Salesforce

UAT 2 Pilot Training & Onboarding

February 2017

Agenda

Introduction

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

** New process internally at SVC*

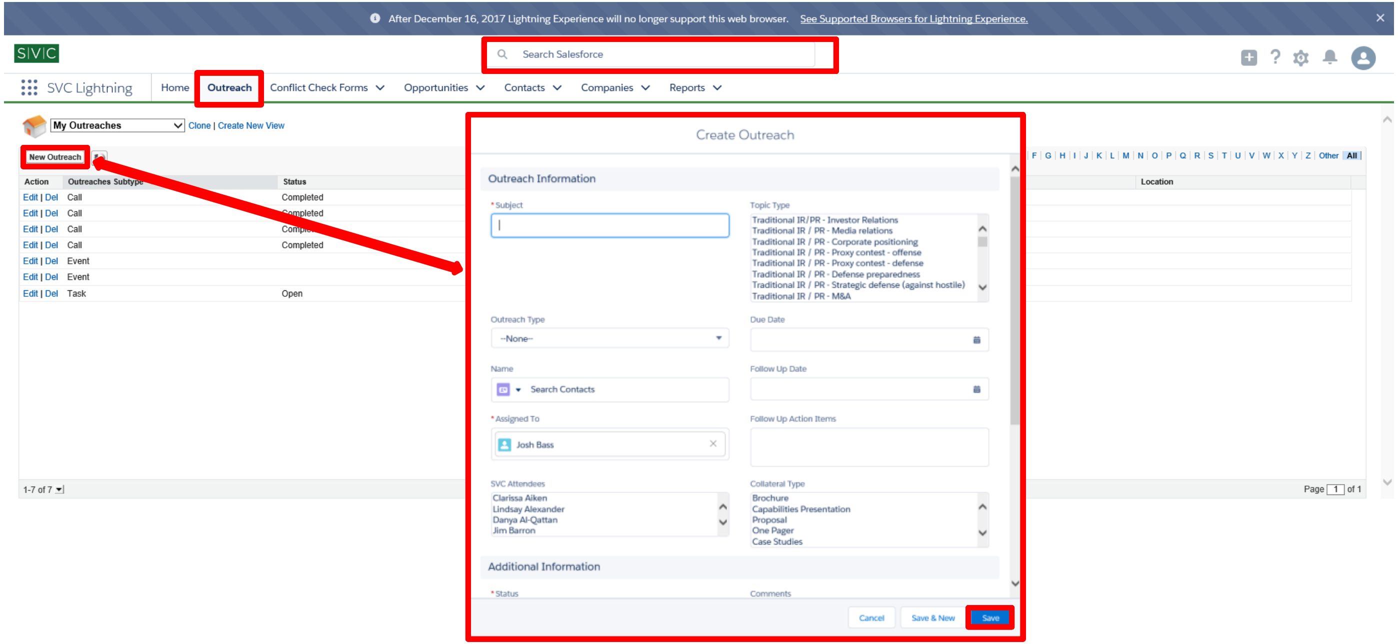
Why Salesforce

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



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

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)

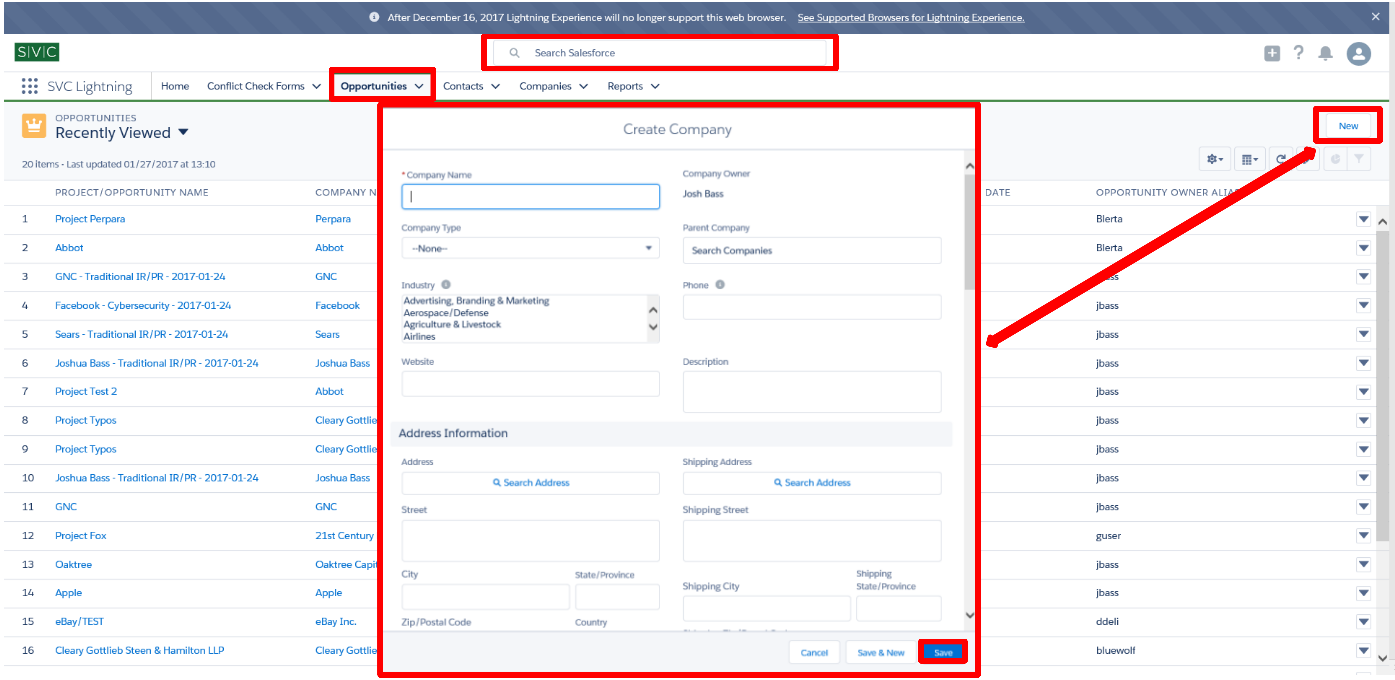
Relationships:

- 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	▪ New business/capabilities pitched to potential clients (propose digital ad campaign for potential new client)	▪ Create New Outreach
Outreach	▪ New business/capabilities pitched to existing clients (propose speaker training for an existing client)	▪ Create New Outreach
New Business	▪ New project or retainer engagements for new clients	▪ Create New Opportunity
Existing Business	▪ 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)	▪ Create New Opportunity

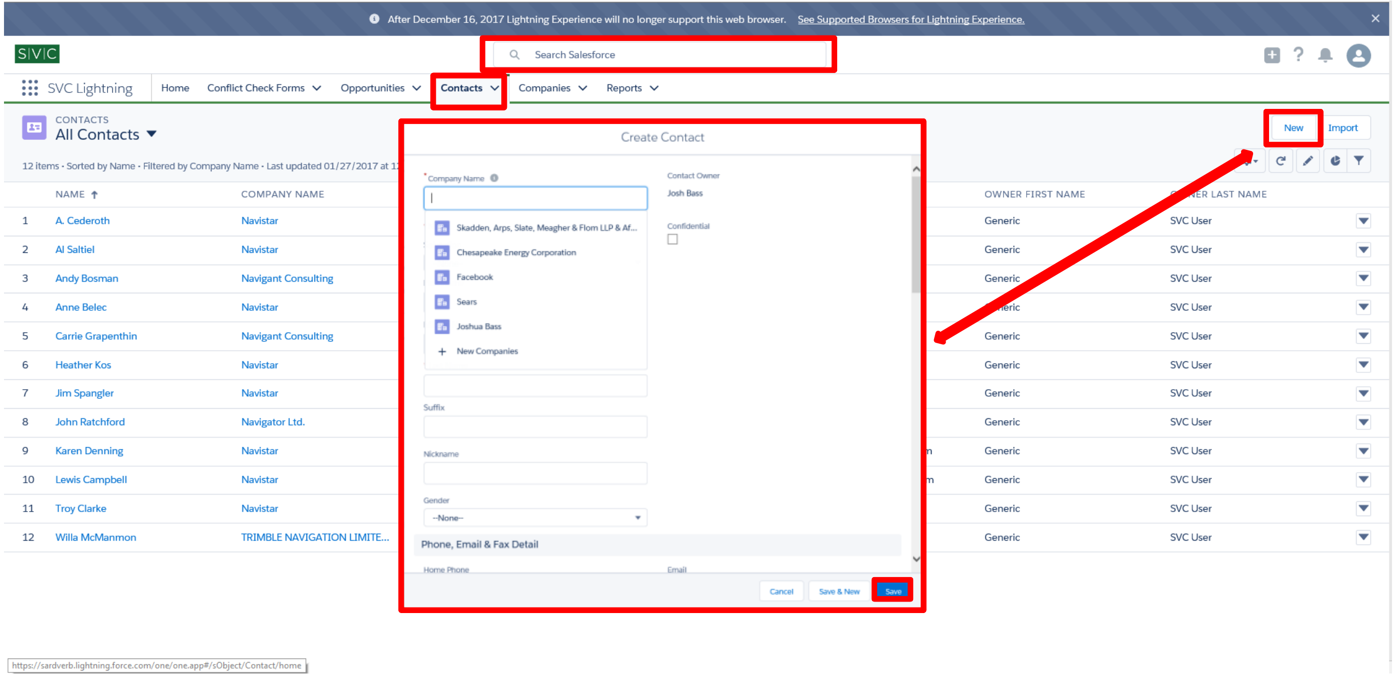
Company – Search & Creation



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

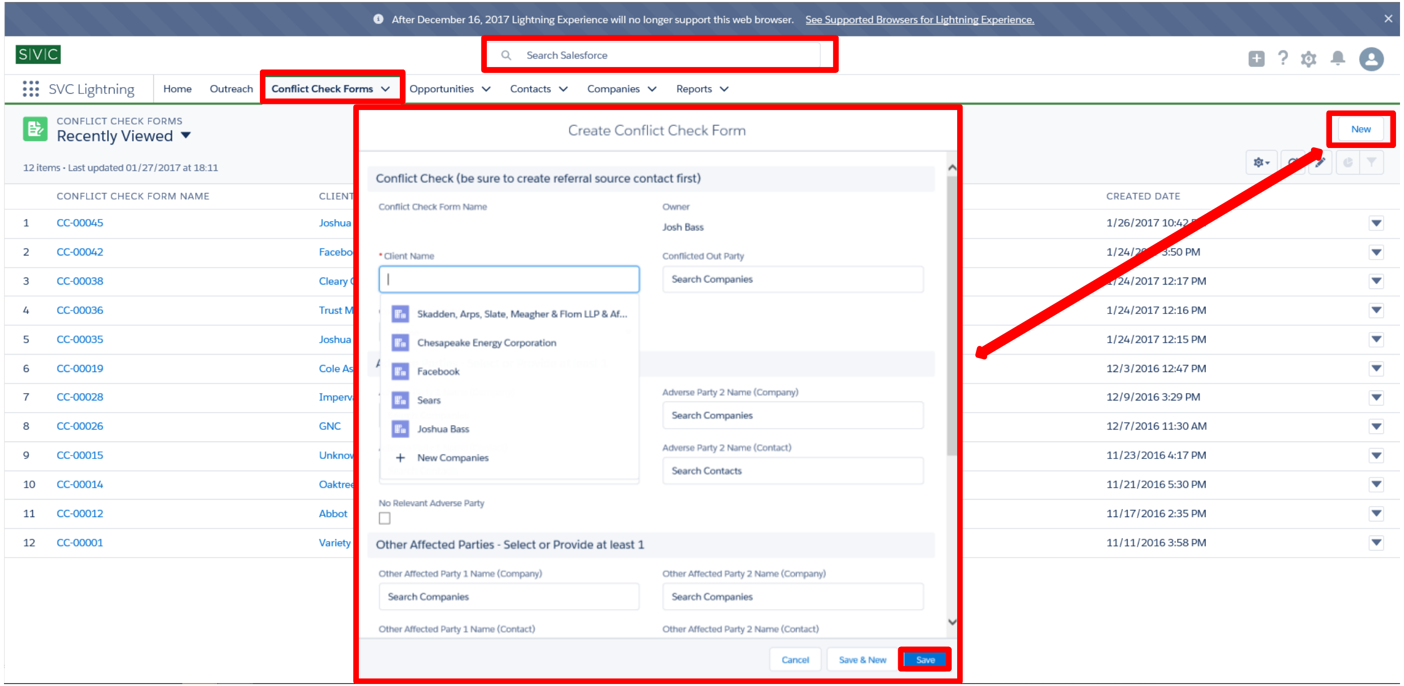
Contacts – Search & Creation



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

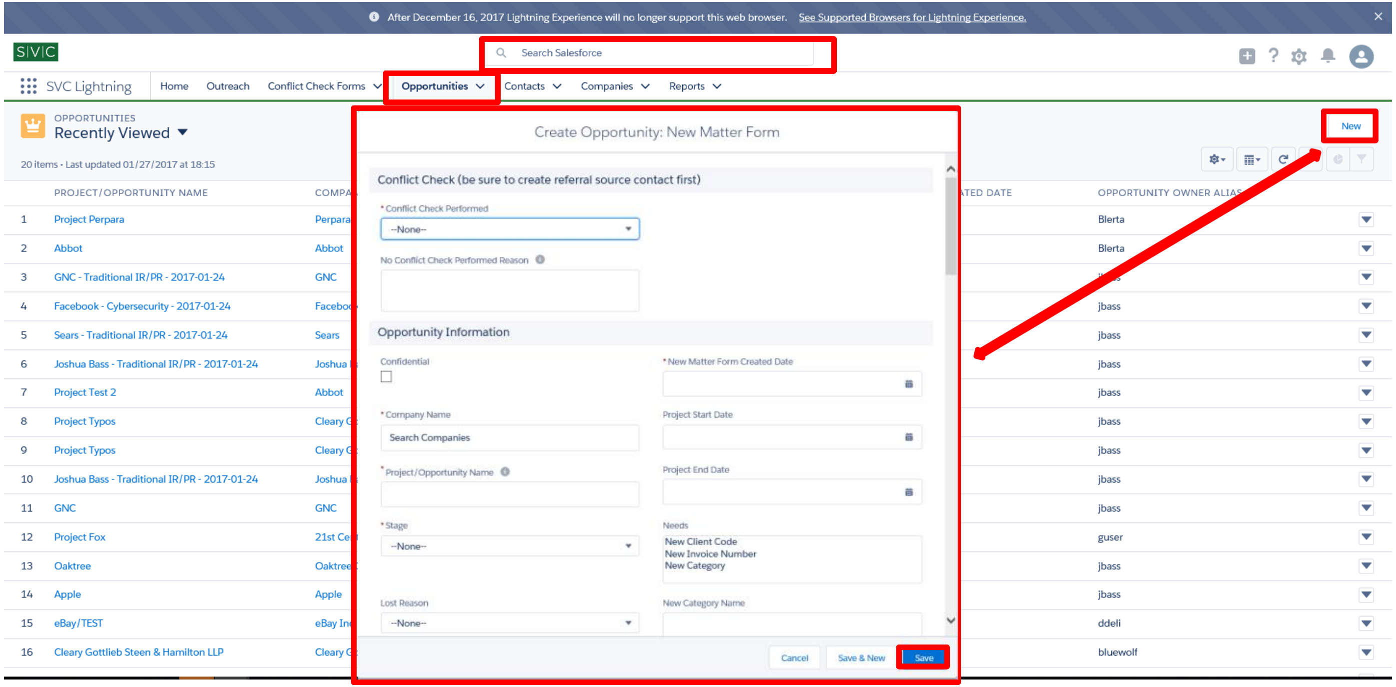
Conflict Check – Search & Creation



Conflict Check:

- 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



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