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# Salesforce

UAT 2 Pilot Training & Onboarding

February 2017

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# Introduction

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## What is Salesforce?

Salesforce is a CRM (Client Relationship Management) tool that will help SVC identify who we know, where they are, and what SVC has done with them. In addition, Salesforce will also help SVC track our Outreach, and gain deeper insights into the SVC referral process and client lifecycle.

- Salesforce will be tracking and replacing the following processes:
  - Outreach\*
  - Conflict Checks
  - New Matter Forms (now called Opportunities)
  - Working Groups (360 Degree view of SVC engagements)
- Salesforce will catalog and allow users to search the following:
  - Contacts (Reporters, Referral Sources, Clients)
  - Companies
  - Notes

## Pilot Group

Chosen as a pilot team to participate in User Acceptance Testing this week.

- Feedback can be sent to [SFDC-Feedback@sardverb.com](mailto:SFDC-Feedback@sardverb.com)

# Why Salesforce

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## Benefits

- Central repository for customer/project data in one consolidated and reportable place
- Robust reporting capabilities
  - How much outreach have we done and where have we done it?
  - How many Conflict Checks have been filled out?
  - How many New Matter Forms have been created?
  - Who are the top 10 referral sources and from which companies?
  - How frequently are we touching the top tier law firms and banks?
  - What type of outreach has yielded the best outcomes?
  - How long did it take to close a piece of business from Outreach to New Matter Form?
  - How many situations did a referral source refer us to that were unsuccessful or successful?
- Tracking outreach/interactions with individuals to paint a clear picture of SVC's relationships
  - Including Journalists and who they worked with (Lisa Fickenscher @ NY Post)
- Increased visibility and accessibility into past business deals
  - Quickly answers the question "Who did work with XYZ on what matter and when?"
- Collaborative tool to add data real time as information is collected
- Continuous updates made to contact and company records throughout the year (instead of 1 time per year during holiday card updates)
- Mobile friendly
- Scalable and maintainable solutions

## Outreach

# Outreach – Creation & Search



After December 16, 2017 Lightning Experience will no longer support this web browser. See Supported Browsers for Lightning Experience.

SIVIC

Search Salesforce

SVC Lightning Home Outreach Conflict Check Forms Opportunities Contacts Companies Reports

My Outreaches Clone Create New View

New Outreach

Action Outreach Subtype Status

Edit   Del	Call	Completed
Edit   Del	Call	Completed
Edit   Del	Call	Completed
Edit   Del	Call	Completed
Edit   Del	Event	Completed
Edit   Del	Event	Completed
Edit   Del	Task	Open

1-7 of 7

### Create Outreach

#### Outreach Information

\* Subject

Topic Type

- Traditional IR / PR - Investor Relations
- Traditional IR / PR - Media relations
- Traditional IR / PR - Corporate positioning
- Traditional IR / PR - Proxy contest - offense
- Traditional IR / PR - Proxy contest - defense
- Traditional IR / PR - Defense preparedness
- Traditional IR / PR - Strategic defense (against hostile)
- Traditional IR / PR - MSA

Outreach Type

Due Date

Name

Search Contacts

Follow Up Date

\* Assigned To

Josh Bass

Follow Up Action Items

SVC Attendees

- Charles Akers
- Lindsay Alexander
- Danya Al-Qattan
- Jim Barron

Collateral Type

- Brochure
- Capabilities Presentation
- Proposal
- One Pager
- Case Studies

#### Additional Information

\* Status

Comments

Cancel Save & New Save

## Outreach:

- Navigate to the Outreach tab and click the “New Outreach” button
- Once you click the “New Outreach” button, the “Create Outreach” form will appear in a pop-up window
- Fill out the fields in the “Create Outreach” form and click the Save button in the lower right-hand side of the form
- You will also have the ability to search for your Outreach via the Search Bar in Salesforce

## Recap

# Glossary Of Terms

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## Outreach:

- Lunch, Meeting, Referral Source Pitch, etc.

## Opportunities (New Matter Form):

- New Client or Existing Client with New Matter

## Opportunity team members

- SVC Client working group

## Companies

- Covers clients, advisors, vendors, publications, asset managers, etc.

## Contacts

- Non-SVC employees (client contacts, reporters, referral sources, etc.)

## Users

- SVC employees (and salesforce.com users)

## Relationships:

- Client Working Group – Role on the project team – financial advisor, director, vendor, etc.
- Contact to Contact – The relationship between two non-SVC individuals (professional or personal)
- Contact to Company – The relationship between non-SVC individuals and organizations (former employee, journalist, board of director, etc.)



# Opportunity Matrix

Client Type	Matter Type	Action
Outreach	<ul style="list-style-type: none"> <li>New business/capabilities pitched to potential clients (propose digital ad campaign for potential new client)</li> </ul>	<ul style="list-style-type: none"> <li>Create New Outreach</li> </ul>
Outreach	<ul style="list-style-type: none"> <li>New business/capabilities pitched to existing clients (propose speaker training for an existing client)</li> </ul>	<ul style="list-style-type: none"> <li>Create New Outreach</li> </ul>
New Business	<ul style="list-style-type: none"> <li>New project or retainer engagements for new clients</li> </ul>	<ul style="list-style-type: none"> <li>Create New Opportunity</li> </ul>
Existing Business	<ul style="list-style-type: none"> <li>New Matter (where you would fill out the new matter form for a new timesheet category or do a conflict check for a new project)</li> </ul>	<ul style="list-style-type: none"> <li>Create New Opportunity</li> </ul>

# Company – Search & Creation



After December 16, 2017 Lightning Experience will no longer support this web browser. See Supported Browsers for Lightning Experience.

SVC Lightning Home Conflict Check Forms Opportunities Contacts Companies Reports

Search Salesforce

OPPORTUNITIES Recently Viewed

20 Items - Last updated 01/27/2017 at 13:10

	PROJECT/OPPORTUNITY NAME	COMPANY NAME
1	Project Perpara	Perpara
2	Abbot	Abbot
3	GNC - Traditional IR/PR - 2017-01-24	GNC
4	Facebook - Cybersecurity - 2017-01-24	Facebook
5	Sears - Traditional IR/PR - 2017-01-24	Sears
6	Joshua Bass - Traditional IR/PR - 2017-01-24	Joshua Bass
7	Project Test 2	Abbot
8	Project Typos	Cleary Gottlieb
9	Project Typos	Cleary Gottlieb
10	Joshua Bass - Traditional IR/PR - 2017-01-24	Joshua Bass
11	GNC	GNC
12	Project Fox	21st Century
13	Oaktree	Oaktree Capital
14	Apple	Apple
15	eBay/TEST	eBay Inc.
16	Cleary Gottlieb Steen & Hamilton LLP	Cleary Gottlieb

### Create Company

\* Company Name

Company Owner Josh Bass

Company Type --None--

Parent Company Search Companies

Industry Advertising, Branding & Marketing  
Aerospace/Defense  
Agriculture & Livestock  
Airlines

Phone

Website

Description

Address Information

Address

Shipping Address

Street

Shipping Street

City  State/Province

Shipping City  Shipping State/Province

Zip/Postal Code  Country

Cancel Save & New Save

New

DATE	OPPORTUNITY OWNER ALIAS
	Blerita
	Blerita
	jbass
	jbass
	jbass
	jbass
	jbass
	jbass
	jbass
	jbass
	jbass
	guser
	jbass
	jbass
	ddeli
	blueewolf

## Company:

- If you are filling out Outreach, Conflict Check, or New Matter Form, we ask that all SVC Account staff search for the company they are going to be filling in
- When searching in Salesforce, use the highlighted top search bar to see if the company is already in our database
- If the company is not in the database, navigate to the Companies tab and click “New” to enter the Company’s details
- Fill out the fields in the “Create Company” form and click the Save button in the lower right-hand side of the form

# Contacts – Search & Creation



The screenshot shows the Salesforce interface for the 'Contacts' tab. At the top, there is a search bar labeled 'Search Salesforce' and a navigation bar with tabs: 'SVC Lightning', 'Home', 'Conflict Check Forms', 'Opportunities', 'Contacts', 'Companies', and 'Reports'. The 'Contacts' tab is selected. Below the navigation bar, there is a table of contacts with columns 'NAME' and 'COMPANY NAME'. The table lists 12 items, sorted by name. A red box highlights the 'New' button in the top right corner of the contact list. Another red box highlights the 'Create Contact' form, which is open. The form has fields for 'Company Name', 'Contact Owner', 'Confidential', 'Suffix', 'Nickname', 'Gender', and 'Phone, Email & Fax Detail'. A red arrow points from the 'New' button to the 'Create Contact' form. The 'Save' button is highlighted in red at the bottom right of the form.

After December 16, 2017 Lightning Experience will no longer support this web browser. See Supported Browsers for Lightning Experience.

SVC Lightning Home Conflict Check Forms Opportunities Contacts Companies Reports

CONTACTS All Contacts

12 Items - Sorted by Name - Filtered by Company Name - Last updated 01/27/2017 at 11:00 AM

	NAME	COMPANY NAME
1	A. Cederoth	Navistar
2	Al Sattiel	Navistar
3	Andy Bosman	Navigant Consulting
4	Anne Belec	Navistar
5	Carrie Grapenthin	Navigant Consulting
6	Heather Kos	Navistar
7	Jim Spangler	Navistar
8	John Ratchford	Navigator Ltd.
9	Karen Denning	Navistar
10	Lewis Campbell	Navistar
11	Troy Clarke	Navistar
12	Willa McManmon	TRIMBLE NAVIGATION LIMITE...

Create Contact

Company Name

Contact Owner

Josh Bass

Confidential

Skadden, Arps, Slate, Meagher & Flom LLP & Af...

Chesapeake Energy Corporation

Facebook

Sears

Joshua Bass

+ New Companies

Suffix

Nickname

Gender

-None-

Phone, Email & Fax Detail

Home Phone

Email

Cancel Save & New Save

New Import

OWNER FIRST NAME

OWNER LAST NAME

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

Generic

SVC User

## Contacts:

- If you are filling out Outreach, Conflict Check, or New Matter Form against a Contact, we ask that all SVC Account staff search for the company that the Contact is associated to
- When searching in Salesforce, use the highlighted top search bar to see if the contact is already in our database
- If the contact is not in the database, navigate to the Contacts tab and click the "New" button to enter the Contact's details.
- Fill out the fields in the "Create Contact" form and click the Save button in the lower right-hand side of the form

# Conflict Check – Search & Creation



## Conflict Check:

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SIVIC

Search Salesforce

SVC Lightning Home Outreach **Conflict Check Forms** Opportunities Contacts Companies Reports

CONFLICT CHECK FORMS Recently Viewed

12 items • Last updated 01/27/2017 at 18:11

	CONFLICT CHECK FORM NAME	CLIENT
1	CC-00045	Joshua Bass
2	CC-00042	Facebook
3	CC-00038	Cleary
4	CC-00036	Trust M
5	CC-00035	Joshua Bass
6	CC-00019	Cole As
7	CC-00028	Imper
8	CC-00026	GNC
9	CC-00015	Unknow
10	CC-00014	Oaktre
11	CC-00012	Abbot
12	CC-00001	Variety

Create Conflict Check Form

Conflict Check (be sure to create referral source contact first)

Conflict Check Form Name

Owner  
Josh Bass

\* Client Name

Skadden, Arps, Slate, Meagher & Flom LLP & At...

Chesapeake Energy Corporation

Facebook

Sears

Joshua Bass

+ New Companies

No Relevant Adverse Party  
☐

Other Affected Parties - Select or Provide at least 1

Other Affected Party 1 Name (Company)  
Search Companies

Other Affected Party 2 Name (Company)  
Search Companies

Other Affected Party 1 Name (Contact)  
Search Contacts

Other Affected Party 2 Name (Contact)  
Search Contacts

Cancel Save & New **Save**

CREATED DATE

1/26/2017 10:42 AM

1/24/2017 3:50 PM

1/24/2017 12:17 PM

1/24/2017 12:16 PM

1/24/2017 12:15 PM

12/3/2016 12:47 PM

12/9/2016 3:29 PM

12/7/2016 11:30 AM

11/23/2016 4:17 PM

11/21/2016 5:30 PM

11/17/2016 2:35 PM

11/11/2016 3:58 PM

New

- When filling out a Conflict Check, click the Conflict Check tab and it will navigate you to the Conflict Check list view
- To create a new Conflict Check in Salesforce, click the “New” button in the top right
- Fill out the fields in the “Create Conflict Check Form” form and click the Save button in the lower right-hand side of the form
- After saving the form, you will receive an email that will also be sent to the Conflict Check committee with all of the info you have filled out
- You also can search for Conflict Checks you have previously created via the Search Bar at the top

# Opportunity (New Matter Form) – Search & Creation

After December 16, 2017 Lightning Experience will no longer support this web browser. See Supported Browsers for Lightning Experience.

SVC Lightning Home Outreach Conflict Check Forms Opportunities Contacts Companies Reports

OPPORTUNITIES Recently Viewed 20 items • Last updated 01/27/2017 at 18:15

PROJECT/OPPORTUNITY NAME COMPANY

1	Project Perpara	Perpara
2	Abbot	Abbot
3	GNC - Traditional IR/PR - 2017-01-24	GNC
4	Facebook - Cybersecurity - 2017-01-24	Facebook
5	Sears - Traditional IR/PR - 2017-01-24	Sears
6	Joshua Bass - Traditional IR/PR - 2017-01-24	Joshua
7	Project Test 2	Abbot
8	Project Typos	Cleary C
9	Project Typos	Cleary C
10	Joshua Bass - Traditional IR/PR - 2017-01-24	Joshua
11	GNC	GNC
12	Project Fox	21st Ce
13	Oaktree	Oaktree
14	Apple	Apple
15	eBay/TEST	eBay In
16	Cleary Gottlieb Steen & Hamilton LLP	Cleary C

Create Opportunity: New Matter Form

Conflict Check (be sure to create referral source contact first)

\* Conflict Check Performed  
--None--

No Conflict Check Performed Reason

Opportunity Information

Confidential ☐

\* New Matter Form Created Date

\* Company Name  
Search Companies

Project Start Date

\* Project/Opportunity Name

Project End Date

\* Stage  
--None--

Needs  
New Client Code  
New Invoice Number  
New Category

Lost Reason  
--None--

New Category Name

Cancel Save & New Save

New

## Opportunity (NMF) :

- When creating a New Matter Form, click the New Matter Form tab and it will navigate you to the New Matter Form list view
- To create a net new New Matter Form in Salesforce, click the “New” button in the top right
- Fill out the fields in the “Create Opportunity: New Matter Form” form and click the Save button in the lower right-hand side of the form
- After saving the form, you will receive an email that will also be sent to Finance to complete their task and receive a final copy of your NMF once it has been processed
- Salesforce gives users the ability to search for NMFs against not only the company, but contacts that are associated with the Assignment Type that we are doing with the client

## Q&A

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