



Opportunities in Salesforce

And why you may be doing it wrong

Opportunities in Salesforce: And why you may be doing it wrong

Intermediate | Admin



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Co-Founder, Ohanaly



Hi, I'm Erick.

A little bit about me...



What's in it for you?

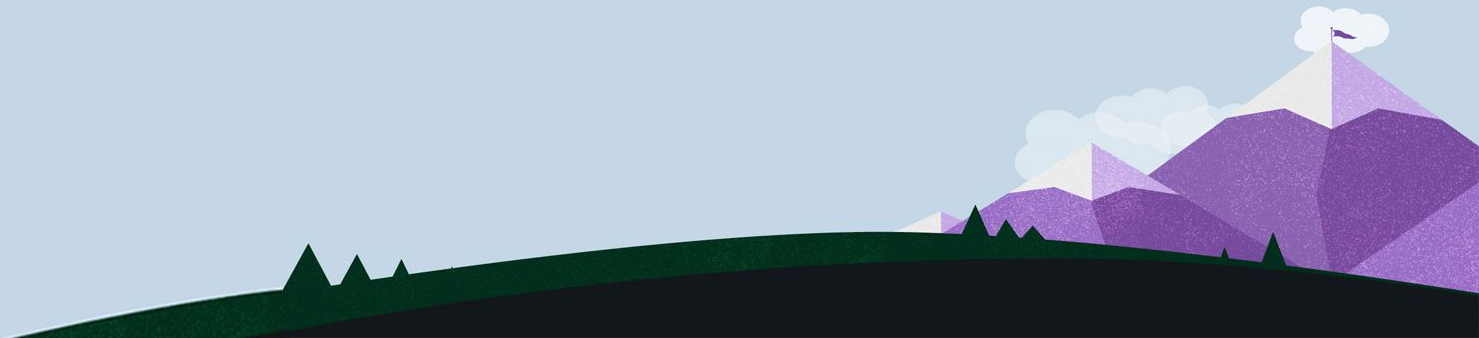
The Agenda & the Takeaways

Agenda

- (Hopefully) Entertaining stories of Non-Opportunities
- Let the data speak: a Survey Review
- Salesforce Opportunity Review
- Best Practices on Field Mappings

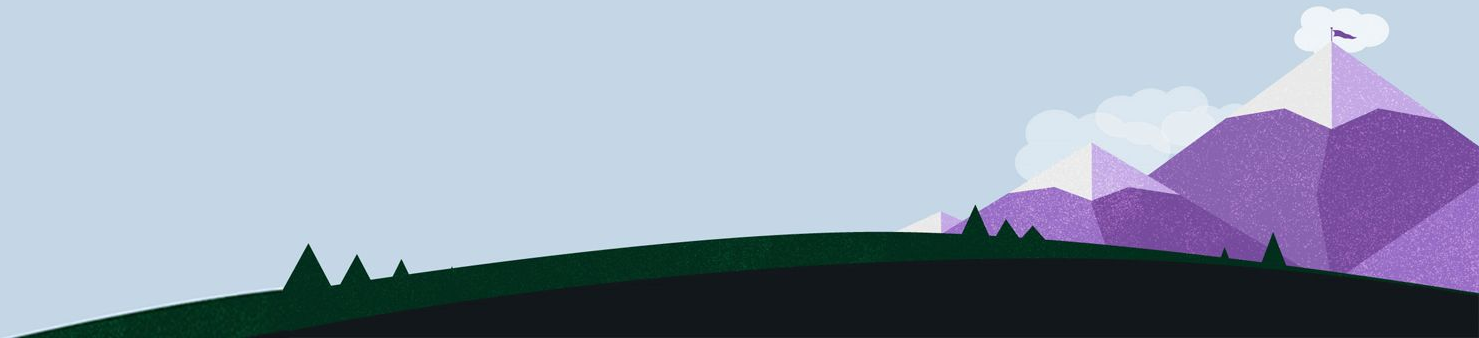
Takeaways

- Learn how to accurately track Opportunities in Pardot
- Learn from mistakes of others
- Refresher course on MQLs & SQLs
- An unmanaged package to make your life super-sweet





#PARDREAMIN2021 |
@PARDREAMIN

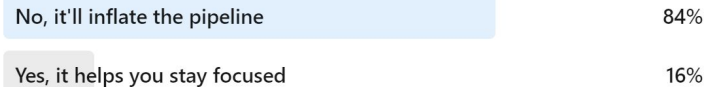


84%

**Believe Opportunities should only be created
when someone has shown interest.**

Should you create an Opportunity for people you want to do business with (MQL) but has not yet shown interest (or is not yet in the market)?

You can see how people vote. [Learn more](#)



160 votes • Poll closed

WHO

Marketing / Inside Sales

Sales / Account Executives

WHAT

LEAD

MQL

SQL

CUSTOMER

Unknown Info

Research Needed

Not Yet Qualified

Prospect Account

Engagement

Nurture

Pardot Grade

Prospect Account

Active Conversations

Open Opportunity

Pardot Score

Closed Won Opp

Contract Signed

WHERE

Lead

Account (Type = Prospect)

Account (Type = Customer)

PARDOT

Prospect

Prospects for Lifecycle Stage

Home / Reports / Lifecycle

Date Range: **Last 30 Days**

Comparing to: Oct 15, 2012 - Nov 14, 2012

2,594

-2.4%

Net New Prospects

127

+1.7%

New Opportunities

42

-5.3%

Won Opportunities

Pipeline

Visitors

55,921

▲ +10.9%

Prospects

2,594

▼ -2.4%

Marketing Qualified (MQL)

1,580

▲ +10.9%

Sales Qualified (SQL)

127

▲ +1.7%

Won Deals

42

▼ -5.3%

\$58,263.15 Total Revenue

Velocity

Average Transition Time

Visitor to Prospect

9 days

Prospect to MQL

3.5 days

MQL to SQL

10.3 days

SQL to Won

21.3 days

Total:

44.1 days



“

Remember, you never get a second chance to make a first impression.

- **Some DJ**
(probably quoting someone else)

”



Thanks for listening!



emahle



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above or hit me up at emahle@ohanaly.com



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