Founding Onboarding & Sales Engineer Exercises

Overview

There are two parts to this exercise: 1. process/operational improvements, and 2. technical skillset. While there are no strict requirements regarding how long these exercises should take, 8 hours or more is too long, and preferably, it should take 60 minutes to several hours. If the length of time is a concern, make necessary adjustments to meet the target guidelines. You are welcome to include comments explicitly where time was a limitation.

Part 1 - Process/Operations

Further's onboarding process is a pre-sales activity and can therefore be referred to as a "trial" or "pilot." At this point in the journey, the customer is still a prospect.

The Virtual Sales Assistant (VSA) is one component of Further's platform and the first product configured during the trial process. The goal is to deploy the VSA in a live production environment so the prospect can get hands-on, real-world experience using the tool in their environment. The current process for setting up and configuring the VSA is below.

Deliverable

Describe improvements and changes you would implement to the current Virtual Sales Assistant launch workflow.

Format

There are no guidelines on the format of the exercise submission. Use your best discretion.

Current Virtual Sales Assistant Workflow

The process described below only covers the VSA and does not explain the end-to-end trial process.

Steps

1. The Account Executive updates the deal status in the Hubspot CRM to "Yes to Trial." A message automatically posts in the #onboarding Slack channel requesting the Head of Customer Success assign a CSM.

2. The Head of Customer Success assigns a CSM to lead the trial process. The Head of Customer Success posts a reply to the Slack thread created in step 1 including tagging the identified CSM and updating Hubspot to reflect the assigned CSM.

3. CSM completes the following artifacts
    a. New Community Template Onboarding
        i. Create a new tab/sheet in the New Community Template Onboarding document, and name the tab with the name of the customer
        ii. Complete columns A, B, and C based on information provided by the customer
    b. Onboarding Template
        i. Creates a new document by copying the Onboarding Template document
        ii. Fill all non-internal fields based on information provided by the customer
    c. Notion Launch Template
        i. Adds a Notion page using the Notion Launch Template
        ii. Complete all applicable fields (example: https://drive.google.com/file/d/1Vg6Znh-qrL9-r42haLt5qRP5rjZtoof3/view?usp=sharing). Field values come from different sources:
            - Directly from customer: ex. CRM IDs, CRM Company, User email, Floorplans
            - Product requirements defined by the customer: ex. Dashboard Market Type, New VSA Design
            - Further-specific information: ex. CRM Connection Complete, Onboarding Template, Launcher

4. CSM posts a message in the #onboarding Slack channel tagging John on the L1 support team requesting they complete fields D through K in the new sheet in the New Community Template Onboarding document added in step 3a. This information comes directly from the specified customer websites.

5. CSM guides customers on integrating Further's platform on their website(s) by following the instructions found at https://talkfurther.notion.site/Further-Virtual-Sales-Assistant-VSA-Website-Script-Installation-Instructions-ac1918df9c5448489ce8a60479843fee.

6. CSM creates a Zendesk ticket by emailing support@talkfurther.com with a link to the Notion page.

7. L1 Support configures and QAs the Virtual Sales Assistant product

8. L2 Support completes the CRM integration

9. L1 Support posts an update to both the Zendesk ticket and the Notion page, stating that all configuration tasks are complete.

10. The CSM posts an update to both the Zendesk ticket and the Notion page when the changes should be made live.

11. L1 Support pushes the Virtual Sales Assistant product live.
12. The Account Executive updates the deal status in Hubspot to “Launched.”

Additional Further Context

- Further’s customer service philosophy is to minimize the level of effort required by the customer. Therefore, invest as much time as necessary to deliver tasks while minimizing customer touchpoints, and provide efficient, targeted, and concise communication.
- Onboarding Roles & Responsibilities

Role	Responsibilities
Account Executive	● Customer discovery ● Deliver demo ● Get prospect approval to conduct a trial ● Overall accountability for the success of the trial as a critical step to successfully winning the deal
Customer Success Manager	● Project management of the trial ● Day-to-day customer point of contact during trial ● Product training and execution of the trial process ● Technical requirements definition ● Data/performance analysis and reporting
L1 Support	● Basic product configuration (ex., Look and feel, turn functionality on/off, etc.) ● Configuration QA
L2 Support	● Systems integration (ex. CRM) ● Complex product configuration

- It is common for the Account Executive to start collecting some information for the New Community Template Onboarding and Onboarding Template documents. This will happen on a case-to-case basis.

Additional Guidance

- An *optional* 30- or 45-minute meeting with a Further CSM team member is available for you to get more information to aid in completing the exercise. The meeting format would be a working session. You may ask additional questions to help you complete the exercise or use the time to get preliminary feedback. The final exercise submission is expected after this meeting (i.e., not during the meeting). Please let your recruiter know if you would like to leverage this opportunity.

- Understanding each field in the onboarding documents is unnecessary. They are provided as references to gain quick insight into the real-world process in use today.

- To complete this exercise, deep familiarity with Further's products should not be necessary.

Part 2 - Technical

Task One

Create a form in a local web application that collects users first name, last name, email, and phone number. When you submit the form, an event should be sent into Google Tag Manager. Configure Google Tag Manager to send the trigger into Google Analytics. Create and configure a goal in Google Analytics so you can display said event as a conversion.

Task Two

Use the form from Task one and push the information collected into Zapier upon submission. In Zapier, validate that the email and phone number are valid using a code block. If the email and phone number are valid then use the credentials below to push the lead into Further. If the email and phone number are not valid then add the user's information into a Google Sheet.

- ✅ Do not use the TalkFurther application in Zapier. Use a code block to make the API request.
- 🔑API Key: `jbhVuPYn.vHR5WMQjy60k0fsAqJFqm0yPHGek86PT`
- Community ID: 142430
- Documentation: https://api-docs.talkfurther.com/#746b4bf4-a785-4b90-9a85-a3202b787e66
- Success looks like: `{"success": "Created new Lead"}`

Task Three

Implement deduplication logic in your Zap, so that if a lead with the same phone number resubmits themselves, a new lead is not created. Instead an email notification is sent out to notify that a lead has revisited the form.

Task Four

Please use CSS, HTML, and/or Javascript to style your project in a way that is aesthetically pleasing, simple, and creates a great user experience.

Deliverables

1. Web form source code made available via either downloadable package or online repository.
2. Create a Loom (https://www.loom.com/) demoing your application and how it works. Please ensure the demo includes the events in Google Tag Manager and Google Analytics as well as the results from the Zap. Then, explain how you implemented each task including challenges and tasks.