

Head of Global CRM Sitecore



Who Is Sitecore

Sitecore is the global leader in customer experience management that lets marketers own the experience they deliver to their customers and prospects.

Sitecore:

800+ Employers

500 + Users

Microsoft WW Global Partner

Dynamics CRM 2011 On –premise +
Outlook Integration

3000 development hours in 5 years

SITECORE EXPERIENCE PLATFORM (XP)

Sitecore XP consists of...

- Sitecore Content Management System (CMS)
- Sitecore Experience Database (xDB)
- Sitecore Experience Marketing applications
 - Experience Analytics
 - Experience Profile
 - Experience Optimization
 - List Manager
 - Path Analyzer
 - and more...

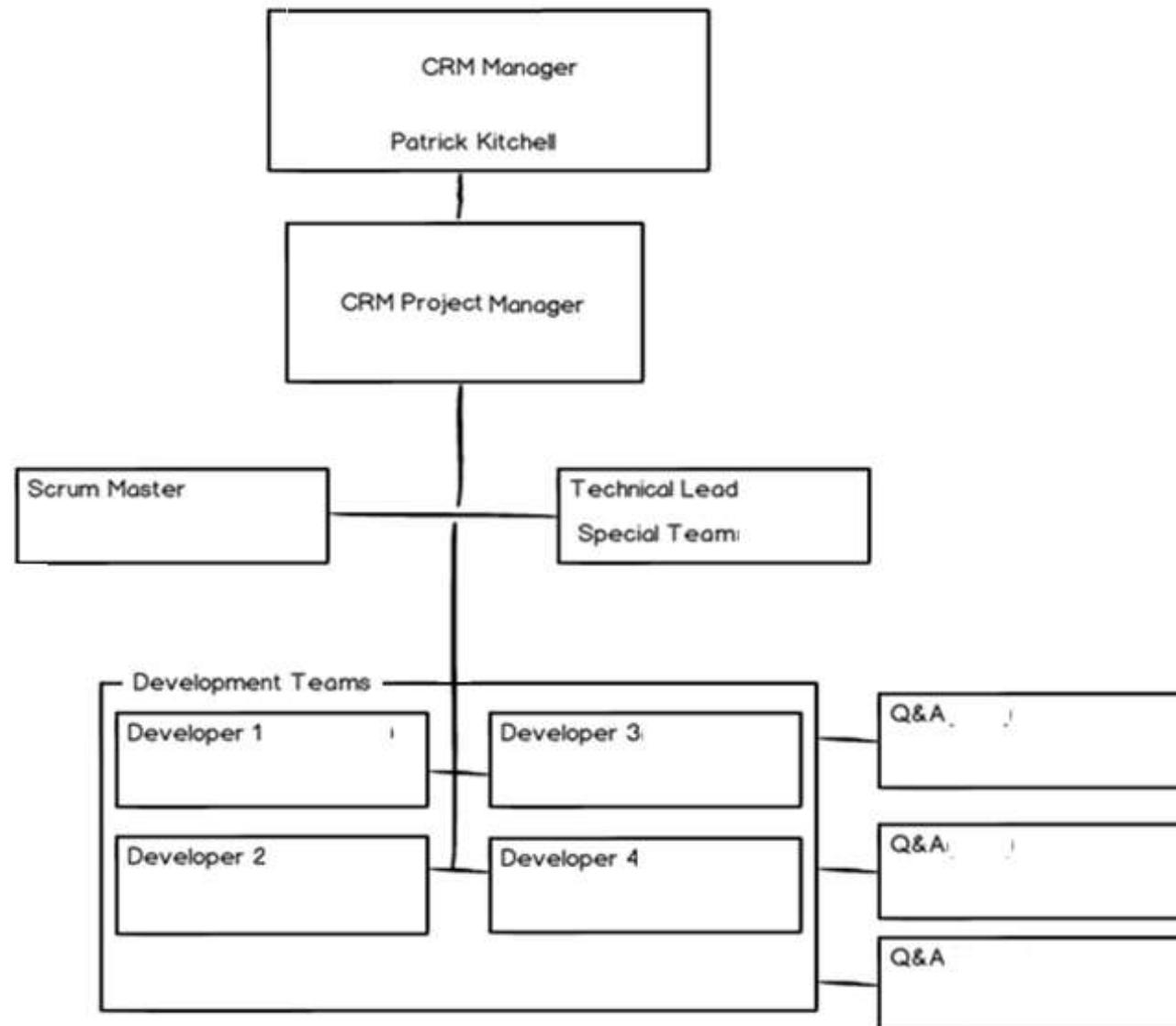


My Role

- Drive high data quality in conjunction with CRM users and other key stakeholders.
- Drive roadmap in alignment with key stakeholders and the communication plan.
- Manage the CRM Team be responsible for the output of value driven goods produced and managed by the individuals in the CRM team
- Works closely with Team Lead to ensure best technical solutions are implemented and delivered.
- Gather, analyze, and define end user requirements for MS Dynamics CRM access and usability in accordance with business objectives with stakeholders across the company.
- Ensure that Microsoft Dynamics CRM and our related/connected systems and applications meet corporate objectives, fulfill end-user requirements, and enhance productivity by identifying, resolving and prioritizing business requirements with stakeholders across the company.
- Engaging and building relationship with key business drivers inside Sitecore in regards to current processes and systems to help understand how to deliver the best value



My Team



CRM Team Responsibilities

- **Handle Service Desk Incidents:** 2 days a week
- **Handle Development Based on Scrum:** See Scrum Process
- **Manage Production CRM: Service, Updates, Up time, etc.**
- Manage Integration Points to CRM and From CRM
- Manage Test CRM: Service and Updates
- Manage Deployments between the various test CRMs to Production
- **Test and Log all bugs and errors**
- Technical Debt: responsibility to clean up all loose ends when moving "too fast"
- **Create Documentation**
- Create and strive towards Team goals based in the Ukraine
- Create and strive towards personal development goals based in the Ukraine



Projects

Sitecore DMS to Dynamics CRM integration

November 2012 – January 2015

Working in cross collaboration teams to move granular analytic web information from our analytic database to our dynamics CRM 2011 system to offer marketing better understanding of campaign and goal conversion. This adds to our already existing DMS to CRM integration where we push in DMS goals into Dynamics CRM 2011 as a new activities. There is tremendous value of having this data into the CRM...

Global Lead Process

Starting August 2012

Designed and implemented a global lead process using Dynamics CRM and setting an automated flow of leads into a traditional lead waterfall model that auto drives leads into countries with single or multiple sales territories. This process and system support offers end to end transparency about which marketing campaigns are driving revenue and offering governance into how long MQLs and SQLs sit...

CRM and Licensing System Integration

July 2012

Help to scope and implement integration between Dynamics CRM and an internal computer licensing system starting on the opportunity and pushing back an orders and invoicing

Account and Contact Auto binding

January 2012

Designed and implement with a team of developers automation that allowed for the binding of contacts to accounts.

Channel Revenue Reporting Process

May 2012

Led a process that helped Sitecore find and understand which originating channels in marketing where driving revenue. This process was rolled out to all business units and included a data scrubbing stage, an automated data worksheet giving marketing an overview over of earliest channel point from either the analytic database, CRM or the sales team

Dynamics CRM Ninja Analytics

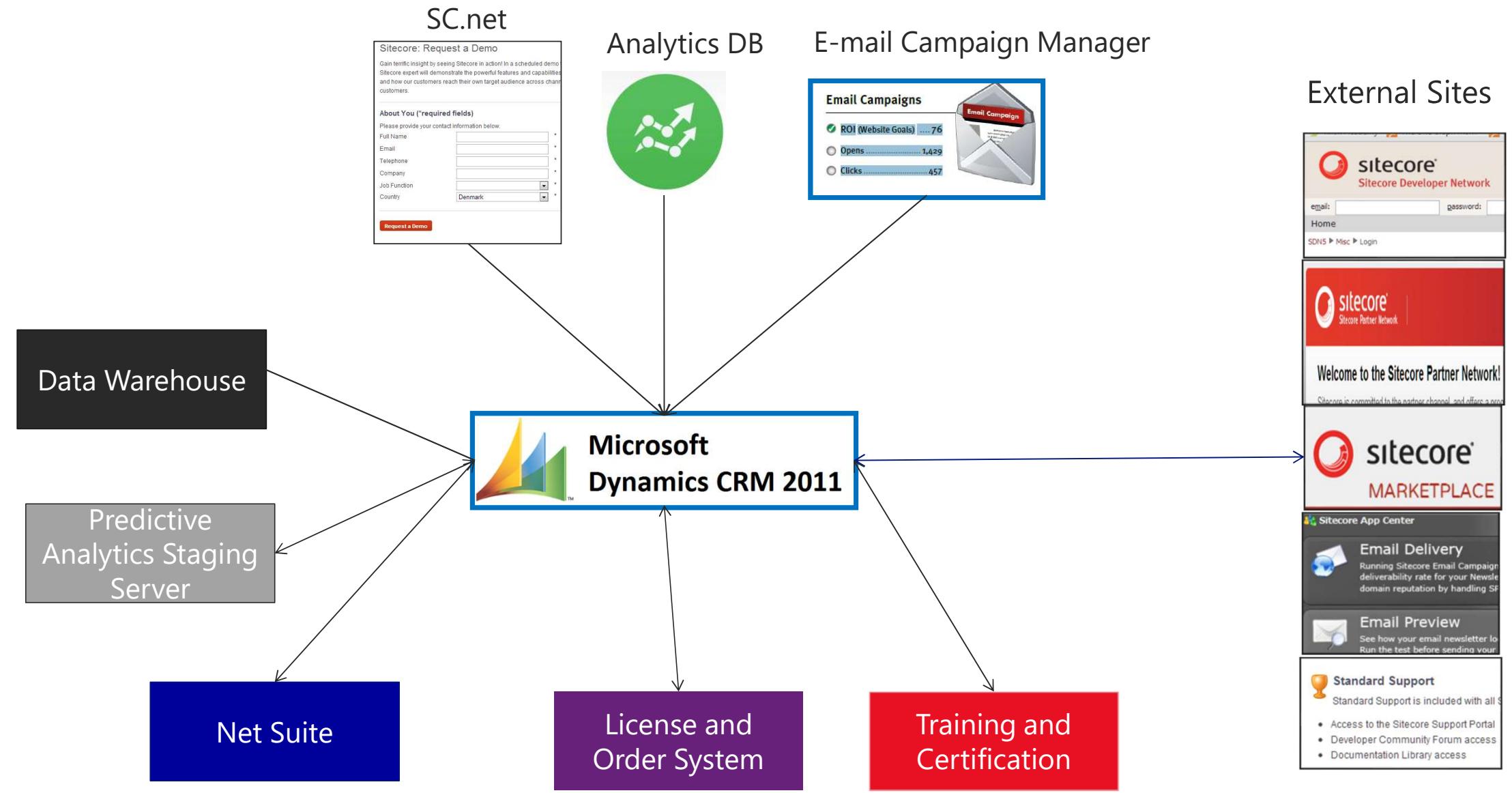
March 2012

Project Manager on building predictive analytic from data sets including Sitecore session data and CRM activity pool and opportunities. The goal was to score accounts, contacts and opportunities based on how relevant they are to Sitecore based on how active they are currently measured against which past activities led to revenue.



Integrations





Skill Sets: Technical Lead/ Architect



Summary

- About 6 years of work with MS Dynamics CRM (MS CRM 2016, 2015, 2013, 2011 and 4.0).
- Design, customization, installation, administration and maintenance of MS CRM.
- Experienced in MS CRM development (Plug-ins, Custom Workflow Activities, ISV, etc.)
- Using satellite technologies like C#, Silverlight, SQL, JavaScript, jQuery, Knockout.js, SparkleXrm, SSRS, SSIS, HTML and ASP.NET.
- Integration MS CRM with other systems.
- C#, ASP.NET
- SQL, MS SQL Server (including stored procedures, views, functions) , SSRS, SSIS
- VBA, Excel add-ons development, PowerPivot
- PowerShell
- Other tools: SVN, TFS, Resharper, StyleCop



Skill Sets: Developer

- Develop solutions and projects based on Microsoft Dynamics CRM
- Installation, administration and customization Microsoft Dynamics CRM 4.0
- Setting up forms / views, the establishment of entities / attributes
- Programming additional functionality: plug-in, javascript, ms sql, optimization of work
- Writing ASP.NET pages and integrating them into the interface of Microsoft CRM (ISV.config, sitemap)
- Creating Reports with MS SQL Server Reporting Services
- Used technologies: C#, JavaScript, T-SQL, ASP.Net



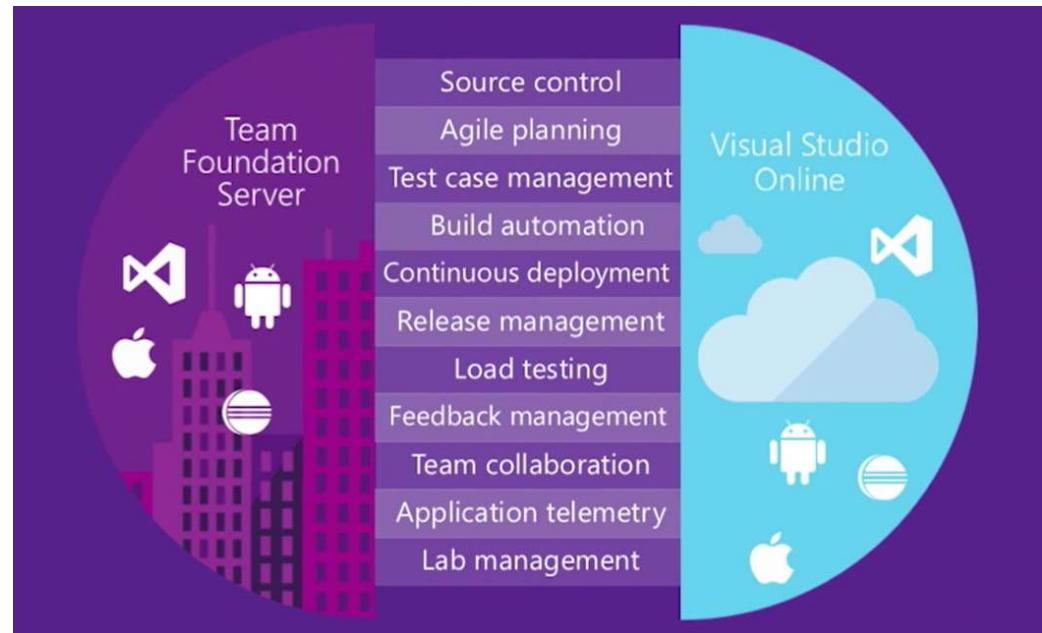
Method Of Working



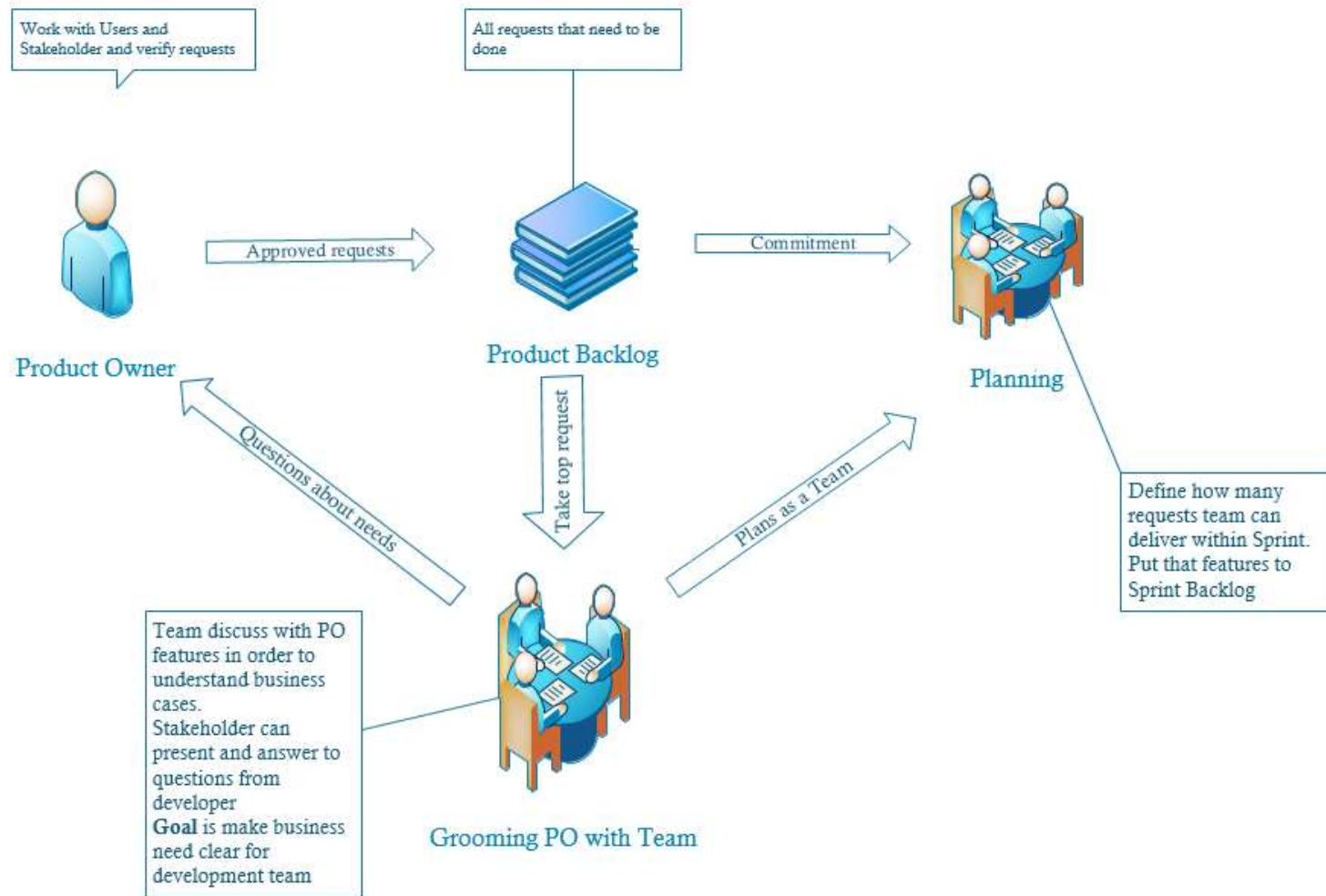
Gathering Business Requirements

Business Logs Requirements \longleftrightarrow Developers Work From Backlog

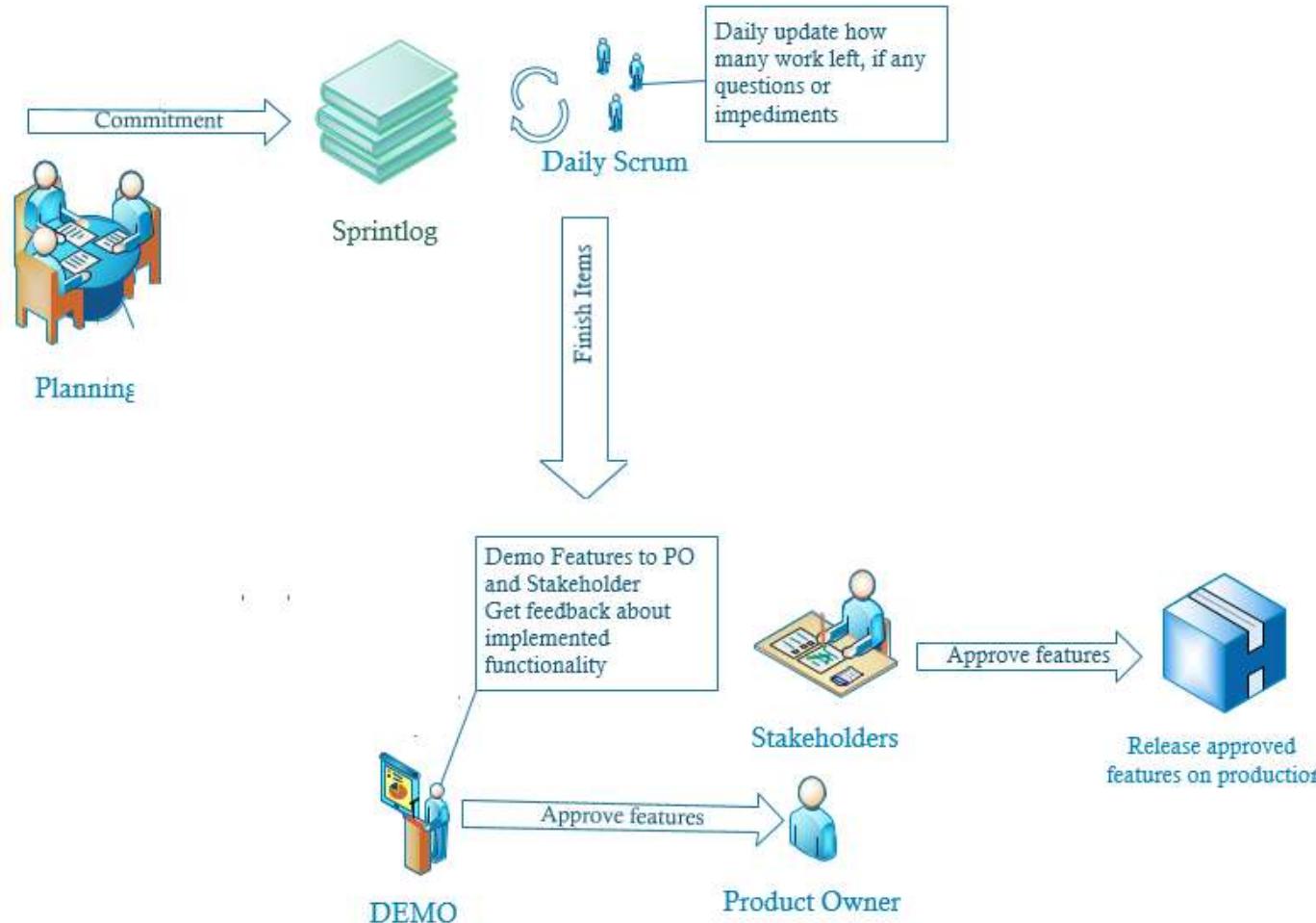
The Atlassian JIRA Software interface features a top navigation bar with links for Products, Teams, Support, Try, Buy, and a search bar. Below this is a secondary navigation bar for JIRA Software with links for Features, Enterprise, and Pricing, along with a 'Get started free' button. A large banner on the left claims 'The #1 software development tool used by agile teams' with its own 'Get started free' button. The main content area displays a 'TIS-70 Scrum Board' with columns for 'To Do', 'In progress', and 'Done'. It lists several tasks, each with a brief description and status. On the left sidebar, there are sections for 'Teams in Space', 'Project blueprints', and 'Product blueprints'.



Method of Working: Scrum



Scrum Process: Commit to Develop



What is the Backlog

A backlog is a list of items requested by people in the business. All backlog items get an ID and a priority based on discussions with stakeholders and users that request functionality.

ID	Title	Backlog Priority	Effort
10619	[CRM][LOS integration] Notify all actors in the workflow when invoices email is being send	2600	5
13937	[Handover][SP1] Opportunity Creation Hindrances	2000	8
14394	[CRM][LOS Integration] Create Credit Notes	2000	8
14552	[Handover][SP1] New Field on Qualification Record Creation and Qualification Record	1900	2
13932	[Handover][SP1] Notification for New Responses on existing QR	1900	5
13933	[Handover][SP1][BANT] Include BANT Criteria dropdowns	1899	1
13934	[Handover][SP1][BANT] Calculate Bant	1898	3
13940	[Handover][SP1] Notification my SQL is re-marketed	1884	8
13945	[Handover][SP1] Opportunity Lost Needs Competitor as reason	1883	5
13946	[Handover][SP1] Opportunity WON --Partner	1882	5
13942	[Handover][SP1] Show Target URL on email links in Score Report	1850	21

The Priority dictates which items get worked on in the period where the developers develop.

Backlog Items Effort Points

Developers in coordination with their scrum master will estimate items by difficulty. This scale is from 1 – 21. The purpose of this ranking is understand how hard it is to complete and help estimate how many items can be completed in the 2 week period.

Efforts	Examples
1	Add checkbox on the Account form (monitored account) Get list of items from the DB (references) Add new column on the View Add new tab with dropdowns on the QR form (BANT) Disable opportunity button on the ribbon
2	SQL scripts for update smth in one action Create new entities (references on account) Create job Create rule for promotion(workflow) New lookup field on QR form
3	Create / Modify Reports pdf report generation (title default tax 0%) Plugin for calculation some logic on QR creation (BANT)
5	Update Orders and Invoices from LOS Change invoice status when activity is send out trigger calculation on some events (BANT) Notification for New Responses on existing QR Opportunity Lost Needs Competitor as reason Opportunity WON --Partner
8	"Regenerate Invoice" button Add field on silverlight and logic CRM portal integrations LOS Create Credit Notes Notification my SQL is re-marketed
13	New Field on Qualification Record Creation and Qualification Record Prototype QR creation form
21	Show Target URL on email links in Score Report
?	

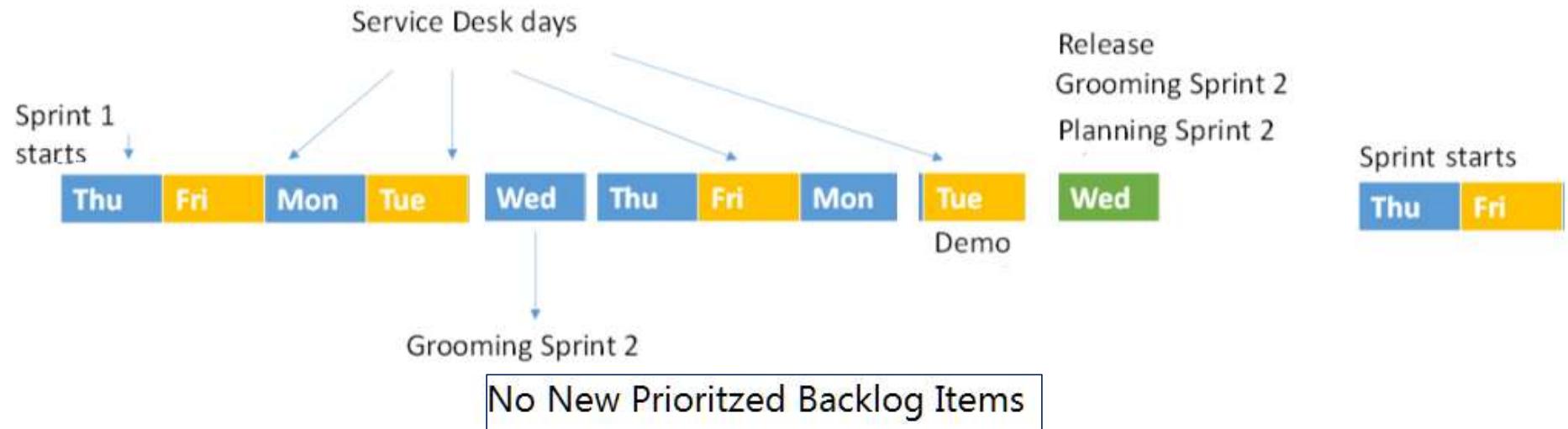
Development Cadence

Development Cadence is the predictable timeline that development follows so that all parties involved can manage the expectations involved in project work as well as individual functional work where no project is defined.

The current length of a sprint for the CRM Team is 2 weeks. This can be changed if the need arises.



Development Cadence



Service Desk days are every Tuesday and Friday – 2,4,7 and 9 day of the Sprint

Grooming meetings are every Wednesday (next Sprint feature discussion). 12:00 PM UA tz

Demo is scheduled on 9 day. 12:45 PM UA tz. But can be held early, when feature is ready.

Release on production on last day. Can be changed according to PO needs.

Planning on last day of the sprint at 4:00 PM UA.tz. Commitment letter right after meeting.

Retro on last day of the sprint at 4:45 PM UA.tz

Stake Holder Management

Single Point of Contact

- Rely on a single appointed BDM to prioritize needs
- Rely on single appointed BDM to communicate up the chain
- Weekly communication

Stakeholder Voting

- Team of Stakeholders vote on prioritized needs
- Monthly cadence on voting

Take Away - Success

- Process education to stakeholders and executives is key
- Transparent communication to users and input from them is key
- Proper skillsets and strong development team management leads to best productivity.
- Known technology finding skilled resources is easy.
- System flexibility makes all things possible(integrate to any system) however, stick to standard
- Proper testing and development environment is crucial



Take Away - Negatives

- Executive Management requests for functionality can be a power trip.
- Without education and transparency frustration and confusion arises on both the top and the bottom of the organization.
- Single Point of Contact becomes a political chip.
- Deviation from standard causes technical debt, creates delay.

