REPORT OF FINDINGS

GREEN ROOF SYSTEMS

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CONTENTS

# 1.	DOCUMENT OVERVIEW

1.1 Purpose and Scope:

The purpose of the project is to install the green roof systems to the existing buildings to enhance energy efficiency, lower stormwater and improve air quality. The project's scope includes the design, selection of materials, and installation of the green roof in addition to developing a maintenance plan to ensure the system's long-term viability. The team will carefully consider several factors, such as the type of vegetation, irrigation systems, and drainage mechanisms to create a comprehensive green roof system that is appropriate for the local climatic conditions. The ultimate objective of the project is to provide a green and sustainable solution for increasing the building's effectiveness and reducing its impact.

1.2 Company Overview:

Green Roof Systems designs and develops green roofs for clients in major metropolitan areas around the world. GRS clients are either individual owners of single buildings or large corporations owning multiple buildings representing multiple sites. Green Roof Systems have completed more than 200,000 green roof projects in Europe for over 150,000 clients and plans to double its business next year with a planned expansion into Canada and the United States.

Global Roof Systems partners with a network of over 5,000 installers who are responsible for purchasing and installing the plants for green roofs. It has ten regional offices in Europe, each one representing a country. Each regional office has its own base CRM solution with customized business processes and country-specific content. GRS wants to replace all these CRMs with Salesforce.

1.3 Project Goals and Objectives:

The goal of the project is to enhance and streamline the process of generating sales for green roof systems, designs, and consulting services. The project entails putting in place a new system for controlling potential projects and customer data as well as giving sales representatives resources to gather and store project information throughout on-site visits. The goal is to boost productivity, raise customer satisfaction, and ultimately expand GRS's clientele.

The primary objective is to replace the basic CRM solution architecture that has been used in the regional offices in Europe with the new CRM solution Based Salesforce Architectures to enhance sales, project management, and customer services. The new CRM solution should offer specialized business processes and regionalized content. To increase efficiency and minimize manual effort,

it is also a goal to automate several tasks, including project assignment, notifying sales representatives of high-priority projects, and creating project records.

1.4 Project Assumptions:

Project Assumptions and Recommendations	
New Application Integrations	Design consultants use internal applications to search several third-party databases for specialty plant availability and inventory. This application supports SAML, and GRS and wants to ensure that all users of this application are active Salesforce users.
	GRS is planning to mitigate all data from the 10 homegrown CRM systems to the new application.
	One project pre site is advised to be created for the projects that include multiple sites so that there may be different installers assigned to different sites.

1.5. Project Terminologies:

The following terminology has been noted and appears throughout the Report of Findings.

Business Titles

Marketers	Attend conferences and trade shows to present whitepapers on green roof technology. A marketer may be assigned to more than one region. Marketers meet with prospective customers and gather information about potential green roof projects.
Sales Representators	Sell green roof design projects. Sales representatives are assigned to a single country-specific region. GRS also has a Strategic Sales Team that includes sales representatives who work across regions for larger strategic customers.

Design Consultants	Collaborates with customers to plan and design green roofs. They also submit applications for installation permits from government organizations.
GRS Managers	oversee teams of sales representatives and design consultants. Each region may have up to five managers.

Installers	Purchases plants and install green roofs. The installers work across regions.
Installation Managers	Manages multiple installers at an installation company.

GRS – Application Systems

SSO	Single Sign On
LDAP	Identity providers or directory servers
GRS	Green Roof Systems

2. EXECUTIVE SUMMARY

2.1. Executive Overview:

Green Roof Systems designs and develops green roofs for clients in major metropolitan areas around the world. GRS clients are either individual owners of single buildings or large corporations owning multiple buildings representing multiple sites. Green Roof Systems has completed more than 200,000 green roof projects in Europe for over 150,000 clients and plans to double its business next year with a planned expansion into Canada & the United States. The Green Roof Systems has got multiple systems and has chosen salesforce to consolidate all the system.

The purpose of the project is to install the green roof systems to the existing buildings to enhance energy efficiency, lower stormwater and improve air quality. The project's scope includes the design, selection of materials, and installation of the green roof in addition to developing a maintenance plan to ensure the system's long-term viability. The team will carefully consider several factors, such as the type of vegetation, irrigation systems, and drainage mechanisms to create a comprehensive green roof system that is appropriate for the local climatic conditions. The ultimate objective of the project is to provide a green and sustainable solution for increasing the building's effectiveness and reducing its impact.

2.2. Project Discovery and Sales Process:

In the Project Discovery and Sales Process stage, the marketers go to conferences and trade shows to talk to the potential clients about potential green roof projects. The sales team then receives verified potential projects and prioritizes them based on factors like budget and start date.

After choosing a project from a list of confirmed potential projects in their area, sales representatives get in touch with the client to confirm the project's specifics and arrange a site visit. They use their mobile devices to collect additional information during their visits on the sites and generate certain estimations for the green roof designs.

Once the customer approves the estimations, the sale is considered, and the design process starts. GRS automatically create a green roof project records and assigns the project to a design consultant who has appropriate skills.

2.3. Project Design Process:

During the project design phase, the design consultant works with the client to develop a design and submit the installation permit applications.

The Design consultant discusses plant selections and design concepts with clients. Until the final design is approved, they continue to provide the customer with updated versions of the installation plans and design schematics. They look for kinds of specialty plants using the specialty plant application and reserve them for the green roof projects.

Once, the project is ready for the approval, the design consultant sends the necessary installation plans and within a week or so, the customers will be able to receive an email with the required permits responses.

2.4. Project Installation Process:

In this stage, the designated installer reviews the installation plans and design schematics on a tablet computer while the customer and installer are on-site. The tablet computer may not always be online. Prior to installation, the installer purchases standard and specialty plants, noting the plant's species, cost per plant, and quantity against the project. All plants must be tracked in the new system against the project and come with a 60-day guarantee.

After the plants are installed, the customer completes final inspection and signs off on the project. At this stage, an invoice should be sent to the customer. GRS would like to provide customers with access to an online portal to pay invoices online and view history of paid invoices. Then, customers should also enter issues with their green roof installation using the portal.

3.   DATA SECURITY

3.1 Security and Sharing:

To protect customer and business data, GRS plans to replace their current regional CRM solutions with Salesforce. To do this, they will probably need to put in place the necessary data security measures in accordance with industry standards and best practices. Salesforce itself provides various security features and compliance certifications, including encryption of data in transit and at rest, user authentication access control, and regular security assessments and audits. To ensure the protection of their sensitive data, GRS may also need to implement extra security measures like employee training, data backup, recovery plans, and regular security assessments.

3.2 User Data Sharing Requirements:

GRS will need to gather and keep track of personal data about their clients, including names, contact information, and project specifics. To complete the green roof installation process, GRS may also be required to share some user information with their network of installation businesses. GRS should make sure that they have the proper contracts with these businesses in place to guarantee that they also adhere to data protection laws and have the necessary data security measures in place.

3.3 User Permissions:

In any system, user permissions are a critical component of data security. User permissions are employed in this project to guarantee that users can only carry out actions that are appropriate for their role and that data is only accessible to authorized users and to make sure that customer information is kept private by carefully regulating user permissions. The following were identified to have the user permissions:

1. **Marketers:** Permitted access to the customer and project data that they have gathered. Other than adding new projects and updating existing ones, they are not allowed to change any data or take any other actions. Marketers can only create new project records and have read-only access to the customer and project data they have gathered.

2. **Sales Representatives:** Can view all pertinent project and customer data as well as access verified potential projects in their area. They can close projects, assign them to design consultants, and update their status. Additionally, sales representatives can use their mobile devices to check into customers' locations and upload project-related media.

3. **Design Consultant:** Depending on their expertise and availability, design consultants are given green roof projects. They have access to all project-related information, such as site

details, client demands, and earlier designs. To make sure the project satisfies the client's needs, design consultants can generate estimates, update project status, and work with sales representatives.

4. **Administrator:** Access to all data in the system, including customer and project data, user data, and system settings. They can set user permissions, create, and manage user accounts, and modify the system to suit their needs. Data security and proper user permission settings are the administrators' responsibilities.

3.4 User Permission Access:

1. **Marketers:**
- Can access and update information like site location, installation budget, project start date.
- Flag the potential projects and assign them to the sales representative.

2. **Sales Representatives:**
- See prospective green roof projects and customer records for their regions and generate estimates and provide them to customers.

3. **Managers:**
- Should have access to all customers and green roof projects in their region.

4. **Design Consultants:**
- Can see prospective green roof projects and customer records for their regions and generate estimates and provide them to customers.
- See the results of the installation permit application and only on projects they are assigned to.

5. **Administrators:**
- Updates the installation details for the projects assigned, submits the issues related to green roof after installation.

6. **Strategic Sales Team:**
- Can see all prospective green roof projects and customer records for their region as well as all potential projects marked as STRATEGIC priority.

7. **Installers:**
- See customer and project details and design documents for projects that they are assigned to.

8. **Installation Managers:**
- See all customer and project details and design documents for projects that are assigned to installers that they manage.

9. **Users:**
- Select their language and access translated data and email communication.

10. **Customers:**
- Requires access to an online portal during and following the green roof installation project.
- They can only view their own project details and associated documents.
- They should be able to use their Facebook credentials to log in to the portal.

4. PROCESS FLOWS

The following section outlines the requirements for each business process documented within the Sample Review Board Scenario – Green Roof Systems

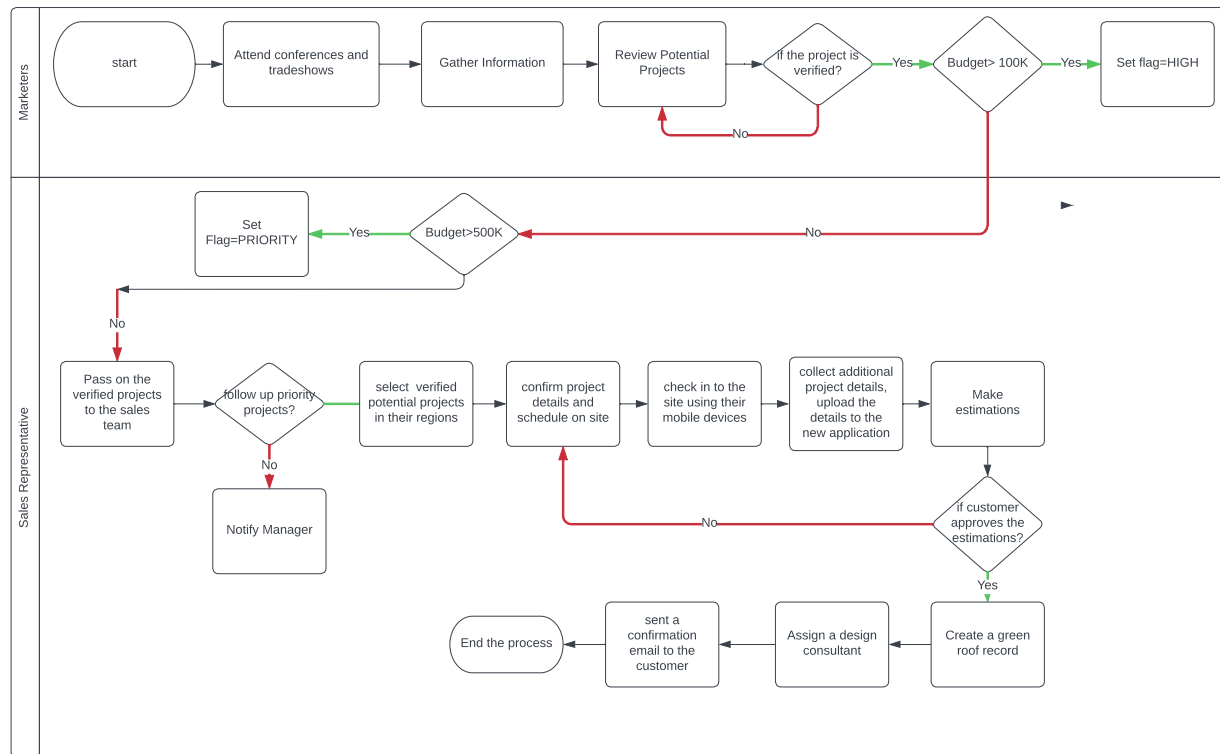## 4.1 Project Discovery and Sales Processes:

Fig:1 Project Discovery and Sales Process

Project discovery begins when marketers attend trade shows and conferences and is followed by the sales process where sales representatives sell design and consulting services.

1. GRS marketers attend conferences and tradeshows to present whitepapers and meet with prospective customers about potential green roof projects. They gather details such as site location(s), installation budget, square footage, and project start date.
2. Marketers review potential green roof projects to confirm that the site location(s) are suitable, and that the installation budget is sufficient, mark the project as verified, and pass the project to the sales team.

   2.1. Potential projects with a start date within 3 months or with a budget larger than €100k should be flagged as HIGH priority and sales representatives in the region should be notified.

2.2. Potential projects with a budget larger than €500k should be flagged as STRATEGIC priority and the Strategic Sales Team should be notified.

2.3. If sales representatives do not follow up with customers for HIGH or STRATEGIC priority projects within 5 business days, their manager should be notified.

2.4. Current customers who are interested in starting a new green roof project should be assigned to the same sales representative who worked with them previously.

2.4.1. The sales rep should be notified to contact the customer.

3. Sales representatives begin the sales process by selecting from a list of verified potential projects in their region.
4. Sales representatives call the customer to confirm project details and schedule an onsite visit.

4.1. When sales representatives arrive at the customer site, they should check-in to the site using their mobile device.

4.2. During the site visit, sales representatives use their mobile device to gather additional project details, save the site GPS coordinates, take photos, and video, and upload them to the new application.

5. Based on the information gathered during the site visit, sales representatives generate an estimate for the green roof design and send a copy to the customer. When the customer approves the estimate, the sale is considered closed, and the design process can begin.

5.1. At this stage, GRS would like to automatically create a green roof project record and assign it to a design consultant in the region with the appropriate skills and availability.

5.2. The customer should receive an email confirming assignment of their design consultant.
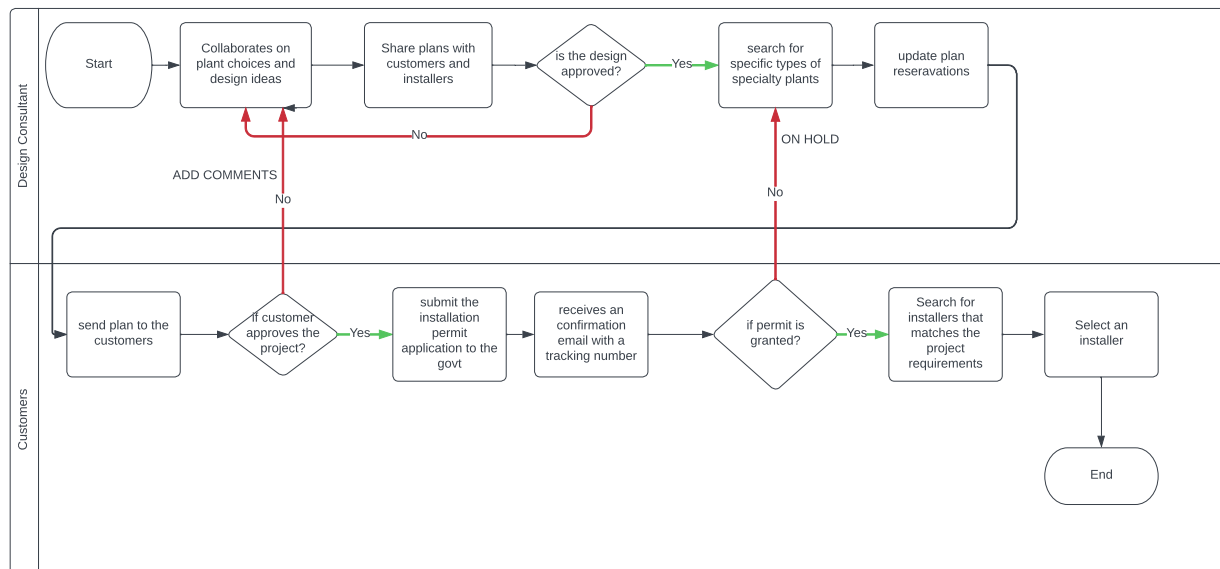
4.2 Project Design Process:

Fig:2 Project Design Process

During the project design process, the design consultant works with the customer to design the green roof and apply for installation permits.

1. Design consultants collaborate with customers on plant choices and design ideas. They also share updated versions of the installation plans and design schematics with the customer until the final design is approved.

    1.1. The installation plans and design schematic files range in size from 30-60 MB and are shared with both customers and installers.

2. Design consultants use the specialty plant application to search for specific types of specialty plants and reserve them for the green roof projects.

    2.1. Plants that are reserved for other projects should not appear in the search results.

    2.2. Each project may reserve up to 50 different types of specialty plants. Each plant reservation includes the plant location, quantity, and recommended spacing.

    2.3. If the project is cancelled, then the reserved plants should appear as available in the specialty plants application.

3. When the project is ready for approval, the design consultant sends the installation schedule, final installation budget, installation plans, and design schematics to the customer.

3.1. The customer approves or rejects the project and includes comments.

4. When the design is approved, design consultants submit the installation permit application to the government agency in the country where the green roof is being installed. GRS would like to leverage the web services that each government agency provides.

    4.1. Government agencies typically respond to the permit application within a week.

    4.2. Customers should receive an email with the response to the permit application along with the tracking number issued by the government agency.

5. If the installation permit is not granted, then the project should be set to a status of ON HOLD.

    5.1. Design consultants meet with customers to decide next steps and may update the green roof design and reapply for the installation permit, making sure to include the tracking number issued by the government agency.

6. When the installation permit is granted, the design consultant searches for installers who have completed training courses that match the project requirements and selects an installer for the project.

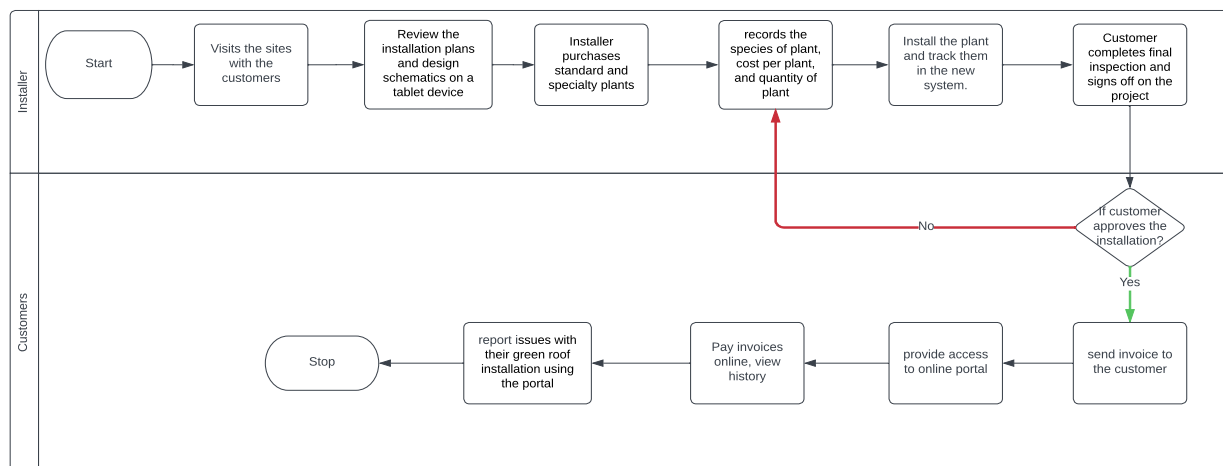## 4.3 Project Installation Process:

Fig 3: Project Installation Process

The installation process begins when an installer is assigned to the project and ends when the customer completes the final inspection.

1. The assigned installer visits the site with the customer and reviews the installation plans and design schematics on a tablet device that may not always be connected to the Internet.
2. The installer purchases standard and specialty plants prior to installation and records the species of plant, cost per plant, and quantity of plants against the project.

> 2.1. All plants are guaranteed for 60 days and must be tracked against the project in the new system. During a typical month, installers complete 400 green roof installations, and each installation can include up to 5,000 species.

3. When all plants are installed, the customer completes final inspection and signs off on the project.

> 3.1. At this stage, an invoice should be sent to the customer.

> 3.2. GRS would like to provide customers with access to an online portal to pay invoices online and view history of paid invoices.

> 3.3. Customers should also enter issues with their green roof installation using the portal.

5.   ANALYTICS

Users may require the ability to analyze their data in many ways, one such a way can be the "reports". The following Report Requirements were gathered through the "Sample Review Board Scenario -Green Roof Systems."

5.1 Report Requirements:

SNO	Name of the Report	Definition	Batch/On-Demand	Cycle	Input Fields	Grouping/Sorting
1	Installer Regional Report	Design consultants would like to see an ad-hoc report that shows the installers in their region who have completed certain training courses.	Batch	Depending on the installment dates	Installer name, Training courses, Region	Installers by region
2	Monthly Revenue Report	GRS Managers would like to see a monthly roll-up revenues for their region and status of associated green roof projects.	On Demand	Monthly	Green Roof project, Total Revenue, Region	Region, Green Roof Project
3	Specialty Plant Report	run a report that includes the specialty plants reserved for the installations.	Batch	Depending on the installation dates	Plants reserved, Green Roof Installation project.	Green Roof Installation Project