Deloitte.

girlsforce

salesforce

Team06- Janna Dringenberg, Gunel Mastaliyeva, Sonia Brown, Elissa Stern, Laurie Scott, Rebecca Bozkurt


KAP Osman Bing Satrio & Eny
IPERION®
a Deloitte business
VENMYN
Independence you can trust
Deloitte & Touche
DELOITTE'S GLOBAL IMPLEMENTATION
Unifying all 12 operating firms into one functional CRM system
Deloitte.
Brightman Almagor Zohar
Deloitte Anjin LLC
Deloitte Danmark
Monitor Deloitte.
McColl Partners
Manhattan Associates
GlobNet
Global Business Network LLC
Deloitte.
ESPAÑA


WANTS
NEEDS

"I want a new consolidated sales process for pipeline for better account/customer management."

AGE 30
LOCATION San Francisco
STATUS Married
CAREER Project Lead

Sales Transformation Project Lead

ERICA ADAMS

BIO

Erica Adams is a Project Lead with years of experiences.
She works in conjunction with project managers to ensure that the goals are met. Her responsibility is to see that the plan they have devised is carried out.
She is also responsible for supervising the team and managing the distribution of tasks to ensure the project's success with the highest efficiency and accuracy.

GOALS

- New consolidated sales process for saving time and money
- Simple and easy to navigate CRM
- Actiona..le framework with walkthrough guidance and help text for users/ Less training

FRUSTRATIONS

- Operating firms currently use different technologies such as spreadsheet/ CRM to support their sales process and it is time consuming
- Every geography has different business process with. 6/8/10 stages

MOTIVATIONS

Set Clear & Realistic Project Goals before starting a project.

Be Direct with Team Members.

Be Positive in Meetings

Conduct Regular Reviews.

I want to choose which members of the team can edit the Opportunities so that there is more security with our general data visibility.

I want to see Closed/Lost Opportunities and why the sale was Lost

Single Sign On Process integrate with existing ERP system and 3rd party platforms

I want a board of top team leaders So that I can see who has the highest number of wins.

I want to see and access reports for opportunities to determine metrics for management and key stakeholders

I want to have a home page Dashboard showing the top sales team members so that I can see the highest numbers of wins so far, within a fiscal year

I want to see an actionable framework and walkthrough guidance So that it will be easy for users to use the new consolidated CRM.

I want to see an interactive dashboard on the homepage, so that I can have clear information about current opportunity stages.

I want to see a Dashboard on the home page with Top Values Opportunities so that the team wants to compete with one another, ultimately increasing total sales.

I want to have visibility of all past interactions and transactions made with the same account globally so that I can make sure the account is having great customer satisfaction outside of my region

Darius Arnold - Sales SME

"They look at the CRM as being such a tiny amount of their job, that they shouldn't have to be trained on it."

Personality

Age: 45
Work: **Senior Sales Manager**
Family: **Married**
Location: **USA region, Global Sales**
Character: Ambitious, Determined, Strategic

Goals

- Quickly see opportunities and access reports for the service, industry, or area of business
- Consolidate CRM to help improve customer success
- User-friendly: Have simple, straightforward, and quick learning of new CRM
- Have Homepage Dashboard with TOP VALUE opportunities and also for the Region Team Leader

Frustrations

- Having to train members of the Sales Team with new CRM
- Different regions have different Sales Processes and Stages and are not representing one single company that has everything together.
- User adoption: some users are not using the system the right way

Bio

Darius Arnold is a Sales SME with years of experience. He is responsible for the success of his company's sales department. He sets goals for his team and produces monthly forecasting reports to see how well they're doing in achieving those targets and budgets based on what's happening with revenue streams so that everything runs smoothly from month to month.

Responsibilities

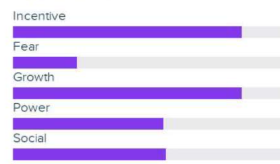
Defining appropriate methodologies, such as tools, notations, modeling practices, etc.

Participation in technical and management reviews

Peer-reviewing the work products in the scope of the SME's competency

Providing training, training materials, and hands-on support in the respective subject matter

Motivation



Brands & Influencers

Preferred Channels

I want to track customer interaction

I want to keep ease being able to understand what things are actionable so I can see anything I need to take action on like overdue opportunities

I need to see the help text for each box I am going to use in the system so that I can understand the system better and do not need training and support.

closing soon opportunity can determine the next actionable response

I need to see guidance on the opportunity page through the stages so that I will not miss any important information to win the opportunity.

I want to be able to create an opportunity with little information so that I can enter the opportunity into the system very quickly.

overdue opportunities can determine the next actionable response

I want to have as few required fields as possible when I start an opportunity so that I can put the opportunity in quickly

I want to create an opportunity that only has read access So that I and users who have full access can only edit it.

I need to see the daily agenda on my homepage so that I can work on my task in an organized way


ACCEPTANCE CRITERIA
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Create Dashboard with all opportunity logistics and due dates for each opportunity owner, and opportunity team member

Ensure that; there is always a help text on the fields. There is extra guidance not for users

1. Opportunity Owner must enter Lost Reason as a required field 2. Opportunity Owner must enter Competitor from a required drop-down field.

Adjust required fields to enter an opportunity to be the precise number needed

Create actionable framework or help text /walkthrough guidance provided

By" date 2. Determine the criteria rules for a number of days before the

Ensure the salesperson is able to: See the daily agenda on the home page and Work on the daily task in an organized way

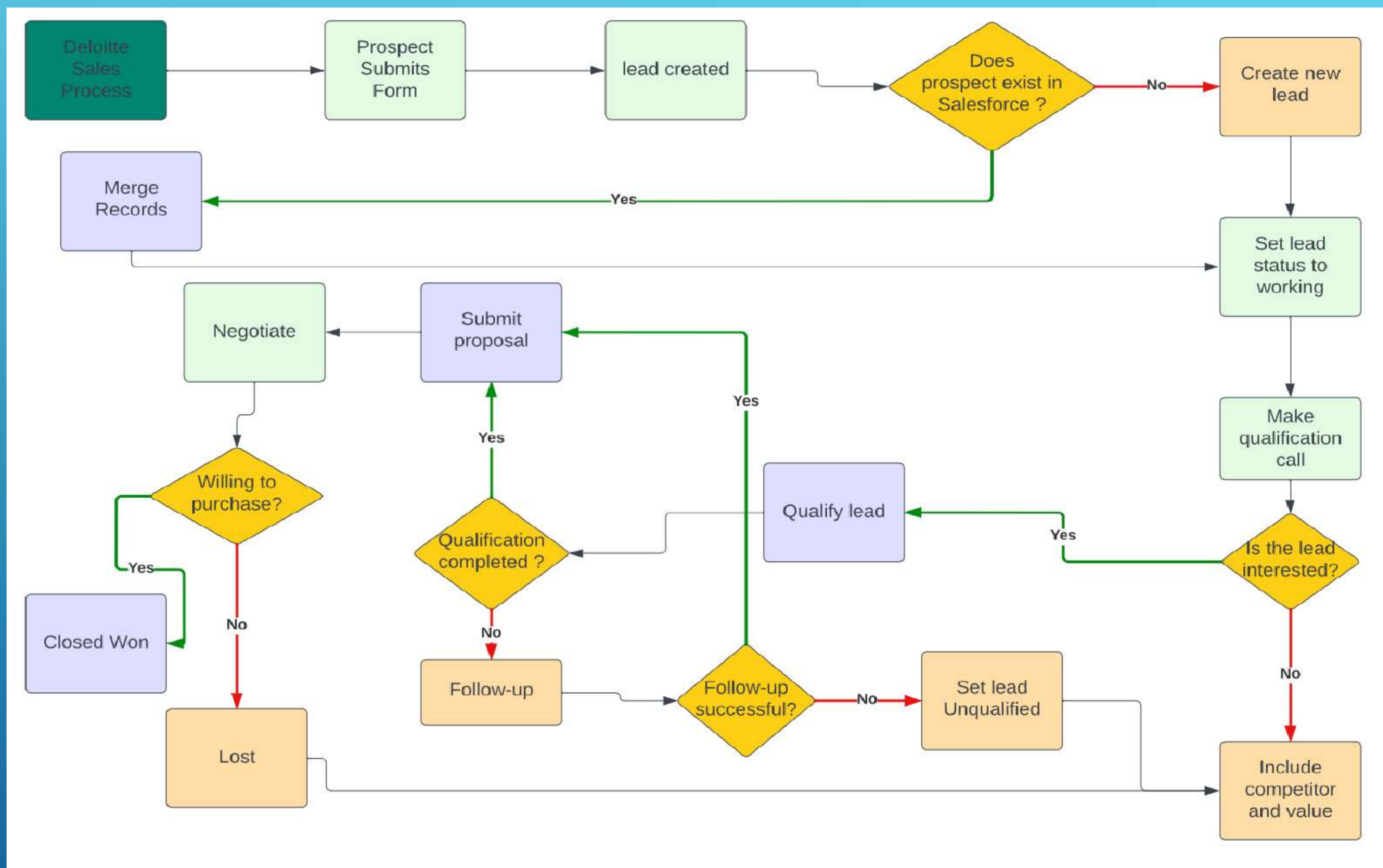
Ensure Dashboard is shown in everyone's home page and is updated regularly

Ensure Dashboard is visible for

1. Grouped by service offering that they represent 2. or the industry or sector that they represent 3. or the area of the business.

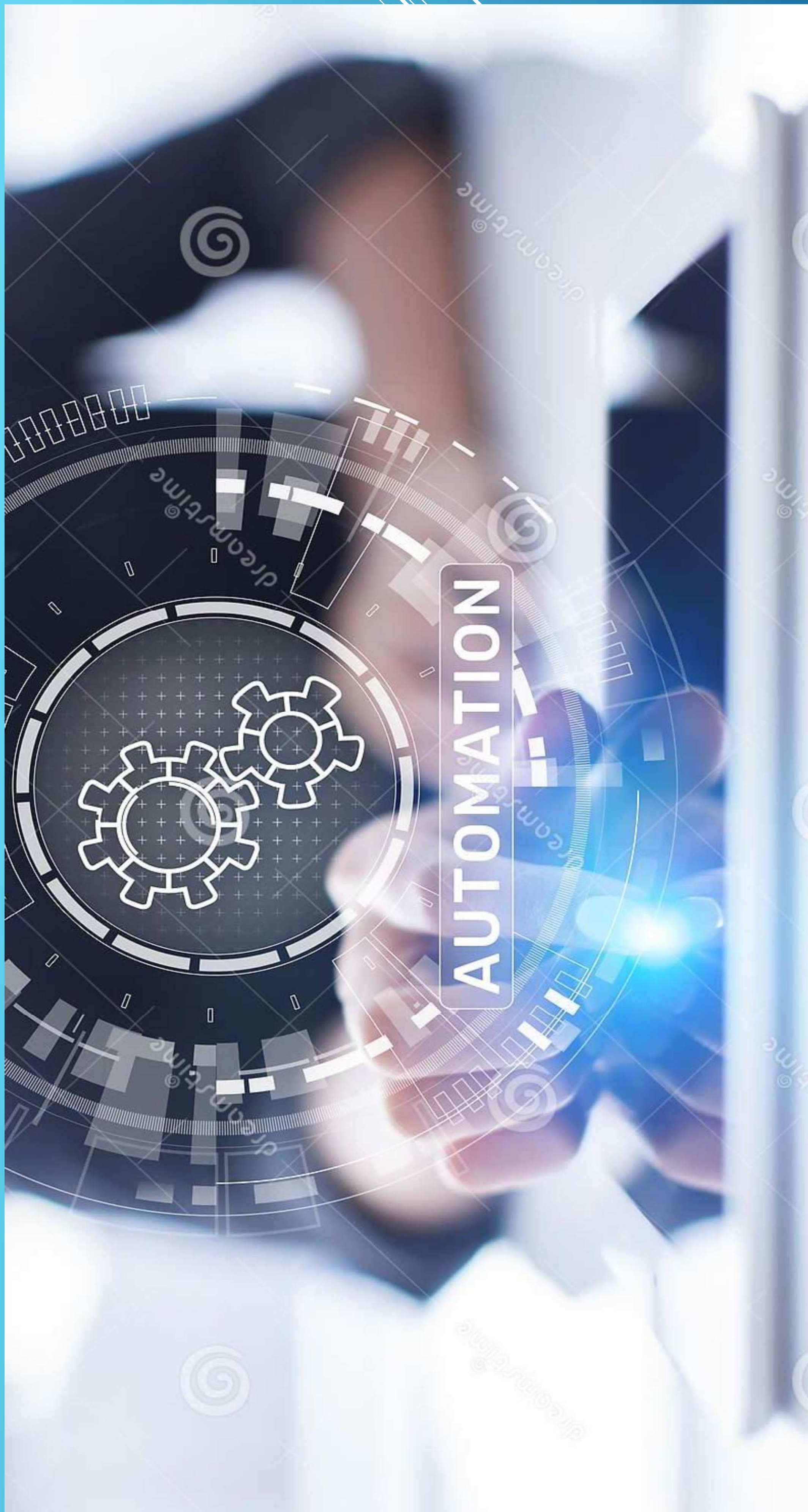
Able to see the board that demonstrates top team leaders and their actions

Users can log on seamlessly and securely with one username and password across platforms


Deloitte Sales Process
Prospect Submits Form
lead created
Does prospect exist in Salesforce ?
No
Create new lead
Yes
Merge Records
Set lead status to working
Make qualification call
Is the lead interested?
Yes
Qualify lead
No
Include competitor and value
Qualification completed ?
Yes
Submit proposal
No
Follow-up
Follow-up successful?
Yes
No
Set lead Unqualified
Negotiate
Willing to purchase?
Yes
Closed Won
No
Lost

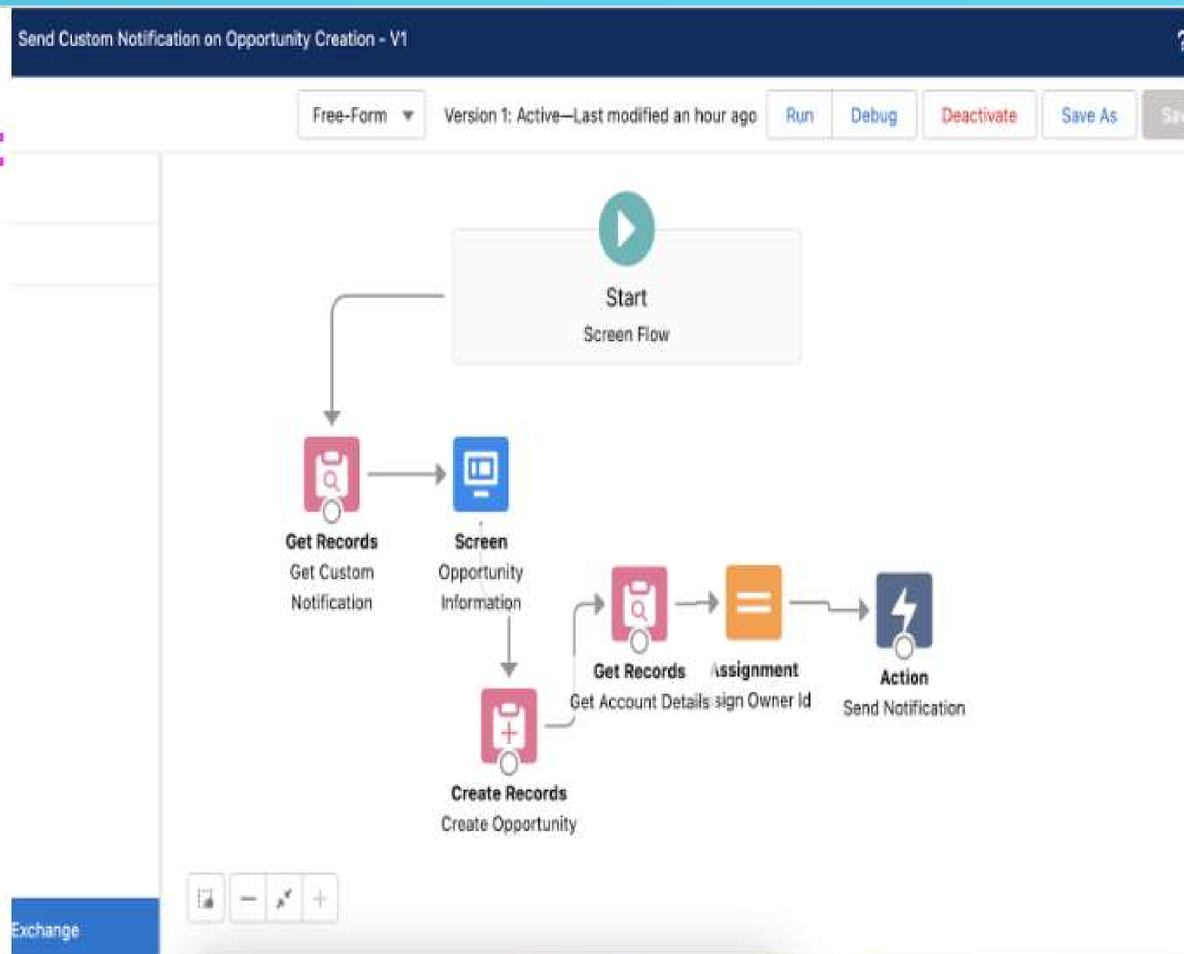
Deloitte's Business Requirements

REQUIREMENT ID	REQUIREMENT STATMENT	MUST/WANT	COMMENTS
FR001	The CRM shall have a home page that lists the purpose of the sales process.	MUST	Sales process purpose and specifications should be identified and listed.
FR002	The CRM home page shall have interactive dashboard with opportunities stages.	MUST	Dashboard for clear visibility on sales stages.
FR003	CRM should have guidance on opportunities through the stages.	MUST	Guidance on sales path.
FR004	CRM should have daily agenda on home page.	MUST	To identify which tasks are assigned to which users.
FR005	CRM should have only 6 sales stages.	MUST	Identified, Contacted, Verified, Proposal Submitted, Verbal Commit, Closed (lost/won/abandoned).
FR006	CRM should have actionable framework and walkthrough guidance.	MUST	This feature will help to get more information out with less training for team.

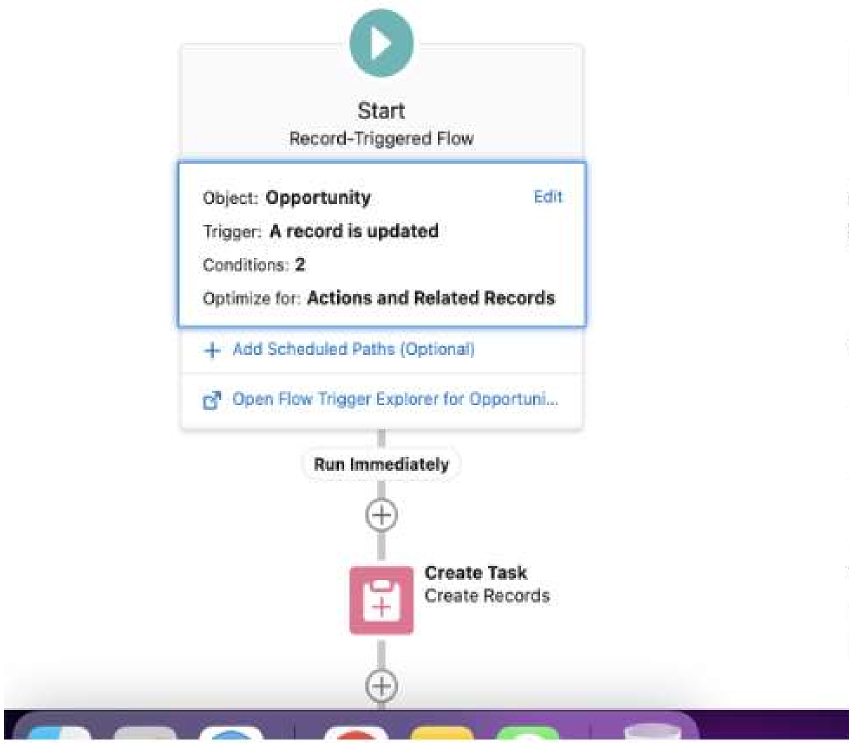

AUTOMATION

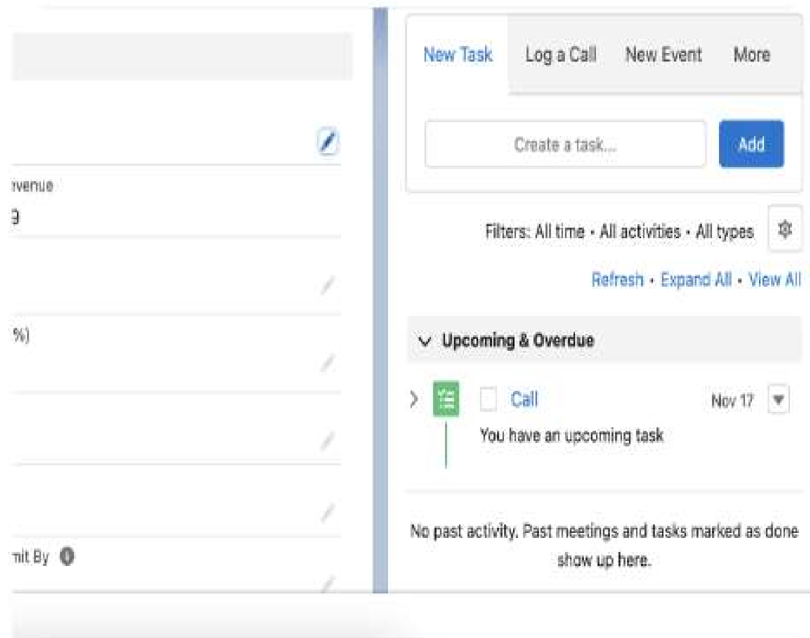
Automations:

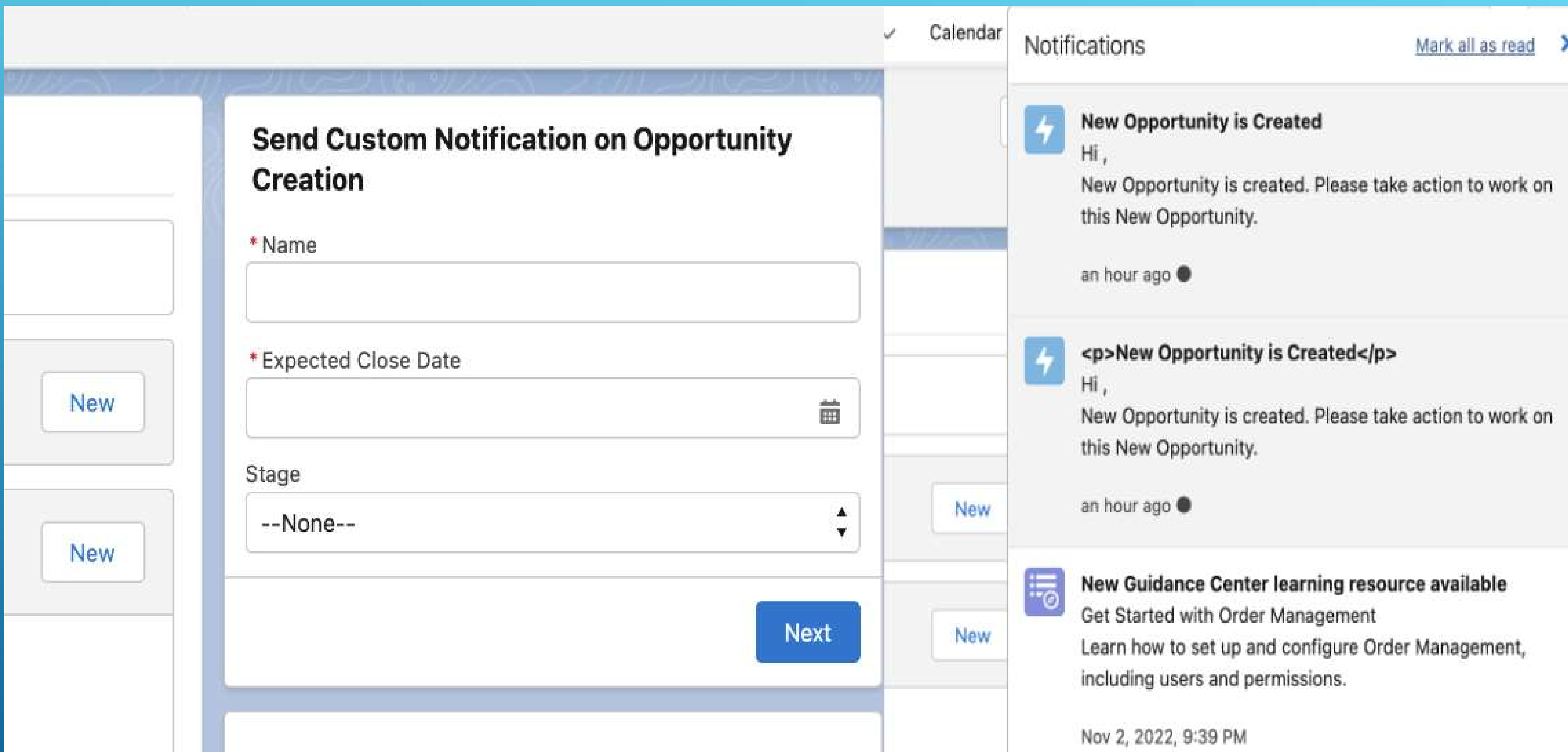
To be able to create an Opportunity directly from Account page and sending notification to the Account Owner for the New Opportunity

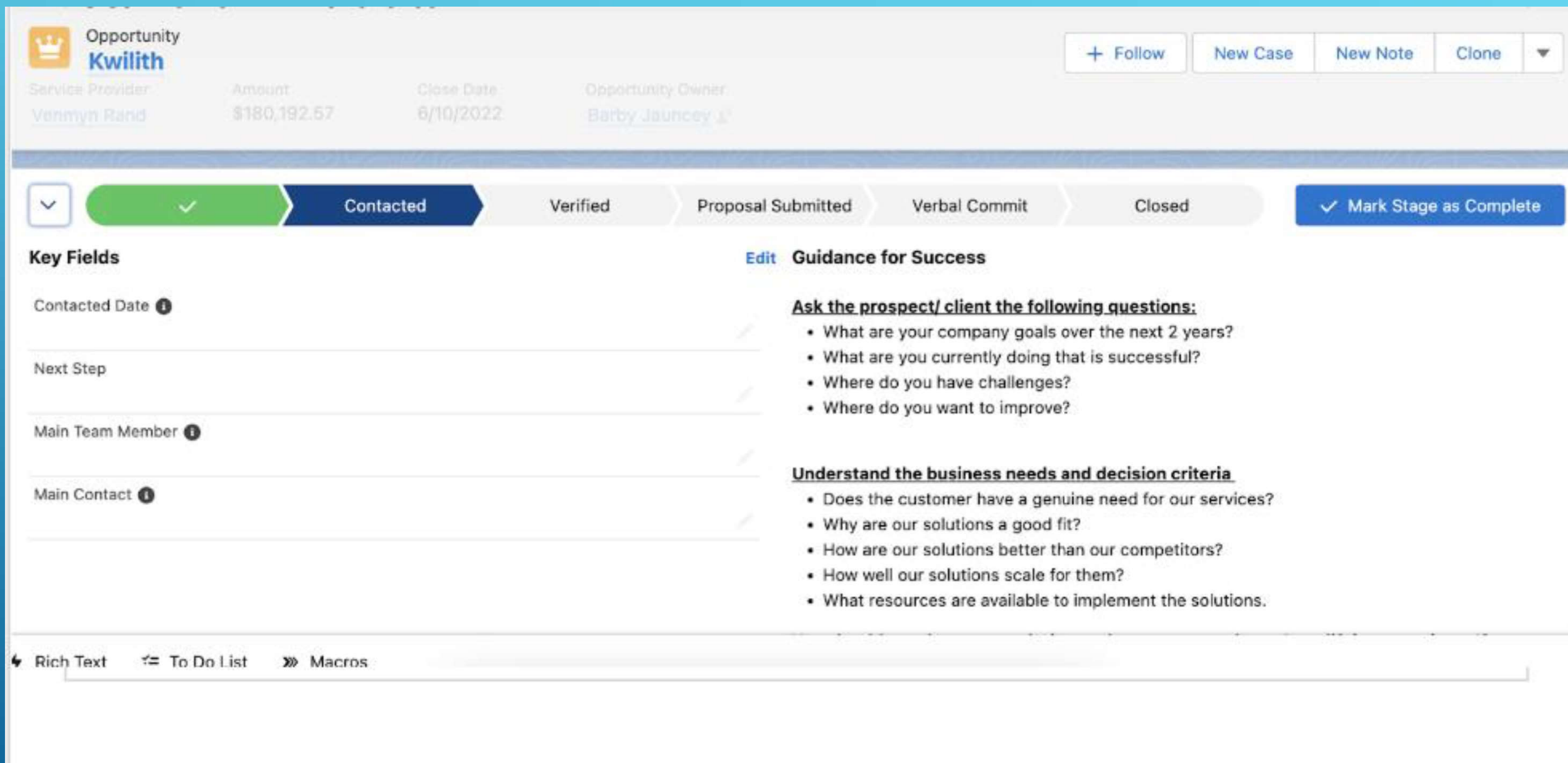


Task Creation Automatically for Opportunity Stages





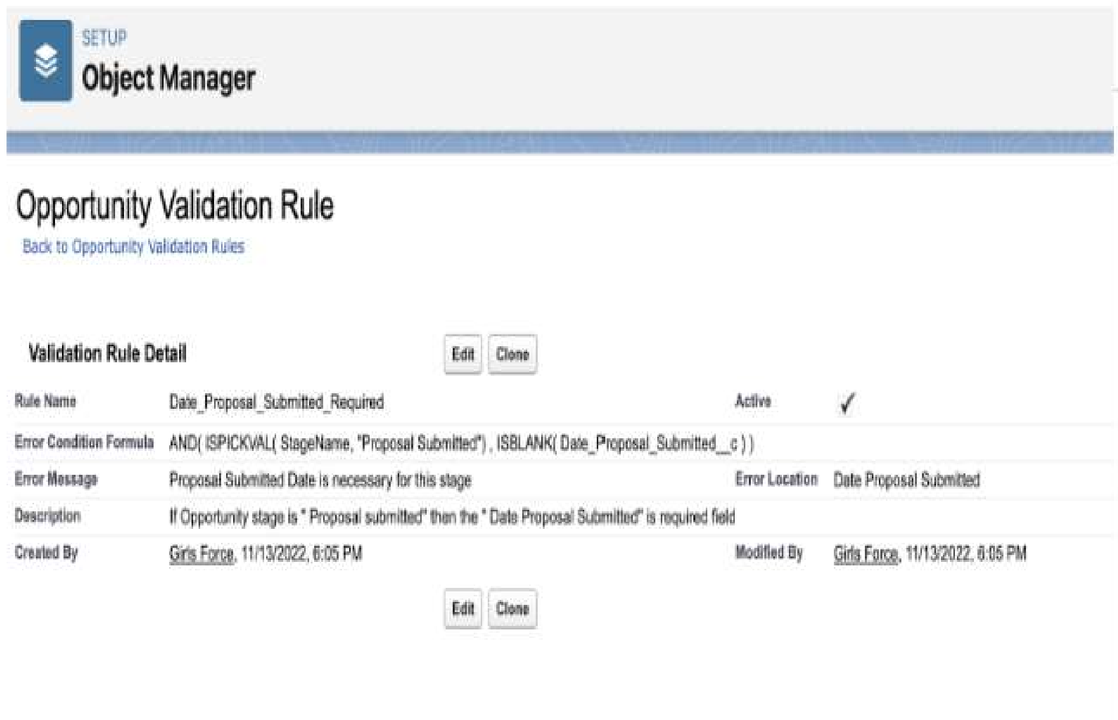

Calendar
Send Custom Notification on Opportunity Creation
* Name
* Expected Close Date
Stage
--None--
Next
New
New
New
New
Notifications
Mark all as read
New Opportunity is Created
Hi ,
New Opportunity is created. Please take action to work on this New Opportunity.
an hour ago
<p>New Opportunity is Created</p>
Hi ,
New Opportunity is created. Please take action to work on this New Opportunity.
an hour ago
New Guidance Center learning resource available
Get Started with Order Management
Learn how to set up and configure Order Management, including users and permissions.
Nov 2, 2022, 9:39 PM

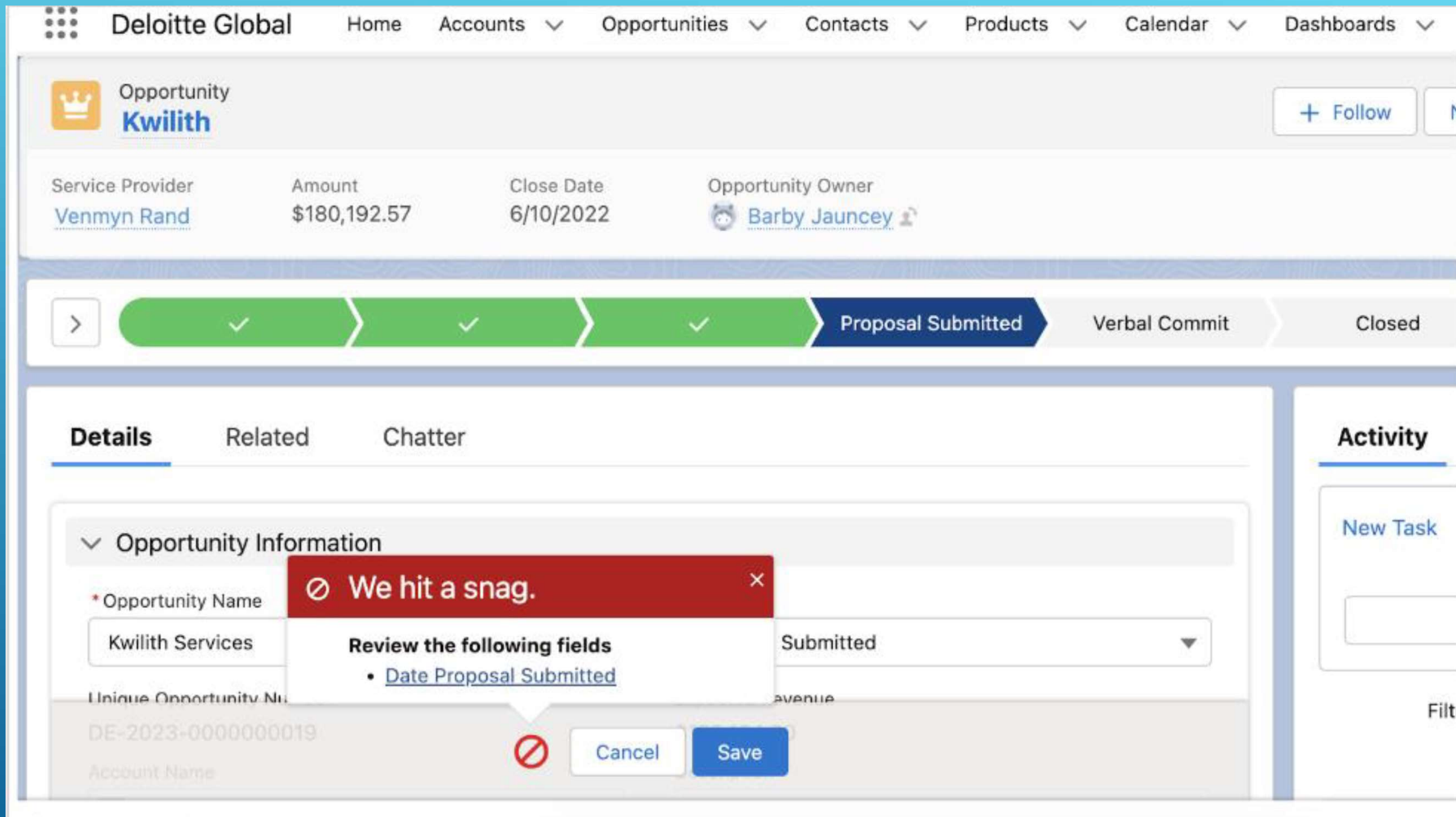

Opportunity
Kwilith
Service Provider
Venmyn Rand
Amount
$180,192.57
Close Date
6/10/2022
Opportunity Owner
Barby Jauncey
+ Follow
New Case
New Note
Clone
Contacted
Verified
Proposal Submitted
Verbal Commit
Closed
Mark Stage as Complete
Key Fields
Edit
Contacted Date
Next Step
Main Team Member
Main Contact
Guidance for Success
Ask the prospect/ client the following questions:
What are your company goals over the next 2 years?
What are you currently doing that is successful?
Where do you have challenges?
Where do you want to improve?
Understand the business needs and decision criteria
Does the customer have a genuine need for our services?
Why are our solutions a good fit?
How are our solutions better than our competitors?
How well our solutions scale for them?
What resources are available to implement the solutions.
Rich Text
To Do List
Macros

Validation Rules:

During the Opportunity life cycle at some stages there is some information we require our salesperson to enter.

For example if we are on the Proposal submitted stage then <u>we need to see the date for the proposal submitted.</u>




Deloitte Global
Home
Accounts
Opportunities
Contacts
Products
Calendar
Dashboards
Opportunity
Kwilith
+ Follow
Service Provider
Venmyn Rand
Amount
$180,192.57
Close Date
6/10/2022
Opportunity Owner
Barby Jauncey
Proposal Submitted
Verbal Commit
Closed
Details
Related
Chatter
Activity
New Task
Opportunity Information
Opportunity Name
Kwilith Services
Submitted
We hit a snag.
Review the following fields
Date Proposal Submitted
Cancel
Save

Lost Reason:

If an Opportunity is Closed/Lost then we require that our salesperson must enter the reason to lost

Opportunity Validation Rule

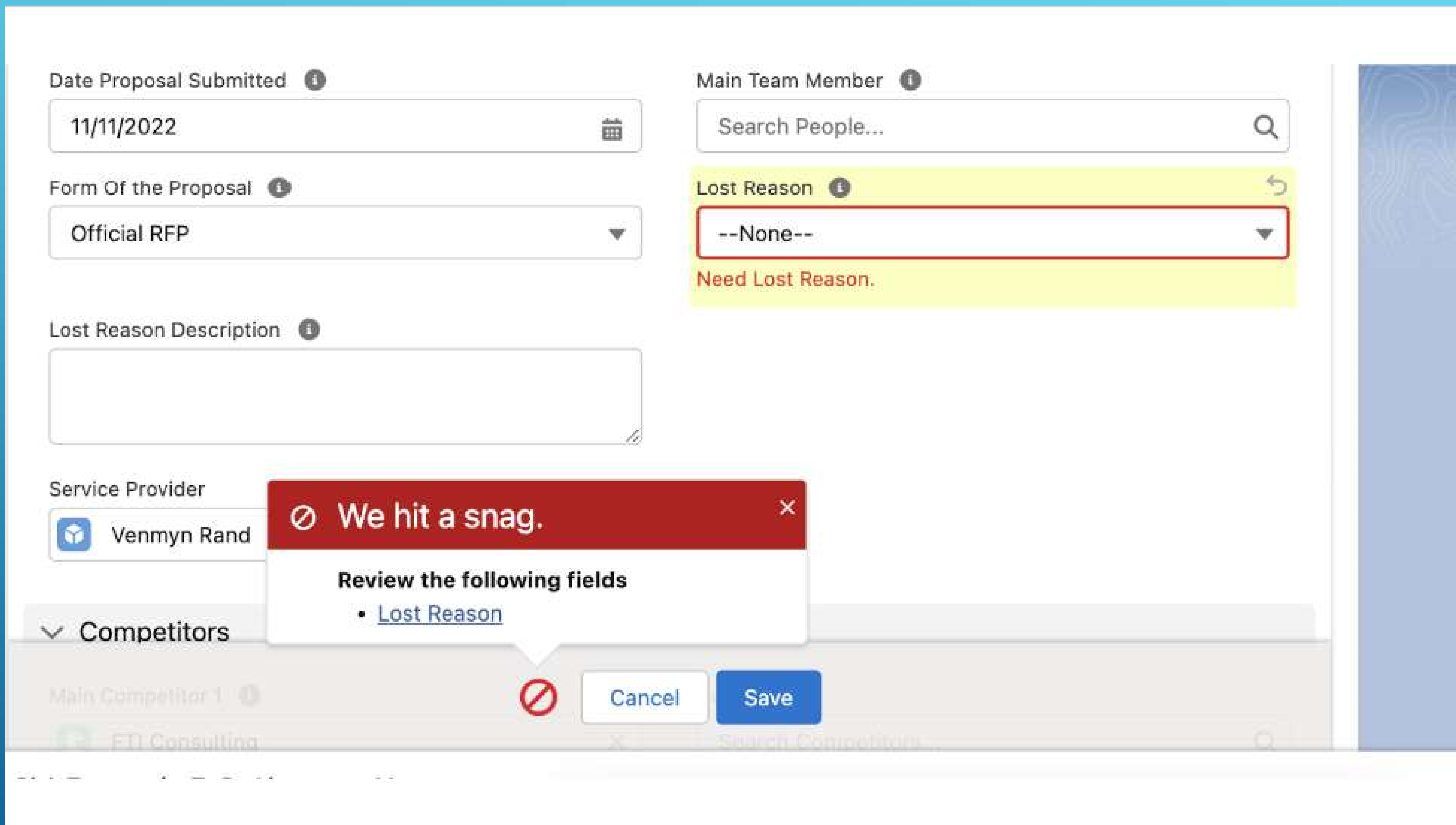
Back to Opportunity Validation Rules

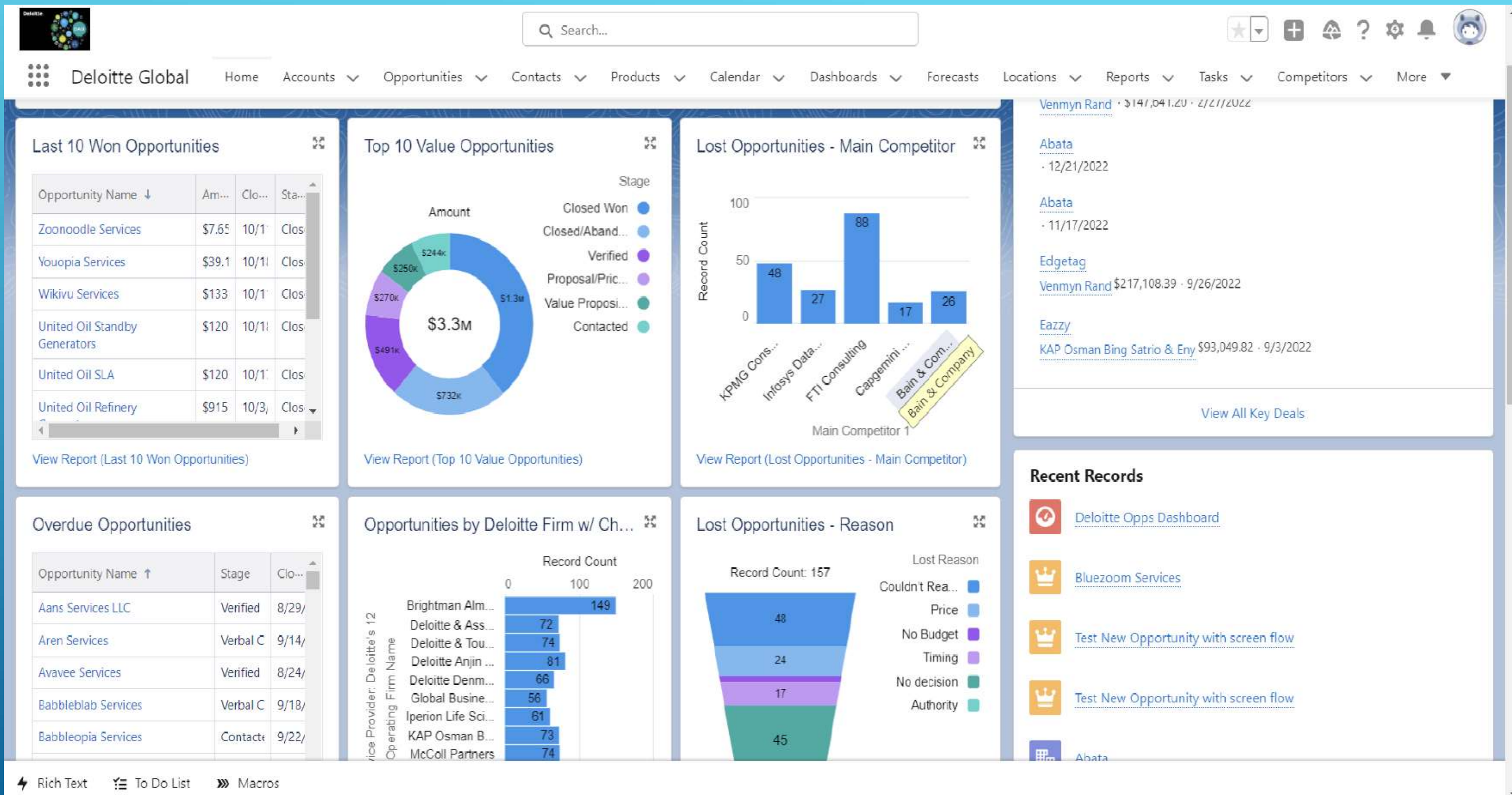
Validation Rule Detail

Edit Clone

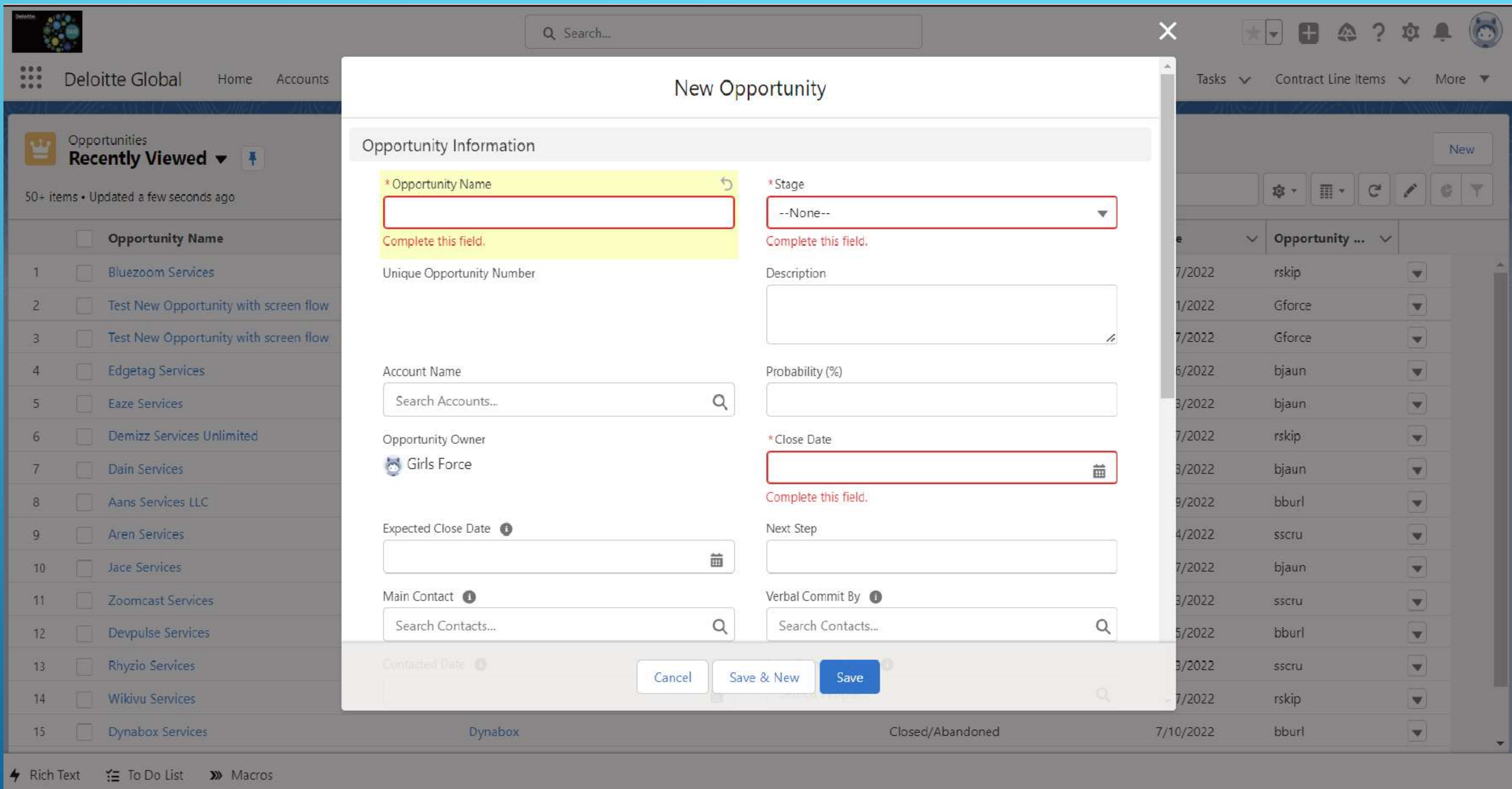
Rule Name	Lost_Reason	Active	✓
Error Condition Formula	ISPICKVAL(StageName , "Closed Lost") && ISPICKVAL(Lost_Reason__c , "")		
Error Message	Need Lost Reason.	Error Location	Lost Reason
Description	this rule help us to make sure our salesperson will enter lost reason for reporting purposes		
Created By	Girls Force, 11/10/2022, 3:18 PM	Modified By	Girls Force, 11/10/2022, 3:20 PM

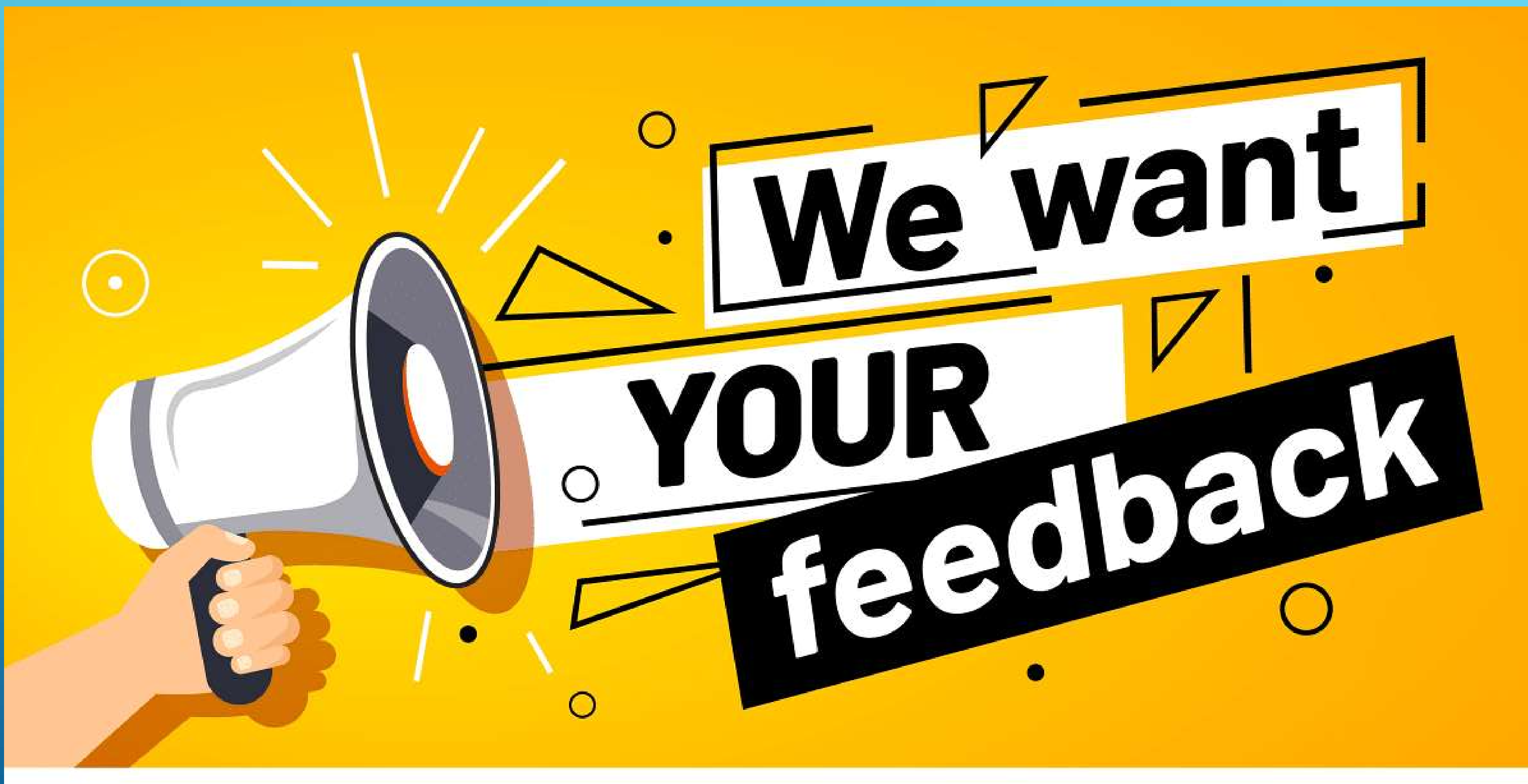
Edit Clone

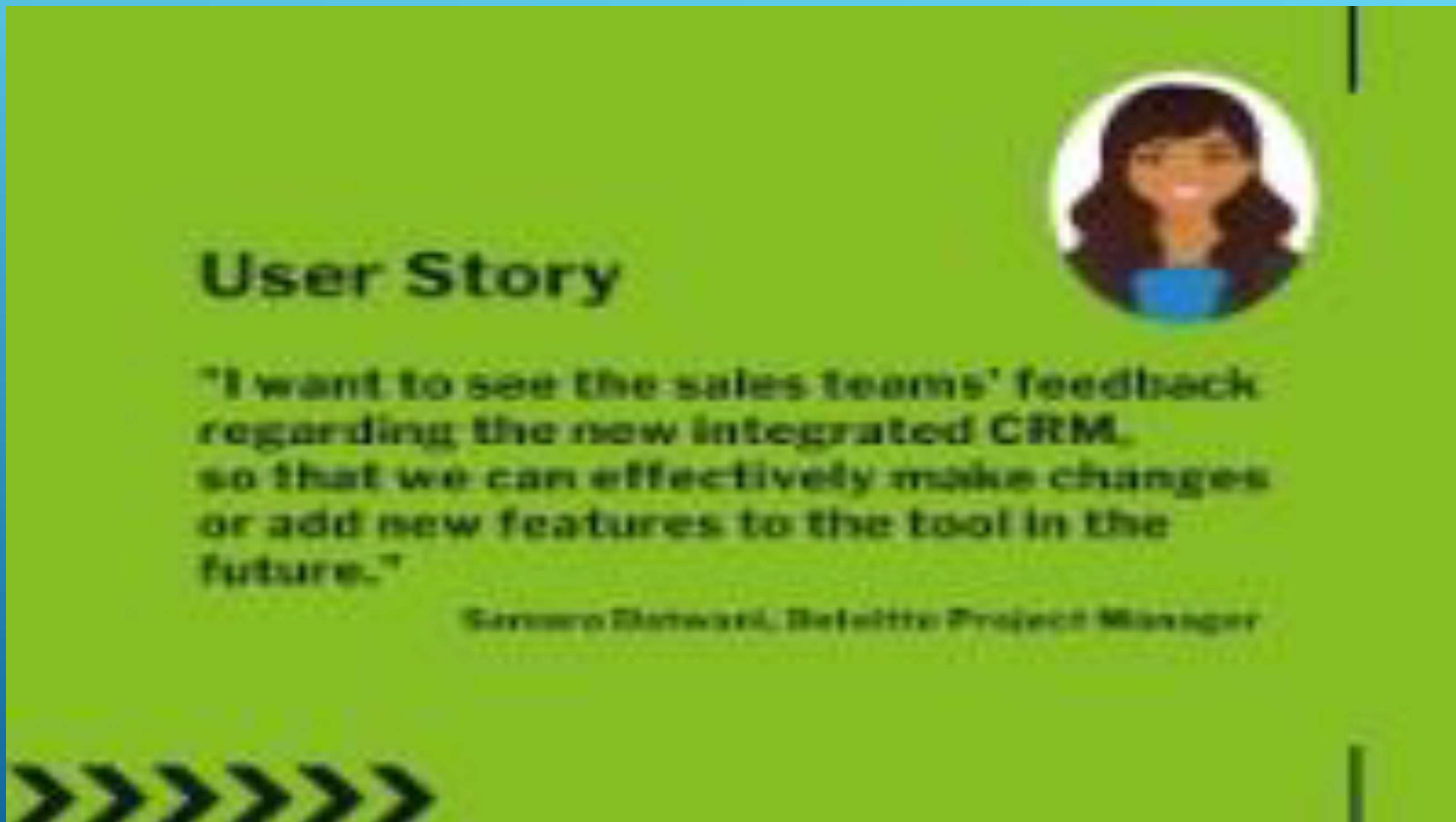

Date Proposal Submitted
11/11/2022
Form Of the Proposal
Official RFP
Lost Reason Description
Service Provider
Venmyn Rand
Competitors
Main Team Member
Search People...
Lost Reason
--None--
Need Lost Reason.
We hit a snag.
Review the following fields
• Lost Reason
Cancel
Save



Deloitte Global
Search...
Home
Accounts
Opportunities
Contacts
Products
Calendar
Dashboards
Forecasts
Locations
Reports
Tasks
Competitors
More
Last 10 Won Opportunities
Opportunity Name
Zoonoodle Services
Youopia Services
Wikivu Services
United Oil Standby Generators
United Oil SLA
United Oil Refinery
View Report (Last 10 Won Opportunities)
Top 10 Value Opportunities
Amount
$3.3M
Stage
Closed Won
Closed/Aband...
Verified
Proposal/Pric...
Value Proposi...
Contacted
View Report (Top 10 Value Opportunities)
Lost Opportunities - Main Competitor
Record Count
KPMG Cons...
Infosys Data...
FTI Consulting
Capgemini ...
Bain & Com...
Bain & Company
Main Competitor 1
View Report (Lost Opportunities - Main Competitor)
Abata
· 12/21/2022
Abata
· 11/17/2022
Edgetag
Venmyn Rand $217,108.39 · 9/26/2022
Eazzy
KAP Osman Bing Satrio & Eny $93,049.82 · 9/3/2022
View All Key Deals
Overdue Opportunities
Opportunity Name
Stage
Aans Services LLC
Verified
Aren Services
Avavee Services
Verified
Babbleblab Services
Babbleopia Services
Opportunities by Deloitte Firm w/ Ch...
Record Count
Brightman Alm...
Deloitte & Ass...
Deloitte & Tou...
Deloitte Anjin ...
Deloitte Denm...
Global Busine...
Iperion Life Sci...
KAP Osman B...
McColl Partners
Lost Opportunities - Reason
Record Count: 157
Lost Reason
Couldn't Rea...
Price
No Budget
Timing
No decision
Authority
Recent Records
Deloitte Opps Dashboard
Bluezoom Services
Test New Opportunity with screen flow
Test New Opportunity with screen flow
Rich Text
To Do List
Macros


Search...
Deloitte Global
Home
Accounts
Tasks
Contract Line Items
More
Opportunities
Recently Viewed
50+ items • Updated a few seconds ago
New
Opportunity Name
Opportunity ...
1 Bluezoom Services rskip
2 Test New Opportunity with screen flow Gforce
3 Test New Opportunity with screen flow Gforce
4 Edgetag Services bjaun
5 Eaze Services bjaun
6 Demizz Services Unlimited rskip
7 Dain Services bjaun
8 Aans Services LLC bburl
9 Aren Services sscru
10 Jace Services bjaun
11 Zoomcast Services sscru
12 Devpulse Services bburl
13 Rhyzio Services sscru
14 Wikivu Services rskip
15 Dynabox Services Dynabox Closed/Abandoned 7/10/2022 bburl
New Opportunity
Opportunity Information
* Opportunity Name
Complete this field.
* Stage
--None--
Complete this field.
Unique Opportunity Number
Description
Account Name
Search Accounts...
Probability (%)
Opportunity Owner
Girls Force
* Close Date
Complete this field.
Expected Close Date
Next Step
Main Contact
Search Contacts...
Verbal Commit By
Search Contacts...
Cancel
Save & New
Save
Rich Text
To Do List
Macros


We want
YOUR
feedback


User Story
"I want to see the sales teams' feedback regarding the new integrated CRM, so that we can effectively make changes or add new features to the tool in the future."

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