|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Salesforce Knowledge Phase 1** |  |  |  |  |
| **Business Objective** | **Key Success Indicator** | **ID** | **Business Requirement** | **Priority** |
| Improve document organization and search functions. | Reduce time to locate information and inquires to SSCs, Sales, Marketing, and Training. | **BRQ - 1** | The system shall provide search capabilities to allow users to locate documents based on keywords. | P1 |
| **BRQ - 2** | The system shall provide the ability to restrict access to certain documents. | P1 |
| **BRQ - 5** | The system shall archive documents based on expiration date and allow documents to be archived manually. | P1 |
| Increase overall communication and awareness between Spectrum Business and Channel Partners. | Obtain Channel Partner feedback and track activity within Knowledge articles. **Article Scores User Activity Reports** | **BRQ - 3** | The system shall monitor user activity (i.e. how many times a document was viewed). | P1 |
| **BRQ - 6** | The system shall recommend articles based on key factors such as process stage, product type and industry vertical. | P1 |
| Channel Partner Adoption of Salesforce Communities. | Increase in Channel Partners utilizing Salesforce Communities. **Baseline Adoption Rates Targeted Adoption Rates** | **BRQ - 4** | The system shall provide mobile access to documents. | P1 |

| **No.** | **Excelacom Service(s) & Deliverable(s)** |
| --- | --- |
| 1 | To-Be Salesforce Knowledge Data Requirements |
| 2 | Knowledge Audit Findings |
| 3 | Definition and Recommendation on 3 Standard Templates and Data Categories |
| 4 | Knowledge content creation and publishing flow |
| 5 | Utilization tracking analytics |
| 6 | Key Productivity Index (KPI) Metrics |
| 7 | Implementation Guide including recommendations for scalability |