TMA Marketing Tool in Salesforce

TMA marketing materials can be sent to a lead or a contact and the steps are the same for both. Create new, or use an existing lead when the account does not exist yet in Salesforce (meaning we have never done business with them). Create a new, or use an existing contact if the account exists in Salesforce already but you want to send it to an individual you're already engaged with.

**Be mindful that other business units may be in the sales process with the customer if it already exists in Salesforce. Make sure you reach out and communicate with the account owner before reaching out to the prospect.*

Step 1. Find the lead or contact in Salesforce, ensure the name, phone number and address are complete and accurate, choose the drop down arrow at the top right next to "convert" and choose "Send Marketing Materials."

Step 2. On the next screen, select the correct "Lead Address" ensuring accuracy again, then choosing "Use Address" or choose "Other Address".

Step 3. Select the appropriate marketing material for your prospect depending on where you're at in the sales process.

Step 4. Create your own personalized message at the bottom of the page. Be sure to include your name and contact info in the note. Click "Preview" and "Next" when you are satisfied. Then click to confirm everything is correct and approved underneath the preview.

Step 5. Go back to your lead in Salesforce and notice the task that was created for you. After 2-3 business days, that task when clicked, will have a tracking number and will link to track via FedEx.

Step 6. A task reminder will notify you when you are logged into Salesforce when the package is delivered (you can also have FedEx notify you when the package gets delivered) so you can follow up in a timely fashion.

Statistics show that a follow-up call and email within 15 minutes from the recipient signing for the gift is the most effective time to achieve success in setting up a meeting.

Make sure to notate any interactions with the lead from this point on, and "Convert" the lead into an opportunity when appropriate. Never duplicate a lead, contact or account.