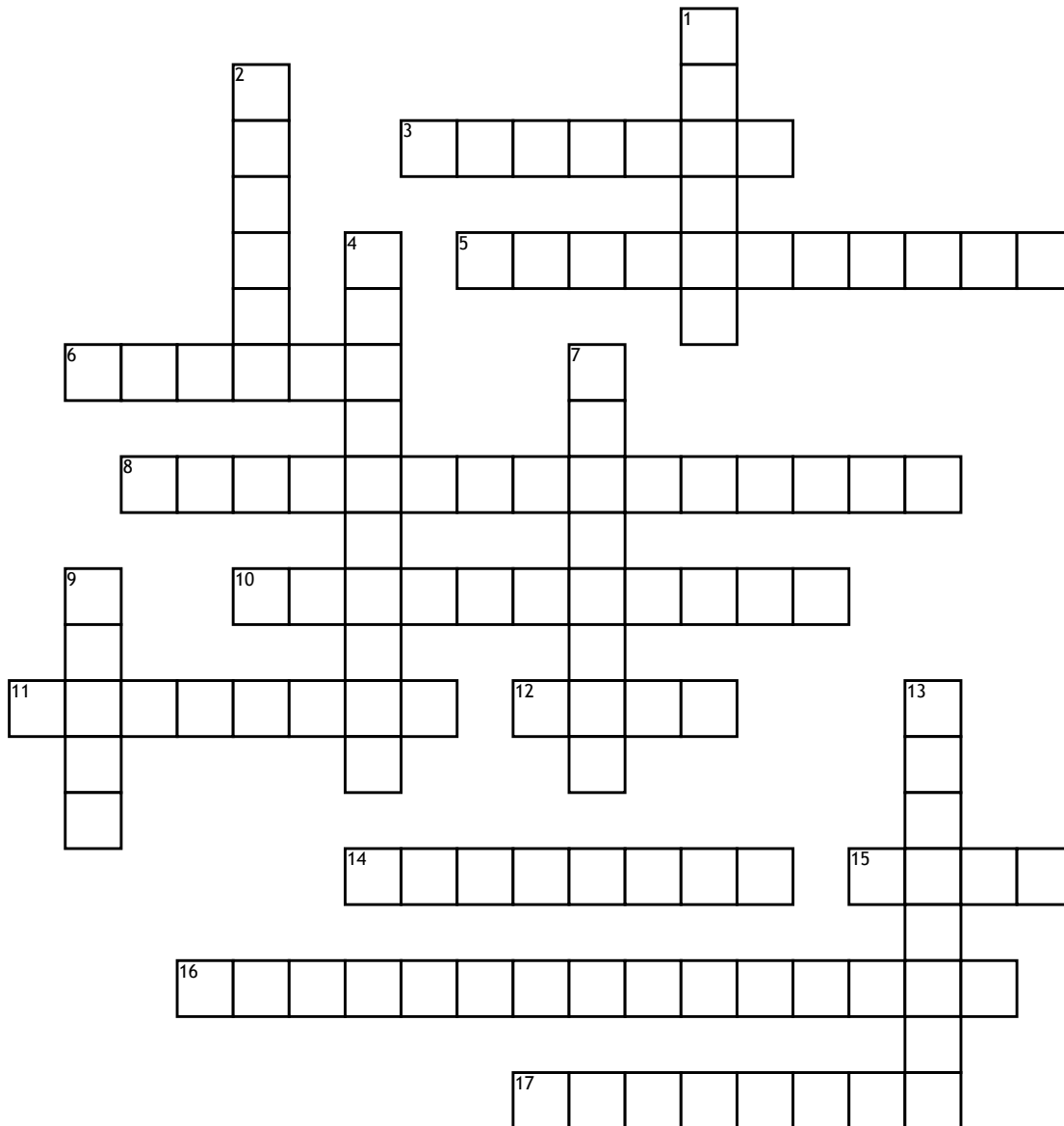


Name: \_\_\_\_\_

Date: \_\_\_\_\_

# SalesForce



## Across

- 3. individuals that are associated with entity records and serve as point people for communications and marketing
- 5. sales effort logged for a product you sell
- 6. broad type of records
- 8. Section of the customer entity page displaying products and services that are sold to a customer and their related entities

- 10. primary owner who serves as quarterback for the entire relationship and cross-sells all bank products
- 11. identified potential sale for a product you do not sell
- 12. potential prospect/customer of the bank w no specific sales opportunity being identified
- 14. individual or business who currently has no products or services
- 15. to-do item or reminder
- 16. group of PUB employees working on an opportunity

- 17. center of influence whether individual or business

## Down

- 1. records are individual entries in salesforce
- 2. Sales effort logged for a product you sell - Bankers III & IV
- 4. group of PUB employees working w/ the entity
- 7. individual or business that has an active product or service
- 9. in person meeting with a prospect, customer or COI
- 13. Task or event that has already taken place and entered afterward