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Clicked Business Analyst/Admin Sprint *Presentation*





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Introduction



I formed part of a team of Salesforce Consultants tasked with the responsibility of improving the internal process to secure sponsors for the upcoming TrailblazerDX conference hosted by Salesforce. Our goal was to understand how Salesforce can effectively and efficiently secure sponsors for the upcoming conference, and what must occur for this to be implemented.

We completed the following tasks to meet this goal: developed user stories, created business process maps using Universal Process Notation (UPN), made a low-fidelity wireframe, a user acceptance testing plan and built a proof of concept/Minimum Viable Product (MVP).



“User stories are a key component of Agile methodology and a common way to communicate target users’ desired activities and expectations. As a tool for communicating criteria for a solution, user stories are critical for any project’s success!”



I created user stories for the different personas based on a discovery session. The following outlines the user stories proposed:

1) *As an Event Manager, I want opportunities categorized as silver, gold or platinum, so that I can ensure the quality of the sales pipeline.*

Acceptance Criteria:

If an opportunity is closed won, then it should be categorized as either a gold, silver or platinum.

If an opportunity is closed lost, then a closed lost reason should be outlined.

2) *As an Event Manager, I would like to view all opportunities categorized as a platinum package, so that I can make a decision for approval.*

Acceptance Criteria:

If an opportunity is categorized under the platinum package, then it must be sent to the Event Manager for approval.

3) *As a sales rep, I want to be able to get automatic reminders for follow-ups with potential sponsors, so that I can ensure the quality of leads.*

Acceptance Criteria:

If a sales rep contacts a potential client, then a notification can be sent within a specified number of days to ensure follow-up.

4) *As an Event Manager, I want to ensure that only authorized changes are made to signed contracts, to maintain quality of contracts.*

Acceptance Criteria:

If a contract is signed by a potential sponsor, then we should be able to automatically detect any unauthorized changes.

5) As a member of the Events Management team, I would like to view dashboards and reports, so that I can get a status on sponsorships in real time.

Acceptance Criteria:

If a member of the Events Management team views their homepage, then they should be able to view all sponsorship opportunities in real time.

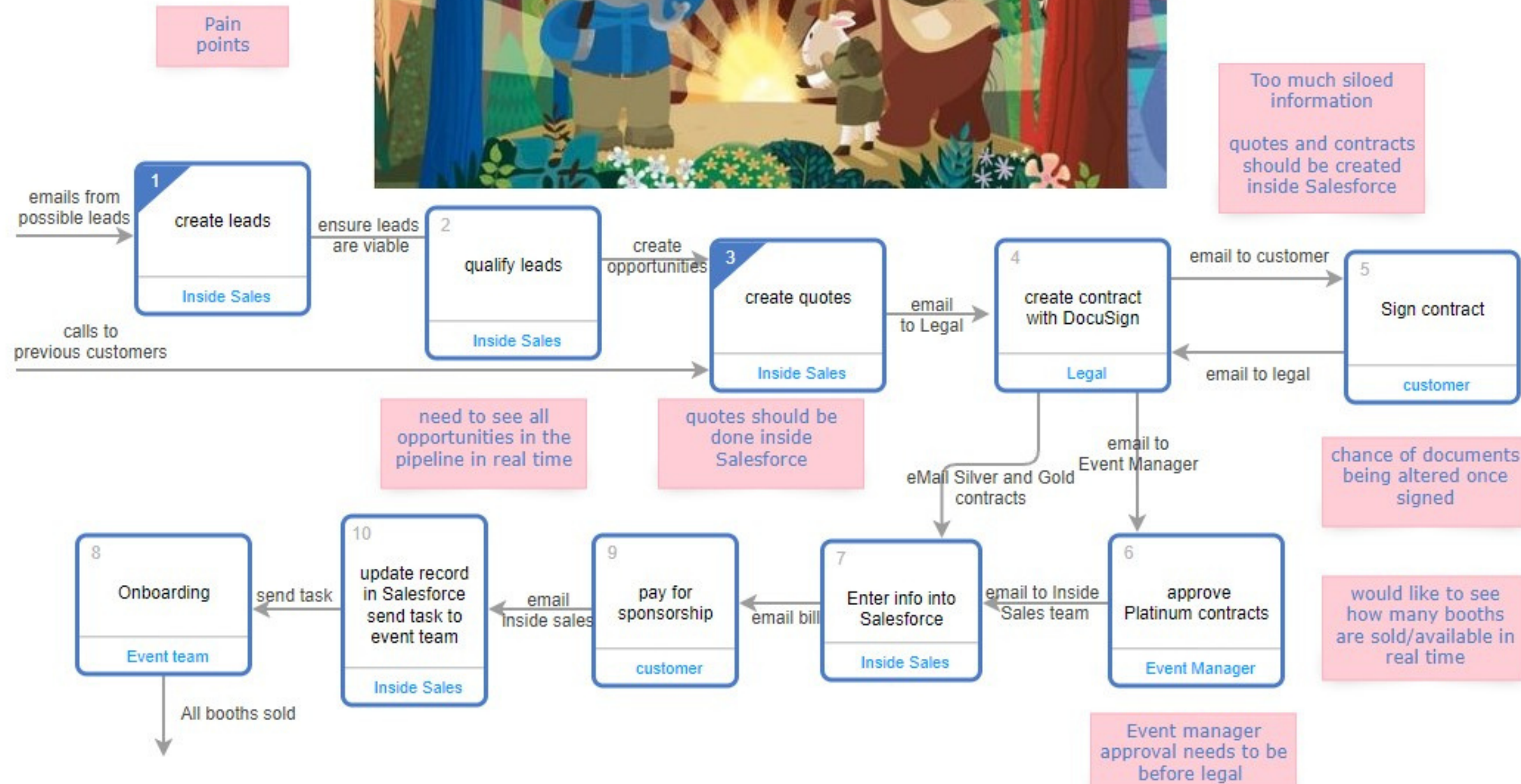


Business Process Map(UPN)

I helped create the following current state process map using elements.cloud which outlines the process from a Lead to Onboarding for acquiring sponsorship for the Trailblazer DX conference:



Current Business Process



Drill down from “create leads”
opportunity”

Drill down from “convert lead to



Wireframe



Our team simultaneously built the wireframe using Figma. We each worked on creating a graph/chart. I was able to present this deliverable before other Clicked peers and coaches.





TrailblazerDX Dashboard

Days left to sell

14

Sponsorship package distribution by Sales Rep

Platinum Booths Sold

Gold Booths Sold

Silver Booths Sold

Type of Sponsor

Revenue by Sponsorship Level

TrailblazerDX

Opportunities

All Opportunities

14 items • Sorted by Stage • Updated a few seconds ago

New

Favorite View

Pending (5)

Qualification (5)

Needs Analysis (5)

Value Proposition (5)

MS Decision Model (5)

Proposal Analysis (5)

Proposal/Pricing De... (5)

Negotiation/Review (5)

Closed Won (5)

\$150,000

Opportunity for HumeS...

\$40,000.00

Thompson78 Inc

4/25/2020

\$150,000

Opportunity for CuryT34

\$100,000.00

Dayle89 Inc

4/14/2020

\$200,000

Opportunity for Sidesch...

\$100,000.00

Reuter45 Inc

5/28/2020

\$100,000

Opportunity for Heber L...

\$40,000.00

Wapner10 Inc

4/19/2020

\$200,000

Opportunity for Alexan...

\$100,000.00

Oliver444 Inc

5/6/2020

\$100,000

Opportunity for Jackson...

\$100,000.00

Fox577 Inc

5/14/2020

\$50,000

Opportunity for Duncan...

\$40,000.00

Thompson18 Inc

4/11/2020

\$100,000

Opportunity for Paul T51

\$600,000.00

Brown485 Inc

5/24/2020

MVP/Proof Concept

I configured the approval process on the Developer org for Platinum Sponsorship packages to be automatically sent to the Event Manager for approval.



TDX23
[Home](#)
[Opportunities](#)
[Leads](#)
[Accounts](#)
[Contacts](#)
[Dashboards](#)
[Reports](#)
[Chatter](#)
[People](#)
[Cases](#)

Opportunity

PWC Platinum Package Sponsorship

[+ Follow](#)
[Legal Team](#)
[New Case](#)
[New Note](#)

Account Name	Close Date	Amount	Opportunity Owner
20 20 Printing Inc	3/15/2023	\$100,000.00	GORKEM TOPCU

✓

✓

✓

✓

✓

✓

Proposal/Price Q...

Negotiation/Revi...

Closed

✓ Mark Stage as Complete

Activity

Details

Chatter

Opportunity Owner GORKEM TOPCU	Amount \$100,000.00
Private <input type="checkbox"/>	Expected Revenue \$75,000.00
Opportunity Name PWC Platinum Package Sponsorship	Close Date 3/15/2023
Account Name 20 20 Printing Inc	Next Step
Type Platinum	Stage Proposal/Price Quote
Lead Source	Probability (%) 75%

Related

Products (1)

[Platinum TDX booth](#)

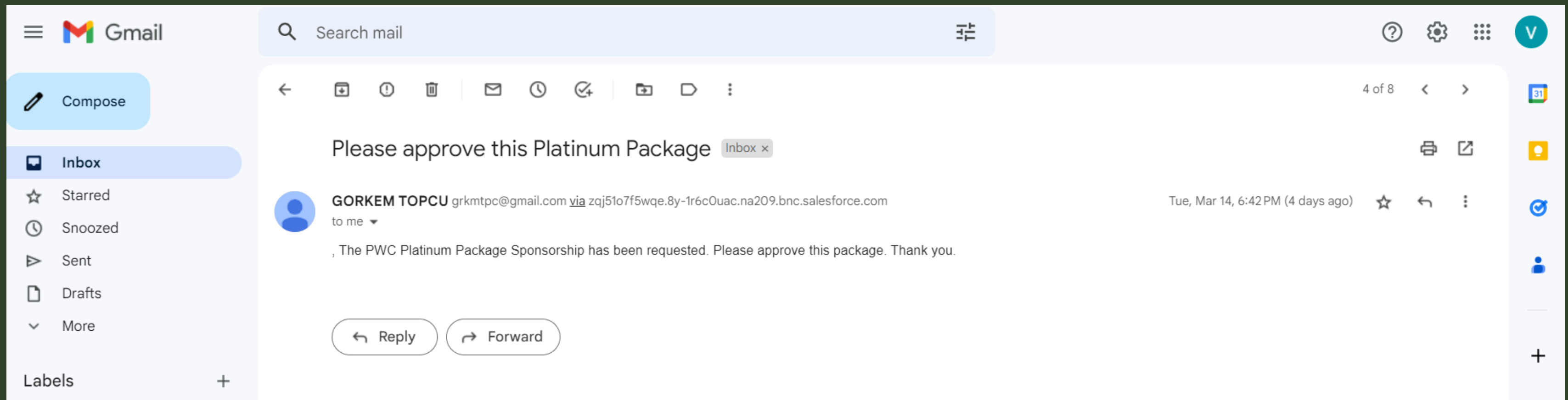
Quantity: 1.00
Sales Price: \$100,000.00
Date:

[View All](#)

Notes & Attachments (0)



Email received by the Event Manager with a request for approval of Platinum Sponsorship Package:





Event Manager's approval request queue:

Logged in as Veronica Corningstone (vcom@tbdx.com) [Log out as Veronica Corningstone](#)

DocuSign Apps Lau...

DocuSign Setup

DocuSign Gen Templates

DocuSign Envelope Templates

DocuSign Logs

DocuSign Envelopes

DocuSign Status

Items to Approve | Approv...

Approval Requests

Items to Approve

2 items • Sorted by Date Submitted • Filtered by requests assigned to me and my queues • Updated a few seconds ago

	Related To	Type	Most Recent Approver	Date Submitted	
1	PWC Platinum Package Sponsorship	Opportunity	GORKEM TOPCU	3/14/2023, 3:42 PM	
2	Deloitte Platinum Package Sponsorship	Opportunity	GORKEM TOPCU	3/13/2023, 3:07 PM	



Conclusion

During this Sprint I documented processes which are easily accessible and manageable. I also learnt the importance of communicating as a team and setting goals during scrums.

I was able to work effectively with my team members under immense pressure because of the aggressive timelines to complete each deliverable. All tasks were done within best practices.