

# Salesforce Pipeline & Lead Management

CRM Dashboard Design · Reporting Framework · Data Integrity

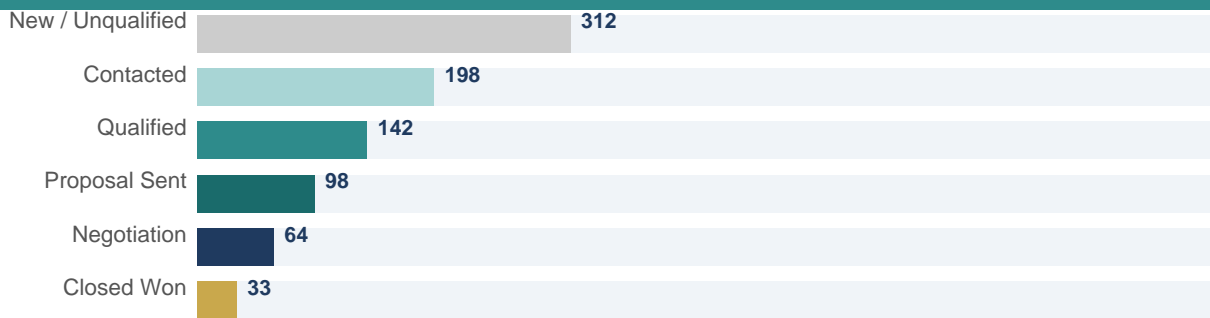
Salesforce Admin · Pipeline Management · 5+ Years CRM Experience

Dashboard architecture designed and administered across Blue Shield of California Foundation, Everett Graphics, and IndyThink client engagements. Supports high-volume lead flows (300+ event leads), pipeline integrity, and exec-ready reporting. Presented adoption methodology at Dreamforce.

## KEY PERFORMANCE INDICATORS



## PIPELINE STAGE DISTRIBUTION



## LEAD SOURCES

Events / Conferences	312	37%
Web Inbound	198	23%
Partner Referral	156	18%
Outbound Campaign	112	13%
Other	69	8%

## DATA INTEGRITY PRACTICES

- ✓ Duplicate detection rules active
- ✓ Required field validation on all lead forms
- ✓ Weekly hygiene audit — stale records flagged
- ✓ Event leads uploaded within 48hrs of event
- ✓ Lead source tracked on 100% of records
- ⋯ Automated re-engagement sequences (in progress)

## SALESFORCE ADMIN CAPABILITIES

- Custom objects & fields
- Dashboard & report creation
- AppExchange integrations
- Workflow rules & Process Builder
- Lead assignment rules
- Sandbox management
- Validation rules
- Email templates & alerts
- User onboarding & training
- Role hierarchy & permissions
- Data import / export (Data Loader)
- Adoption analytics