How to Finally Conquer the Salesforce Leads & Contacts Conundrum

Build the Crucial Unified Report You Can't Get In Salesforce
Dear Salesforce Community,

Creating a report that spans Salesforce contacts and leads is notoriously painful and frustrating. To represent true leads in a single report requires that you spend copious time and resources manipulating data outside of Salesforce’s native reporting tools, rather than on making the most of opportunities.

This guide shows you how to overcome the leads-contacts reporting challenge with the help of Bedrock Data Fusion — without having to restructure your CRM, change your sales process, or buy expensive software. By the end, you’ll see how easy Fusion blends leads and contacts so you can easily report across these objects.

Let’s get started!

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BedrockData
I. The Challenge of Lead & Contact Reporting in Salesforce

When Salesforce was created back in 1999, its product team created two separate objects — leads and contacts — to represent a single person. And while there is some merit to this design, Salesforce users have struggled to report on leads and contacts for decades.

The reason for their frustration is very simple: in Salesforce, some people are leads, while others are contacts. And the absence of a unified Leads and Contacts report makes it impossible for:

- Executive and product teams to measure how a new product has impacted net new leads and existing contacts (active customers, churned customer, past opportunities, partners, etc.).
- Sales teams to report on all records, leads and contacts, at the same time for the same company.
- Marketing operations to report on their funnel to measure campaign performance, and how leads, contacts, and opportunities relate to one another.

To solve this issue, Salesforce users have tried creating a custom report type, selecting a primary object, then one or more related objects. But because leads and contacts aren't necessarily related, there is no way to return all leads and contacts in a single report.

The problem becomes acute when you attempt to measure more than just “new leads”, as Salesforce assumes you are a lead once and only once. This leads model makes it hard to track re-engagement with leads, to engage with contacts who become opportunities for an upsell or cross-sell, and to win back churned customers or lost opportunities — all of whom Salesforce represents as contacts, not leads.

The idea of a unified lead and contact report has been a frequent and loud request from the Salesforce community, with nearly 1,000 votes on the Salesforce Success site. But, due to its underlying object design, Salesforce cannot fulfill the request.
II. Combining Contact & Lead Data in One Report

Using Fusion, you can automatically unify your leads & contacts in a single data warehouse, and then build a single report using both objects. You can also measure how leads and contacts data relate to opportunities, campaigns, revenue, and churn data. This unified reporting means you can finally answer questions through a single report dashboard such as:

- How many total leads have we engaged?
- How many are “net new” (acquired) vs. existing?
- How are these converting to opportunity?
- How are these converting to customers?
- How much have you invested in targeting a specific account?
- How much pipeline revenue was generated by that account per campaign?
- How many interactions were needed before the account was converted to a customer?
- What was the medium (e.g. phone, email, chat, etc.) for these interactions?
- What was the optimal sequence of interactions that most effectively led to the acquisition of a new customer?

Because the Salesforce Lead and Contact objects map into the fused_contact table, you can, in a single place, report on actions taken by both net new leads/contacts and existing leads/contacts.

Read on for a detailed walk-through of how to set this up.

“I honestly don’t understand why SF created [separate] tables for Lead and Contacts. Why not have one table and use record types to distinguish? Then allow users to decide what type of report they want to run (just contacts, just leads, both)?...When I create a field, allow me to chose if it should be applied to just contacts, just leads, both.”

— Salesforce User on Salesforce Success Website
III. How To Set It Up

A. Setup Custom Fields for Leads & Contacts in Salesforce

To track engagement for your product, you’ll first want to configure some custom fields in Salesforce on your lead & contact records - if you don’t already have something like this in place.

Let’s say you are tracking engagement across both leads & contacts for a “Product A”.

First, set up a field to track product interest. This can either be an individual checkbox field, or a multi-select checkbox if you are tracking product interest for multiple products.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product A</td>
<td>Checkbox</td>
<td>To indicate Product A interest</td>
</tr>
</tbody>
</table>

Then, presumably you are tracking interest along some kind of progression. For example:

Qualified Lead based: Lead -> Marketing Qualified Lead -> Sales Accepted Lead -> Sales Qualified Lead -> Opportunity -> Customer

Or: Trial Conversion Based: Trial -> Quality Trial -> Customer

You’ll want to create a field to track the progression status.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product A - Funnel Stage</td>
<td>Dropdown</td>
<td>Track progress through the pre-defined stages of the Fusion funnel</td>
</tr>
</tbody>
</table>

Then, to build velocity reports later, you’ll want fields to stamp the progression dates, like so:

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product A - Signup Date</td>
<td>Date</td>
<td>Trial signup date</td>
</tr>
<tr>
<td>Product A - Trial Date</td>
<td>Date</td>
<td>Date the end user became a quality trial</td>
</tr>
<tr>
<td>Product A - Customer Date</td>
<td>Date</td>
<td>Date the end user became a customer</td>
</tr>
</tbody>
</table>

Lastly, you may want to create formula fields so your formulas are calculated directly around number of days - or you can leave this out and calculate them later on.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product A - Lead to Trial Days</td>
<td>Formula (number)</td>
<td>Number of days between these two funnel stages</td>
</tr>
<tr>
<td>Product A - Trial to Quality Trial Days</td>
<td>Formula (number)</td>
<td>Number of days between these two funnel stages</td>
</tr>
<tr>
<td>Product A - Quality Trial to Customer Days</td>
<td>Formula (number)</td>
<td>Number of days between these two funnel stages</td>
</tr>
</tbody>
</table>

For each of the above, you’ll want to use either Salesforce and/or your marketing automation to tag values for these fields - e.g. setting product interest based on filling out a trial form, or stamping dates fields based on a user completing the action.
B. Connect Fusion as Your Unified Salesforce Warehouse

To set connect Salesforce to Fusion, you must first create an account (which has a free trial).

1. Click Manage Connectors.

After you click Manage Connectors from the dashboard, you can select Salesforce.

2. Authenticate Salesforce

Now Fusion will ask you to authorize your Salesforce account. You may add multiple instances of any application, such as a production, sandbox, and/or developer account.

Once you sign in, Fusion will then begin ingesting all the data via your Salesforce instance’s API and building your cloud data warehouse.

Fusion’s cloud data warehouse is a hosted MySQL solution. As a relational SQL data warehouse built for the cloud, Fusion is hosted on AWS and runs on Amazon RDS. Thanks to this MySQL architecture, Fusion provides total relational database support for structured columnar stores and comprehensive support for the SQL language. And because Fusion is an acceptable data source for any service that accepts MySQL, it also works great for developers looking to build modern data applications and for analysts to connect to reporting tools such as Tableau, Looker, Power BI and many others.

As Salesforce API calls are processed 1 API call per thousand records, after you authenticate your warehouse may take some time (usually under an hour) to load your Salesforce data.
C. Mappings

A mapping defines how one field relates to another field for a given object. Fusion has two kinds of mappings:

- Default Mappings are automated and ensure you have standard data fed into your warehouse without having to do anything.
- Custom Mappings give you the flexibility to map in any data you’d like from your Salesforce objects.

**Default Mappings**

Fusion automatically maps your Salesforce contacts and leads to a single fused object, so you don’t need to do anything to bring those objects together as one.

Here is how Fusion maps other main Salesforce objects into Fused objects:

<table>
<thead>
<tr>
<th>Salesforce Object</th>
<th>Fusion Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead, Contact</td>
<td>Contact</td>
</tr>
<tr>
<td>Account, Organization, Partner</td>
<td>Company</td>
</tr>
<tr>
<td>Case</td>
<td>Ticket</td>
</tr>
<tr>
<td>Event, Note, Task</td>
<td>Activity</td>
</tr>
<tr>
<td>User</td>
<td>Owner</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Opportunity</td>
</tr>
</tbody>
</table>

To see which fields, you can run a quick `SHOW COLUMNS FROM fused_contact` command. After which you’ll see the following fields mapped automatically:

- first_name
- last_name
- company_name
- email
- phone
- mobile_phone
- fax
- title
- department
- status
- lead_status_detail
- lifecycle_stage
- subsidiary
- lead_score
- street_address
- state
- city
- zip_code
- country
- external_company_id
- external_sales_person_id
- lead_source
- lead_source_detail
- original_source
- referred_by_account
- campaign
- first_conversion
- recent_conversion
- first_conversion_date
- recent_conversion_date
- record_type_id
Custom Mappings
Fusion also loads hundreds of native Salesforce objects into your data warehouse, such as the following Campaign-related objects:

- Campaign
- CampaignFeed
- CampaignHistory
- CampaignInfluence
- CampaignInfluenceModel
- CampaignMember
- CampaignMemberStatus
- CampaignShare

Or any of the approximately 300 other native Salesforce objects, listed here.

From these Salesforce you can create a custom mapping in Fusion. To do so, click **Schema** at the top of your Fusion portal.

Doing so will direct you to **Create Custom Field**. Clicking **Select a Type** will present you with a menu of objects.
As an example, you could select Contact as the Field Type, and Salesforce as the connector. Then you could affiliate Lead Source, which has a dependent field called Lead Source Detail, with Contact, so that Lead is tied to Lead Source for Salesforce. This is helpful since lead source details aren't by default in Fusion's universal mappings, making them ideal for custom mappings. When you're finished, the mapping will show up as follows under the All Custom Fields tab.

In case you need a little inspiration, below is a list of other possible Salesforce mappings you might try to create in Fusion, with 'Product' as a placeholder for any product you may have launched, and 'Action X' as a placeholder for any action a user or account may have taken in your product:

- Contact / Campaign — Salesforce / Lead / Campaign
- Contact / Referred by Account — Salesforce / Lead / Referred By Account
- Contact / Lead Status Detail — Salesforce / Lead / Lead Status Detail
- Company / Product Start Date — Salesforce / Account / Product Start Date
- Company / Product Cancelled Date — Salesforce / Account / Product Cancelled Date
- Company / Total MRR — Salesforce / Account / Total MRR
- Company / Product — Salesforce / Account / Product
- Company / Product MRR — Salesforce / Account / Product MRR
- Company / Product App ID — Salesforce / Account / Product App ID
- Company / Action X — Salesforce / Account / Action X
- Company / Status Detail — Salesforce / Account / Status Detail
- Company / Status — Salesforce / Account / Status
- Company / Days to Onboarding Completed — Salesforce / Account / Days to Onboarding Completed
- Company / Onboarding Completed Date — Salesforce / Account / Onboarding Completed Date
- Company / Onboarding Start Date — Salesforce / Account / Onboarding Started Date
- Company / Stage Detail — Salesforce / Account / Stage Detail
- Company / Stage — Salesforce / Account / Stage
- Opportunity / Owner ID — Salesforce / Opportunity / Owner ID
- Opportunity / Product Family — Salesforce / Opportunity / Product Family
- Opportunity / Closed Lost Detail — Salesforce / Opportunity / Closed Lost Detail
- Opportunity / Closed Lost Reason — Salesforce / Opportunity / Closed Lost Reason
- Opportunity / Stage — Salesforce / Opportunity / Stage
- Opportunity / Close Date — Salesforce / Opportunity / Close Date
- Company / Active Customer — Salesforce / Account / Active Customer

You'll want to map each of the custom fields you setup to track product engagement on your Salesforce leads & contacts, to the Fusion contact object. Both fields from the Salesforce lead & Salesforce contact should be mapped to the same fused contact field.

For more on creating custom mappings between two or more connectors, consult our post Mapping Systems and Fields in Fusion.
D. Plug Into Reporting Tool of Choice

Now that you know have a Fusion account and know how to map custom fields, you can now plug your Fusion warehouse into any reporting / business intelligence (BI) tool that accepts MySQL as a data source. Some common examples include Tableau, PowerBI or MetaBase.

To do so, the first step is to retrieve your Warehouse Keys, which include the host, username, database, password, and port number of your Fusion warehouse. To download your warehouse keys log back into Fusion and click Get Credentials on the dashboard.

Connect to Your BI/Reporting Tool

Now launch your reporting tool. Here you may enter your warehouse credentials when you connect to a data source. Since every analytics platform is different, we’ve provided detailed instructions for popular analytics tools here.

Your Fused Database

To see what’s in your Fused Database, run a SHOW TABLES command. You should then see the fused, raw, and links tables in your warehouse. A few things to note:

- Fused tables follow the naming convention of fused_object. For example, fused_contact, fused_opportunity, fused_company, and fused_opportunity.
- Raw tables follow the naming convention of system0_object. For example, salesforce0_leads.
- Links tables follow the naming conventions of links_object1_object2. For example, links_company_contact or links_contact_opportunity.

Contacts & Leads in One Report

The fused_contact table contains Salesforce lead and contact data, so that’s where you can report off of the two datasets in a unified manner, with a combined lead & contact data set.
For example, if you were using Amazon QuickSight, you would select the `fused_contact` table as shown below.

If you were to select multiple tables, such as `fused_company`, `fused_contact`, and `links_company_contact`, here is an example of field you would return:

And if you're using another application like HubSpot with Salesforce, you can map Contact to Leads for a given product. Which is exactly what we did to gauge interest in our Fusion product.

How does this mapping manifest as a unified leads-contacts report?

Below, we're running a SQL query in Meabase which returns a count of our `Lead Source Detail` fields from the `fused_contact` table.
We can visualize our counts as bar chart, with relative interest by **Lead Source** detail broken down by *Account Sign Up, Connect With Us, Contact Us, Early Access, MarTech 2017* on the x-axis:

Building a unified report allows you to break down new vs. existing leads alongside your existing contacts, by lead source and dollar amount. The unified report allows you to see visually how each lead source breaks down by attracting new leads vs. re-engaging existing leads or existing contacts.

And by connecting to resulting opportunities, you can also see the resulting opportunity conversions and pipeline or revenue from your sources or other criteria you’re capturing.

### Connect Contacts to Opportunities

In addition, to report on opportunity results for both, you can join the `fused_contact` table to the `fused_opportunity` table via the `links_contact_opportunity` table – and then pull in to the report whether an opportunity is created, forecasted revenue, forecast percentages, etc.

### What Else Is Possible?

You are not limited just to Salesforce data. You can connect other data sources into your Fused warehouse to look at impact of marketing or support tied to Salesforce data. Within your Fusion account you’ll see what other connectors are available which include Marketo, HubSpot, Zendesk, Freshdesk, NetSuite and many others.
V. Getting Started

Get started today with your unified Salesforce lead + contact reporting.

You can set up a free trial account of Fusion and follow the steps we’ve outlined here in the guide to be up and running quickly. We invite you to give Fusion a try today.

Use Fusion to Unify Salesforce Leads & Contacts Reporting

TRY IT FREE