Ambassador Kickoff & Work in Progress Session - #1

April 6, 2016

Agenda

Topic	Time
Program timelines and milestones	5 minutes
Defining the CRM Ambassador	15 minutes
What is a Work in Progress session?	5 minutes
Questions & Answers	5 minutes
Work in Progress #1 – Organization, and Contact	55 minutes
Next Steps	5 minutes

During the meeting we ask that you:

- Please mute your phone until you are ready to ask a question
- Wait until the allotted time to ask questions
- Be respectful of one another's opinion and the allotted time

Client Connect Goal

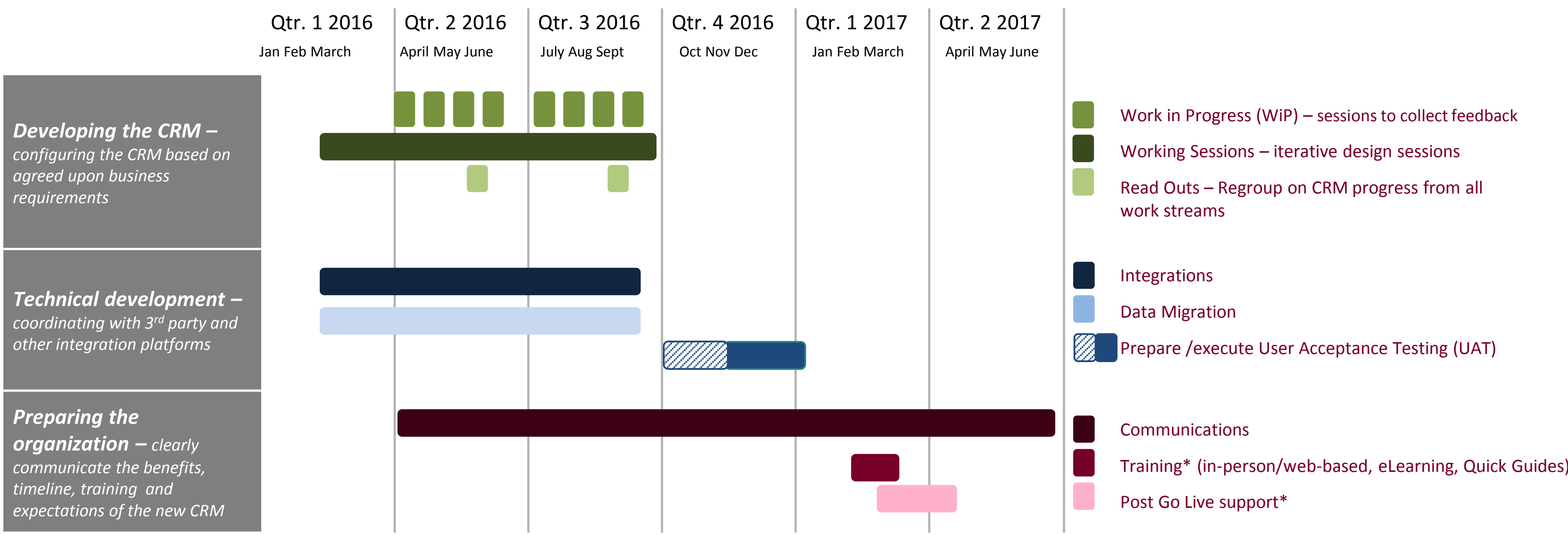
To deliver on our promise of differentiating the customer experience by providing a more complete and detailed view of MFS clients and prospects through the transformation of roles, workflows, data and tools. Enhance client service levels & sales, increase the efficiency of the Distribution team by improving data quality, more tightly integrating system flows, and streamlining and standardizing business processes.

By improving business processes, tools and driving adoption, the Distribution Global Sales & Service Teams, will collaborate more effectively and operate more efficiently in order to deepen client relationships, deliver world class service, promote client loyalty, and ultimately drive sales.

Program timelines and milestones

The development for the new CRM is estimated to last until 2017 (a mid-point validation will occur in Qtr. 3 2016).

The role of the Ambassador will cut across the entire project but the time requirement will change.



To get to this stage, the CRM team has involved key stakeholders (e.g., Sector Leads and Regional Teams) to collect global best practices and define the business processes.

*To be confirmed

What is a CRM Ambassador?

You will play a critical role in the development, execution and adoption of the CRM.

What is a CRM Ambassador?

A CRM Ambassador is an MFS employee representing the Business, IT, or another relevant support group, who is enabled to support the CRM initiative through the life of the project. A CRM Ambassador takes on different roles where the goal is to ultimately drive successful adoption of the new CRM.

What will CRM Ambassadors be asked to do?

- **Provide high-level direction:** Participate in WiP sessions and provide feedback and guidance to meet MFS' requirements.
- **Communicate progress with your respective teams:** Each Ambassador represents a distribution, sector and/or region they need to keep informed (project team will provide material).
- **Support UAT & Adoption:** Support User Acceptance Testing (UAT) and adoption through supporting training & post go-live support. Detailed information will be provided

	Selection	Work in Progress	UAT	Training	Post Go Live Support
CRM Ambassador Role	❑ Identification of CRM Ambassadors	❑ Attend WiP sessions ❑ Review with local teams to gather feedback	❑ Attend UAT training ❑ Execute test scrips/attend UAT meetings	❑ Attend Train-the-CRM Ambassador user training ❑ Support end user training (up to 3)	❑ Support post go live support (TBD)
Projected Time*	NA	12 Hours over 24 weeks (8 WiPs @ 1.5 hours)	5 Hours for training 4 Hours per week(3) of UAT	~ 6 Hours for Train-the-CRM Ambassador ~ 6 Hours per end user course	~8 Hours per month for 1 month

Where can I get more information?

- Sector Leads will be your key contacts for questions on the CRM

* Times estimated and subject to change

Ambassador goals

You will be a key element in driving engagement and building successful adoption of the new Client Connect/CRM.

Your Goals as an Ambassador:

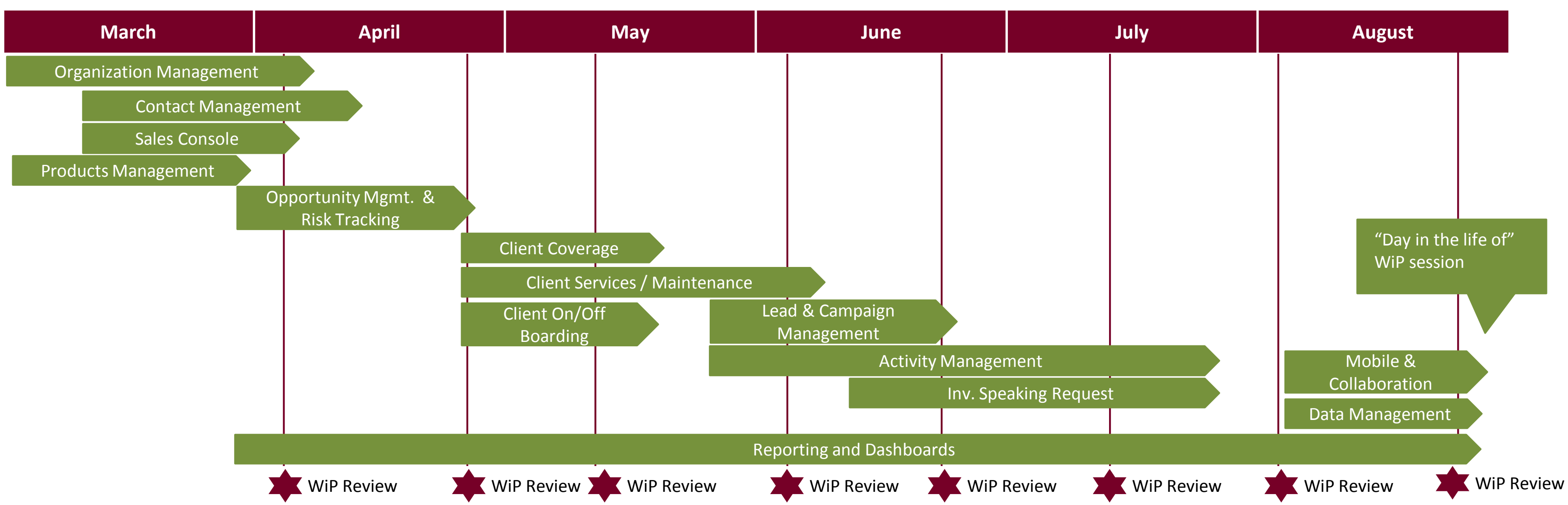
Reinforce Awareness	Increase Familiarity	Aid Knowledge Sharing	Support Rollout	Sustain Engagement
▪ Ambassadors should work to ensure that all end users are aware of how the new CRM will apply to their area of focus. ▪ Ambassadors will reinforce key messages from leadership on the prioritization of the initiative.	▪ The more familiar our people are with their roles and responsibilities for the new CRM, the more effective the organization will be in identifying and mitigating emerging risks. ▪ Ambassadors will help to escalate issues and challenges from their lines of business prior to training taking place.	▪ Ambassadors should be the link between the new CRM and the business to increase knowledge. ▪ Ambassadors will be provided with tools and messages to support knowledge sharing.	▪ Having an informal leader available greatly enhances learning and productivity during the training phase. ▪ The Ambassadors will create additional layers of support that can support teams as they learn new processes and procedures.	▪ After the completion of training, employees will need support and continued guidance for the new CRM system, as well as it's tools and processes. ▪ The Ambassadors will continue to monitor commitment, identify barriers to engagement and support understanding of the new CRM after training is deployed.

Your teams are more likely to adopt desired behaviors for the new CRM when messaging is delivered by someone they know, trust, and who is as involved and as similarly impacted.

Understanding the WiP

What is a WiP?	"WiP" stands for Work in Progress.
Why do we have WiPs?	As we are in process of configuring the CRM to meet the needs of MFS and our users, we want an **opportunity to get feedback from different stakeholders.** To support the iterative development, we will demo the CRM to the Ambassadors during development at regular intervals to capture feedback.
Objectives of WiP sessions	• Review and **validate key functionality** with the Ambassadors and Sector Leads • Outline business requirements, **benefits** and a demo of the CRM on how it supports these requirements • Confirm **functionality aligns with current and future business processes** • Provide feedback on design and **ease of use for end use**rs • **Highlight potential gaps** in requirements

Tentative WiP Schedule



WiP sessions

The 8 WiP sessions will be roughly every 3 weeks (1.5 hours) and there will be a defined time period for the feedback collection.

Pre WiP Week

- Wednesday: Confirm the Session and inform participants of the topics which will be covered

WiP Week

- Monday: Sector Lead WiP Session (1:00 PM EST)
- Tuesday: APAC WiP Session (8:00 PM EST)
- Wednesday: Americas/EMEA WiP Session (8:30 AM EST)
- **Friday: Ambassador Feedback due 10:00 AM EST**
  - Ambassador feedback (changes or questions) is critical to the success and adoption of the CRM
  - Functional Team will review and categorize feedback for Sector Leads

Post WiP Week

- Monday: Review feedback with Sector Leads
- Wednesday: Report Summary to Ambassadors on action taken on feedback provided

Tentative WiP Dates

1. April 6, 2016
2. April 20, 2016
3. May 11. 2016
4. June 1, 2016
5. June 22, 2016
6. July 13, 2016
7. August 3, 2016
8. August 24, 2016

**Note: APAC WiP session will be Tuesday 8-9:30 PM EST

WIP #1

- Introduction to the new CRM
- Organization Management
- Contact Management

Our new CRM

What is the technology behind the new CRM?

Salesforce.com is one of the leading CRM enterprises. The technology and support that comes with implementing this CRM is greater than what we have been able to provide in-house with our current CRM tool. While Salesforce.com is a leading CRM platform, we are developing it to integrate with other innovative Distribution and Marketing technologies, work with our improved future state processes, and support MFS's growth plans, while empowering us to better manage our customer relationships.

Consultant Relations and Platform	Global Retail Sales	Data Team
Product Team	Who will use the new CRM?	Client Servicing
Reporting Collectors	Institutional Sales	Global Marketing

"New" CRM Terminology

MFS is taking this development opportunity to streamline some of our terminology. During this transition to a new CRM how we refer to elements in our system may change slightly, while some will remain the same. During this initial WiP, we will review how the new CRM terms relate to existing SalesLogix system.

The following terminology will provide additional context for future ongoing interactions with the CRM:

SalesLogix Term		CRM Terms	
Account	=	**Organization**	An entity (Company, Firm, Corporation, Institution) that relates to MFS as either a Client, Prospect, Consultant, or Service Provider.
Contact	=	**Contact**	A Contact is an Individual or Group of interest to MFS. A Contact is associated to an Organization.

Our ask of you

During today's WiP session, we ask that you **<u>take notes regarding functionality and user experience as you will be asked to provide feedback following the WiP session</u>**:

- Following the session you will be emailed a link to an **online form**. Within the form you will do two things:
  1. Provide your feedback regarding the functionality and user experience of the processes demonstrated in the new CRM.

Provide your feedback regarding the functionality of the portions of Salesforce.com presented on April 6, 2016 by 10:00 AM EST April 8th.

Select the new CRM process

Feedback category

Please provide your question/feedback for the specific process?

Provide the process and category

Enter feedback here

  2. Complete the "Ease of Use" portion of the form. Consider each of the processes demonstrated today and consider the end-user perspective when responding.

  3. All feedback will need to be entered into the **online form** by you, or someone from your team, by **10:00 AM EST on Friday** of WiP week to be reviewed by the project team to determine status.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		WiP Session		Feedback due by 10;00 AM EST

WiP Demo Agenda

Now it's time to jump into the system! The content covered during this WiP covers some of the basic information for the CRM. Keep note of your enhancements and requests, so you can submit after the WiP session.

Navigation

- Overview
- Basic navigation and layout

Organization Management

- Initial Organization Profile by:
    - Type of User
    - Organization Segmentation
    - Organization Hierarchy

Questions

Contact Management

- Initial Contact Profile by:
    - Type of User
    - Contact Role
    - Dual Registration
- Expense Tracking
- Sales Data
- Teams (Retail Only)

Questions

Thank You


Dziekuje bardzo
Spasibo
Merci beaucoup
Danke schön
Thank You
Domo arigato
Xièxiè
Gracias
Obrigado
Cheers
Asante sana

APPENDIX

Navigating the new CRM

The new CRM is designed to be user friendly. While we will be configuring the look and feel, the basic navigation includes:

1. **Tabs -** Content is divided into tabs, located at the top of the page.
2. **Side-bar -** The toolbar on the right will be short-cuts to different parts of the CRM
3. **Dashboard -** View a snapshot of your Dashboards right in the Home tab
4. **Tasks -** Your Tasks organize your assigned follow-up tasks
5. **Calendar -** Your Calendar organizes your upcoming client meetings and events
6. **Create New –** User can create new contacts, opportunities, etc. directly from the side-bar.

Project overview of the CRM initiative

Mission

The primary objective of the CRM implementation is to leverage a centralized, connected and intuitive CRM platform that empowers sales, service, and marketing teams to operate effectively to deepen relationships, deliver world class service, promote client loyalty, and drive sales.

Objectives

Focus on Value	World Class Service	Data Quality	User Adoption
Personalization	Capture Global Interactions	Get the Basics Right	Voice of Customer

Benefits

- Helps perform job more efficiently
- Support client service better
  - Reduce Redemptions
  - Retain Consultant Rating
- Increase and protect brand value
- Help raise assets

Enhancements*

Process	Technology	Governance
Improved prospect insights	Application Architecture	Standardized data definitions
Complete relationship view	Data Architecture & Data Quality	Checks & balance to ensure data quality
Streamlined pipeline tracking	Integration Architecture	Use of external data sources to enhance data quality
Structured meeting prep/notes		Automated duplication checks
Seamless request process		

* To be finalized

Work in Progress (WiP)

Work in Progress

All Ambassadors will participate in Work in Progress (WiP) sessions where they will be asked to provide feedback on the CRM functionality and end user experience

Ambassador		
WiP Role & Responsibility	Time Commitment	Total Population
1. Provide high-level direction 2. Communicate progress with respective constituents 3. Provide feedback on processes, and look & feel within a set time via an online tool	Approximately 1.5 hours every 3 weeks (estimated 8 sessions over 5 months total)*	All Ambassadors

Work in Progress (WiP)
Objectives
▪ Review and validate key functionality with the Ambassadors ▪ Outline business requirements and demo how the new CRM will support requirements ▪ Confirm functionality meets needs and aligns with current and future business processes ▪ Collect feedback on design and ease of use for end user ▪ Identify potential gaps in process requirements

User Acceptance Testing (UAT)

UAT

Ambassadors will participate in user acceptance testing (UAT) to pilot a more finalized version of the new CRM prior to formal training. During UAT, Ambassadors have the opportunity to execute system scripts and observe navigational aspect of the system to better prepare and support training activities.

Ambassador		
UAT Role & Responsibility	Time Commitment	Total Population
1. Attend UAT training and support testing effort by working with project team to identify testing defects and remediation efforts 2. Pilot UAT system and provide feedback on the following training aspects: a) The content being covered b) The length of the training c) The use case / business examples being used d) User experience 3. Execute UAT scripts 4. Pilot training	4 hours per week (estimated 3 weeks total)*	30 Ambassadors*

User Acceptance Testing (UAT)
Objectives
▪ Pilot training ▪ Prepare users for training by discussing scripts prepared and expectations ▪ Complete UAT testing before training commences for the general end user population to avoid elongating original timeline

* To be confirmed

Training

Training

A sub-set of Ambassadors (approximately 20*) will be selected to become co-facilitators to support in-classroom training courses. The role of a co-facilitator will be to leverage business and regional knowledge to sufficiently provide end users with use case scenarios and answer business questions in real time.

Ambassador		
Training Role & Responsibility	Time Commitment	Total Population
1. Sign up for and attend Train-the-Ambassador training 2. Select Ambassadors will co-facilitate end user training (up to 3 trainings) 3. Co-facilitators will present / highlight best practices and provide insight on business/regional use case examples	~6 hours per courses*	20 Ambassadors*

Training
Objectives
▪ Prepare co-facilitators for training execution ▪ Conduct a blended learning approach with multiple platforms for a geographically disperse end user base ▪ Provide consistent messaging for all training medias (i.e., in-classroom, eLearning, virtual, etc.)

* To be confirmed

Post Go Live support

Post Go Live Support

The work of the Ambassadors does not cease at go-live, but may continue months into the future. Ambassadors play a critical role in ensuring knowledge transfer and process/technology adoption by their respective local business units.

Ambassador		
Post Go Live Support Role & Responsibility	**Time Commitment**	**Total Population**
1. Be a resource to answer end user questions (i.e., office hours, team meetings, Q&A sessions) 2. Identify and resolve any outstanding transition issues 3. Troubleshoot and escalate end user issues 4. Actively participate in identifying and generating innovative solutions for operational issues 5. Act as a role model for the new CRM desired behaviors	~4 Hours per month for 1 month	TBD

Post Go Live Support
Objectives
▪ Ambassadors to serve as informal leaders or experts to enhance learning and productivity after the training rollout ▪ Support to enhance successful adoption of new CRM and associated behaviors ▪ Support end users as they transition to the new system

* To be confirmed