

Requirements Review

SIGMA 360 project – SALESFORCE – CRM ALPHA – 2023

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Context

EKOVYA works with 1000 customers and receives about three orders by customer per year. It also works with 200 suppliers.

EKOVYA's goal is to become a medium-sized company.

The CRM Alpha Team is in charge of implementing the Salesforce solution (Sales Cloud, Professional Edition) to be linked to an e-commerce website referencing the products catalogue of EKOVYA. The CRM Alpha Team is also charged of connecting the Salesforce solution to the e-commerce website.

Customer requirements

1. The customer journey on Ekova's e-commerce website
 - a. The customer journey must be seamless and cross-channel.
 - b. The website must:
 - I. Be user-friendly, with consistent navigation and well-organized layouts.
 - II. Load quickly, respond promptly to user input, and does not crash (loading page not superior to 10 seconds).
 - III. Work consistently across latest versions of most commonly used devices and platforms: web browsers (latest versions of Chrome, Safari, Opera, Edge) mobile devices (reference Iphone 11), and desktop computers (reference Lenovo Thinkpad). No pad special edition.
 - c. Transitions between different screens, features, or functions within the application must be designed to be fluid and natural, enhancing the overall user experience.

2. The Information System (aka Salesforce)

- a. The information system must be intuitive and fast.
- b. The Information System (Salesforce and other tools) must be accessible from anywhere, with cloud technology. Salesforce is accessible through the cloud by default. The team CRM Alpha will design and build the other tools of the Information System to be also accessible by cloud as far as each tool allows it.
- c. The Information System must be delivered with a comprehensive guide of the technology used. It should provide a basic map of how the Information System will run at delivery date and in the future.

3. Salesforce will replace HubSpot

Salesforce will replace HubSpot as CRM. Data from Hubspot must be migrated from HubSpot to Salesforce, while maintaining data integrity.

4. Categories of data available in Salesforce

- a. Sales Pipeline
- b. Lead Management
- c. Customer Management
- d. Product Management
- e. Sales Related Tasks

5. Customer data migration from Excel

Team CRM Alpha will migrate EKOVA's customer data from Excel files to Salesforce.

6. Number of Salesforce users: 4 users (including 2 Key Users)

Alexandre GAIN (EKOVA's Director), **Elizabeth GOLOVANOV** (EKOVA's Sales Director): Admin accounts, Access to all data.

Sales and Marketing Manager: Access to all data, all functions, and all reporting.

Sales Representative: Access own records, sales functions, and parts of reporting (to be specified).

7. Building of a new e-commerce website

- a. Built with WordPress and integrating WooCommerce.
- b. The e-commerce is exclusively B2B.
- c. The confirmation of a customer basket triggers a sales order in SAP (SAP manages sales orders, delivery schedules, invoices, payments and dunning, and stocks level).
- d. Manage bundles (products in packages triggers price offers).
- e. Manage Coupons (promotional codes).
- f. Management of cross-selling (products suggestions).
- g. Management of up-selling (propositions for product upgrades/promotions while shopping).
- h. Price management by customer categories: with a certain amount of purchase, customers get privileged access (premium, gold, VIP) and gain advantages (e.g. -5% on specific products). Special rate grid for categories of clients with special access to an account. -> online account creation for customers.
- i. Standard prices in Euros. Change rate automation feasibility must be studied.
- j. Creation of the e-commerce on the subdomain "shop.ekovya.com" (and not an URL like "ekovya.com/shop").
- k. Degressive prices relative to quantity of purchase.
- m. Real-time stock levels accessible for the SAP back-end user (sales rep) but not for the customer.
- n. Ability for the Sales Rep to show the level of stocks he wants to gain control of marketing strategy.
- o. New business: account creation form sending a mail to Salesforce for Sales Representatives to create new customer accounts.
- p. Creation of a customer basket issuing a command number to be sent to SAP (web version of SAP possible).
- q. Creation of a customer basket allowing price study and turning into a quotation to be transferred to SAP to facilitate commercial callback.

8. Basket Confirmation Process

- a. Only logged customers can pay because of contractual commitment - specified in the General Terms and Conditions of Sale - It is not possible for a customer to create a shop account on his own. Only the salesperson has this authorization.
- b. Creation of a sales order in SAP when the customer confirms basket purchase.

Commenté [E[1]: ATP - Ability To Promise
ERP responsibility to -> confirm/infirm sales order and send email to client with delivery schedule.]

- c. The customer pays with the sales order ID number while paying via bank transfer.

9. Multilingual website

- a. The website must be available in French and English.

10. Calculation of shipping costs

- 1. Customer journey must include calculation of shipping costs only in UE (Swiss and GB included), based on partner shipping companies' costs: UPS (classic shipment) and Chronopost (fast shipment).
- 2. Blocking purchase if stock unavailable.

Commenté [E[2]: Opening an issue -> no payment via the website; only on sales rep. confirmation.

11. Centralization of Sales and Marketing data

- a. The Information System must centralize digital marketing campaigns and their KPIs.
- b. Creation of a leads file with push-up notifications for Sales Representatives when contact form received.
- c. Delete duplicates in the lead's files by origin.

12. Marketing tasks automation

In the context of customer acquisition, and to reduce recurring tasks, the following marketing tasks will be automated as much as possible:

- a. Correspondence Management (mailing) with Ekovya address. (Emailing will be managed with Brevo, to be integrated with Salesforce)
- b. Gift coupons
- c. Linked manual entrances on website to salesforce leads database
- d. Newsletter
- e. Inscription on mailing list (on will of customer)
- f. Mail for first contact registration -> CTA on a landing page inviting to request account creation
- g. Account creation confirmation mail (username, password) -> commercial notification of account creation.
- h. Post-order satisfaction form
- i. Confirmation/thanking mail following a phone call ("thank you for your time, I noticed that...") to optimize time of sales representatives.
- j. Follow-up after abandoned basket.
- k. Automatic creation of coupons for abandoned baskets.

13. Ekovya must have access to the following website data and KPIs

The Information System must provide Ekovya with key data to observe customer journey:

- a. Cart abandonment rate
- b. Amount of income generated by the website
- c. Statistics of visit of each store categories
- d. Browser type
- e. Visitor's country
- f. First orders of each account

- g. Number of new clients
- h. Acquisition rate (rate of new clients compared to already acquired)
- i. Average customer basket
- j. Bounce rate (+ as below as possible)
- k. Average visit time of visitors
- l. Number of account creation demands
- m. Number of account creation demands honored