

ACE CRM Integration

Project overview & best practices

2021

Agenda

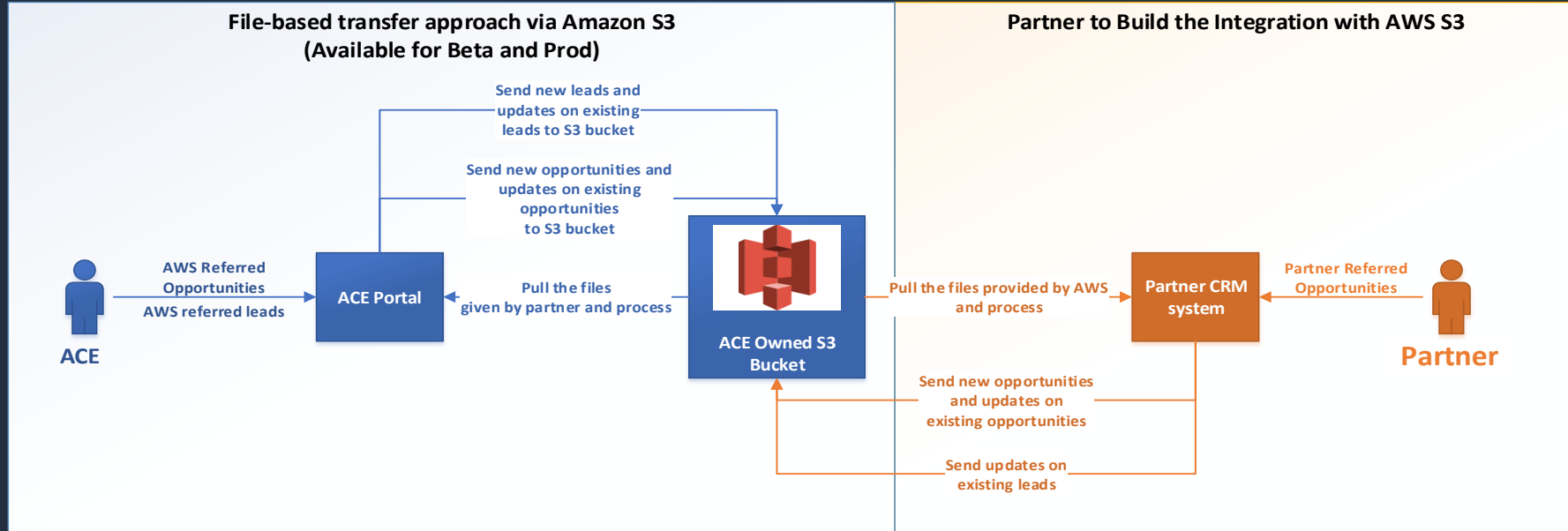
- Current ACE Process (Quick Demo)
- Benefits of integration
- High Level Architecture
- Documentation
- Best practices – Project Management
 - Align resources/stakeholders
 - Project Timelines
- Best practices - Implementation

APN Customer Engagement (ACE) CRM Integration

Benefit to ACE eligible Partners:

- ❖ Receive near real-time updates between ACE CRM and your existing CRM
 - Easy to collaborate with our AWS sellers
 - Easy to create, submit, and receive opportunities to and from AWS
 - Gain valuable time back to invest back into building your business
- ❖ Strengthen your co-sell efforts and goals with better ways to account plan
 - Increases visibility into the AWS seller landscape
 - Decentralizes lead and opportunity management
 - Increases reporting capabilities

High Level Overview of Technical Architecture



Features: Using this integration, Partners will get following features. Partner can implement all of the features or subset of these features.

For Leads:

- From ACE: Partner can receive new leads and subsequent updates on leads
- From Partner: Partner can send updates on the leads to ACE

For Opportunities:

- From ACE: Partner can receive new **AWS Referred** opportunities
- From Partner: Partner can send new **Partner Referred** opportunities
- Bi-directional: Send and receive updates on both **AWS Referred** and **Partner Referred** opportunities

Best practices – Documentation

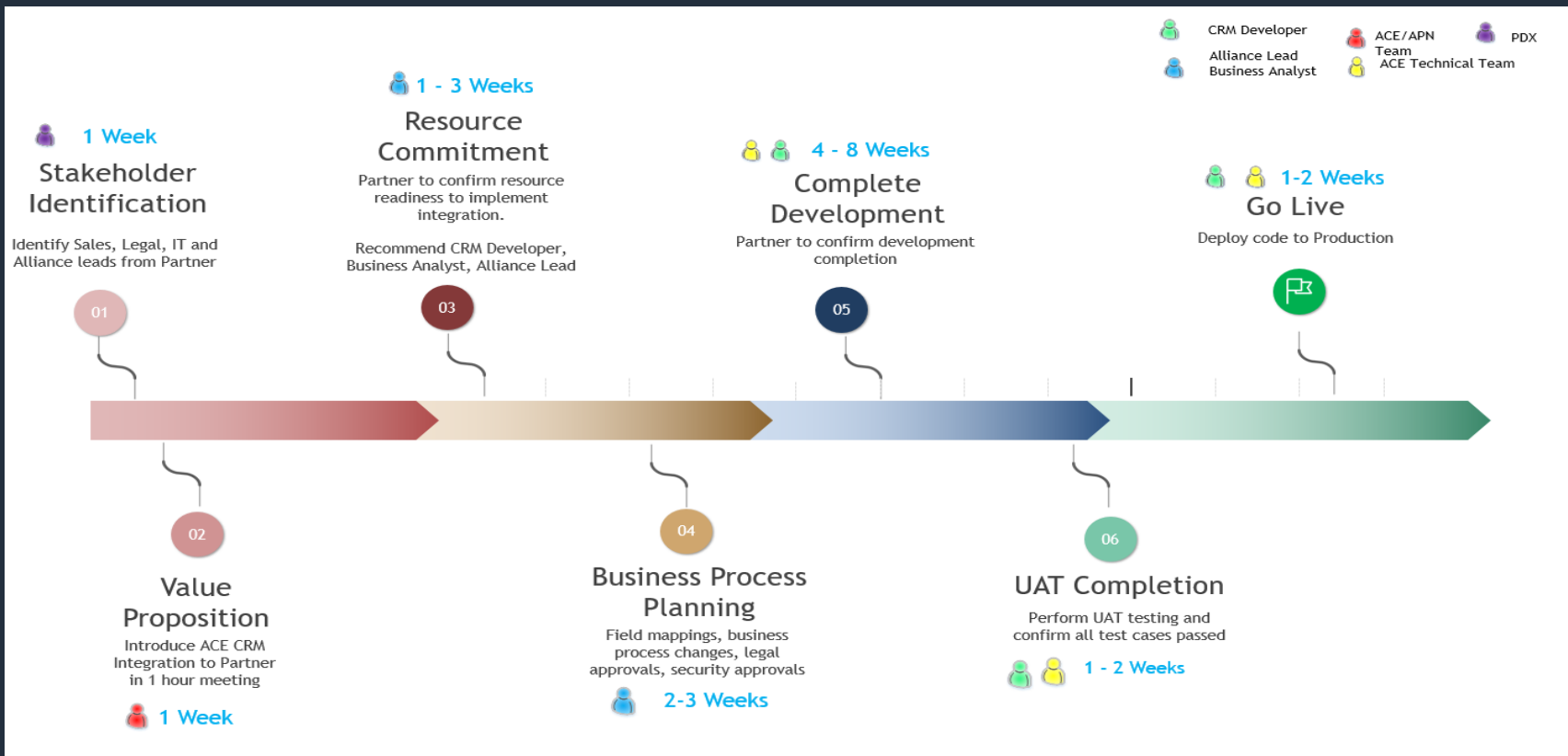
- ✓ Understand the existing resources available in ACE CRM Developer Toolkit

	Description	File Names	Comments
1	User Guide	ACE CRM Integration - User Guide GA	Provides the detailed information about the onboarding process
2	Checklist	Development Task Checklist	Provides the checklist for the list of steps to be followed for onboarding, read operation and update operation. This also has FAQs for the same.
4	Field definition file	Field Definitions for Field Mapping	Provides the definition for each field and if a fields is updatable or read only.
3	Sample Lead and Opportunity file and format	Lead-Outbound-Sample.json Opportunity-Outbound-Sample.json	Provides sample files for both inbound and outbound data structure.
5	Sample Results file and format	Results Sample file.json	Provides sample results file that we produce after processing each file for update operation.
6	Sample Code files	ace_read_s3.py Apex_Sample_REST_API_Code.cls S3_Authentication.cls Sample_AceOutboundBatch.cls SFDC apex s3 sample.txt	Provides sample code files to authenticate to S3, pull the files from S3 and update in SFDC.
7	Test scripts	Test Scripts for UAT	Provides test scripts that Partner has to validate before going live.
8	FAQs	ACE - Partner CRM Integration_FAQs_26052020.docx	Provides FAQs based on questions raised by various other Partners

Best practices – Align resources

Role	Responsibility
CRM Developer	Build the solution – experience with Amazon S3 is helpful
Sales Operations Lead	Assist with sales process changes and readiness
Business Owner or Project Manager	Help navigate internal discussions and keep effort prioritized
ACE Pipeline Manager User	Provide feedback and context to incorporate into the new process

Project Overview: End-to-End Project Timelines



Best Practices – Project Management

- ✓ Have the current ACE Pipeline Manager user give a demo for real-life context of use and pain points
- ✓ Schedule weekly check-ins with all stakeholders

Best Practices – Implementation

- ❖ Make sure you're using a sandbox environment
- ❖ Map all fields listed as '**mandatory**' in the Field Definitions excel file
 - ❖ These are the same required fields in the submission form today
 - ❖ Partner CRM identifier must be mapped to ensure the Partner opportunities are synced with AWS opportunities
- ❖ Consider creating separate sales stages for AWS to avoid unwanted overriding of information
 - ❖ AWS will likely have different sales definitions, but it's important to have visibility into what AWS projects
- ❖ For leads, ensure that 'Campaign Name' flows from lead to opportunity conversion
 - ❖ This provides AWS and APN Partners visibility into where sales were originated

Questions:

Thank you!