Salesforce Marketing & Operations Audit

Current State, Findings & Optimization Roadmap

Audit Objective and Purpose

Salesforce provides a stable foundation for The Client's lead intake and sales process. The core lifecycle is clearly understood by stakeholders, routing is functioning as intended, and attribution fields are largely in place. The recommendations in this audit prioritize operational efficiency, reporting accuracy, and scalability while minimizing disruption to existing business processes.

The greatest opportunities are not around ‘fixing’ broken processes, but around four principles

- Improve reporting accuracy before adding complexity
- Reduce manual effort wherever practical
- Consolidate automation into Salesforce where it creates long-term value
- Preserve existing business processes unless measurable improvements exist

Audit & Assessment

Stage Definitions in Salesforce

Operational - Needs Improvement

1 LEAD INTAKE STAGES

New — New contact enters CRM as New from any source (via Slack to SDRs).

→ **Working** — Assigned to Molly or Valerie, unless HCA or SDR manually inputs referrals.

→ **Engaged** — Meeting scheduled via phone or ChiliPiper link.
Signals conversion to SQL (Lifecycle).

→ **Unqualified** — Does not meet qualification criteria.

→ **Cold** — 6 contact attempts (3 within 36 hrs, 3 over next 5 days).

→ **Converted** — Lead has an open opportunity (Design stage).
Signals opportunity creation (Opportunity Stage: Design).

2 LIFECYCLE STAGES

Lead — New contact enters CRM as New.

→ **MQL** — Meets qualification criteria (service area, homeowner, valid project). Address required.

→ **SQL** — HCC/VHCC scheduled via SDR or ChiliPiper.
Signals beginning of Opportunity Stage.

→ **Customer** — Proposal signed. Installation date scheduled.

→ **Unqualified** — Does not meet qualification criteria.

3 OPPORTUNITY STAGES

Information Collection — Required project information is gathered during initial SDR call or VHCC.
24.00%

→ **Design** — SQL must send past 1 year gas/ electric bills. Proposal created in Retool.
34.00%

→ **Proposal Sent** — 1 day post-design via manual PDF or Retool (known signature bug).
35.00%

→ **Proposal Review** — Ideal to get 100% of Proposal Sents in another conversation. Capacity issues.
55.00%

→ **On Hold** — Customer in limbo. Not converting but don't want to lose contact. Remove from Flow.
39.00%

→ **Closed Won** — Proposal signed. Installation date scheduled. Manually change to Closed Won.
100.00%

→ **Closed Lost** — Opportunity closed lost. Installation completed.
0.00%

Stage Definitions in Salesforce

Strengths

- **Clear ownership**
- **Fast speed-to-lead**
- **Geographic prioritization**
- **Reporting should be rectified following SQL workflow updates**

Recommendations for Improvement

VHCCs and HCCs should have separate opportunity flows, if it makes sense for the sales team.

- Third Flow Scenario (2.0) is SDRs schedule and perform VHCC directly, HCAs take over in Design Stage.

On Hold Stage

- Option A (Recommendation): Keep On Hold but don't use probability for forecasting.
- Option B: Use probability equal to the stage they were in before going on hold.

Redefine the SQL event

Clarify what qualifies an opportunity as SQL to ensure consistency and accuracy.

Reassess probabilities for forecasting

Validate and optimize stage probabilities to improve forecast accuracy.

Automate SQL event through clear defining goal lines

Implement automation based on defined criteria to reduce manual effort and improve data quality.

Work to achieve 100% Proposal Reviews

Address capacity and process gaps to ensure every proposal is reviewed.

Lifecycle Governance

Contact object currently relies on Lead Status rather than a dedicated Lifecycle Stage.

Lifecycle is being approximated through Lead Status (Contact) on the Contact object and a separate Sales Qualified checkbox on the Opportunity object.

SQL depends on HCA manually checking Sales Qualified.

Working, Engaged and SQL definitions are operationally clear but not fully standardized for reporting.

Create a dedicated Lifecycle Stage field as a parallel field first, validating reporting.

Decide whether **Lead Status** can be deprecated.

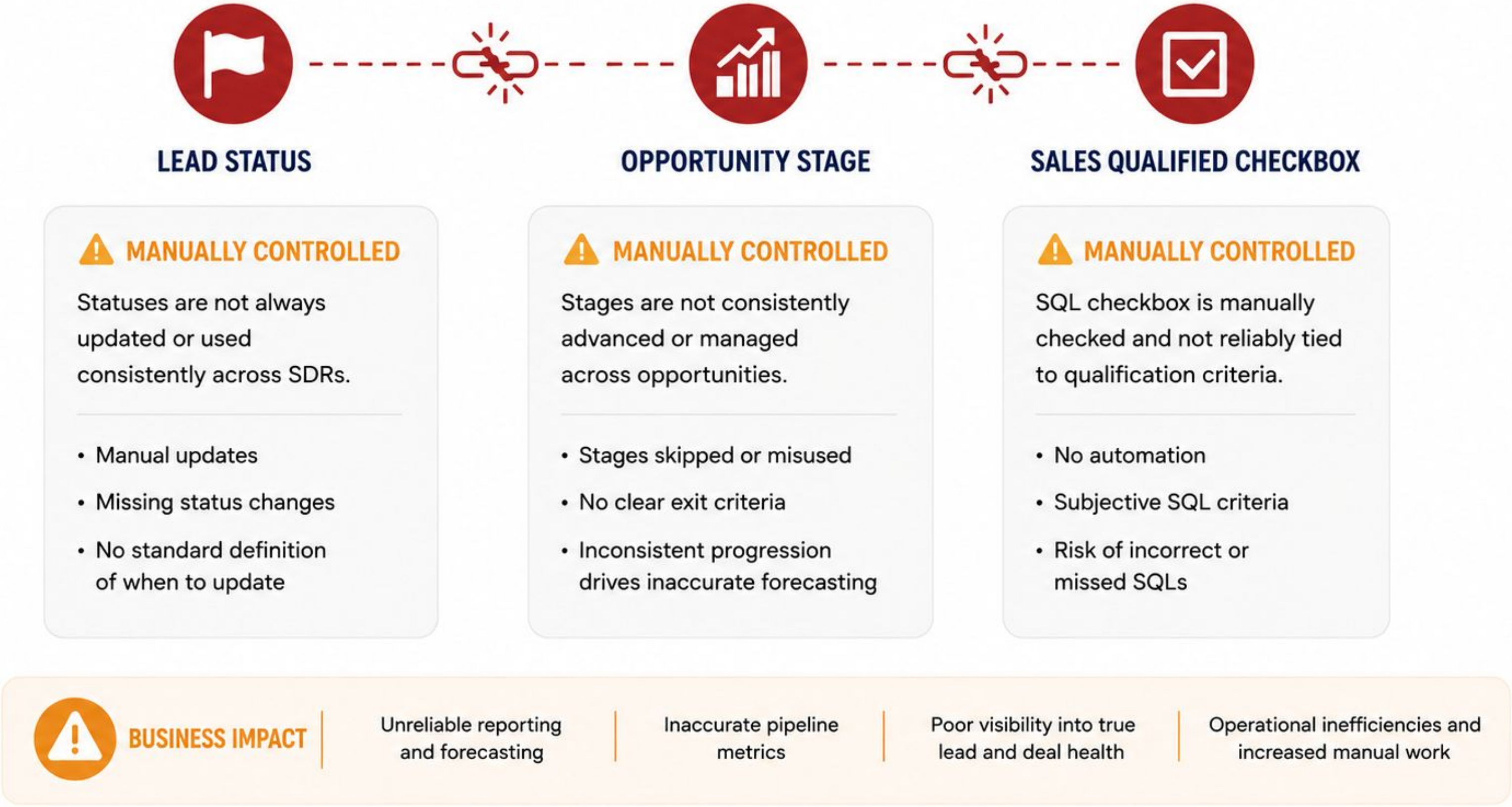
Timestamp lifecycle transitions.

Automate lifecycle progression where possible.

Recommendations for Improvement

Lifecycle Governance

Needs Improvement



Attribution, Source, & Campaign Governance

Operational - Needs Improvement

SQL CHECKBOX

- Remove dependency on SDR checkbox input as the main Qualified lead indicator.
- Continue to use Lead as initial inquiry for first-touchpoint.
- Create MQL, SQL, Customer, and Unqualified Lifecycle Stages in Contact Object.
- Redefine when a Lead converts so that only SQLs are converted.

ATTRIBUTION FIX

- Keep attribution framework.
- Add Original Lead Source to store first-touch source forever.
- Implement dependent picklists.
- Create parent-child campaign hierarchy starting with cross-channel CO Media Domination Campaign.
- Map all attribution fields to Lead and Contact Objects.

LEAD SOURCE CLEAN UP

- Make Lead Source required.
- Make Lead Source 2 dependent on Lead Source using Salesforce dependent picklists.
- Ensure everything maps correctly from tools into SF (i.e. calculator drop down menus).
- Reorganize Lead Source 2 categories:
  - Search Engine (Google, Bing, DuckDuckGo, ChatGPT)
  - Publications (Boston Globe, Colorado Sun, Boston Moms)
  - OOH Placements (Billboard, Bus)
  - Referral Partners (Direct Referral, Carbon Free Homes, CJCA)

Lead Source Governance

Needs Improvement

Lead Source
(High-Level Channel)

- Rename Google Ads → **Paid Search** (future-proof beyond Google).
- Rename Word of Mouth → **Referral**.
- Rename Web Direct → **Direct Traffic**.
- Consolidate News / Press, NewsPress, and News Press into **PR / Earned Media**.
- Consolidate Lead Partners, Contractor List, Program Implementer, and Solar Partners under a single **Partner Referral** category (differentiate in Lead Source 2).
- Evaluate if Website Footer belongs under **Direct Traffic**.
- Review if **Phone** is an acquisition source or communication method.
- Standardize **naming conventions** (spacing, capitalization, punctuation) across all values.

Lead Source 2
(Specific Source)

- Remove **duplicate concepts** (e.g., Google and google.com).
- Separate **Internal Event** and **External Event** values.
- Clarify if **Inbound Call** and **Outbound Call** are Lead Source values or activity fields.
- Clarify **Meta** vs. **Facebook** vs. **Instagram** usage to prevent inconsistent attribution.
- Group **partner organizations** (utilities, nonprofits, contractors, solar partners) under standard naming conventions.

Lead Source Detail

- Use Lead Source Detail for **supplemental business context** only (e.g., referral contact, contractor name, ambassador, event details).
- Store digital attribution in **UTM fields** (`utm_source` , `utm_medium` , `utm_campaign` , etc.) rather than duplicating campaign values.
- **Document** when manual entry is expected and what information should be recorded.

Current Lead Routing Workflow

Operational

Routing is functioning correctly.
Salesforce acts as the intake system.

ChiliPiper manages
meeting scheduling.

Opportunity ownership
begins after qualification.

Evaluate migrating external automations into Salesforce Flows to orchestrate routing, lifecycle and notifications - reducing external dependencies.

Run in parallel with existing automation before full migration.

Lead Enters System

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Lead Assigned to SDR via ChiliPiper

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Nurture Automation with Schedule Call Link

- Example: CO RoundRobin via ChiliPiper Link

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Lead Routed to Lead Lists (Filtered List)

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Opportunities Assigned to Opportunity Owner (HCA)

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Opportunity Flow - [HCC] or [VHCC]

SDR Workflow Assessment

Operational

STRENGTHS

Efficient Speed to Lead

- 5 minute Speed to Lead
- Skyslope cadence
  - 3x within 36 hours
  - 3 more times over the next 5 days

CHALLENGES

Key Challenges

- 20+ limited Lead Detail for each Contact
- Manual updates
- No lead scoring

RECOMMENDATIONS

Recommended Improvements

- Simplify forms using Dynamic Forms and progressive profiling.
- Automate revenue updates.
- Buildout Project level management reporting
- Elevate Dialpad data and activity for each contact
- Implement lead scoring.

Roadmap & Opportunities

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90 Day Roadmap Prioritization

	0 – 30 DAYS FOUNDATION	31 – 60 DAYS OPTIMIZATION	61 – 90 DAYS SCALE & INSIGHT
HIGH PRIORITY Lifecycle Stage Rework, Lead Routing Flows, Attribution & Campaign Governance	• Rework lifecycle stages and definitions • Build lead routing flows in Salesforce • Audit current attribution & campaign governance • Establish data governance framework	• Activate and test routing flows • Implement campaign governance policies & standards • Standardize UTM structure • Improve data capture accuracy	• Validate attribution model & reporting • Monitor routing performance • Enforce governance & QA processes • Optimize based on performance insights
MEDIUM PRIORITY Campaign Hierarchy, SDR Workflow Improvement, Lead Scoring	• Assess campaign hierarchy • Map SDR workflow & pain points • Define lead scoring model & criteria	• Implement campaign hierarchy • Optimize SDR workflow (cadence, sequences, tasks) • Deploy lead scoring model	• Refine SDR workflows & cadences • Track lead scoring performance • Iterate based on data & feedback
LONG-TERM PRIORITY Automation Consolidation & Predictive Insights, Lifecycle Conversion, Routing and Speed-to-Lead Reporting	• Audit systems & data sources • Identify integration opportunities • Define KPIs for lifecycle conversion, routing & speed-to-lead	• Consolidate data into Salesforce • Build lifecycle conversion tracking • Develop routing & speed-to-lead dashboards • Establish baseline benchmarks	• Implement predictive insights • Enhance reporting automation • Action on insights to drive performance improvements • Continuous optimization

OUTCOMES BY DAY 90

- Improved data accuracy & trusted reporting
- More efficient SDR workflow & lead management
- Automate scalable operations
- Actionable insights for better decisions & growth

Cohesive Opportunity Log

1. **Standardize lifecycle stage definitions** across Lead, Contact
2. Implement a dedicated **Lifecycle Stage** field and timestamp key lifecycle transitions.
3. Standardize **SQL qualification criteria** and automate lifecycle progression where practical.
4. **Simplify** the Lead intake experience using Dynamic Forms, progressive profiling, and conditional field visibility.
5. **Reduce manual data entry** through field automation and auto-population where possible.
6. Evaluate migrating **business logic** and **automations** into native **Salesforce Flow** while running in parallel with existing processes for validation.
7. **Document** the end-to-end lead routing process, ownership rules, and automation architecture.
8. Standardize **Lead Source** taxonomy and implement dependent picklists.
9. Add an **Original Lead Source** field to preserve first-touch attribution.
10. Implement a **Parent–Child Campaign hierarchy** to improve initiative-level reporting.
11. Improve visibility into **email engagement** and call activity within Salesforce.
12. Implement **Lead Scoring** to better prioritize SDR outreach.
13. **Automate** monthly revenue and amount updates where feasible.
14. Enhance lifecycle, routing, and reporting reporting to improve funnel visibility and executive insights.
15. Establish **CRM governance standards** for lifecycle management, attribution, campaign structure, and routing documentation.

Additional Recommendations

Standardize HCA Email Outreach

- After the initial HCC call, the HCA sends an email asking for pictures.
- Each HCA has a different outreach method—streamline email format across all HCAs.

Monthly Opportunities Closed Report

- Management needs an update report of Opportunities Closed each month.
- In Salesforce, update Anticipated Close Dates to the last day of each month if they do not close.
- Anything that is not closed is not auto-updated, leading to hours of additional work for HCAs.

Retool Proposal Bug

- Retool proposal bug prevents customers from signing digital proposals generated by Retool.
- Must send manual PDF, but these do not allow for email nurture reminders.

SFDC and Retool Revenue Discrepancies

- Delivered Revenue in SFDC is recorded when retros are completed—no estimating.
- In Retool, "Estimated Net Revenue" is based on expected values when actual values aren't available because the retro hasn't been done.
- Use Estimated Revenue in SFDC as a separate field.
- To align the systems, separate Estimated and Actual revenue in Retool, similar to how they are tracked in SFDC.

Market-Specific Lead Routing

- Create Lead Routing flows to market-specific lists for SDRs instead of using filtered lists.

Nurture Campaigns & Triggers

- Reassess and optimize nurture campaigns and triggers to easily migrate to HubSpot.

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Thank You