



Lead Management through Salesforce Sales Cloud

Salesforce features within Lead
Management offered by KPMG





Lead Management

Helps sales reps

- **convert more leads into opportunities**
- **see where marketing campaign leads come from**
- **act and make smarter decisions**



Lead Management in a nutshell



Leads are potential customers who are interested in your product or service. Converting leads into loyal customers will provide success within a business. By managing your leads in a systematic and structured way, you can increase both the total number of leads generated and the conversion rate.

What is Lead Management?

Lead Management is the methods, processes and software used to find prospective customers and convert them into buyers by using targeted sales and marketing strategies. Lead Management is essential for organisations who want to increase their customer base and reach a larger audience of people.

Continue reading and learn how some of Salesforce's solutions can help you automate your Lead Management process.

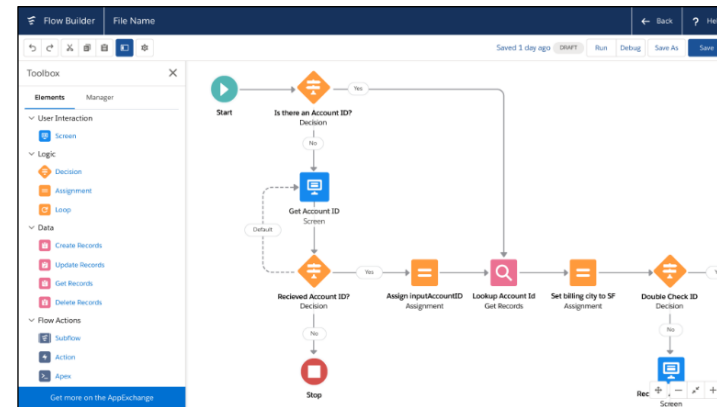
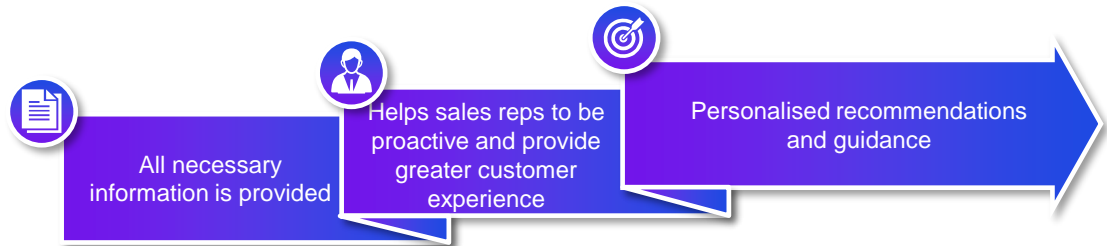


Digital Assistant

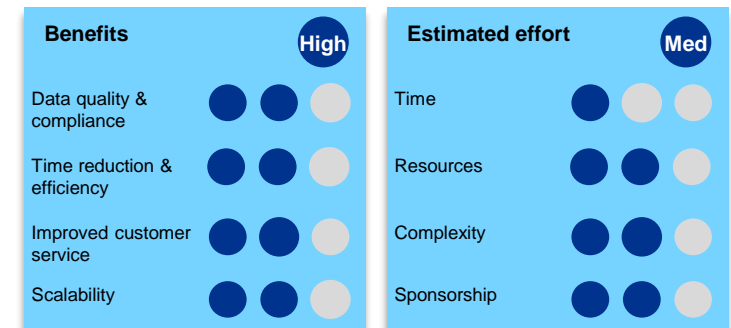
A feature that provides personalised recommendations and guidance to the customers

Need access to data and information to provide a good experience?

With Digital Assistant Sales reps have access to relevant customer data on the go. For example, this can help sales reps provide personalised recommendations and guidance during customer meetings. With Digital Assistant sales reps have access to all necessary data and information to provide a good customer experience and recommend the solution that fits the customer best.



KPMG has previously developed an RPA (Robotics Process Automation) solution in combination with CRM systems, where the digital assistant checks if the booked customers have uploaded the necessary information beforehand. If they haven't, the digital assistant sends a reminder to the customer. The solution helped to support a more proactive customer service and experience.

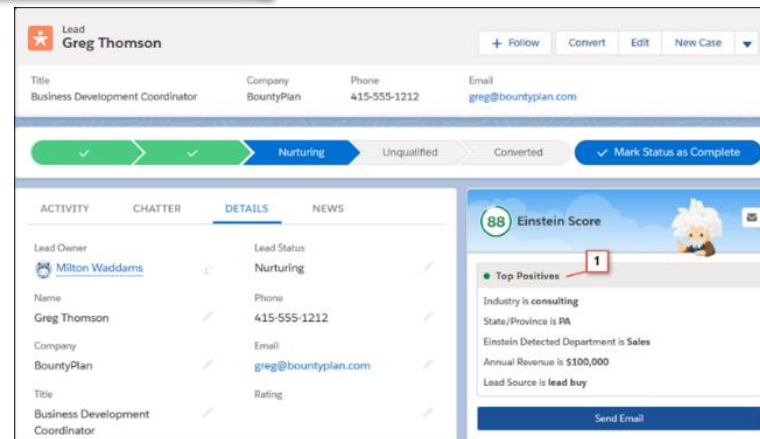


Einstein Lead Scoring

How do you select the most relevant and promising leads and how do you know if a lead is about to convert?

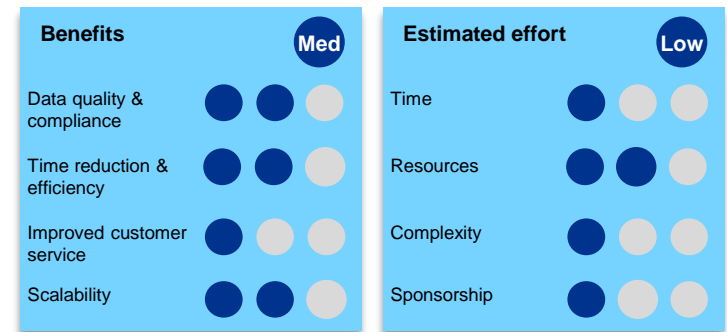
Convert more leads faster?

Einstein Lead Scoring helps sales reps convert more leads faster **using AI** to automatically analyse historical sales data and discover top factors that determine whether a lead is likely to convert into an opportunity.



Salesforce Einstein Lead Scoring helps converting leads by giving you:

- Insight into the factors that explain why leads are likely to convert or not. It's like giving each rep a personal data scientist to take connection and conversion rates to the next level.
- Factors displayed on each lead record, helping sales reps prepare for every call quickly.
- Ranking leads: Einstein Lead Scoring adds a lead score field to leads. The lead score lets sales reps prioritise their work by ranking leads according to their similarities to prior converted leads. Leads with higher scores have more in common with leads that have converted in the past.
- Based on data analysis, Einstein creates a predictive model for your organisation. Every 10 days, Einstein reanalyses your lead data and refreshes your scores. If new trends emerge, Einstein won't miss them.

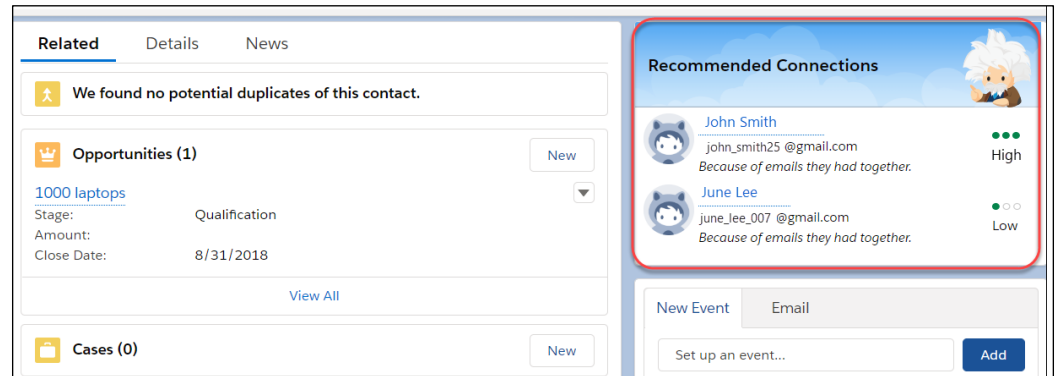


Einstein Recommended Connections

Get insights about your team's network to see who has the strongest connections to your customers

How do you engage with the relevant contacts to close a deal?

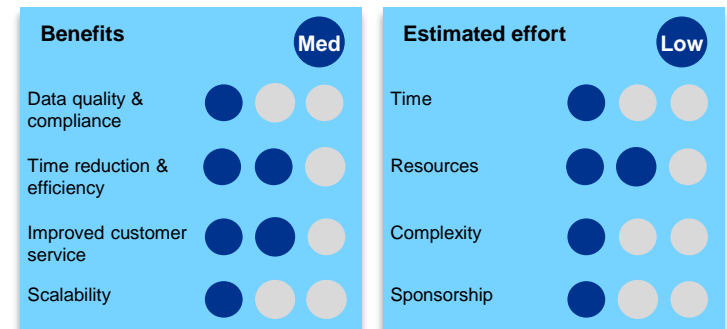
When working on a potential deal, stakeholder management plays a critical role. Navigating between hundreds of contacts related to a specific account in your CRM is, however, a difficult task. Use AI to find the most relevant contacts for a deal.



The vast amount of data in CRM systems makes it difficult to make a distinction between the strong and weak relationships in the network of stakeholders on prospect/client side. This neat little AI feature may bring you some value.

Based on AI, Salesforce Einstein Recommended Connections strengthens stakeholder management giving you:

- A recommended connections tab, which helps to rate the relationship strength between contacts based on email engagement.
- Einstein shows important connections within the networks (aka fellow Salesforce users).
- Einstein will show how many interactions another user has had with a lead or contact, so that you can determine if working with this person would make sense to manage the relationship or close the deal.



Definition of benefits and effort estimates

Benefits gained and efforts required to develop and implement the solutions and features are based on previous projects of a similar nature. Based on the collective score, each feature is assigned an overall high, medium or low score to provide the reader with an overview of ease of implementation vs. benefits for the future organisation.

Benefits

High

Data quality & compliance



To what extent does the feature or solution comply with data quality requirements and general compliance and regulations.

Time reduction & efficiency



To what extent can the implementation of a feature or solution reduce time spent on a task or optimise the current practice to make the process more efficient.

Improved customer service



The extent to which the feature or solution can help improve existing customer service processes and practices.

Scalability



The extent to which the feature or solution can be used across the client's Salesforce organisation across multiple objects and processes.

Estimated efforts

Med

Time



Estimate of time required to implement the feature or solution.

Resources



Estimate of resources required to implement the feature or solution.

Complexity



Based on a standard Salesforce instance, how complex is the implementation of the feature or solution.

Sponsorship



The extent to which client sponsorship is required to successfully implement and embed the feature or solution in the client's organisational culture.



Want to hear more?

Our experts are ready to help if you are interested in hearing more about how these features could benefit your business.

Contact us

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