LIEFERHELD
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Sales Handbook

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1 Sales Process

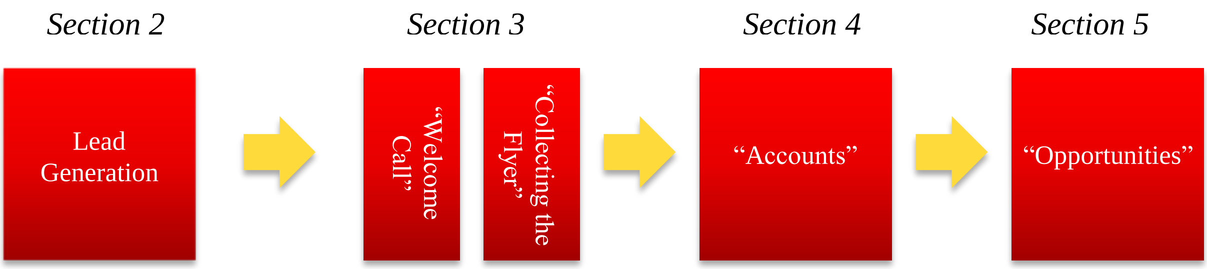
This booklet gives you advice about Salesforce and the Backend. We start in section 2 by explaining what a “lead” is, how you can create a “new” one and how to work with it.

Section 3 addresses the steps needed to be taken to get a restaurant online. The section is divided into two important parts, making a “Welcome Call” and “Collecting the Flyer” from the restaurants.

In the last step the lead needs to be converted and all information has to be entered into the Backend system.

In section 4 “accounts” and “single spreadsheets” are introduced. section 5 deals with “opportunities” and starts with explaining the details and how to open up a new one. The aim is to record what opportunity each sales employee has with a restaurant and what kind of products he/she would be able to sell. Therefore he/she can add products to the opportunity. Furthermore it is possible to see how mature an opportunity is.

While reading this booklet we advise you to use Salesforce simultaneously and try to reconstruct the steps described.



2 Lead

In this Section

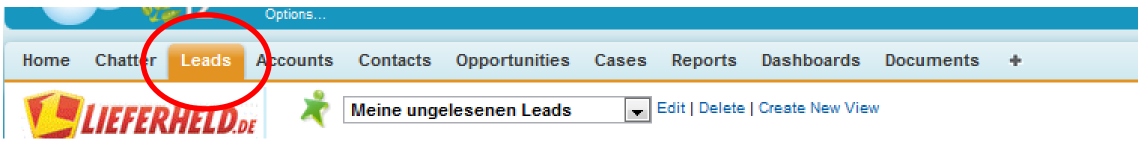
- Create a lead
- Lead edit

A lead in our case represents information about a delivery service aka “restaurant”. The editorial teams search the web and other platforms for potential restaurants and create leads so that you can work with them to sign up restaurants for our website. Before a lead reaches value, it will be checked if the service delivers food or is already listed on the webpage of Lieferheld.

Usually you do not need to create a lead, but to get familiar with the format it is important to understand how to do so.

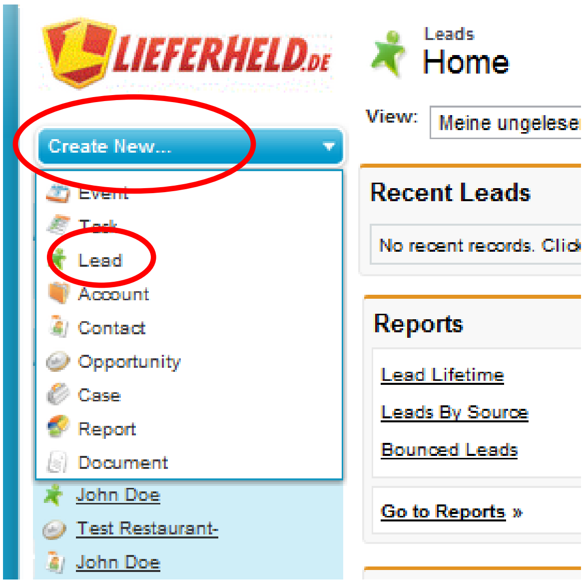
2.1 Create a Lead

1.



2.

3.

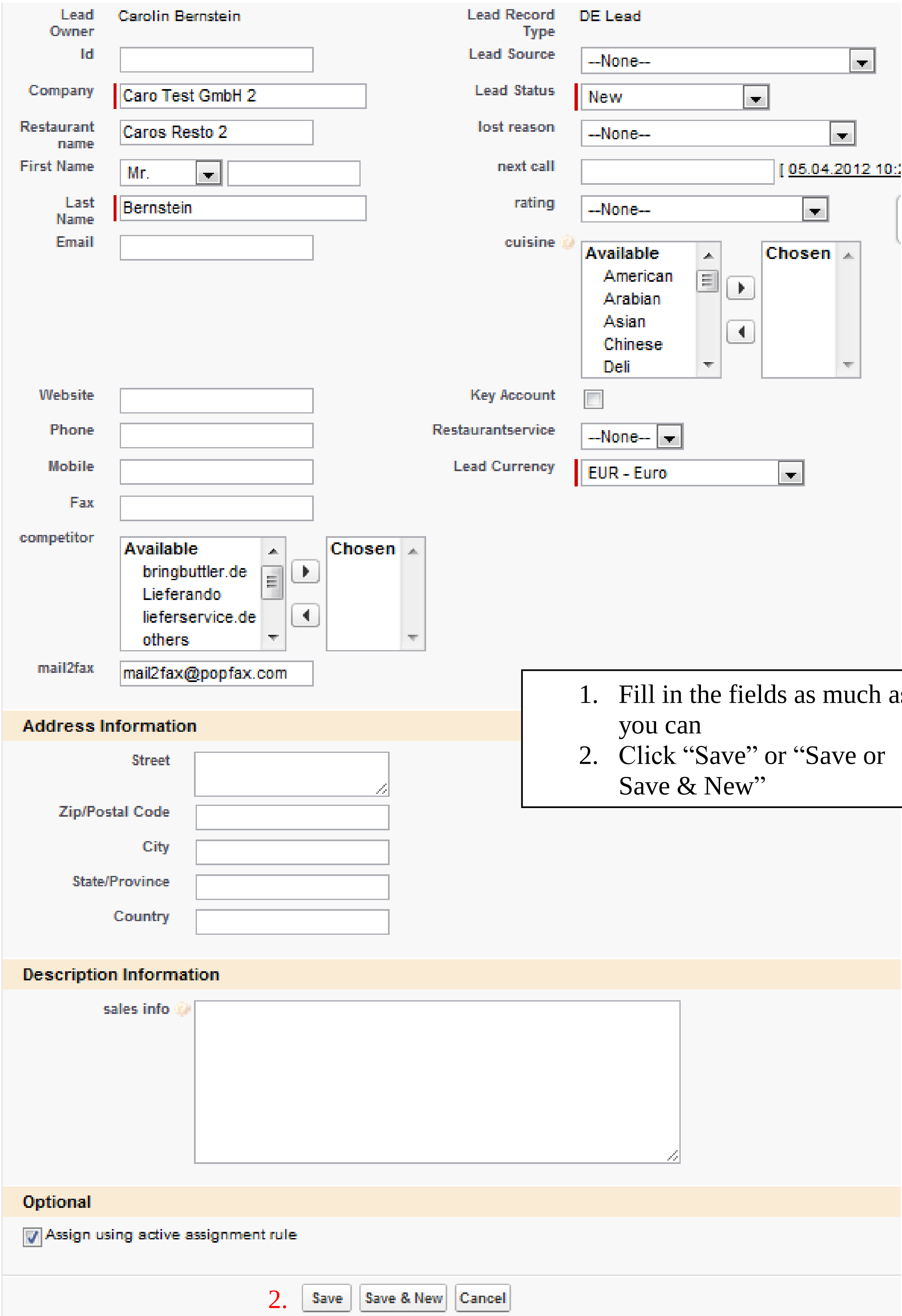


1. Click tab “Lead”
2. Click “Create New”
3. Click “Lead”

Figure 1: Create a lead

2.2 Setting up your Lead

1.



1. Fill in the fields as much as you can
2. Click “Save” or “Save or Save & New”

Figure 2: Lead edit

In the graph below, you can see what the entire lead looks like. The lead record consists of a number of fields that you can use to capture information about a potential lead.

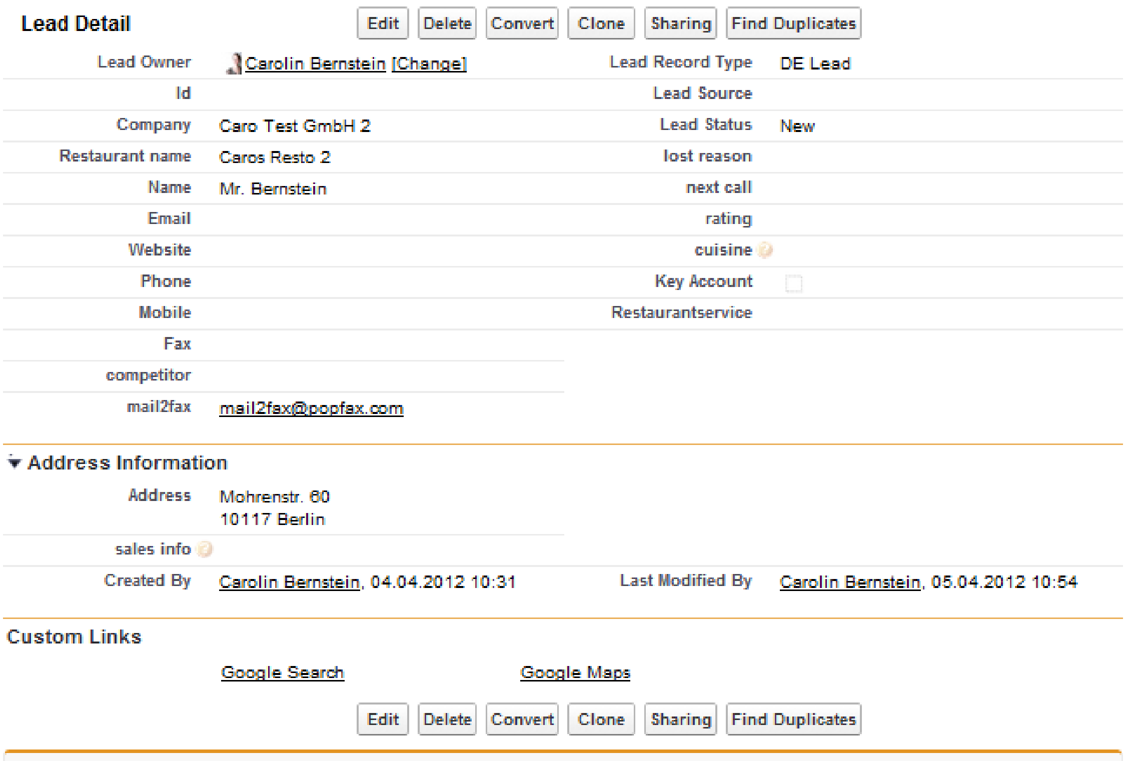


Figure 3: Lead detail 1

- ✓ ***Lead owner:*** the person who owns the lead
- ✓ ***Company:*** the name of the company
- ✓ ***Restaurant name:*** the restaurant name
- ✓ ***First and last name:*** the owner of the restaurant
- ✓ ***Lead source:*** define and track the sources of your leads
- ✓ ***Lead status:*** the status of the lead: new, in progress, converted, lost
- ✓ ***Lost reason:*** if the lead is lost, choose a reason: e.g. commission too high, duplicates etc.
- ✓ ***Cuisine:*** the food that is offered
- ✓ ***Currency:*** the currency of the country

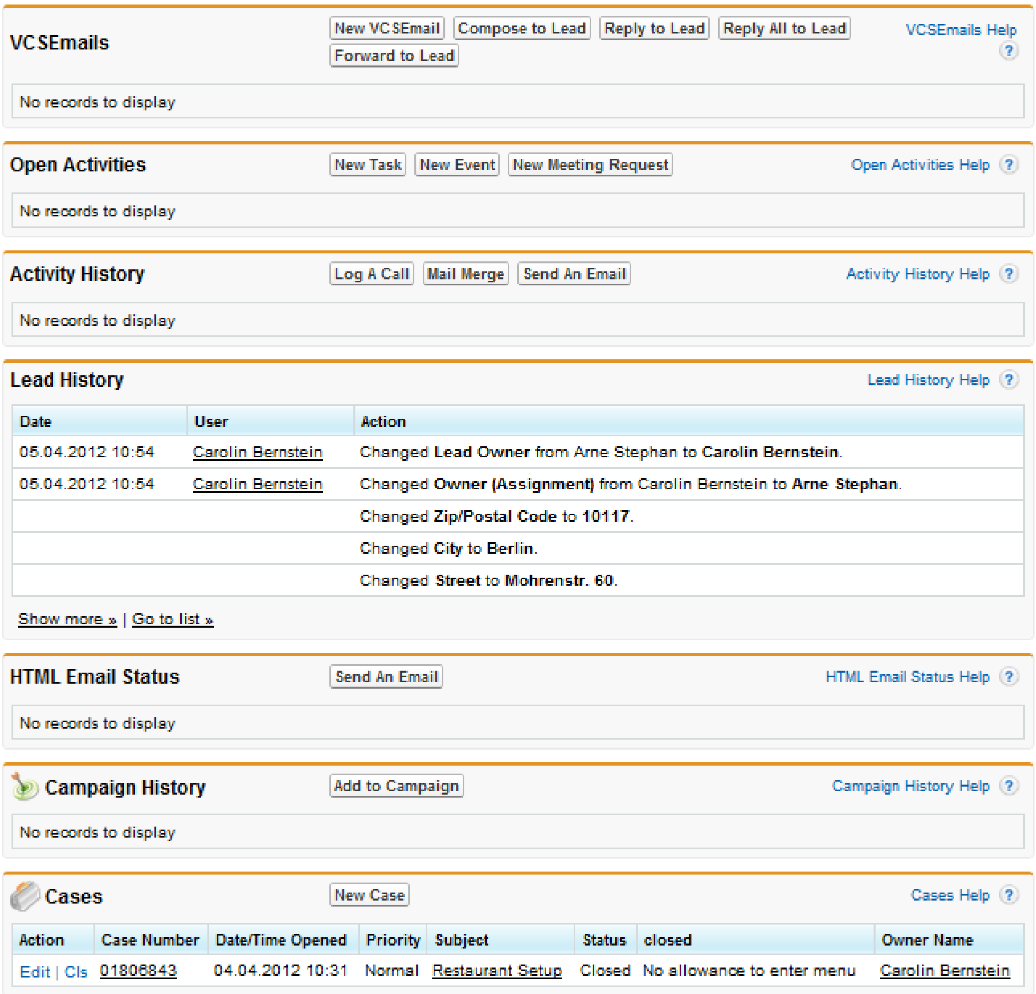


Figure 4: Lead detail 2

- ✓ ***VCSEmail:*** write Emails within Salesforce
- ✓ ***Open activities:*** click, e.g. "New Task", for scheduling your tasks
- ✓ ***Activity history:*** the history of every call you logged, remember to always log a call
- ✓ ***Lead history:*** every action in the lead is logged
- ✓ ***Cases:*** for each lead the case "Restaurant Setup" is generated

3 The Restaurant Setup

Before a restaurant gets online you have to complete two tasks first:

1. Convince the restaurant to join Lieferheld -> verbal commitment
2. Receive the menu from the restaurants -> physical commitment

In order to assign these tasks to the responsible department a case is always attached to a lead, where someone independent from the lead owner can also work on it.

In this section

- Work with a lead
- My restaurant Setup
- Welcome Call
- Log a call
- Case: “Restaurant Setup”
- Convert the lead
- Edit Backend

3.1 Work with a Lead

Every lead has the case “Restaurant Setup” attached automatically. Work on the “Restaurant Setup”, before you convert the lead into an account.

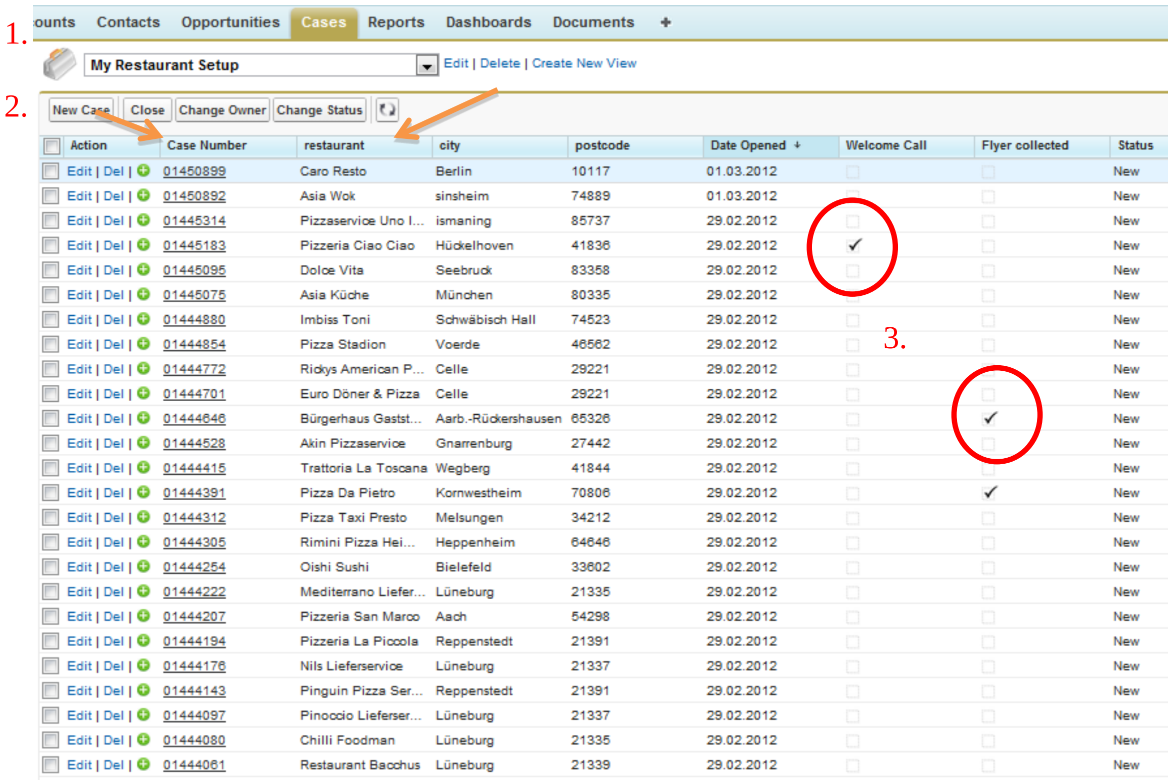
Two cases are generated automatically in Salesforce: the “Restaurant Setup” and the zip code qualification.

The Restaurant Setup process is divided into two parts:

- ✓ ***Welcome Call (WC):*** Convince the restaurant to work with us.
- ✓ ***Flyer collection*:** Collect the menu of the restaurant.

3.2 My Restaurant Setup

Every sales agent has his/her own "Restaurant Setup" case he/she is responsible of. These can be found in the tab "Cases" – "My Restaurant Setup". These are all not yet completed Restaurant Setup cases.



1. ounts Contacts Opportunities Cases Reports Dashboards Documents +

My Restaurant Setup Edit | Delete | Create New View

2. New Case Close Change Owner Change Status

3.

Action	Case Number	restaurant	city	postcode	Date Opened	Welcome Call	Flyer collected	Status
Edit | Del |	01450899	Caro Resto	Berlin	10117	01.03.2012			New
Edit | Del |	01450892	Asia Wok	sinsheim	74889	01.03.2012			New
Edit | Del |	01445314	Pizzaservice Uno I...	ismaning	85737	29.02.2012			New
Edit | Del |	01445183	Pizzeria Ciao Ciao	Hückelhoven	41836	29.02.2012	✓		New
Edit | Del |	01445095	Dolce Vita	Seebruck	83358	29.02.2012			New
Edit | Del |	01445075	Asia Küche	München	80335	29.02.2012			New
Edit | Del |	01444880	Imbiss Toni	Schwäbisch Hall	74523	29.02.2012			New
Edit | Del |	01444854	Pizza Stadion	Voerde	46562	29.02.2012			New
Edit | Del |	01444772	Rickys American P...	Celle	29221	29.02.2012			New
Edit | Del |	01444701	Euro Döner & Pizza	Celle	29221	29.02.2012			New
Edit | Del |	01444646	Bürgerhaus Gastst...	Aarb.-Rückershausen	65326	29.02.2012		✓	New
Edit | Del |	01444528	Akin Pizzaservice	Gnarrenburg	27442	29.02.2012			New
Edit | Del |	01444415	Trattoria La Toscana	Wegberg	41844	29.02.2012			New
Edit | Del |	01444391	Pizza Da Pietro	Kornwestheim	70806	29.02.2012		✓	New
Edit | Del |	01444312	Pizza Taxi Presto	Melsungen	34212	29.02.2012			New
Edit | Del |	01444305	Rimini Pizza Hei...	Heppenheim	64646	29.02.2012			New
Edit | Del |	01444254	Oishi Sushi	Bielefeld	33602	29.02.2012			New
Edit | Del |	01444222	Mediterrano Liefer...	Lüneburg	21335	29.02.2012			New
Edit | Del |	01444207	Pizzeria San Marco	Aach	54298	29.02.2012			New
Edit | Del |	01444194	Pizzeria La Piccola	Reppenstedt	21391	29.02.2012			New
Edit | Del |	01444176	Nils Lieferservice	Lüneburg	21337	29.02.2012			New
Edit | Del |	01444143	Pinguin Pizza Ser...	Reppenstedt	21391	29.02.2012			New
Edit | Del |	01444097	Pinoccio Lieferser...	Lüneburg	21337	29.02.2012			New
Edit | Del |	01444080	Chilli Foodman	Lüneburg	21335	29.02.2012			New
Edit | Del |	01444061	Restaurant Bacchus	Lüneburg	21339	29.02.2012			New

Figure 5: My restaurant Setup

1. Click on the tab "Cases"
2. Select from the dropdown menu : My Restaurant Setup
3. Here are all your Restaurant Setups with the current status: Welcome Call done, Flyer collected, None

3.3 Making the Welcome Call

The Welcome Call is not to say “hi” to the restaurant, but to convince the restaurant to work with us and join our platform. The Welcome Call is necessary to get the agreement of the restaurant for further cooperation. The Welcome Call therefore is assigned to sales.

Welcome Call definition:

- ✓ You need to talk to the “owner” or “manager” of the restaurant or at least to someone who has permission to sign business contracts and make final decisions.
- ✓ The verification to join the portal can only be given by the Owner of the restaurant.
- ✓ You have to confirm the full name of the restaurant owner/decision maker and the legal form of the restaurant.
- ✓ You have to ask for the order sending method which can be phone, sms, Email, Fax and terminal.
- ✓ If you offer a trial period, you have to mention that it is still a contract though one with no commission. It is not allowed to say that there is no contract agreement. When the restaurant joins our platform, it agrees to our terms and conditions.
- ✓ Check the restaurants address
- ✓ Always log the call
- ✓ You have to attempt to receive the mobile number or email. If you don’t get it, you have to record the reason in “Log a Call”

Welcome Calls can have different outcomes:

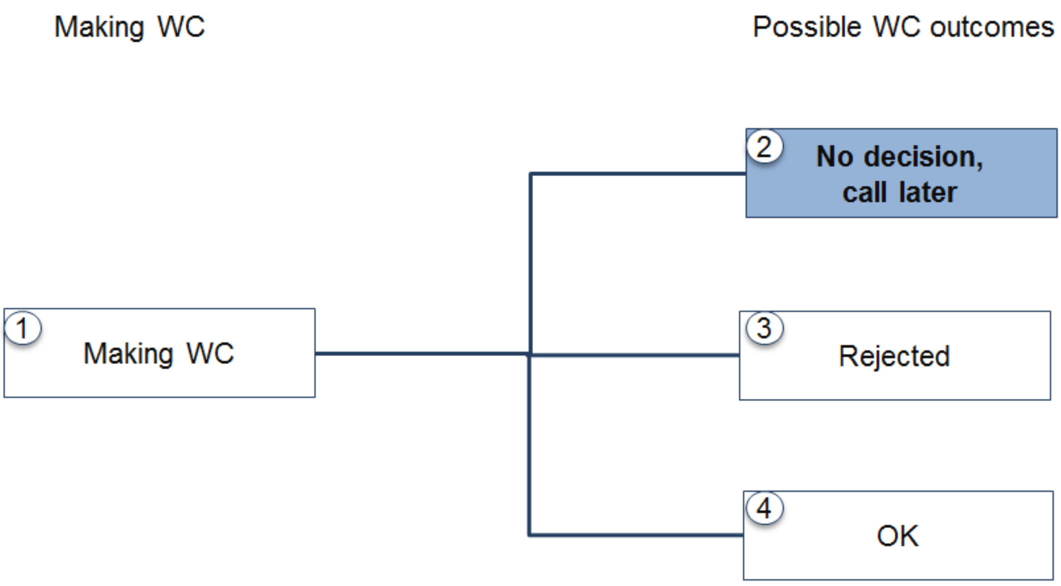


Figure 6: Making the WC: no decision

No decision, call later (2)

If you could not reach the directing manager right away, call later again. But make sure to log the call. If you have an appointment, set the next call date in your case "Restaurant Setup".

3.4 Excurse: Log a call

After each contact with a restaurant you have to log the call, so you can keep track of information and discussed topics. The call always has to be logged in the **lead or ac-**

count, never in the case! The log is important so others can follow the history of an account.

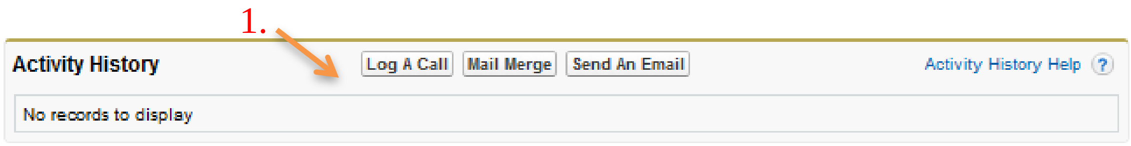


Figure 7: Log a call

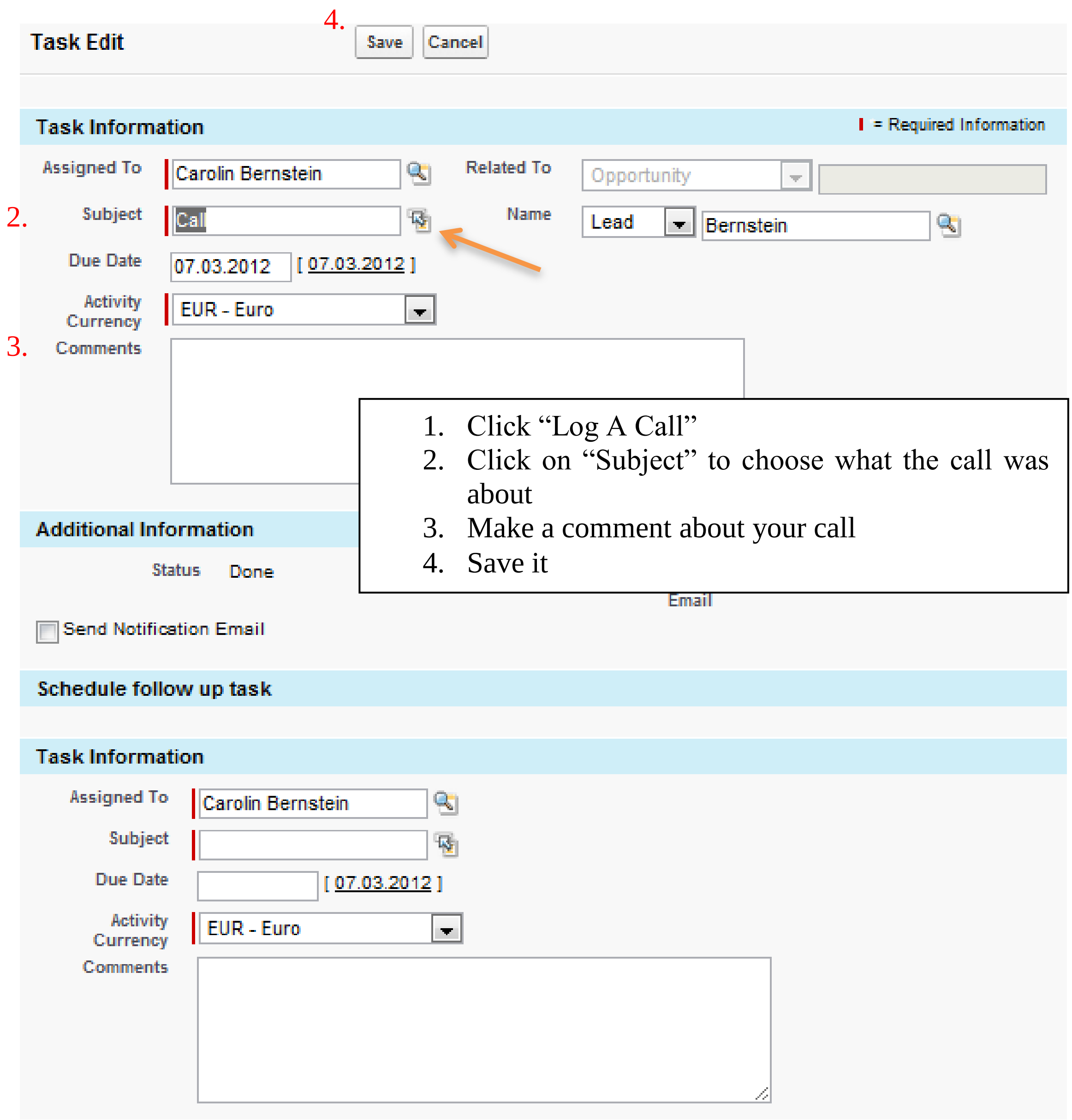


Figure 8: Log a call: Task edit

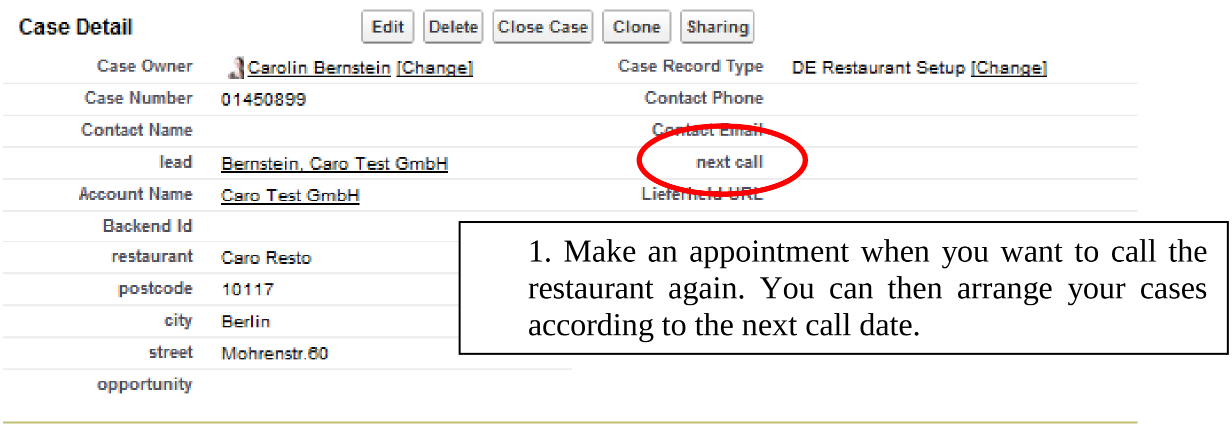


Figure 9: Next call

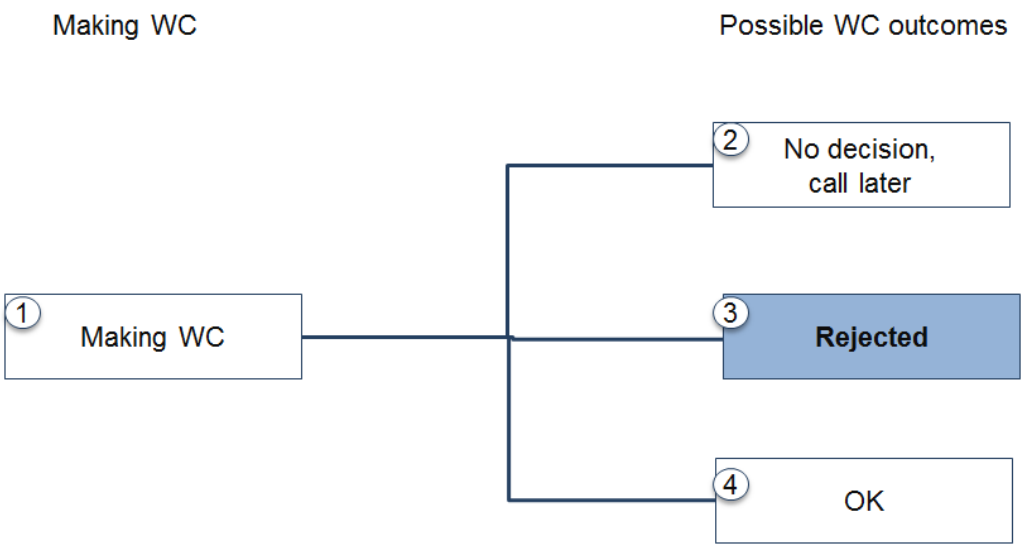


Figure 10: Making the WC: rejected

Outcome – Rejected (3)

If a restaurant persistanly doesn’t want to or is not able to work with us then you can close the case as “No allowance to enter menu”:

- the owner declares he has no interest at all in doing business with Lieferheld

- you have tried to convince him three times in a row of working with Lieferheld without success

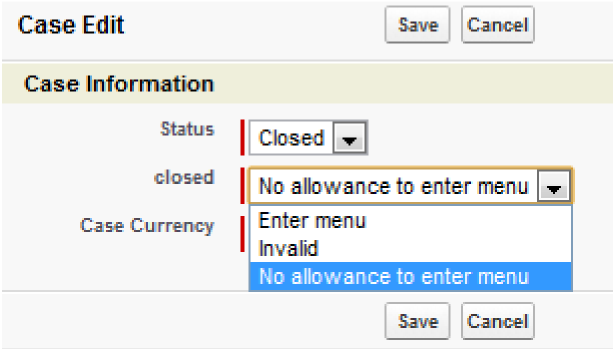


Figure 11: Close case: no allowance to enter menu

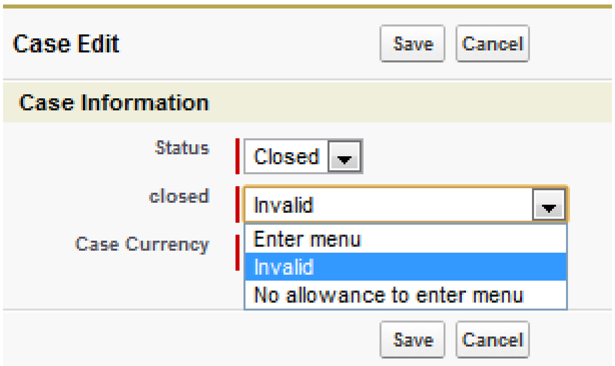


Figure 12: Close case: invalid

If the Restaurant Setup for example is out of date or the lead does not exist anymore then you can close the case as „Invalid".

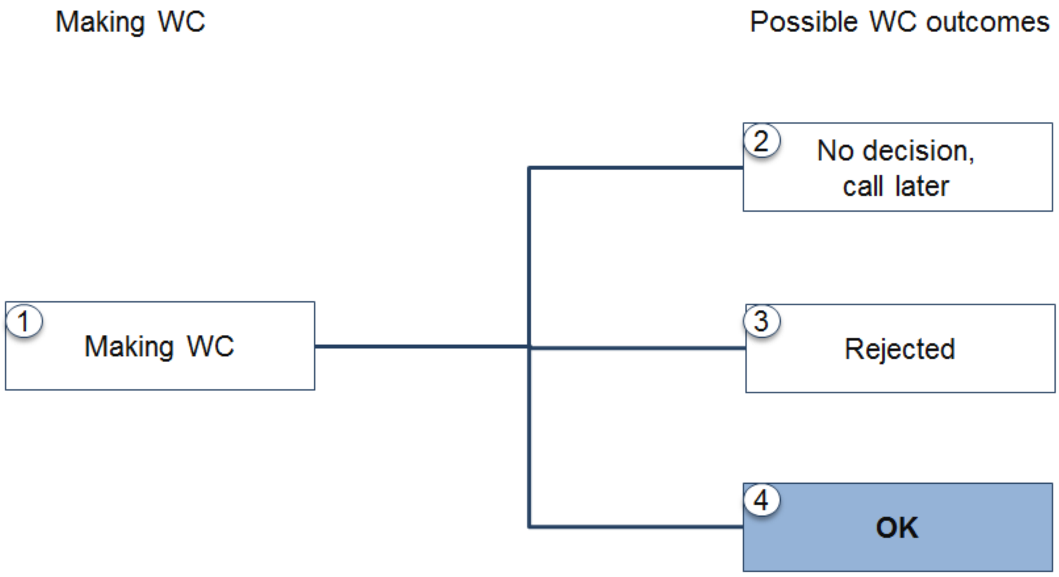


Figure 13: Making the WC: OK

<u>OK - Positive Welcome Call (4)</u>

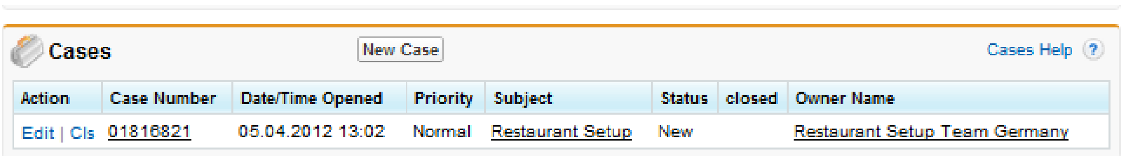
When you have convinced a restaurant to work with us then you can mark the Welcome Call as positive.

Open the case "Restaurant Setup" and

- ✓ mark the Checkbox "Welcome Call"
- ✓ add the Date

3.5 The Case "Restaurant Setup"

Scroll down to the cases related list and click on the subject Restaurant Setup.



Cases New Case Cases Help ?

Action	Case Number	Date/Time Opened	Priority	Subject	Status	closed	Owner Name
Edit | Cls	01816821	05.04.2012 13:02	Normal	Restaurant Setup	New		Restaurant Setup Team Germany

Figure 14: Cases: Restaurant Setup

Figure 15: Case detail: WC

In order to add the restaurant on the Lieferheld platform you also need the menu flyer, delivery areas and delivery times. There are various possibilities to get the menu:

- the restaurant owner sends it in straight away (E-Mail, Fax, Snail-Mail, Website)
- editorial team sends someone to collect the menu

In any case, when the menu flyer is available it will also be marked.

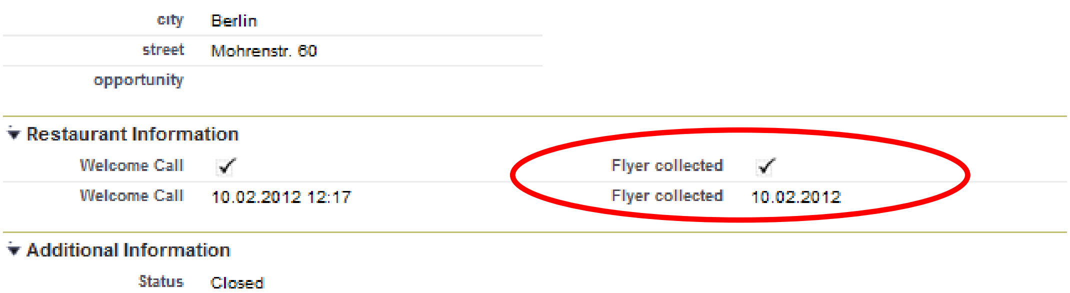


Figure 16: Case detail: Flyer collected

If the Welcome Call checkbox is marked then you can close the case with „Enter Menu“. The editorial team can start typing in the menu as soon as they collected the flyer and take the restaurant online.

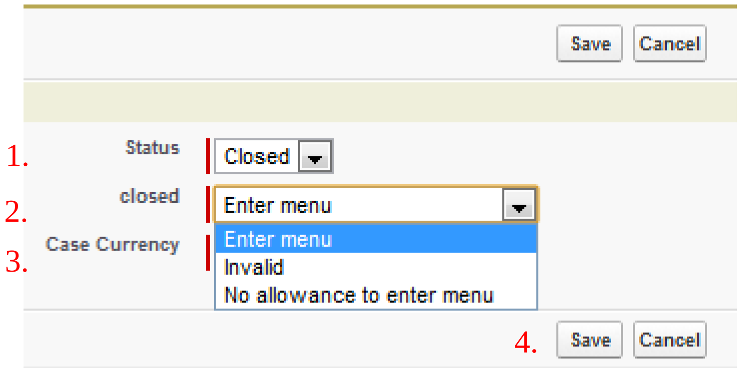
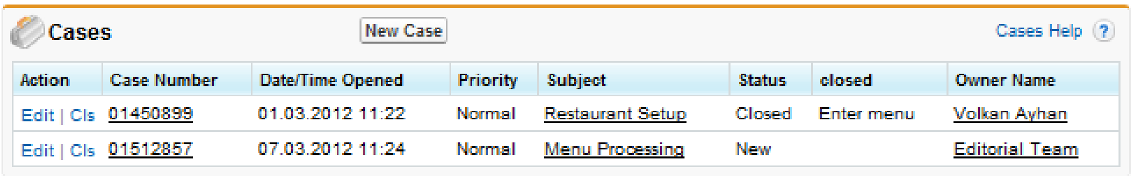


Figure 17: Close case: enter menu

Closing the case:

1. The status must be set to closed
2. Closed: choose "Enter menu"
3. Case currency: choose the accurate currency the country is using
4. Save it

The closed case "Restaurant Setup" with the closed status "Enter menu" will create a new case: "Menu Processing". This case will go to the editorial team for further proceeding.


Cases New Case Cases Help

Action	Case Number	Date/Time Opened	Priority	Subject	Status	closed	Owner Name
Edit | Cls	01450899	01.03.2012 11:22	Normal	Restaurant Setup	Closed	Enter menu	Volkan Ayhan
Edit | Cls	01512857	07.03.2012 11:24	Normal	Menu Processing	New		Editorial Team

Figure 18: Case: Menu processing

3.6 Convert the Lead

Now that the restaurant shows interest in working with us, convert the lead into an account!

An account is your future contact and each account has one to several opportunities with various stages. Now you’ll always know what the status of the deal is.

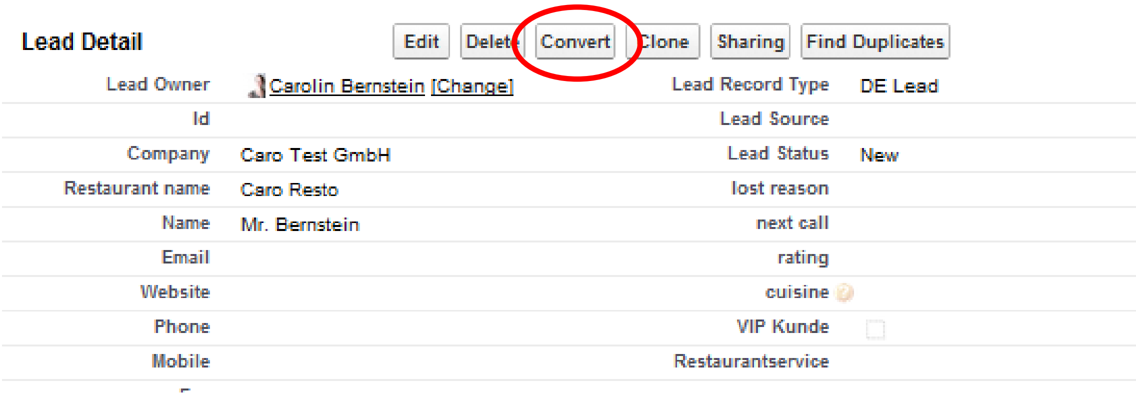
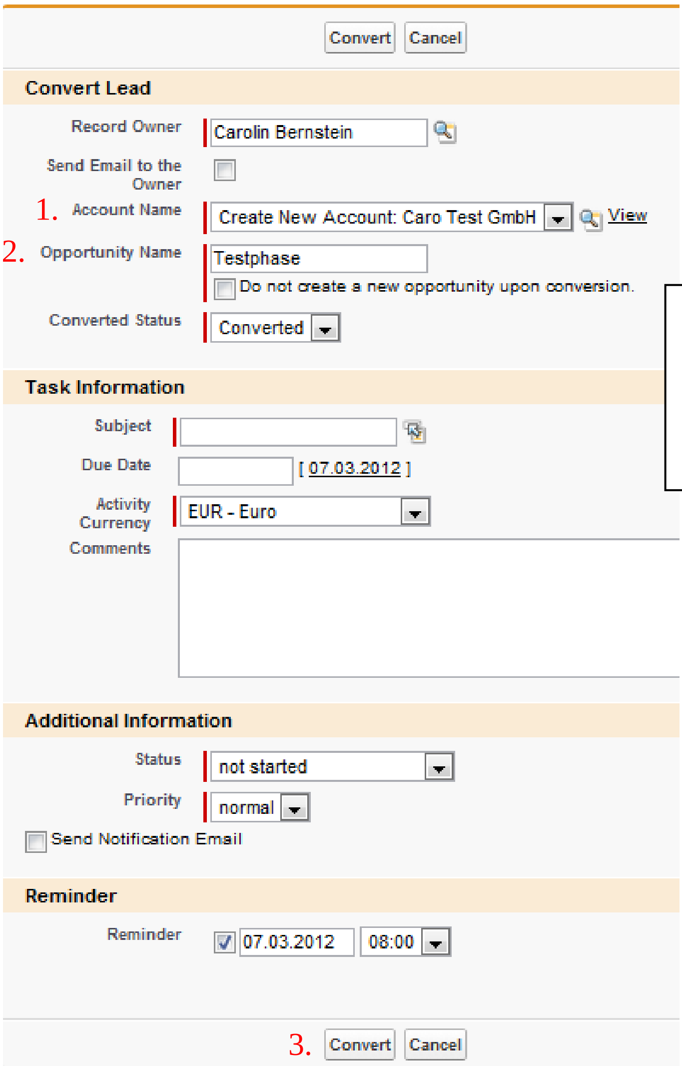


Figure 19: Convert the lead



Convert a lead:

1. The account name will be adopted from the lead
2. Give your opportunity a name
3. Click convert

Figure 20: Convert lead

3.7 Excurse: Create a restaurant in the Backend

Once a lead is qualified, it is time to create the account in the Backend system. All information can be taken from the lead/account.

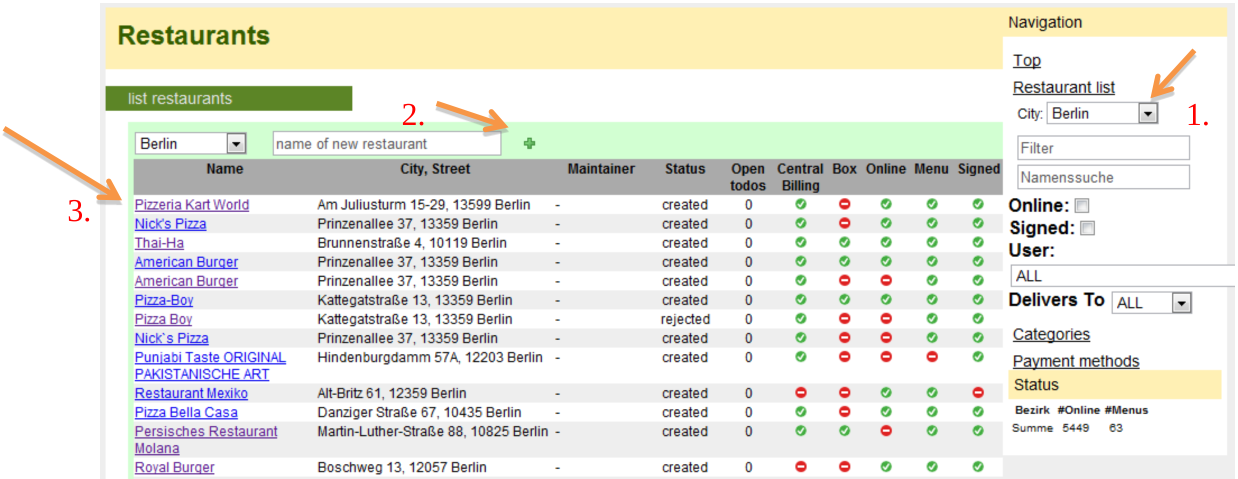


Figure 21: Backend: list restaurant

1. Enter the name of the city
   Select it in the dropdown menu
2. Enter the name of the restaurant and click on the green cross
3. Wait until the newly added restaurant shows up and click on the name of the restaurant to edit it's information
4. Fill in all information and tick the according check marks
   Owner, Company Name, Salesforce ID, Tariff and so on

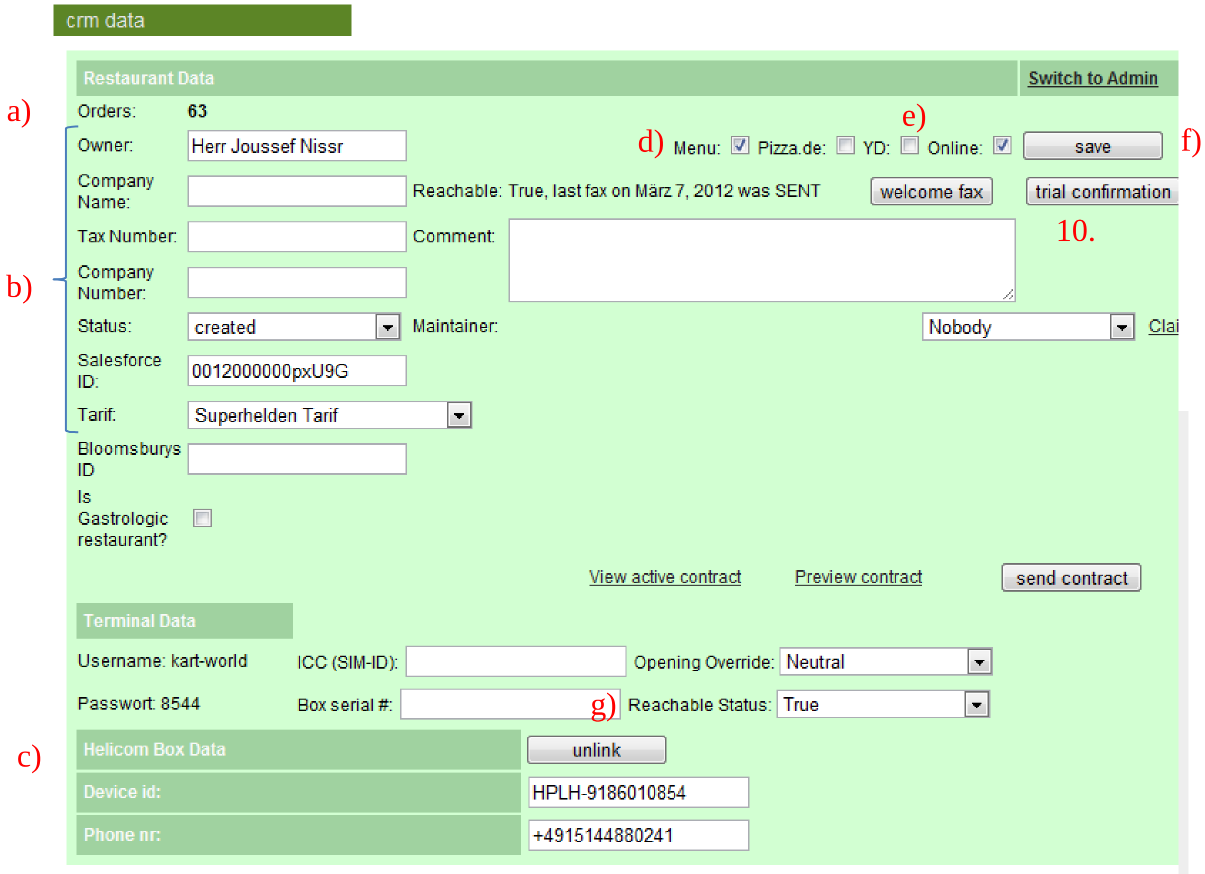


Figure 22: Backend: CRM data

After the sheet has opened up enter the appropriate information:

a) Shows the number of orders so far

b) General information:

- ✓ Owner: for the German case start with **Herr / Frau**
- ✓ Name of the company/Restaurant
- ✓ Salesforce ID: see below
- ✓ Tariff: choose the tariff in the dropdown menu

c) Needs to be completed by the box shipper when the restaurant gets a Terminal

d) Checkbox showing if the menu is already created

e) Checkbox to get the restaurant online

f) Click to save all setting in CRM data (saving is confirmed by a yellow flash)

g) The reachable status shows the restaurants availability for Lieferheld

In order to connect the Backend to Salesforce you have to insert the Salesforce ID.

- ✓ Copy the Salesforce ID of the account (NOT the lead ID) into the respective field in the Backend. You'll find the Salesforce ID in the URL
- ✓ Vice versa: The Backend ID needs to be added to the Salesforce account. Therefore use the last numbers of the Backend URL and fill them in.

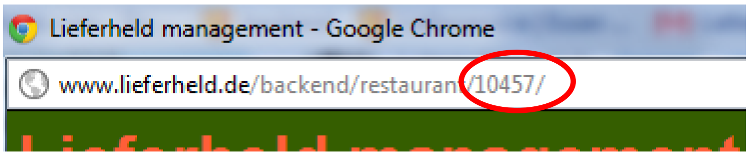


Figure 23: Backend ID 1

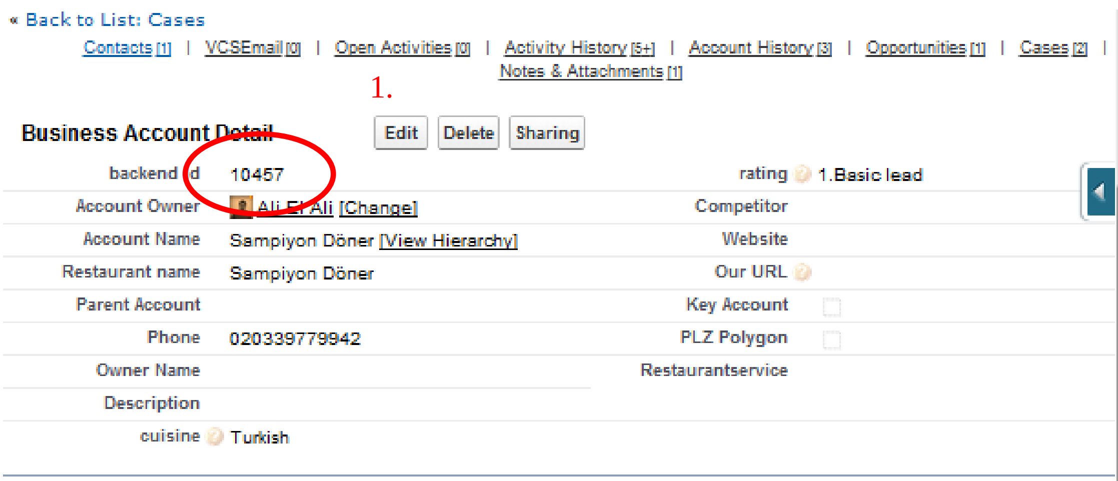


Figure 24: Backend ID 2

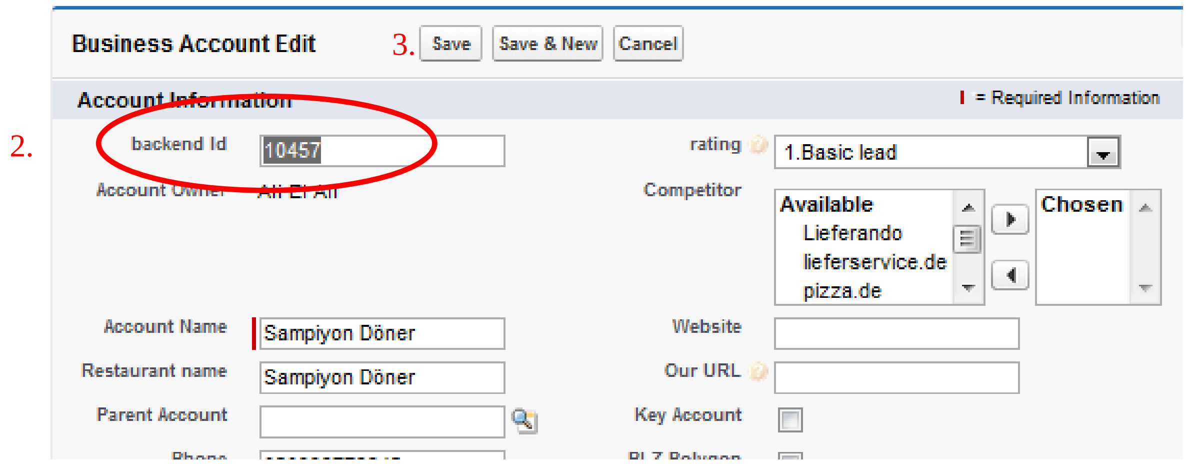


Figure 25: Business account edit

Enter Backend ID:

1. Go back to your account and click edit.
2. Enter Backend ID
3. Save

1.

Figure 26: Salesforce ID 1

2.

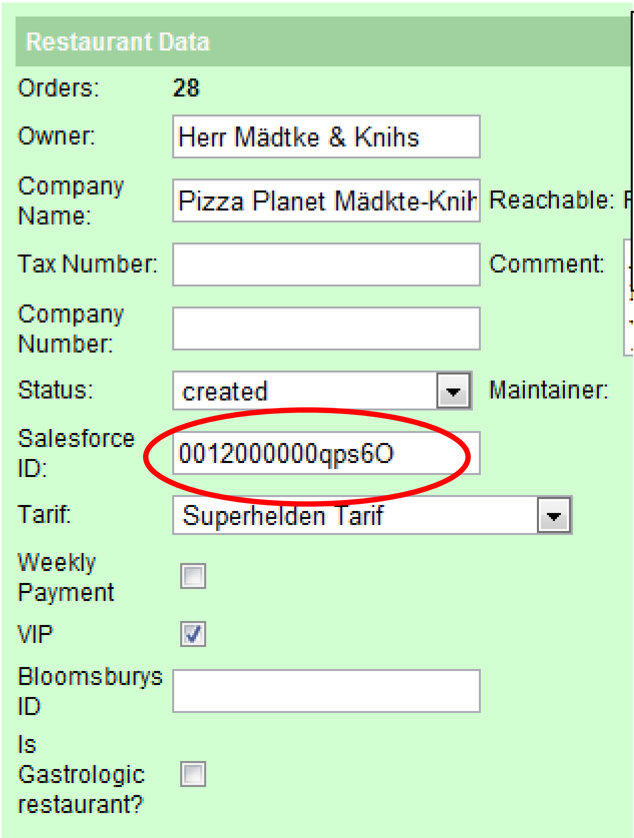


Figure 27: Salesforce ID 2

Enter Salesforce ID:

Go to the Salesforce Account

1. Copy the Salesforce ID
2. Enter the Salesforce ID into the Backend
3. Save

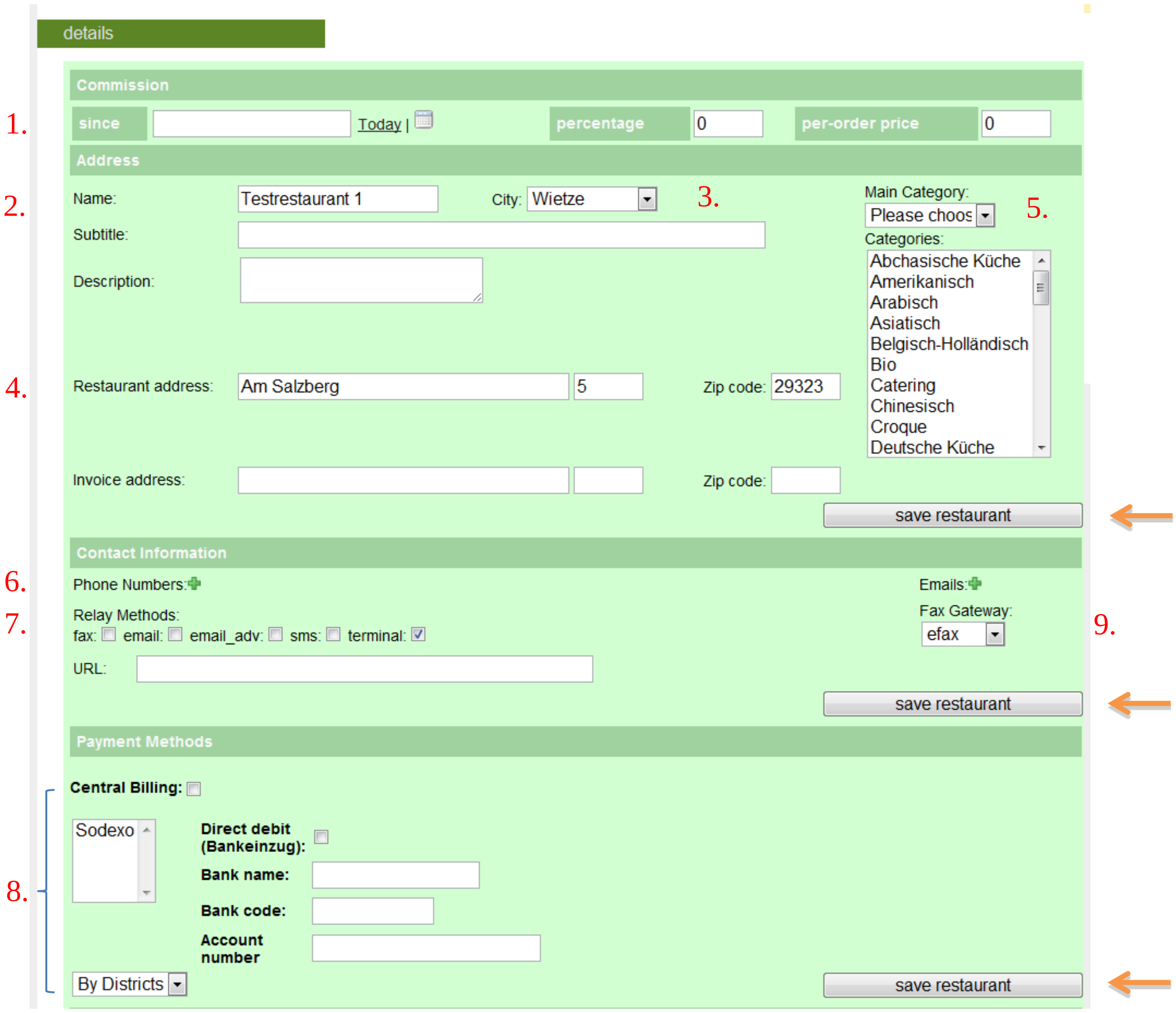


Figure 28: Backend details

1. **Fill in the contractual agreed percentage (commission) and when it was arranged**

   Make sure you use a full stop instead of a comma
2. **Complete the restaurant's name (subtitle and description is not of importance)**
3. **Select the city in which the restaurant is located**
4. **Enter the zip code and the address**
5. **Select the category of the cuisine (done by editorial)**

   At first the main category and then further cooking-styles, press Strg/ctrl to select more than one category

6. **Click the plus ( ) to add each email, phone and fax numbers separately and tick the according box**
7. **Choose the relay method**

   In most cases it is „fax“; if the restaurants receives a terminal then the department who sets up the terminal will mark “terminal”; for orders via e-mail check „email“ and fill in the URL
8. **Complete the data of the restaurant‘s bank account; especially make the check mark of central billing, if the restaurant wishes Online Payment**
9. **Save the information by clicking one of the buttons**
10. **Button welcome fax and trial confirmation (see above Figure 22):**

    Click to send a test fax to the restaurant to find out if the channel is available:

- “Welcome fax“ is for restaurants with a contract
- “Trial confirmation” is for restaurants in testing phase (do not send a Fax, when the restaurant has a Lieferheld-Box).

When the channel fax works then the status will be “sent”.

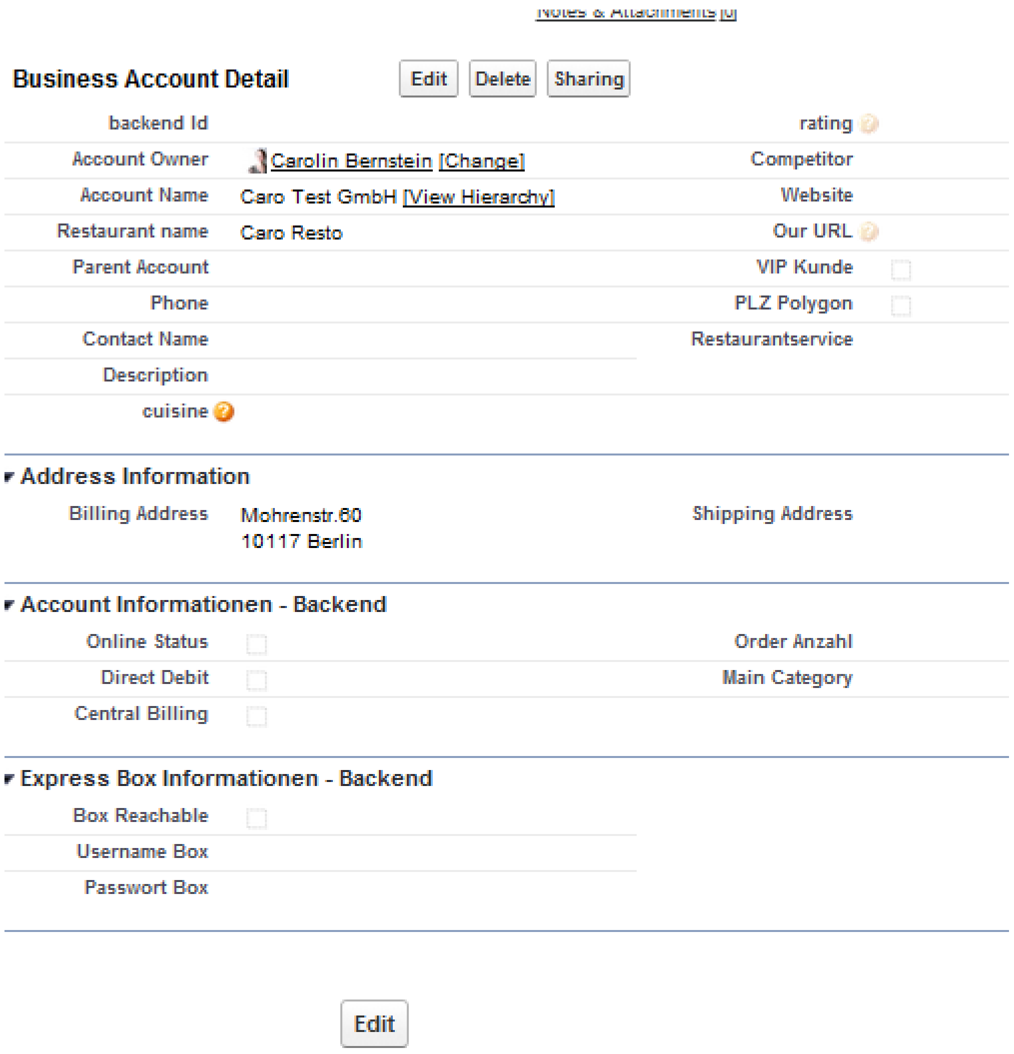
If not then the status will be “wrong” and you have to check with the restaurant if their channel fax is working.

4 Account

In this section

- Short glossary of account details
- How to use an account

A qualified lead needs to be converted into an account. All information is visible here, so the account represents the collected data of your restaurant.



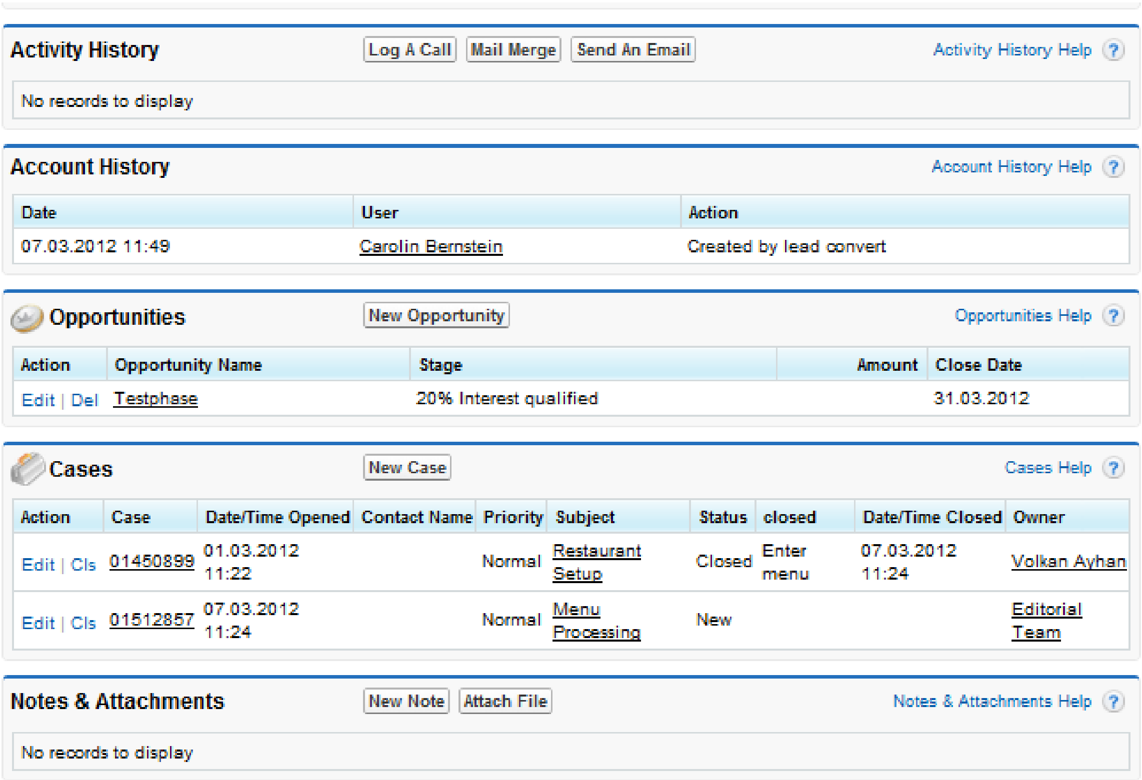


Figure 29: Accounts

- ✓ ***"Edit":*** you can modify fields
- ✓ ***"Account owner":*** the account owner is usually assigned automatically to the agent who is responsible for the area
- ✓ ***"Account name":*** represents the name of the restaurant you want to track

All information according to a restaurant should be documented in the account, e.g. attachments, contracts, etc. This is your starting point to work:

- ✓ ***Tab "Opportunity"***: generate a new opportunity or edit an old one by clicking on the opportunity name.
- ✓ ***Tab "Cases":*** generate a new one or modify the existing by clicking on the case number.
- ✓ ***Tab "Notes & Attachments":*** attach files, like the signed contracts for each product

5 Opportunities

In this section

- Opportunity detail
- Add opportunities
- Choose a product and price books
- Create and send quotes
- Create PDF's
- Discount request - internal

Opportunities are the essence of sales. Once you qualified a lead and converted it into an account then also an opportunity is created automatically. Every account has at least one opportunity, but you can manage more opportunities at the same time and track each opportunity with greater precision.

A newly converted lead always has an opportunity with the stage status of "20% Interest qualified". From this stage on the opportunity can go through various stages.

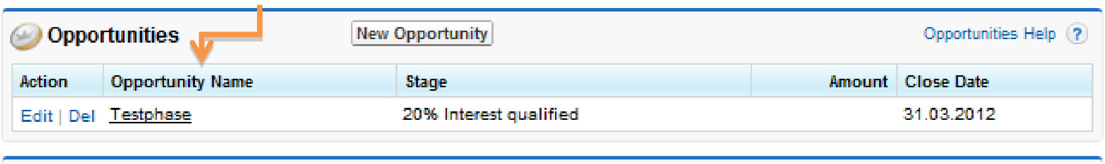
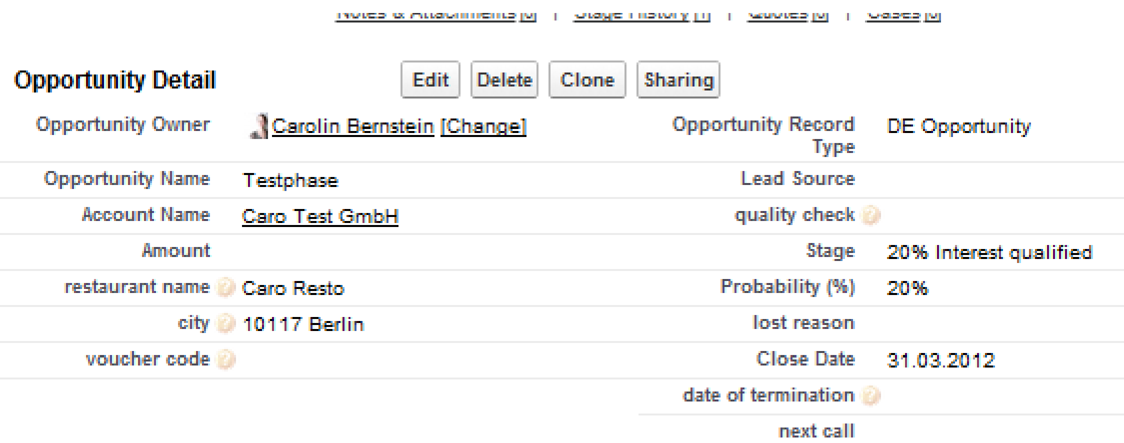


Figure 30: Opportunity



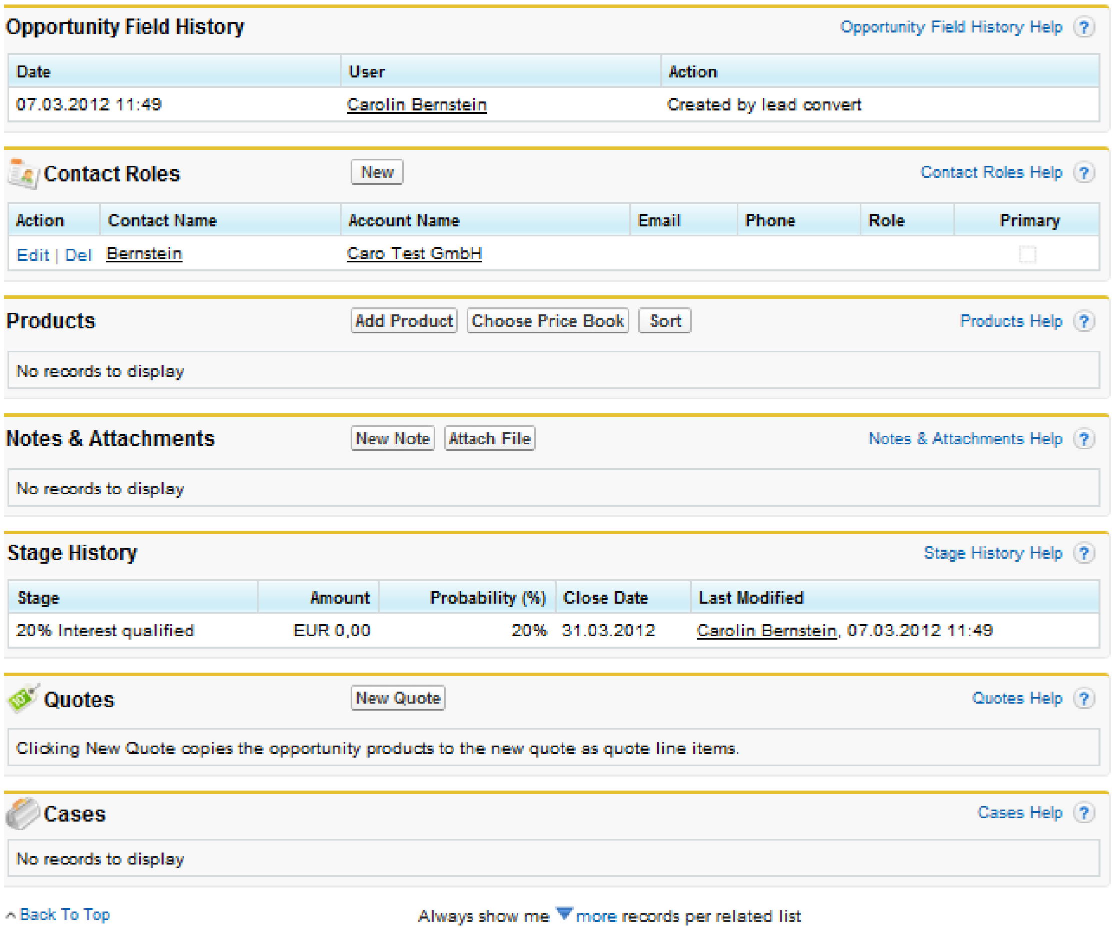


Figure 31: Opportunity detail

- ✓ ***Opportunity owner***: Does not have to be the account owner; it is the one who owns the opportunity
- ✓ ***Opportunity name:*** Describes the opportunity
- ✓ ***Account name***: The account, the opportunity belongs to
- ✓ ***Restaurant name and city:*** Generated automatically from the account
- ✓ ***Stage***: Qualify the stage of the opportunity
- ✓ ***Probability:*** The confidence factor associated with the likelihood that you will win the opportunity. Each sales stage is associated with a default probability to close. Typically, you do not need to edit this field; it gets assigned automatically by the Stage option that you pick.
- ✓ ***Close Date:*** The date which the contract is fulfilled or the day you think the contract is being signed at latest. If the date cannot be hold, the close date must be changed to the next reachable date
- ✓ ***Products***: Add the related product to the opportunity

5.1 Add opportunities

Create a separate opportunity for each possible sale. For example if you have the chance to sell e.g. Pizza-Boxes or Flyer, do the following steps:

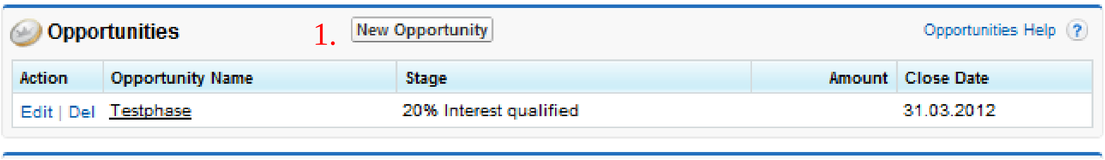


Figure 32: New opportunity

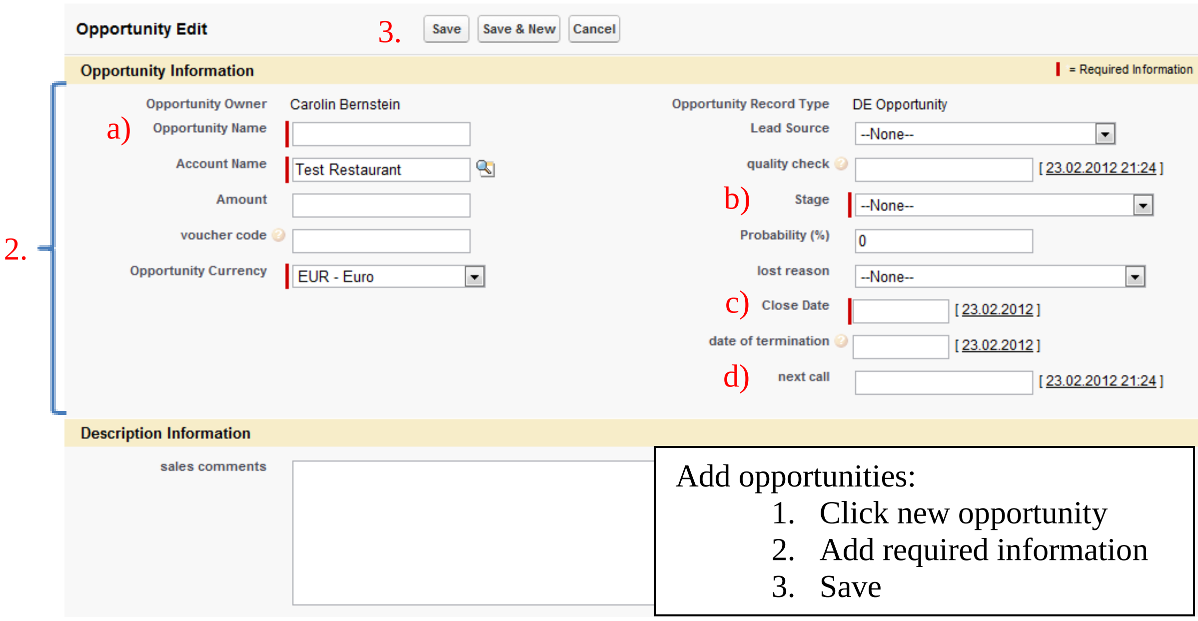


Figure 33: Opportunity edit

1. **Scroll down to the opportunities related list and click new opportunity (Fig. 32, Fig. 33 will show up)**

   The edit mode of a new opportunity appears. The "Account Name" is automatically filled in

   Fill in the fields as much as you can or required

   a) Enter the name of the opportunity

   b) Select the stage to which you think the contract is already in advance

   c) Enter the close date

   d) Optional: next call

2. **Click Save when you are done**

The opportunity detail page now appears. You can click the edit Button on this page at any time if you need to modify the record.

5.2 Choose a product

Opportunities always need a related product that is sold. Attached products are important for tracking and reports.

- ✓ ***Products***: for each opportunity add a new product
- ✓ ***Price book***: a collection of products and their associated prices.

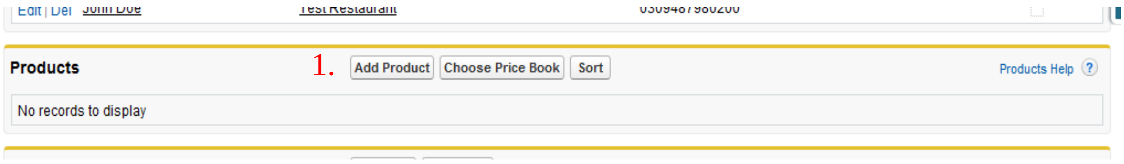


Figure 34: Add product and choose price book

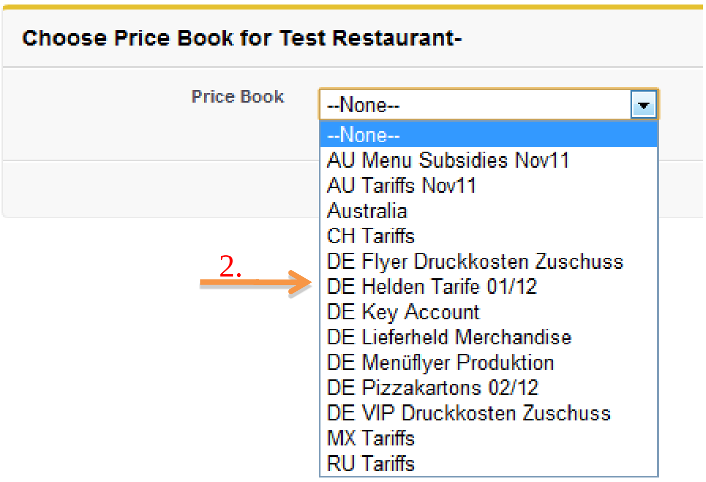
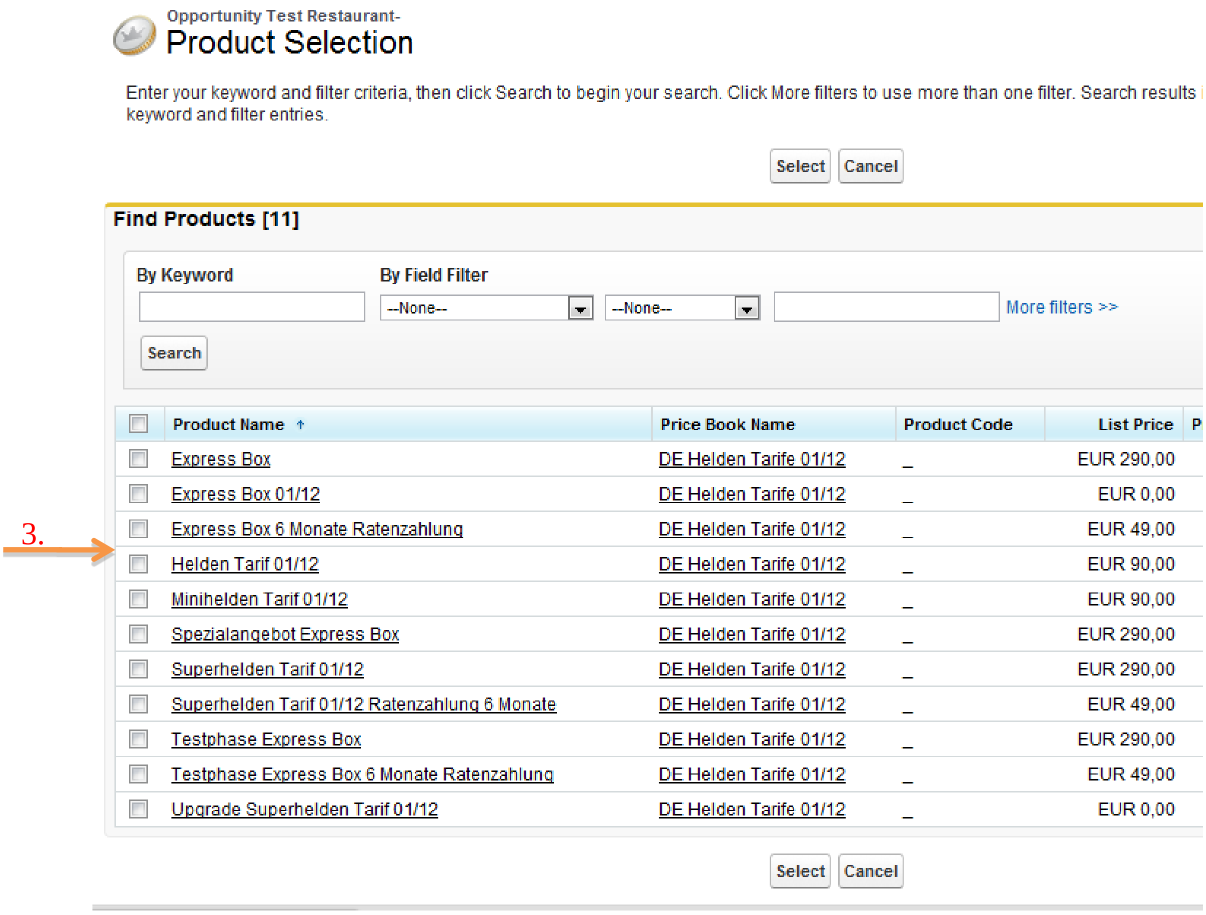


Figure 35: Price Book

Product Selection:
1. Click add product (Fig. 34)
2. Choose Price Book (Fig. 35)
3. Select product (Fig. 36)
4. Add required information (Fig. 37)
5. Click Save



	Product Name ↑	Price Book Name	Product Code	List Price	P
	Express Box	DE Helden Tarife 01/12	_	EUR 290,00	
	Express Box 01/12	DE Helden Tarife 01/12	_	EUR 0,00	
	Express Box 6 Monate Ratenzahlung	DE Helden Tarife 01/12	_	EUR 49,00	
	Helden Tarif 01/12	DE Helden Tarife 01/12	_	EUR 90,00	
	Minihelden Tarif 01/12	DE Helden Tarife 01/12	_	EUR 90,00	
	Spezialangebot Express Box	DE Helden Tarife 01/12	_	EUR 290,00	
	Superhelden Tarif 01/12	DE Helden Tarife 01/12	_	EUR 290,00	
	Superhelden Tarif 01/12 Ratenzahlung 6 Monate	DE Helden Tarife 01/12	_	EUR 49,00	
	Testphase Express Box	DE Helden Tarife 01/12	_	EUR 290,00	
	Testphase Express Box 6 Monate Ratenzahlung	DE Helden Tarife 01/12	_	EUR 49,00	
	Upgrade Superhelden Tarif 01/12	DE Helden Tarife 01/12	_	EUR 0,00	

Figure 36: Product Selection

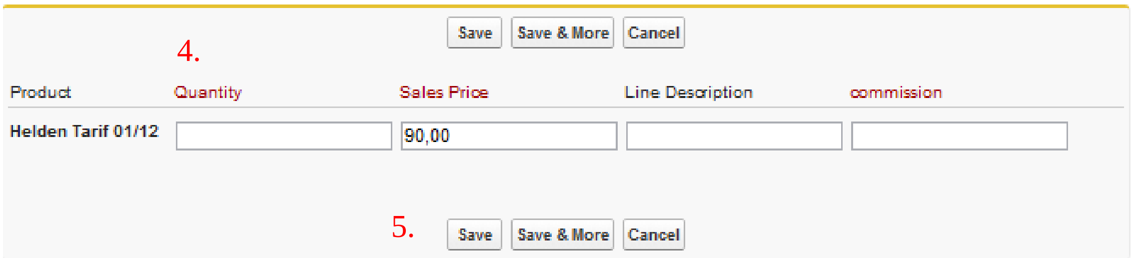


Figure 37: Product information

Change the stage status up to ≥ 95% when the product is sold and the closing date to the date of contract submission. For each new product you have to choose a new opportunity.

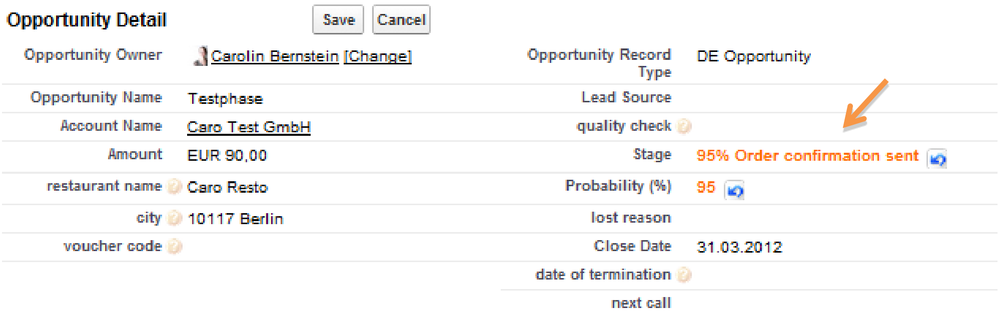


Figure 38: Opportunity detail: stage 95 %

5.3 Create and send quotes

Now you can create a quote for the restaurant in Salesforce.

You can create a quote from an opportunity.

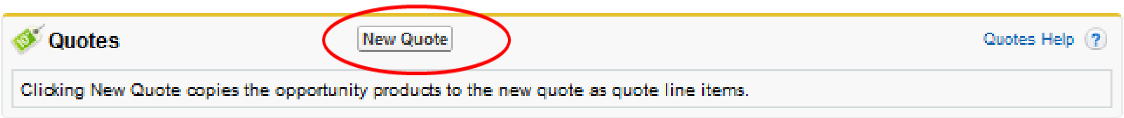


Figure 39: Quote

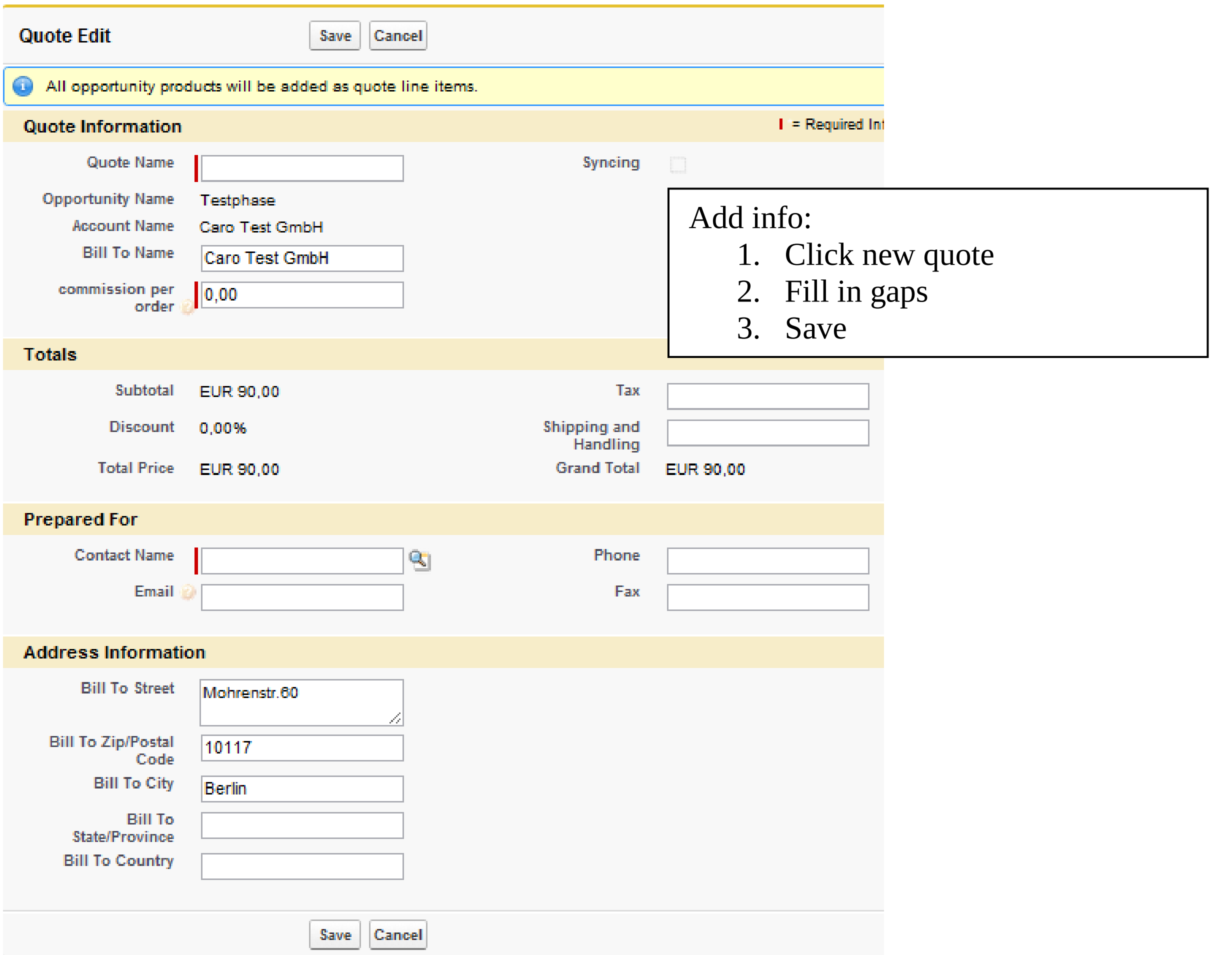


Figure40: New quote

5.4 Create PDF’s

You can generate quote PDFs to print or email to your customers.

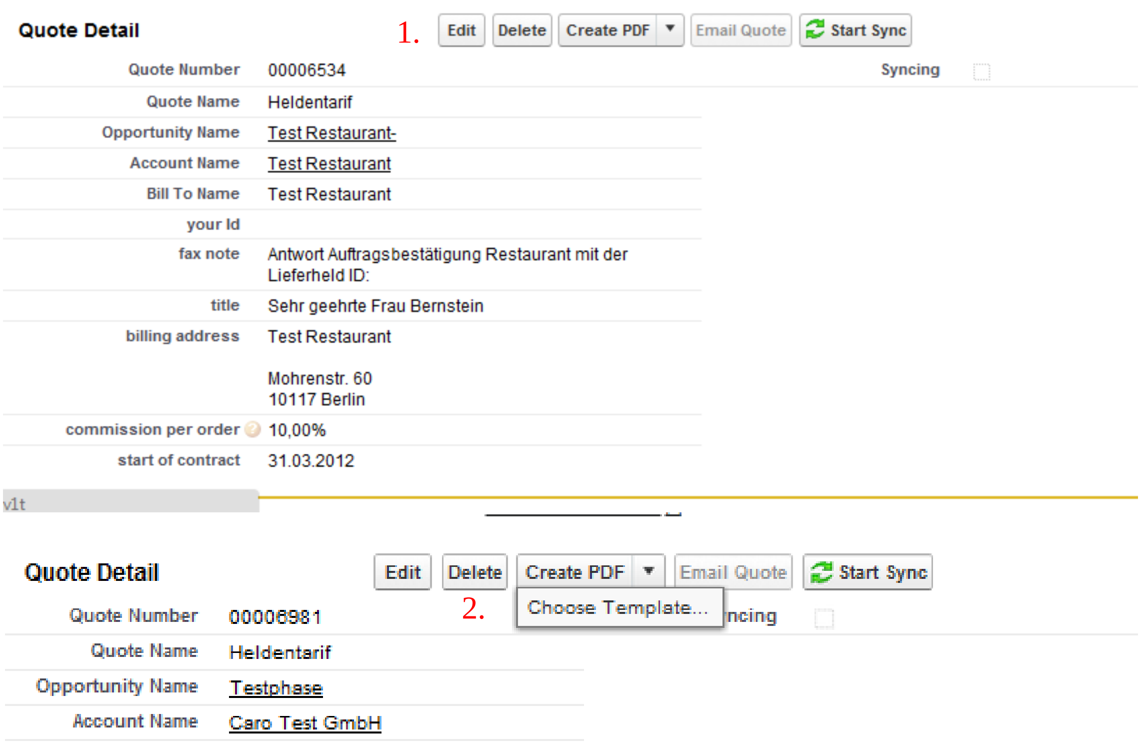
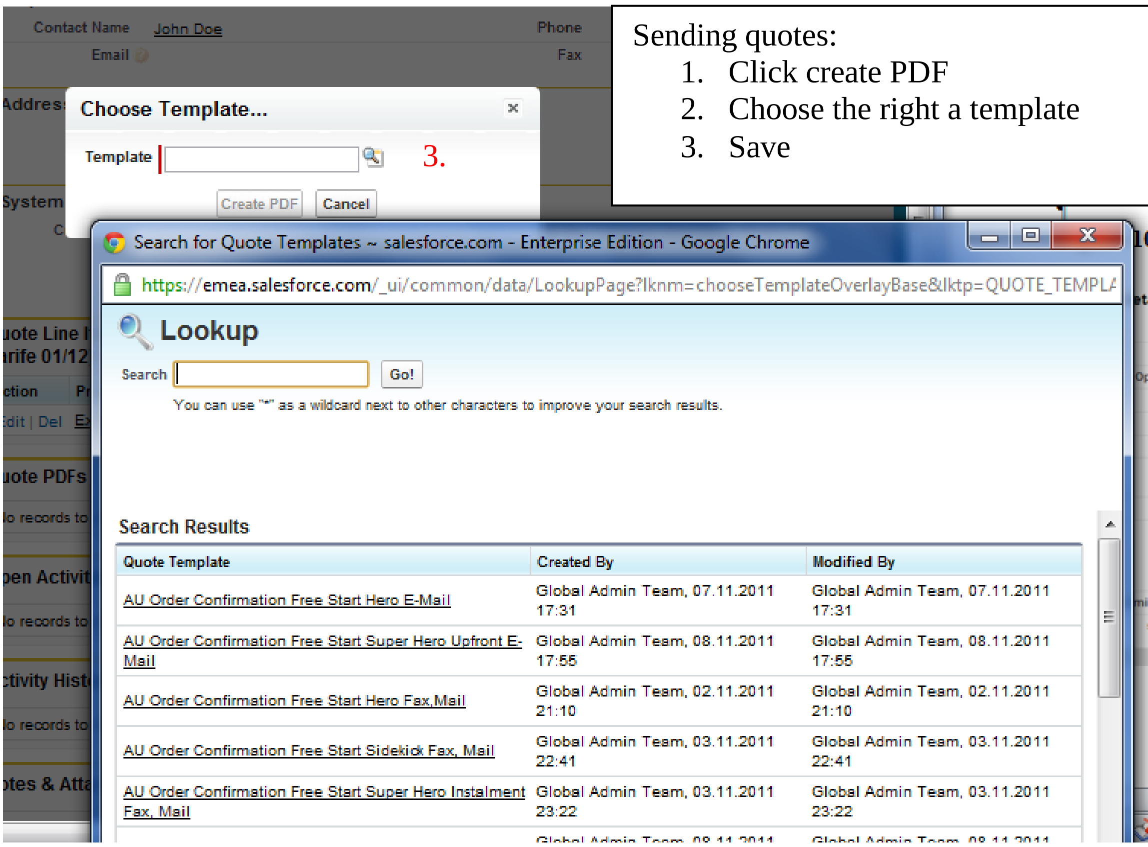


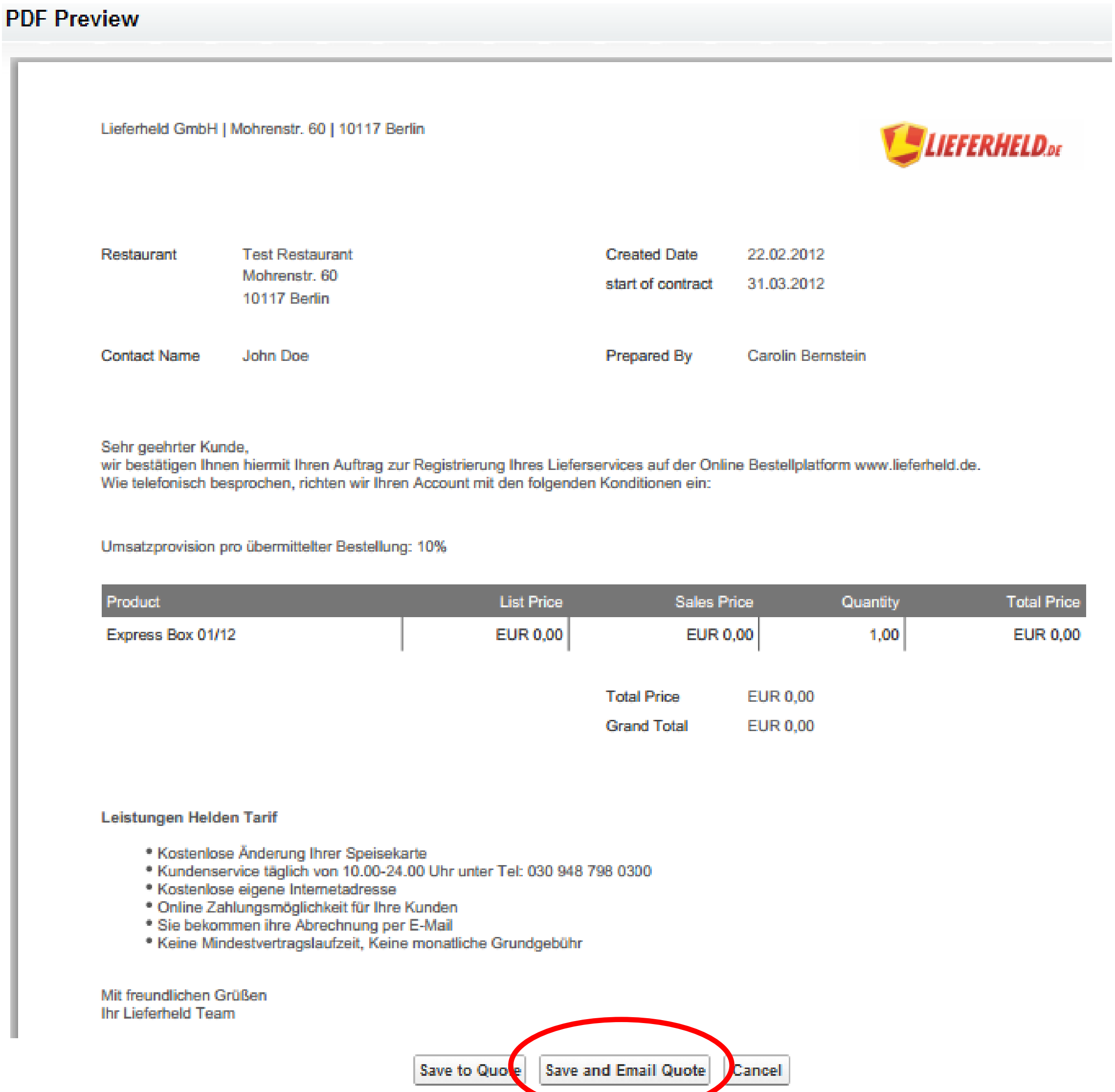
Figure 41: Create PDF



Sending quotes:
1. Click create PDF
2. Choose the right a template
3. Save

Figure 42: Choose Template

The quote is only created and the contract not sent yet. Click “Save and Email Quote” to send. Now the contract has been send and needs confirmation by the customer. It is possible to upgrade the probability up to 95%. Go back to the spreadsheet: Opportunity details, to do so.


PDF Preview

Lieferheld GmbH | Mohrenstr. 60 | 10117 Berlin

LIEFERHELD.DE

Restaurant	Test Restaurant Mohrenstr. 60 10117 Berlin	Created Date start of contract	22.02.2012 31.03.2012
Contact Name	John Doe	Prepared By	Carolin Bernstein

Sehr geehrter Kunde,
wir bestätigen Ihnen hiermit Ihren Auftrag zur Registrierung Ihres Lieferservices auf der Online Bestellplatform www.lieferheld.de.
Wie telefonisch besprochen, richten wir Ihren Account mit den folgenden Konditionen ein:

Umsatzprovision pro übermittelter Bestellung: 10%

Product	List Price	Sales Price	Quantity	Total Price
Express Box 01/12	EUR 0,00	EUR 0,00	1,00	EUR 0,00

Total Price	EUR 0,00
Grand Total	EUR 0,00

Leistungen Helden Tarif

- Kostenlose Änderung Ihrer Speisekarte
- Kundenservice täglich von 10.00-24.00 Uhr unter Tel: 030 948 798 0300
- Kostenlose eigene Internetadresse
- Online Zahlungsmöglichkeit für Ihre Kunden
- Sie bekommen ihre Abrechnung per E-Mail
- Keine Mindestvertragslaufzeit, Keine monatliche Grundgebühr

Mit freundlichen Grüßen
Ihr Lieferheld Team

Save to Quote | Save and Email Quote | Cancel

Figure 43: PDF Preview

5.5 Excurse: Create case discount request

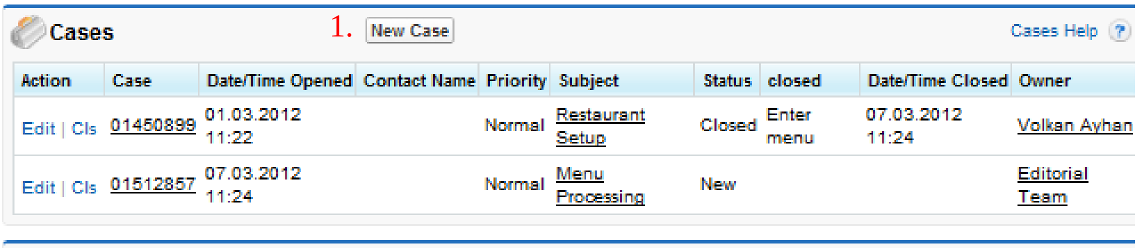


Figure 44: Cases

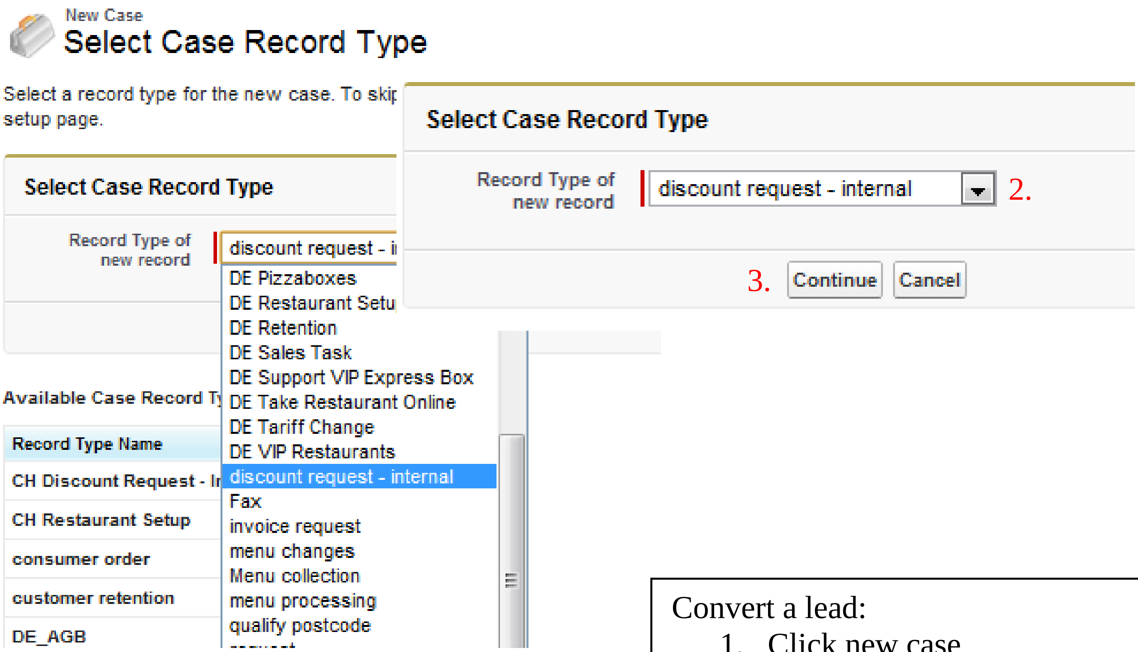
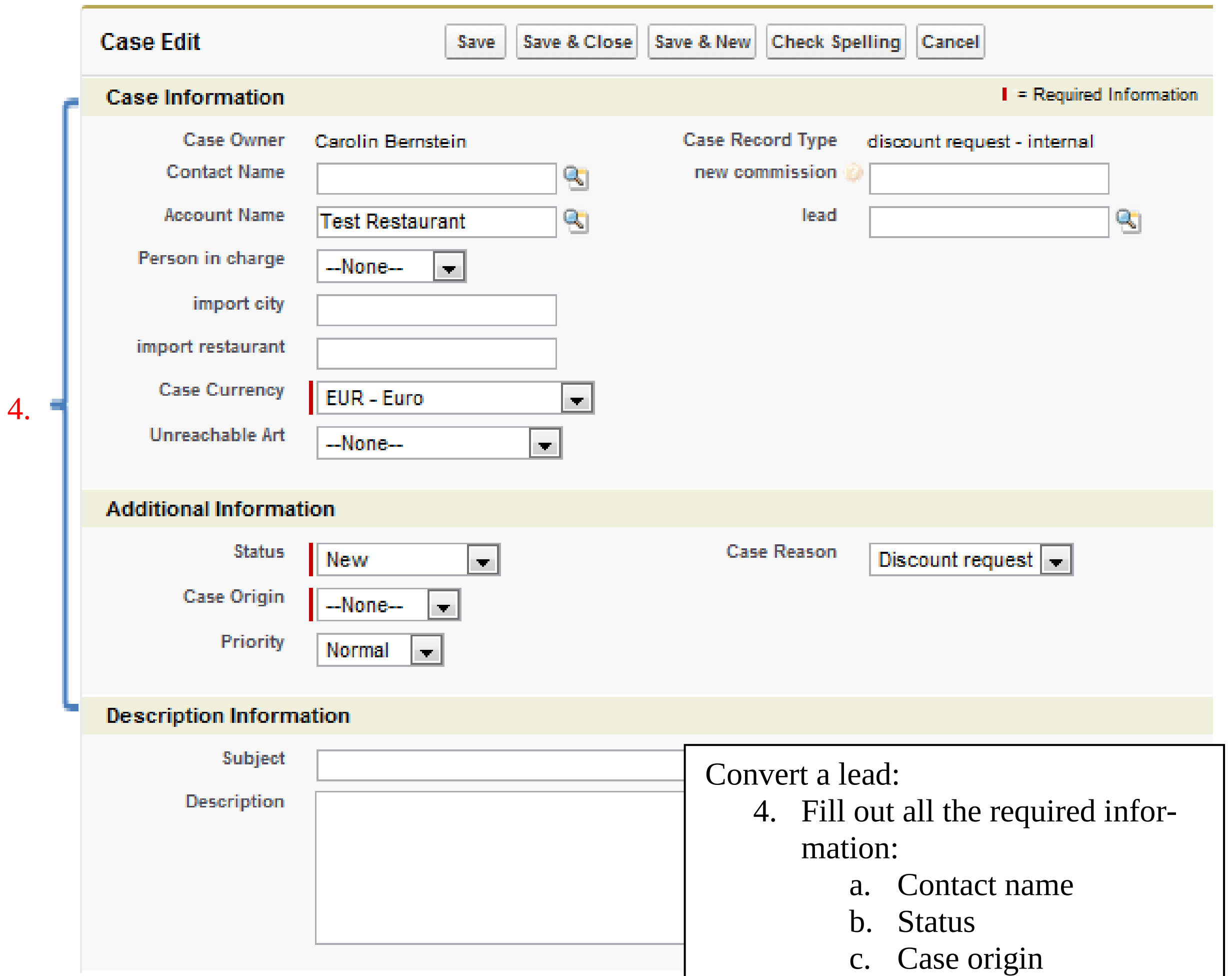


Figure 45: Discount request - internal

Convert a lead:

1. Click new case
2. Choose template: discount request
3. Click continue



Convert a lead:

4. Fill out all the required information:
    a. Contact name
    b. Status
    c. Case origin
    d. New commission
    e. Description
5. Click submit approval

Figure 46: Request internal

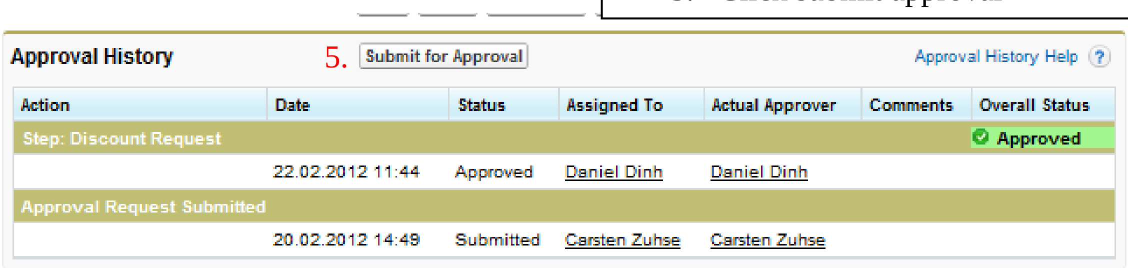


Figure 23: Approval history

Submit your approval to the responsible person aka supervisor, who can permit the request. The discount request has to be authorized, if you would like to offer a commission rate which is at least 1 percentage point below the regular percentage rate. After the discount request has been accepted the status is highlighted in green.

Recap: Steps of the Sales Process

Typically you will be doing only Welcome Calls in the first month as a sales agent at Liferheld. After you have had a chance to build a pipeline, you will be doing

Welcome Calls

Possible outcomes:

- No decision
  → Log the call, call later
- Rejected
  → Close the case
- OK
  → Mark checkbox "Welcome Call", add date