SIGMA360 Salesforce Blueprint

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1. Introduction

This Blueprint describes the roadmap of the SIGMA360 Salesforce Project. The team of consultants known as CRM Alpha is responsible for the execution of this project as an internal initiative.

1. 1. Context

EKOVYA operates with a customer base of around 1,000, each placing around three (03) orders a year. In addition, the company maintains relationships with 200 different suppliers.

Vice-President Alexandre GAIN has internally hired the CRM Alpha team to help with its business development strategy. The team will be responsible for implementing a CRM solution.

This commitment runs from August 21st, 2023, to December 9th, 2023, with production starting on November 2023.

To meet the customer's needs, the CRM Alpha team organized a scoping meeting. The background and needs were documented in the Scoping Note, explaining the global strategy of the company.

EKOVYA is a small, dedicated company known for its versatility and commitment to excellence in a variety of fields. EKOVYA offers a wide range of high-quality products and services. As for now, it operates exclusively in France but looks forward to expanding its market shares across Europe.

1. 2. Activities

EKOVYA's main activities are classified as follows:

Solutions Division: this division focuses on trading in office furniture and IT equipment.

Consulting Division: EKOVYA specializes in engineering and project integration through its consulting service.

Innovation Division: EKOVYA specializes in engineering outsourcing and prototyping through its innovation department.

Communication Division: currently on hold, it remains a potential avenue for future projects.

1. 3. Objectives

1. 3.1. Global strategy

EKOVYA's long-term strategic objectives are to **grow into a mid-sized company.** To achieve this, it aims to:

- *Expand internationally;*
- *Develop commercially through sales growth;*
- *Optimize organizational management.*

The CRM ALPHA team will implement a CRM solution to help EKOVYA achieve its objectives.

1. 3.2. Concrete Actions

Five main actions will be taken:

1. Creation of an e-commerce website;
2. Integrate the e-commerce website to a Customer Relationship Management software (CRM);
3. Automation of marketing tasks;
4. Data migration from flat files and from Hubspot to the CRM software;
5. Integrate the CRM with the company's Enterprise Resource Planning software (ERP).

1. 4. Respect of French and European legislation

SIGMA360 Project respects the European RGPD legislation.

2. Customer requirements

2. 1. Customer requirements: website design

The creation of an e-commerce website involves several stages, from design to maintenance. The aim is to offer customers a pleasant, secure, and efficient online shopping experience, while maximizing the site's visibility on search engines to attract more visitors.

The team CRM ALPHA will design the already existing website with a content management system (CMS). This solution offers a wide range of themes and plugins that can help create a customized and professional-looking website, respecting EKOVYA's graphic charter.

Here are the steps to design the website with Wordpress:

2. 1. 1. Select a Theme

The team chose a WordPress theme named "*Consulting*" that suits the website's style and purpose. It will allow the team to make design changes like site title, tagline, logo, and site colors, and customize the header and the footer.

2. 1. 2. Create Pages and Content

The team will use the page builder Elementor to create essential pages like "Home", "About EKOVYA", "Contact", "Employment Offers" and "Blog".

2. 1. 3. Enhance Security

To protect the website visitors from the risks of a cyberattack and its consequences, the team will set strong passwords requirements, 2 factor authentication, and consider using a security plugin like Wordfence.

The team will also ensure the website's security by regularly updating WordPress themes and plugins.

To restore lost or damaged data in the eventuality of an incident, the team will back up the website with recurrent databases and files saving procedures.

2. 1. 4. Launching the website

Once the EKOVYA’s manager is satisfied with the website's design and functionality, it's time to launch it for the public to see.

2. 2. Customer requirements: easy to use website

A website ensures that visitors can easily navigate and find what they’re looking for.

To achieve this, the team will implement a range of solutions:

2. 2. 1. Images optimization

This option lets us compress and resize images to reduce their size while maintaining their quality. We will also use modern image formats like WebP when supported by browsers (Chrome, Opera, Opera Mini, Edge).

2. 2. 2. Code optimization

In the code, there are often spaces, tabs, and line breaks used for readability, which aren't necessary for the browser to understand the code. These can be safely removed without affecting functionality. Developers often include comments in their code to explain its purpose. While helpful for humans, comments are not needed by browsers to render a web page. Therefore, they can be stripped out during minification.

2. 2. 3. Content Delivery Network (CDN)

The primary purpose of a CDN is to deliver web content, and more, to end-users more efficiently and quickly. CDNs work by caching content on servers located strategically around the world. When a user visits the website, the CDN helps deliver content automatically selected from the nearest server to the user's location. This reduces the physical distance the data needs to travel, minimizing latency. CDNs can also apply compression techniques to reduce the size of assets before delivering them. Smaller file sizes mean faster downloads.

Ekovya may use various CDNs on the market that would cost between 0,01 € and 0,081 €, like Bunny CDN and Azure Microsoft.

2. 2. 4. Browser Caching

This solution will improve the website's loading speed, implementing cache information to instruct browsers to store static assets locally, thus reducing the need to re-download it on subsequent visits. Ekovya may use a caching plugin like W3 Total Cache in Wordpress.

2. 3. Customer requirements: e-shop

The consultant team is in charge of creating the e-commerce website by using a plugin for CMS that can turn the site into a fully-fledged online store. Here are the steps to install and set-up the e-commerce website.

2. 3. 1. WooCommerce

The team will install WooCommerce to configure the settings as follow:

2. 3. 2. Add products

The team will enter product details such as title, description, price, images, and set product attributes and variations (e.g., sizes and colors).

2. 3. 3. Shop design

The team will customize the appearance of the shop by respecting the graphic charter: policies, colors, fonts, images, and layouts to match EKOVYA's brand identity.

2. 3. 4. Shop organization

The team will create product categories according to EKOVYA documentation on the matter, allowing EKOVYA Sales Services to add products according to a procedure. The team will add products to test the structural functionality of the shop organization.

2. 3. 5. Customer account creation

EKOVYA requires the creation of a customer account to access automatic purchase and other privileges, such as being able to see the level of stocks in real-time, by setting-up a "create account" button located in the "menu" or the"Home page" which will redirect the customers to a registration form where they can provide personal information.

Required fields will be set-up, the visitors must insert a corporation number, and other fields typically include: Full Name, Email Address, Password, shipping address, and a Siret number.

This form is called a “lead form” and is going to be implemented into Ekovya’s website.

2. 3. 6. Customer payment

EKOVYA’s website will provide instructions to the customer on how to make payment via bank transfer.

2. 3. 7. Manage bundles

In order to manage bundles in EKOVYA’s shop, the team will need a plugin, such as “WooCommerce Product Bundles” and “WPC Product Bundles”. The plugin allows us to choose whether the bundle will consist of fixed products (pre-defined) or customizable products (allowing customers to choose from a list of items), and configure pricing rules, such as setting a fixed bundle price or offering a discount compared to buying individual products separately. It also can enable us to promote bundles prominently on the website by adding them to the shop, product category pages, and homepage.

2. 3. 8. Manage coupons

In this step, the team will create and manage coupons via WooCommerce, and fill out the coupon details, including the coupon code, description, and discount type (percentage, fixed amount, or free shipping).

We can also configure usage restrictions such as minimum and maximum spend, usage limits per customer, and product/category restrictions, and set usage limits for the entire coupon, such as the total number of times it can be used across all customers.

WooCommerce can help us to specify how many times an individual customer can use the coupon, if applicable, and set an expiry date for the coupon to create a sense of urgency.

2. 3. 9. Management of cross selling

Our team will select the products that sales representatives want to recommend to customers when they view the current product, to configure for cross-selling.

Cross-sell products are typically displayed on the cart page, encouraging customers to add complementary items to their order before checkout.

WooCommerce can help us to promote cross-sell products on the website by adding them to product pages, especially on product detail pages.

2. 3. 10. Management of up-selling

By navigating in WooCommerce, we can select the product to configure for upselling. Upsell products are typically displayed on the product detail page, encouraging customers to consider purchasing a more advanced version of the product they are viewing.

2. 3. 11. Price only in Euro

Within WooCommerce, we can configure settings to determine the stores's location and currency. Ekovya can set-up a plugin "WooCommerce Multilingual and Multicurrency" dedicated to exchange rate.

2. 3. 12. Number of clients

In the Customers section, in WooCommerce back office, we can see a list of all customers. The total number of customers is typically displayed at the top of the list.

To have more detailed information about the customers, we can export the customer data to CSV files, and open it using spreadsheet software like Microsoft Excel or Google Sheets.

2. 3. 13. Degressive prices relative to quantity of purchase

WooCommerce allows us to edit or create a product for which we want to offer degressive pricing based on the quantity purchased.

If the product has variations like sizes or color, we can configure tiered pricing to do so. For example, if we want to offer a discount for buying 5 or more units, we can create variations like "1-4 units" and "5+ units."

By default, WooCommerce will display the price range and let customers select the variation that matches their desired quantity.

2. 3. 14. Multilingual – French & English

The website must be available in French and English

For this step, our team will need to install and activate a translation plugin like "WPML" or "Polylang." to configure the language settings. We will then add French and English as the languages to support on the website.

2. 3. 15. Creation of a command order number

Our team here needs to install a Custom Order Number Plugin in WooCommerce to customize the order number format, and prefix, "Custom Order Numbers for WooCommerce" and "Sequential Order Numbers." The custom order number format we specified will be applied automatically.

2. 3. 16. Shopping cart

The customer must have access to a cart function allowing to generate a quotation to be transferred to SAP to facilitate commercial callback.

When the team installs WooCommerce, it automatically creates a cart and checkout pages. The team will ensure they are correctly set up and published.

To add additional information or messages to the cart page, we can use hooks or plugins like "WooCommerce Customizer."

Visitors can add products to their cart by clicking the "Add to Cart" button on the product pages.

Customers can review their cart by clicking on the cart icon in the navigation menu. When ready to check out, they can proceed to the checkout page to enter their billing and shipping information.

To create the shopping cart, customers must enter information such as the name of their company, an email address, and their SIRET number. (This information is sourced from WooCommerce).

A message is sent to the sales representatives in Salesforce so that they can validate the quote.

This will generate a sales order in SAP.

Thanks to data recovery, the sales representatives can propose personalized offers in the event of a shopping basket abandonment.

2. 3. 17. Calculation of shipping costs

Calculating shipping costs involves setting up shipping methods, configuring shipping zones, and defining shipping rates based on various criteria such as location, weight, or cart subtotal.

In WooCommerce, we can create a zone, region, or country. It offers various shipping methods that enable us to configure it to our needs.

We are going to install a plug-in solution designed to make it easier for users to pay shipping costs. It will automatically calculate shipping costs based on the volume and weight of the order. The user simply needs to select the nearest relay point on a map.

	France	**European Union**	**United Kingdom**
SMALL	13,44€	20,28€	26,90€
MEDIUM	17,04€	29,16€	32,60€
BIG	19,80€	39,12€	37,90€

Legend: package size and area of delivery.

2. 3. 18. Launching the e-commerce website

Once the team configured everything and tested the website thoroughly, EKOVYA's direction must approve the result so we can go live for customers to start shopping.

2. 4. Customer requirements: integration with SAP

To be studied further with ERP Bravo Team.

2. 4. 1. Triggering command in SAP

A purchase triggers a sales order in SAP: creating a PHP call from WooCommerce to send an invite with the command number in SAP Web version to create an order.

2. 4. 2. Sending invoice from SAP

The creation of the order in SAP must automate an invoice mailing to the customer.

2. 4. 3. Real-time stock level

Real-time stock levels accessible for the SAP back-end user (sales representatives) but not for the customer.

2. 5. EKOVYA's KPIs

In order to measure website performance, EKOVYA sets up a number of indicators by using a combination of web analytics tools and e-commerce platforms.

2. 5. 1. Website performance

This measures the total revenue generated by the website during a specific time period. It's an important indicator of the site's overall financial performance. It can be tracked by Google Analytics.

2. 5. 2. Cart abandonment rate

This KPI measures the percentage of users who add items to their shopping cart but do not complete the purchase. A high cart abandonment rate may indicate issues with the checkout process or user experience. Google Analytics provides acquisition data.

2. 5. 3. Statistics of visit of each store category

Google Analytics tracks the number of visits of different categories or sections of the website.

2. 5. 4. Visitor's country

Google Analytics helps understand which areas of the site are most popular and which may need improvement.

2. 5. 5. Average visit time of visitors

The average amount of time visitors spend on the website per session, and their geographic location. Google Analytics can help us track it.

2. 5. 6. Acquisition rate

This measures the rate at which new clients are acquired compared to those who are already existing clients. It's important for assessing the growth of the customer base. Salesforce can manage customer acquisition.

2. 5. 7. Average customer basket

This KPI calculates the average value of items in a customer's shopping cart. WooCommerce can help us understand buying patterns.

2. 5. 8. Bounce rate

Bounce rate measures the percentage of visitors who land on a page and then leave the site without interacting further. A lower bounce rate typically indicates better user engagement. It can be tracked by Google Analytics.

2. 5. 9. Number of account creation demands

This counts the total number of requests from users to create an account on the website. Salesforce can create customer objects and fields to track the number.

3. Salesforce deployment

3. 1. Salesforce Accessibility

3. 1. 1. Accessibility

Salesforce is a cloud-based CRM platform that users access through web browsers. This means that users interact with Salesforce's interface via web-based applications, as opposed to desktop software.

3. 1. 2. Mobility

Salesforce offers mobile applications for use on smartphones and tablets, enabling you to access the platform while on the go.

3. 1. 3. Customization

Salesforce allows users to personalize their environment based on their preferences and specific tasks.

3. 2. Customizing Salesforce objects

Salesforce object customization lets Ekovya adapt Salesforce to its specific needs.

3. 2. 1. Lead Management

The team will create an object named Lead and custom fields to capture additional information relevant to the need.

They will create custom lead record types to categorize leads differently based on EKOVYA's sales process and customize page layouts to display relevant information and fields for different types of leads. This helps users focus on the most critical information.

Integrate Lead Assignment Rules: Define lead assignment rules to automatically assign leads to the appropriate sales reps or teams based on criteria like geography or lead source.

Note: without Ekvovya's sales process documentation, it is not possible to accurately plan ahead the time of this task.

3. 2. 2. Customer Management

To manage customer data differently from standard contacts or accounts, we will create a "Customer" object and custom fields to capture unique customer information, such as contract details, customer segment, or renewal dates.

3. 2. 3. Product Management

The team will create a custom object for product management to track product details beyond what standard objects provide. Then, add custom fields to store product specifications, pricing, availability, or any other relevant data.

3. 3. Security management

Security management is a critical aspect of Salesforce administration to ensure that sensitive data and operations are protected.

By using Profiles in Salesforce, we can assign users to profiles that define their permissions and access levels. Profiles control what records and objects users can view, edit, and delete. Additionally, we will use filed-level security to specify which fields on an object are visible and editable for different profiles.

We will use Permission sets to grant.

Alexandre GAIN (EKOVYA's Vice-President): permission to access all data.

Elizabeth GOLOVANOW (EKOVYA's Sales Director): permission to access all data.

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

Sales Representatives: permission to access their own records, sales functions, parts of reporting, and the ability to show the level of stock.

Furthermore, we will define password policies that require users to create strong passwords and change them at regular intervals, and we will enable 2FA for added security. Users are required to provide a second form of verification, such as a one-time code from an authentication app, in addition to their password.

3. 4. Centralization of Sales and Marketing data

Centralizing Sales and Marketing data in Salesforce is a crucial step to ensure that the company's employees have access to a unified view of customer and prospect information.

The team will start by defining the specific data that both the Sales and Marketing teams need to share and collaborate on. This could include contact details, lead information, opportunity data, campaign data, and more.

This involves creating custom fields, objects, and record types to capture relevant information.

Then, integrate the data gathered from different platforms (Brevo, WooCommerce, flat files, Hubspot) to Salesforce. This integration ensures that data flows seamlessly between the systems.

The team can also develop custom reports and dashboards that provide insights into both Sales and Marketing data, and show the progression of leads through the sales funnel, including their interactions with marketing campaigns.

3. 5. Price management by customer categories

Managing prices by customer categories in Salesforce can be accomplished through several methods, including custom fields.

EKOVYA's expecting a definition of three **categories of customers** based on factors like account type and purchase history: **premium, gold, VIP**.

To do so, we can create custom fields on the Account or Contact object to indicate the customer category for each account or contact. For example, you can create a custom picklist field called "Customer Category."

4. Marketing Tasks Automation

4. 1. Mail for first contact registration

When new visitors demand account creation, an automated email can be sent to welcome them. This email should acknowledge their registration, provide a brief introduction to the company and services, and possibly offer an incentive to encourage further engagement.

Brevo (formerly Sendinblue) can be used to set up and automate various processes, including sending automated welcome emails when new contacts register on the website. The software covers B2C marketing needs as well as B2B thanks to its lead management functions.

Brevo emailing software offers a range of subscription packages based on the monthly volume of emails sent, from €0 to €49/month.

Free of charge: this first free Brevo package allows you to send up to 300 emails per day to an unlimited number of contacts. The free offer also includes a chat function for communicating with Brevo customer service.

Starter: from €19 per month. Allows you to send up to 20,000 emails per month, with no daily sending limit and an unlimited number of contacts.

Business: from €49 per month. Allows you to send up to 20,000 emails per month to an unlimited number of contacts and take advantage of numerous advanced features such as AB testing, removal of the Brevo logo from your email campaigns, advanced reporting, Facebook Ads creation, landing page creation from within the tool, multi-user access to collaborate with your team, and telephone support.

To use Brevo's marketing automation options, we will **make available on the website a Brevo form** for the user to fill out with information such as: name, contact, email, etc. Following this, we will collect customer data and store it in a database. We can personalize the content of the automated campaigns according to the needs of each contact, thus avoiding overly generic messages.

Finally, we will create a script that sends an email in response to the form data and integrate the email sending script into the contact form. For security, we will strive to use anti-spam mechanisms.

4. 2. Inscription on mailing list

(On customer's will)

When someone subscribes to the mailing list, we can set up an automated confirmation email. This email should confirm their subscription, include details about what they can expect from the emails (e.g., frequency, content), and provide an option to unsubscribe. To do so, the consultant team can use the software Brevo, and import the existing mailing lists into the Brevo database.

From here we can easily upload a .csv, .xlsx or .txt file, or enter the recipients manually.

4. 3. Thanking mail following a phone call

To create an automated, thank-you email after a sales representative's phone call, the consultant team can use a Customer Relationship Management (CRM) system. This email can include a summary of the conversation, any agreed-upon action items, and express gratitude for their time.

Brevo offers a large number of predefined scenarios that we can easily customize, creating our own scenarios.

4. 4. Correspondence Management

To manage mail correspondence with EKOVYA's address, the consultant team can integrate an email platform (e.g., Brevo) with Salesforce, if both services allow it. This integration can allow for:

- C*entralization of interactions with customers,*

- *Synchronizing changes in customer database,*

- *Automation of follow-up emails, such as reminders, based on Salesforce data.*

4. 6. Newsletter

EKOVYA runs a website, a blog, and an online store. It requires an essential communication tool, the newsletter, creating and maintaining a link with customers, readers or members.

Sending out a regular newsletter can meet a number of objectives:

- *Promote products or services*
- *Inform about current events*
- *Highlight editorial content*

- *Build audience loyalty*
- *Generate recurring traffic to the site/blog*

Newsletters can be automated to be sent out at regular intervals (e.g., weekly, monthly) using Brevo.

4. 7. Follow-up after abandoned basket

When users abandon their shopping cart, we can automate the creation and delivery of personalized discount coupons to incentivize them to complete their purchase. This can help recover potentially lost sales.

Brevo allows us to identify and track shoppers who abandon their carts on the website, as well as the products they leave behind. To retrieve this information, we can install the plugin Google Tag Manager. This tag manager is completely free.

Once identified, the shoppers will be added to the "identified contacts" list in the Brevo account and will enter the abandoned cart automation. After a specific delay, an abandoned cart email will be sent to encourage them to complete their purchase.

4. 8. Automatic creation of coupons for abandoned baskets

Creating automatic coupons for abandoned baskets in WooCommerce can be achieved through a plugin called "WooCommerce Recover Abandoned Cart". It allows to include dynamic coupons in abandonment emails. We can configure the discount type, amount, and other coupon details, and send abandoned cart reminder emails at appropriate intervals.

The plug-in can enable us to schedule follow-up emails to be sent at specific times after cart abandonment 1 hour later.

4. 9. Post-order satisfaction form

Automating the satisfaction survey after an order can be an excellent way to gather valuable feedback from customers and improve the company's service. Here is how you can automate this process.

First, we select a customer satisfaction management tool, such as SurveyMonkey, Google Forms, Typeform to create the satisfaction survey.

Then, we can integrate it to WooCommerce. To do this, we will use a plugin like "WooCommerce Follow-Ups" or "WooCommerce Customer Feedback Survey."

The Brevo for WooCommerce plugin will let us link WooCommerce site's marketing tools with the Brevo platform. Its installation requires no development skills.

4. 10. Posts on social networks

Ekovya may use a social media management platform that schedules and manages social media posts across various social networks. **SocialBee** helps to create and schedule posts on Twitter, Facebook, LinkedIn, Instagram (for business accounts), Pinterest, and others.

After connecting the social media accounts to SocialBee, it offers various posting schedules, including repeating content and one-time posting. We can set up different posting schedules for each social media profile.

SocialBee's category management functionalities enable companies to create multiple categories to organize and recycle content, edit posts using images, texts and links, and approve, reject, or assign posts to different social network accounts.

SocialBee offers a variety of features such as personalized links, keyword search, bulk editing tool, message preview, multiple users accounts, data importation and more.

Administrators can also schedule posts by date or time, and receive notifications for failed actions, empty categories, media import status, and others.

5. Data migration

5. 1. Data migration from Excel files and Hubspot to Salesforce

The team will make sure to create a data backup in HubSpot and Salesforce, before starting the migration process. This provides a safety net in case anything goes wrong during the migration.

In the first step, the team will prepare the data as follows:

5. 1. 1. Organize the Excel files

The team will ensure that customer data is well-organized in Excel files. Each column should represent a specific data field (e.g., first name, last name, email, phone number).

5. 1. 2. Clean and standardize data

The team will review and clean data that are both in Hubsport and Excel files to eliminate duplicates and correct errors (e.g., date formats, capitalization). Standardize fields such as country names, state abbreviations, and job titles.

5. 1. 2. Data export procedure

In HubSpot, we are going to use the export functionality "Download customer data".

Then, data will be converted into a format that Salesforce can import, such as CSV (Comma-Separated Values).

Once we gather all data in CSV files, we will use Data Import Wizard provided by Salesforce that simplifies the import process. Then, create a mapping document that specifies which HubSpot fields are to be mapped to Salesforce fields during migration.

5. 1. 3. Review imported data

After the import is complete, the team will review the imported data in Salesforce to ensure accuracy. Check for any errors or discrepancies. After that, the team will identify fields in HubSpot and their equivalents in Salesforce.

5. 1. 4. Data cleansing

The team will resolve any problems or inconsistencies in the imported data.

5. 2. Data migration from Dolibarr to Salesforce

Depending on the relevant data available in EKOVYA's Dolibarr, we will migrate data from Dolibarr to Salesforce following the same steps as the procedure described in part 6.1.

6. Visual Representation of the Information System

The Information System must be delivered with a comprehensive guide on the technology used, providing a basic map of how the Information System is supposed to run.

The Visual Representation will be part of the deliverables at the end of the project.

7. Approval

This project charter is subject to approval by Alexandre GAIN, the Vice-President of EKOVYA, before the beginning of the project.

The project team documents the work done and ensures that it aligns with the project scope, objectives, and quality standards.

The Vice-President reviews the documentation and the work that has been completed. He evaluates whether the proposals meet the agreed-upon requirements and quality criteria.

Once all concerns have been addressed, and the Vice-President satisfied that the project aligns with the initial objectives, he provides formal sign-off by email.

Responsible	**Support**	**Approval**
Dyhia AMOUR	Team	Alexandre GAIN

Signatures of CRM Alpha team members, with first name, last name, function, and date:

Signature of EKOVYA's Vice-President, with first name, last name, date, and initials on every page: