the touch.
- Use the Leads Process for Attempts 1-8, Contacted, ect.
- Convert the Lead when you set the appointment.
- Utilize cheat sheets, training videos, and other resources.
- Email/Call FAST with questions or issues you have.

NEXT STEPS

LOG INTO TRAIN

1. Go to **valpak--sftrain2.sandbox.my.salesforce.com** to log into the Training Sandbox.

2. Please reach out to FAST with any issues/questions.