

Blackforce.ca | Training Program

COHORT 9 Group Project II

9th April, 2025

Salesforce Sales & Service Cloud Implementation

Sales Management, Customer
Support & Agents' Productivity for
an eCommerce Company

Problem Statement:

Your group has been approached by “**Global Grocery**”, a chain of grocery stores, to implement **Salesforce Sales and Service Cloud** in order to manage their sales and support operations. As they expand into new territory, the volume of sales inquiries as well as support requests across multiple regions is becoming enormous and very hard for the team to manage. They have identified some of the issues below:

The sales managers are worried about managing different sales teams across multiple geographical locations. Sales agents are complaining about bad lead data, resulting in a low conversion rate. They want clean, well-structured, and valid contact information for the leads. Also, the new sales agents are not familiar with the sales process that has been put in place. They prefer a visual representation of the sales process with key fields and guidance for success for each of the sales stages. The fields on the picklists for different stages should be applicable to the stage. The business also requires a lead qualification score strategy that can increase the chances of successfully closing any opportunity. They prefer in-house solutions and not Artificial Intelligence or plugins from the marketplace.

The sales manager would also like a complete end-to-end sales process to be followed. For instance, the management would like to see a lead enter the system. The lead source should be clearly identified, and an opportunity should be associated with the lead upon conversion. Also, before a contract is created, the prospective customer should receive a quote according to the products in the business. They sell internationally, so they expect different currencies and prices to be unique based on the region of the customer, achieved via a custom price book.

The marketing manager would like to see the campaign efforts that contributed to the highest number of leads and closed-won opportunities for the team. In particular, they would like to see how each of the campaigns influenced sales. The sales agents work as a team and often share commissions based on the revenue of each sale. The team would like to split deals automatically as well as forecast how much sales they are likely to make in the next quarter.

The support managers are worried about maintaining their service level agreements with the different types of customers. Premium customers are entitled to an exceptional standard of service. Management's top priority is to ensure premium customers are served in a timely manner by the right agent, using a streamlined process. An unqualified agent should not be able to pick up cases that require technical knowledge.

They are also worried about cases not being resolved on time. All cases should be resolved

within 3 days. Premium customer issues should be resolved within 8 business hours. The managers would like visibility into cases that have not been resolved 8 hours before the close date. A guided path and milestones should show the case status.

The types of contracts sold for customer support include Basic (Free Support), Standard, and Premium. The system should be able to automatically create entitlements and service contracts anytime an account is created for a customer.

However, if a customer did not purchase support for their products, they are automatically given a Basic Contract — which is in the form of a prewritten text (generic email reply), a step-by-step article inserted in an email, or a link to their community website where they can get more information about how to resolve their issues.

“Global Grocery” agents would like to minimize the number of telephone calls received from customers. Ideally, they want customers to go online to use their website to find solutions for their issues. The website articles are well-written and categorized so that a customer can easily find answers. However, if they cannot find answers on the customer community website, they should be able to click on a live chat to talk to an agent. Alternatively, they can send support an email or submit an online form to reach out to Global Grocery — this should automatically generate a case in the system.

Implementation Guide

Your implementation should include the following:

- You are permitted a one-day discovery call to discuss the requirements of this project with the business. This will be a group call to minimize the time spent on the discovery phase. All teams must agree on a specific day to carry out this activity.
- After the discovery session, your team should prepare a detailed proposal to implement the project. This proposal must include a complete breakdown of the work to be done, including user stories. **Do not begin any work unless the proposal has been submitted and approved by the business.** The proposal deadline is stated in the deliverable deadlines in the appendix. The proposal should include key elements such as:
 - Project Scope

- Project Components
 - Estimated Duration (in days and weeks)
 - Cost Breakdown of each component based on the estimated duration
- Your team should create a PowerPoint presentation of **no more than 15 pages** that outlines the problem and your proposed solution. This presentation should summarize each problem area and the Salesforce solutions your team has proposed to address them. This must be completed **after** implementation.
 - Your team should develop a **Standard Operating Procedure (SOP)** document that outlines how to carry out the sales and support processes in Salesforce. This should serve as a comprehensive **Solution Design Document** and operational manual for the company's business and Salesforce org. It should include your data model and all other technical components referenced in your proposal. Full details of the system design must be provided.
 - The business would like to ensure that the time and cost estimates provided are enforced. Please include a timeline/schedule, team resource breakdown, and what each member of the team will contribute to the project's success.
 - You must also provide a **Training Manual** for key business users, and a list of suggested areas for improvement. Include a proposal on how your team could be retained as consultants for future Salesforce process implementations or enhancements.
 - Within your team, you should nominate members for the following roles: **Project Lead, Business Analyst, Consultant, Engineer, Developer**. Divide the work accordingly. **Do not allow one person to complete all documentation**. Everyone MUST contribute. Teams that fail to demonstrate equal participation will be penalized and may not be rewarded.

Note: Use **project implementation strategies** to complete this project. Follow the phases

of: **Plan, Analyze, Design, Build, Validate, and Deploy**. This is a collaborative project. Everyone must contribute to the success of the implementation.

Timeline & Deadlines

- **Planning, Analysis, and Solution Design:**

Proposal submission to management for approval.

Deadline: April 30, 2025

- **Implementation, Testing, and Deployment:**

Salesforce implementation, PowerPoint development, and documentation preparation.

Deadline: May 16, 2025

- **Demo Day:**

May 17, 2025

- 15-minute demo presentation
- 5-minute Q&A session

Rewards

- Best Presentation and Implementation Team wins **\$1000 CAD (or \$100 per team member)**.
- **All members must CONTRIBUTE and be PRESENT** during the final presentation to qualify for the reward.
- If a team member does not participate or attend the demo, they will not receive a reward.
- If fewer than 50% of your team participate in the project, **no reward** will be given to the entire group.