

This is my turn to enquire. This is usually how I would start.

## 1. What is the latest work you have done?

Expectation here is to help me understand what you have been doing recently.

- Your client industry
- What is the project about
- What is your role
- Latest feature

Based on the response, I would take up the next set of questions

What follows is not necessarily in same order. But largely the pattern is more or less similar.

## 2. What is a Lead Process ?

What are different ways you can get Leads into Salesforce ?

What is Lead Assignment ?

## 3. Assume, I have 3 teams working on Leads, how can I ensure the incoming leads are assigned equally to them ?

To discuss round robin allocation.

## 4. Let's say the maximum leads to nurture per day is 3 and with 3 team members, I can handle 9. If new leads come in, what will you do with them ?

To discuss further on queues.

## 5. What is Web-To-Lead

Expecting to hear an actual use case.

## 6. What is Lead Conversion

Elaboration on the different aspects of conversion.

## 7. Lets say you have Lead process with 3 status - New, Nurturing, Qualified. When the status is set to Qualified, I want to convert the Lead. Can it be done, if so How ?

Enter the flows

## 8. For the above, if the answer is flow, then I will ask why not trigger ?

Just to understand if the guy used triggers and get a sense of his understanding

## 9. After the lead conversion, if a new lead is getting created with same email, I want to prevent it, How can this be done ?

Config way, custom way - detailed discussion.

## 10. How to access leads which got converted

Checking how far you go researching<sup>1</sup>

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<sup>1</sup> Follow for everything about Salesforce  
LinkedIn - <https://www.linkedin.com/in/shrishaildeshpande/>  
Twitter - <https://twitter.com/shrishall>  
Web - <https://shrishall.com>