TRB

Salesforce

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BLACK & VEATCH
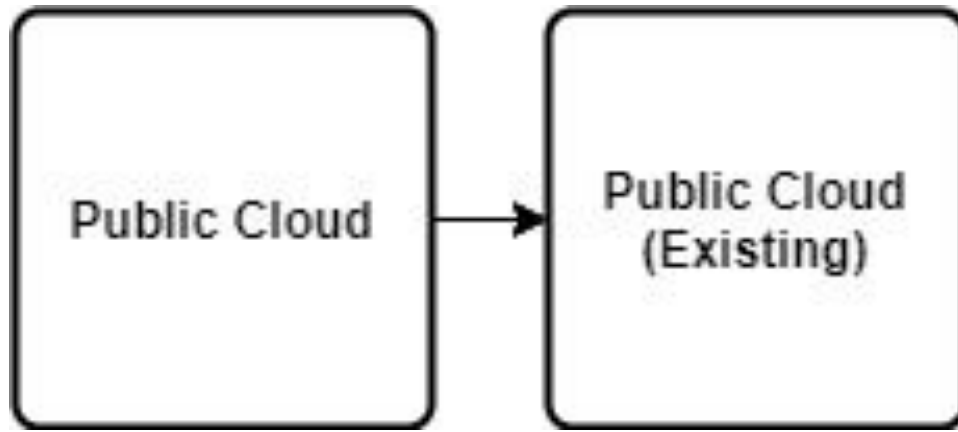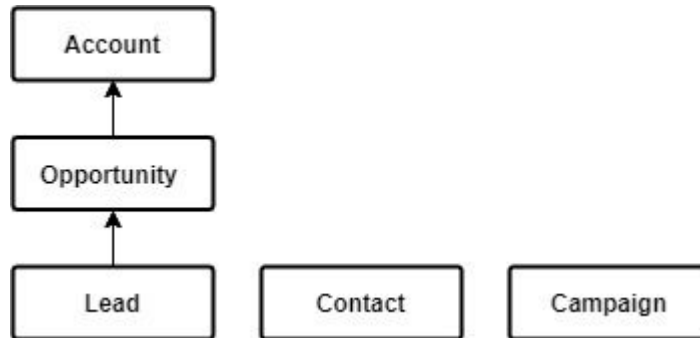
Salesforce? What is it?

- **Salesforce is a just a SASS/public cloud solution for CRM**

- **While the project is transformative…the architecture is simple…it is just a public cloud talking to existing systems and integration routes**

- **We use Salesforce Sales Cloud**
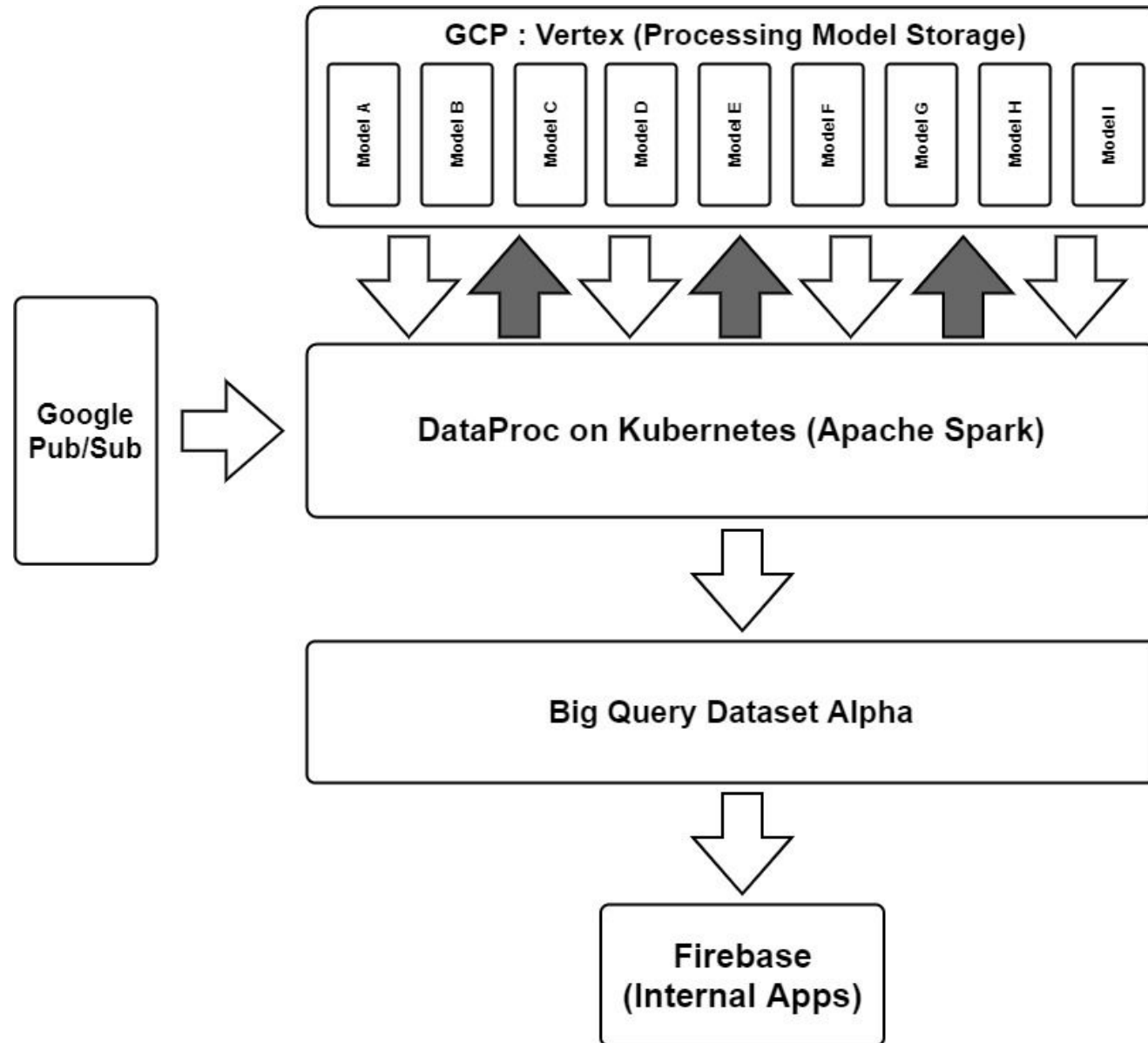
Sales Cloud?

- **Sales Cloud is 5 core objects (tables)**

- **Leads graduate to Opportunities that then convert to Accounts**

- **Contacts is our Rolodex**

- **Campaigns are how we engage**

Final Form Architecture
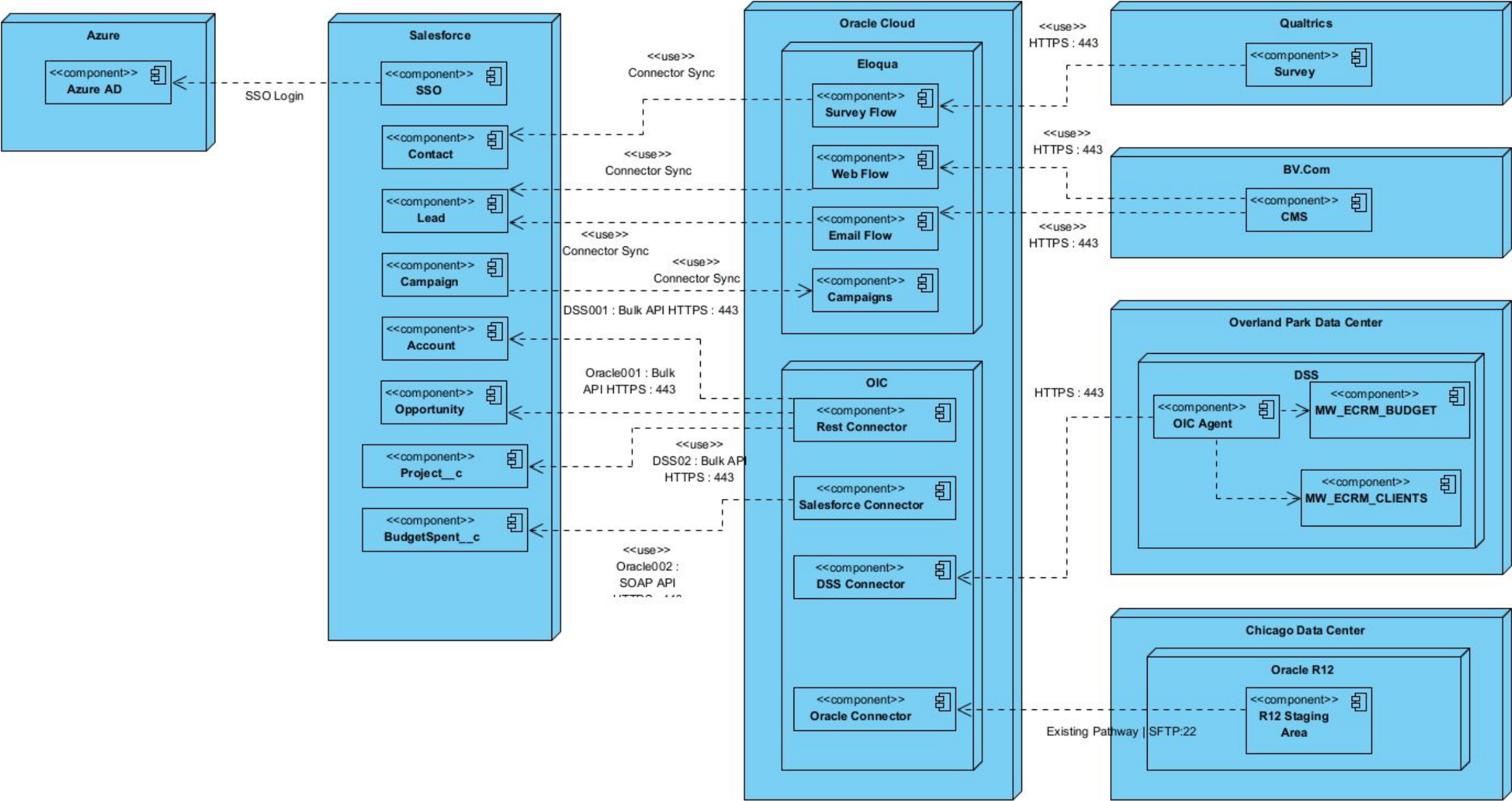
Ingestion and Initial Processing

Product Forge
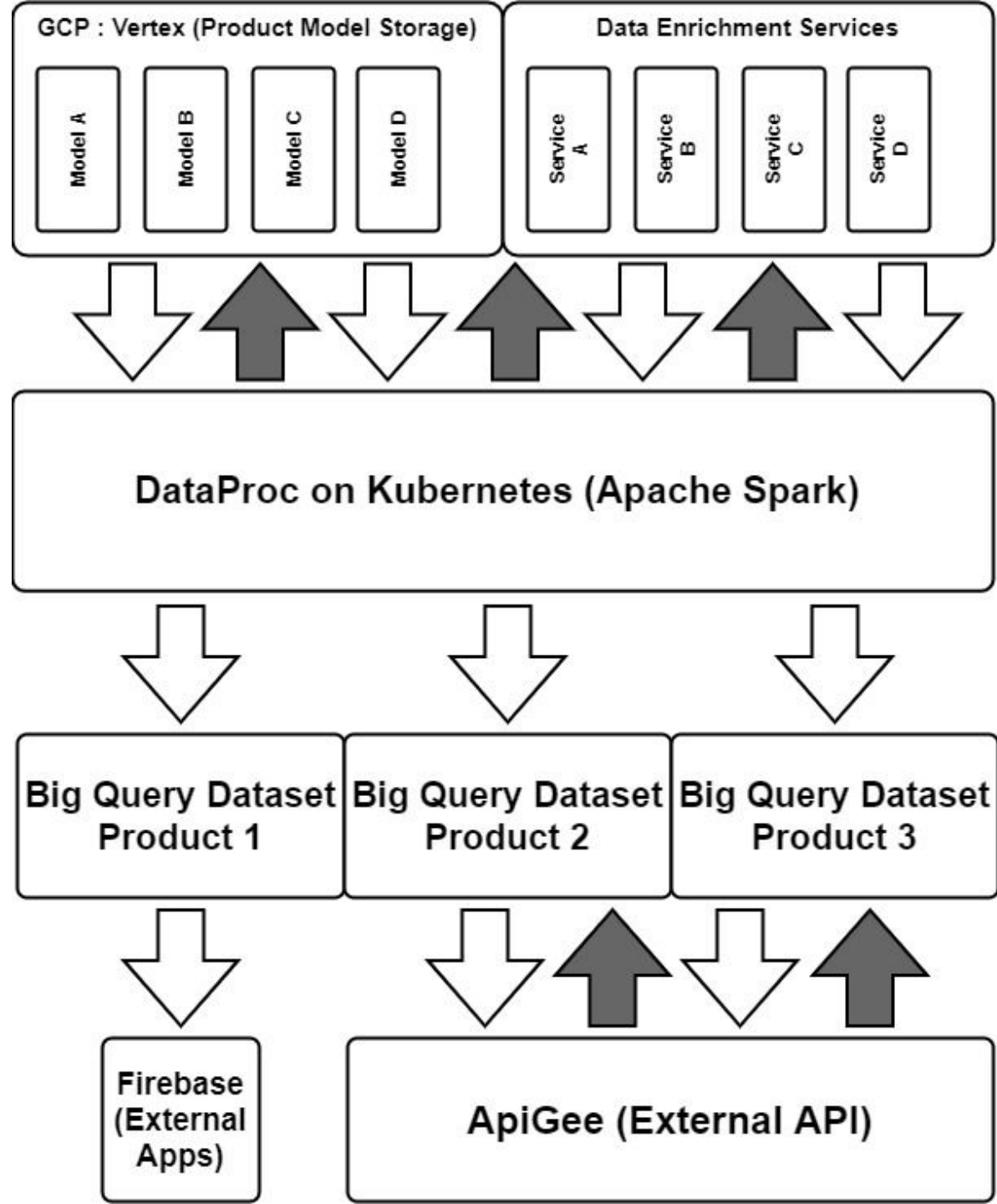
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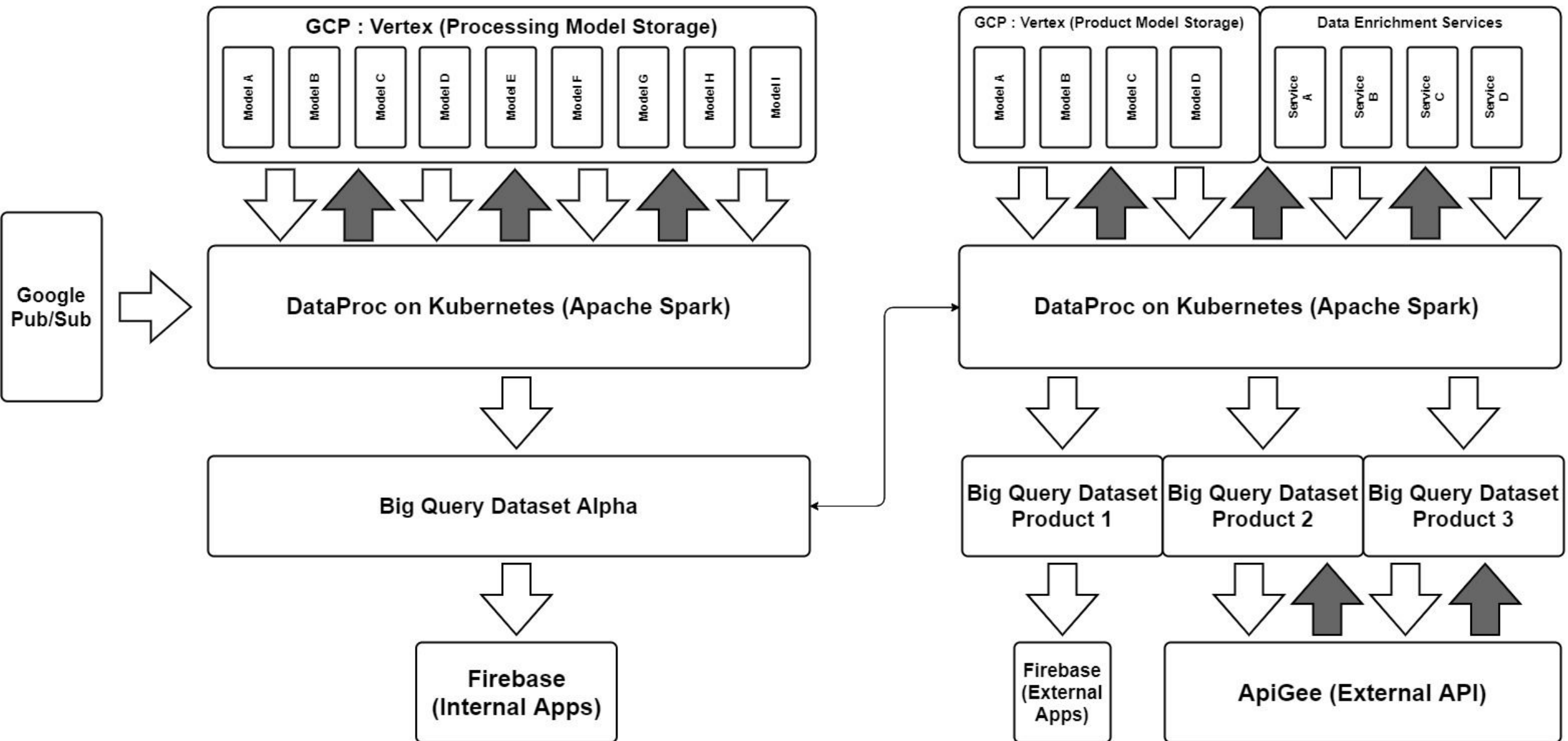
Final Form Architecture
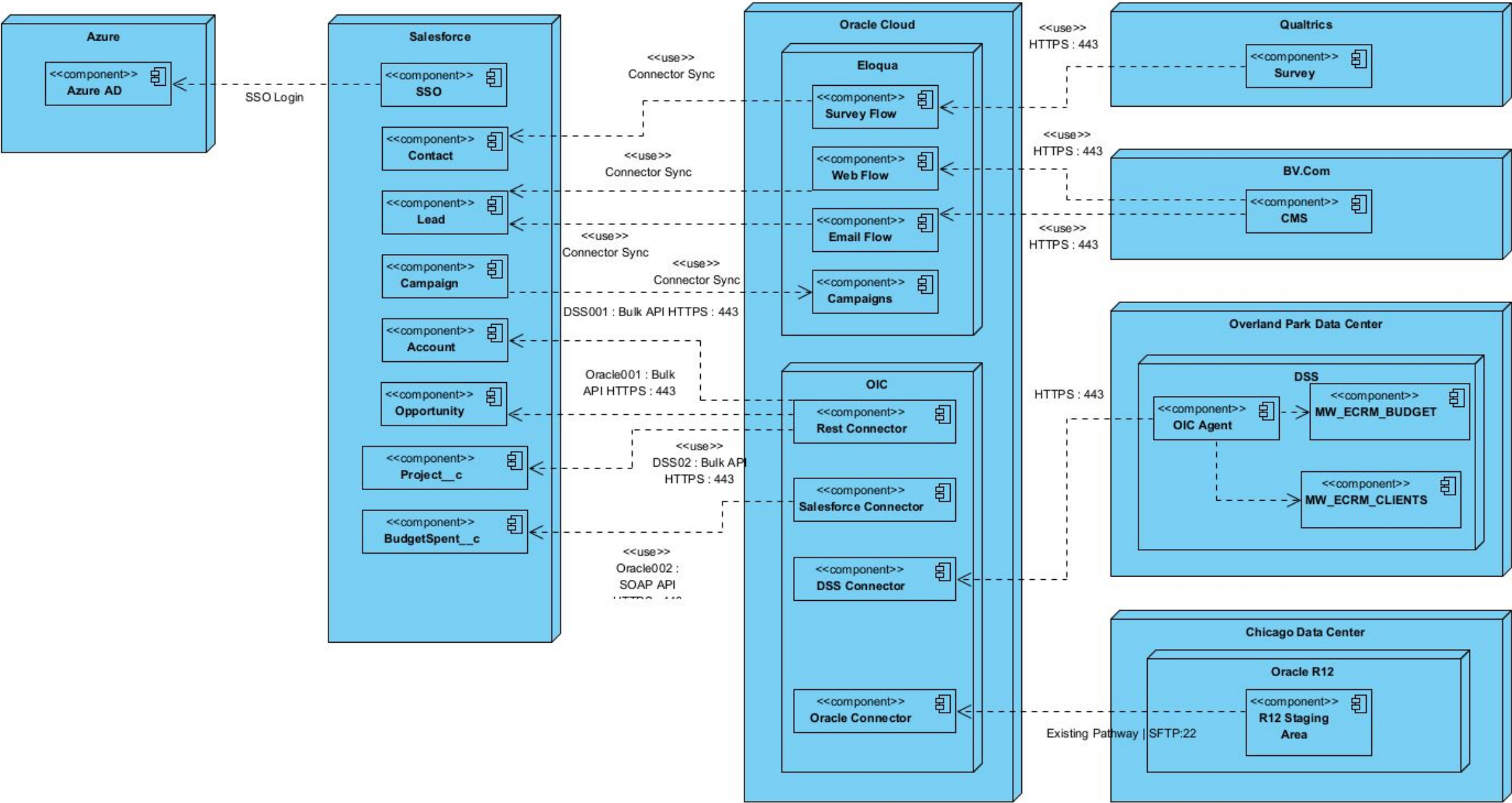
Integrations

Integration		
Azure AD	Enterprise SAML based SSO	SSO – On Demand
Oracle	Syncs open opportunities and new accounts to Oracle R12	Batch Nightly
DSS	Syncs Proposal Budgets	Batch Nightly
Eloqua	Syncs Marketing Automation Activity and Campaign Reponses	Batch every 15 mins

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Using Salesforce Einstein

- Einstein is a machine learning platform for Salesforce. It uses AI to examine past winning deals and then uses it to predict if you will win current deals.

- Einstein uses a learning Algorithm , so it gets smarter over time and with more data being fed to it.

- Einstein should be enabled on users that regularly communicate with Prospects about deals or Professionals who work with Sales Forecasts.

This is just the most common use case for me. Many more can be created!

	Crawl – 0 to 90 Days	Walk – 91 to 180 Days	Run – 181 Days to 365 Days
Use Case	Prediction : Will a Lead become a Winning Deal	Prediction : Will a Lead become a Winning Deal	Prediction : Will a Lead become a Winning Deal
Data Einstein Consumes	Outlook Activity, Previous Deals, Email Campaign Reponses, Single Lead Scoring Model (Eloqua)	Outlook Activity, Previous Deals, Email Campaign Reponses, Multiple Lead Scoring Models, Website Clicks, What B&V content is read, Trade Show Activity, Customer Survey Results, Miller Heiman Sheets	Outlook Activity, Previous Deals, Email Campaign Reponses, Multiple Lead Scoring Models, Website Clicks, What B&V content is read, How B&V content is read, Trade Show Activity, Customer Survey Results, Miller Heiman details, All Sales/Marketing Activity
Features & Value Enabled for the Business	Analytics about the Prediction	Prediction, Proposal Budget Validation, Automated PRB tasks and Analysis	Prediction, Proposal Budget Validation, Automated PRB tasks and Analysis, Automated Digital Miller Heiman Reviews, Data Driven Sales Strategy

Information Only Review TRB Presentation

- The Black & Veatch CIO's Technical Review Board (TRB) Process includes several Process Tollgate Steps:
    - this **Information Only Review** (Optional)
    - the Product Selection Review (Optional)
    - the Technical Launch Review (Required)
    - the Architecture Design Review (Required)
    - the Design Proposal Summary Review (Optional)
    - the Application Disaster Recovery Plan (ADRP) Review (Optional)
    - the Go to Production Review (Required)
    - the Project Cost / Benefit Realization Review (Optional)
- These processes are managed by the TRB, which is comprised of CIO members representing various emphasis areas (e.g. Cloud, Hosting, Security, Networking, Applications, Architecture, etc.)
- An **Information Only Review** is an ideal way to introduce an upcoming project to the TRB when that project is in its earliest stages, or when the project does not require the full TRB tollgate processes, but rather just needs to provide an awareness presentation to the TRB.

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Agenda

- Project Overview
  - Objectives
  - Deliverables
    - In Scope
    - Out of Scope
- Architecture or Workflow Design
- Key Stakeholders
- TRB Qualification Assessment
- TRB Approval
  - Qualification Agreement
  - Expectations
  - Next Steps
- Additional Questions

Project Overview

- Objectives
  - Replace MS Dynamics CRM with a more modern tool
  - Create a base platform for Sales and Marketing

Project Deliverables

- In Scope
  - Sales Cloud
  - Account Processes
  - Opportunity Processes
  - Contact Processes
  - Campaign Processes
  - Lead Processes
  - Integration with Oracle R12
  - Integration with Oracle Eloqua
  - Integration with DSS
  - SSO with Azure AD
  - Reporting

Key Stakeholders

Role	Stakeholder
BV Business Sponsor	Irvin Bishop
BV CIO Portfolio Manager	Paul Gerberding
BV Application Owner	Angelia White
BV Data Owner	n/a
BV Application Specialist	n/a
Project Manager	TBD
Solution Architect	Greg Chambers
Solution SME	n/a
UAT Lead	Priya Bhirud
UAT Participants	Many
Solution Support Lead	n/a
Other	n/a

CIO Staffing Needs

- "Fully Loaded" : APM, Architecture, Security and Support Staff
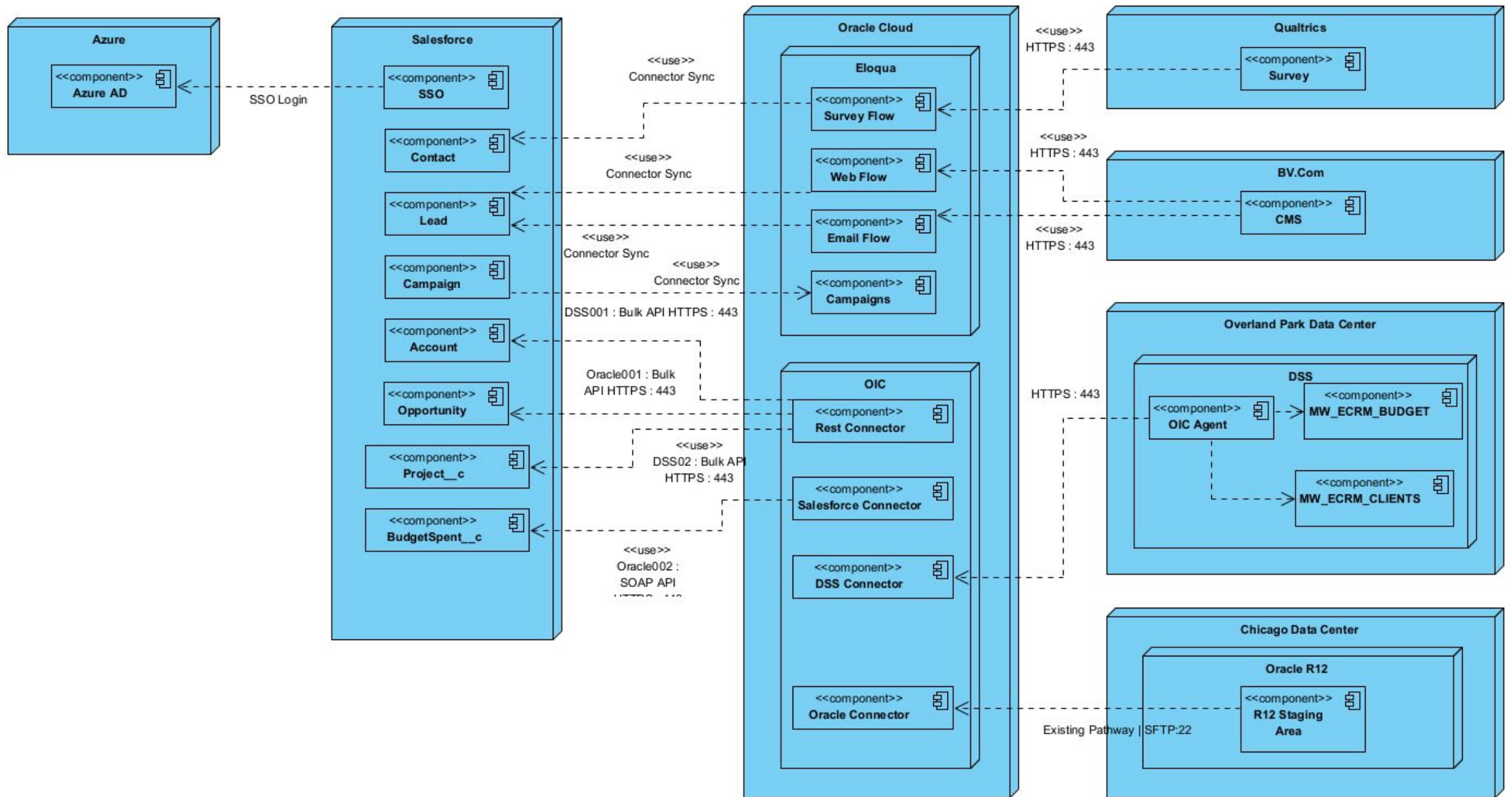
TRB Qualification Questions:

- Does the project implement a new application/technology or major release? **Yes (new application)**

- Is this a business critical / visible / risky project or system, or does the proposed solution integrate with business critical systems? **Yes**

- Does the project's deployment include new infrastructure (On-prem or IaaS)? **No**

- Does the solution only use cloud services (including PaaS/SaaS)? If yes, then this must be reviewed by the Convergence Committee and may be referred to TRB for full review.   **Yes**

- Is this project budget over $250,000? **Yes**

- Does this project have any Security Policy Issues? Are there any open security questions or concerns relative to the Black & Veatch Security Policy? A valid substitute for a Security Assessment (integral component of the TRB reviews) is written confirmation from the B&V CISO that a Security Assessment is not required or that the B&V Security Policy does not apply. **No**

- *If the answer to any of these questions is "yes" then at least a subset of the TRB reviews is required. The proper set of reviews will be determined by the TRB Chair and confirmed by the B&V Infrastructure Director and/or B&V Applications Director.*

- *Other considerations / decisions to be made as part of the qualification process include whether or not an ADRP will be required and whether or not the system is considered business critical.*

TRB Item Refinement Questions:

- Will the solution include restricted data? **<u>Yes</u>**

- Will the solution include Personally Identifiable Information (PII)? **<u>Yes</u>**

- Will the solution integrate with other systems? **<u>Yes</u>**

- Is this an upgrade to an existing solution? **<u>No</u>**

- Does the project require a PM due to size, cost or complexity? **<u>Yes</u>**

- Does the solution require a Disaster Recovery Plan? **<u>Yes</u>**

- Does the solution require additions or modifications of physical or logical network infrastructure? **<u>No</u>**

- Is this a SaaS project? **<u>Yes</u>**

- Is this a transition project? **<u>No</u>**

TRB Approval

- TRB Qualification Agreement?
- Expectations for future TRB reviews?
- Summary of Next Steps

Discussion.

Thank You

Contact Us

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