# Industry Concepts

- Sales Strategy: Go-to-Market process for products and services; e.g Direct/Indirect
- Sales Model: Inside/Outside (Inside will hand off to Outside) and Territory based process
- Methodology: Depends on Industry/Product & Company and allows standardized terms and steps in the process. e.g Miller Heiman: Strategic, Conceptual and LAMP
- Forecasting: Management of Revenue, estimate how much revenue can be generated
- Leads: are Sales Prospects, need qualification and converted to customers
- Campaigns: are Marketing and Sales initiatives to generate new business

## Strategy

- How an organization takes products and services to market
- Direct or Indirect(channel partner) or a Hybrid of both; if hybrid it's good to know the % of revenue generated by each
- Each strategy can implement a different Sales Model: Inside/ Outside where Inside reps call a pool of leads for qualification and then pass them to outside reps for management of accounts
- Sales Model: Territory where Opportunities are assigned by geographic areas.

## Methodology

- Standard set of Stages, Activities and Processes that brings an opportunity to closure.
- Standardization allows common terms and steps to be understood by everyone.
- Strategic Selling:
  - Identify Key Players and understand their degree of influence and motives
  - Evaluate competitive position and strength and uncover essential/ unknown information
  - Develop comprehensive action plan to determine if the deal is worth the effort
- Conceptual Selling:
  - Understand customers issues first and then develop jointly
  - Consultative approach builds credibility/trust, also ensures competitors difficult to duplicate
- Large Account Mgmt Process:
  - Similar to Strategic Selling, for larger customers with impact on industry trends

## Forecasting

- Key fields:
  - **Amount**: rolls up into forecast
  - **Stage**: identifies where a deal or Opp is in the pipeline
  - **Probability**: Likely hood of the deal closing
  - **Category:** helps group Opp in a forecast
- Opportunity Stages shows at what stage in the qualification process an opportunity will close however a more subjective process is required: Called Forecasting (Pipeline, Best case, Commit, Closed)
- Forecasting via: Opportunity Stages (Qualified, Needs Analysis, Proposal) OR Forecast Categories (Pipeline, Commit)
- Shows how much revenue can be generated for a give period of time.

## Leads / Campaigns

- Leads: Sales Prospects who are interested in products and services, will be qualified and converted to customers
- Lead Sources:
  - Trade Shows
  - Company Website
  - List Purchases
- Campaign Goals:
  - Increase Sales Revenue
  - Acquire new customers
  - Increase retention
- Campaign allows up-sell/ cross-sell opportunities and can be strategic (containing child campaigns) or simple (email)
- Campaign should be:
  - Prepared
  - Executed
  - Tracked

# Implementation Strategies

- Discovery Questions: key questions to ask for discovery
- Project Roles: key roles involved in the project
- Sales & Marketing Challenges and Business Drivers

## Discovery Questions

- What is your go-to-market strategy?
- How are sales teams organized?
- How are leads generated and qualified? Volume?
- How do your sales reps interact with prospects and customers?
- Walkthrough Sales process: is there a standard methodology?
- What is the forecasting process?
- What key pain points facing the Sales Organization?
- What metrics are used to measure your success this year?
- Lead Process:
  - Website -> Web Forms -> Lead Capture
  - Inbound Call -> Search / Create New Lead in SFDC -> Lead Capture
  - List -> Import Data -> Lead Capture
- Lead Qualification:
  - Open Leads, Working Leads, Established Contact?, Qualified / Qualification Questions?
- Revenue Management (Forecast):
  - Open Opportunities, Presentations Proposals & Negotiations, Won / Not Won, Won Opps provide 360 degree support

## Project Roles

- Sales Reps: want an easy-to-use system, time-saving solution; they provide usability feedback (day in a life) and identify pain points
- Sales/Marketing Managers & Execs: want team visibility & forecast, system ROI; they provide business process, and key metrics and promote adoption
- Sales/Marketing VPs: want improve alignment of sales & marketing; they provide Website Integration, Lead gen/ qualification and distribution process
- Campaign Managers: want organize/ capture campaign impacts on revenue, understand ROI, create and execute campaigns; they provide promotion and buy-in, generation of lead lists and lead-customer lifecycle process
- Analytics/BI: want quality data, reliable segmentation of data for reporting on positive/negative performance of sales process; they provide reporting requirements and can identify key business metrics
- IT: want seamless integration/cut-over of existing system; they provide data migration, integration and ownership of the system going forward

## Challenges / Drivers

- Sales Challenges:
  - Weak Pipeline (quality leads), Low Sales Rep Productivity, Poor Predictability, Ineffective Selling
- Marketing Challenges:
  - Insufficient Leads, Poor Alignment with Sales, Measure Marketing ROI
- Stronger Pipeline: Automated Lead Capture, Lead Routing, Monitoring and Alerts, Lead Scoring and Conversion
- Lower Forecast Variance (Funnel Mgmt): High User Adoption, Prevent garbage data and End-User Reports and Dashboards with quality data, Accurate Forecasting
- Sales Rep Productivity: 360 Degree view of customer, shared view of Sales Activity, Auto populate Emails and Proposals, Automated approvals with reminders and escalations
- Complete Visibility: Drive more business and track back to marketing investment, Align Sales and Marketing one consistent platform

# Sales Cloud Solution Design

- Business Challenges mapping to a Design Solution
- Scenario to include custom application development
- Design Considerations: currency; channel, territory, sales productivity
- Account and Sales Team allow users to grant additional access

## Solution Mapping

- Weak Pipeline: Optimize Lead Mgmt with Lead Scoring & WF Alerts
- Low Sales Rep Productivity: Lessen rep data entry burden and automate business processes, give reps 360 view of their customer
- Poor Predictability: Enable real-time visibility to quota attainment, give mgmt real-time forecasts
- Ineffective Selling: Standardize a selling methodology and implement in app
- Use Adoption: Easy-to-use, give time back to the sales and marketing, keep data clean which will provide data-trust
- Insufficient Lead Generation: Optimize lead generation & management integrate with a marketing partner
- Poor Alignment (Marketing & Sales): Find common ground and make the hand off seamless and transparent
- Limited Report-ability: Provide more reports on data to those who need it and ensure metrics are easily accessible (campaign effectiveness, marketing budget etc.)

## Design Considerations

- Mulit-Currency:
  - With advanced currency management, **Opp Close Date** determines conversion rate
  - Currency is set at Company, User and Opp levels; with the lowest level overriding
  - Reports/Dashboard Totals are shown in your default currency (but changeable by customizing report); You can show 'Converted' column in reports.
  - Dynamic Dashboards display values in default currency of the logged in user
- Channel Management:
  - Use separate logins for Partner/Customer Portals to access salesforce data
  - Use Salesforce-to-Salesforce to collaborate with partners who also using salesforce
  - Consider communities to share ideas and questions and expose to public (with Sites)
- Territory Management:
  - Affects the sharing model of accounts and associated contacts, cases & opportunities
  - Must have customizable forecasting to use Terr Mgmt; Once enabled **cannot** be disabled
  - Forecast data is derived from Opp associated with accounts in your Terr; Opp can only be in ONE Territory.
- Sales Productivity Tools:
  - Chatter, Salesforce for Outlook, Mobile, Offline, Email/Mail merge template, Content

## Account / Sales Teams

- Account Teams:
  - Users can create Account Teams for the Accounts they own.
  - Account Owners determine team members, access to Account, plus related Contacts, Opp and Cases
  - A Team Role can be setup as part of the Team (different than Roles)
  - Can create 'Default Teams' for users that typically work with user and can be Automatically added.
- Sales Teams (Opportunity):
  - Users can create Sales Teams for the opportunities they own.
  - Account Owners determine team members and access to the Opportunity (RW or RO)
  - Sales Team Role can be setup as part of the Team (different than Roles)
  - Can create 'Default Teams' for users that typically work with user and can be Automatically added.

# Marketing & Leads

- Relationship between marketing process and sales process
- Campaigns Influence and ROI
- Lead Scoring and Qualification
- Lead Data Quality

## Processes

- Lead Process Qualification: Hand-Off and Lead Feedback/Velocity:
  - Pass Lead to Sales
  - Call back at a later Date
  - Do not Call
- Lead Quality Pain points (Sales need to know):
  - Lead Line of Business?
  - Lead Product Interest?
  - Lead Expected Ship Date?
- Sales Process Types:
  - Use Record Types (Sales Process) to ensure different fields are entered for each type of Opportunity
- Sales Process Stages:
  - Different stages can exists for different processes
  - Certain stages require approval if discounts are greater than 25%
  - Each stage can be tied to a probability of closure of the opportunity
  - Allow **Feedback tracking** so that Marketing can collaborate on deals
- Sales Process Example:
  - Use different record type/process to support each line of business
  - Use stages for both lines of business
  - Create approval process for certain stages and apply when criteria is met

## Campaigns

- Standard **Type** Picklist: Email, Trade Show, Webinar
- Typical Campaign fields: Start/End Date, Expected Revenue, Budget Costs, Actual Costs
- Campaign Hierarchy allows marketing to group campaigns together within a specific program, allowing efficient analysis of related efforts
- Campaign Influence allows marketing to track influence of multiple campaigns on a single Opp (sales deal). Marketing can also track which was the ***Primary influence***. Can enable 'Automatic' tracking, related to the contact role on an opportunity
- Campaign ROI: `(Value won Opp - Campaign Cost) / Campaign Cost`
- Pipeline created by each Campaign: `Value Open Opp generated by Campaign`
- Revenue created by each Campaign: `Value Closed Opp generated by Campaign`
- Number of Sales Deals Influenced by each Campaign: `Number of Opps Influenced by a Campaign`

## Leads

- Default **Lead Status** Picklist values: Contacted, Open (*default*), Qualified (*Converted*), Unqualified
- Custom Fields: Need to be mapped to Opportunity fields for the conversion process
- Lead Conversion can create:
  - Account (existing or new)
  - Opportunity (existing or new)
  - ***Option to NOT create Opp also***
  - Contacts
  - Follow up Tasks
- Converted Lead can no longer be viewed/edited as a Lead but can be viewed in Lead reports
- Lead validation rules ensure data quality e.g. *expected ship date cannot be in the past*
- Lead Scoring/Rating e.g. Hot, Warm, Cold
- Lead Qualification to ensure lead qualification e.g. *include; Line of Business? Product? Expected Ship Date?*

# Account & Contact Management

- Method for Establishing Accounts or Contacts
- Account/Contact visibility and derived Opportunity and Activities visibility
- Account/Contact Relationship and Hierarchy; Including Person Accounts
- Methods for maintaining Account/Contact data with enrichment tools

## Account / Contacts

- Account standard Industry Picklist field
- Account standard Contact Roles Picklist field; which contacts on the account play which role
- Account Related List (give 360 view): Contacts, Activities, Opportunities
- Partners that can help sell to the Account
- Contact Related List: Opportunities for a given contact, Opportunities are add to this list when Contacts are added to the Contact Role related list on the Opportunity, Campaign list shows which campaigns this contact is a member of

## Visibility

- Account Team open up visibility
- Territory Management allows Account Assignment Rules
- Managers in Role Hierarchy with Unchecked “Read/ Edit” profile permission to not have access to Account below them in the role hierarchy

## Hierarchy

- Person Accounts: Business to Consumer model (financial services)
- A person account is an individual consumer with whom you do business
- Adding person accounts in contact roles on accounts is available but not recommended. As a best practice, we recommend using the Partners related list to associate person accounts with other accounts.

## Maintain Data

- JIGSAW/Data.com: Search, Add, Clean Account, Contact, Lead data

# Opportunity Management

- How to support different Sales Process scenarios
- Relationship between Sales Stage, Forecast and Pipeline
- Relationship between Opportunities, Products/Price Books and Assets, Contract and Campaigns, Quote & Quote Sync
- Determine Forecast/Pipeline solution

## Sales Process

- Different Sales Processes can be used to cater to different products or services, each sales process can have it's won set of sales stages
- Different Sales Process can be used to also differentiate between page layouts and record types of the Opportunity
- Sales Process should map to a methodology and use a common tense e.g. Delivered Proposal vs. Proposing
- Data Validation, WF and Approvals can provide support for the Sales Process
- Default Sales Teams allow the usual people to work on the opportunity without worrying about data access
- Contact roles provide primary contact on the deal (**buy side**) to help close the opportunity (decision makers)

## Stage/Forecast/Pipeline

- Customizable Forecasting: Allows managers to update and override forecast
- Opportunity Stage defines also: Probability and Forecast Category and are auto-populated when the Stage is picked
- Supported Forecast Categories (plus total amount used in the calculation):
  - **Pipeline**, Best Case, Commit
  - **Best Case**, Commit, Closed
  - **Commit**, Closed
  - **Closed**
  - **Omitted** (excluded from Forecast amounts is associated with the Close Lost Opportunity)
- Forecast for the user is defined by the date range and for customizable forecast it can be the standard or custom fiscal year ranges, it shows the **Quota** amount for the user for that period
- Forecast by Revenue or Inventory

## Products/Assets/ Quotes

- Enabling Quotes means that Products/ Price Books must be defined
- Quote allow multiple pricing-scenarios for each opportunity
- Price Book contains products and their associated prices (which can be in different currencies): they can be defined as standard or custom
- A product can have a different 'List Price' in a different Price Book
- All products added to the Opportunity must come from a single Price Book
- Quotes can be synced to an Opportunity (sync all updated to either record). Opp can ONLY be synced to one Quote at a time.
- Opportunity identifies the synced Quote:
  - Synced Quote Field on Opp Detail Page
  - Syncing Checkbox on the Quote Related List
- Products can be converted to Assets of an Account once the Opportunity is Closed Won

# Sales Productivity

- Key Challenges that slow down Sales Reps and ways to Improve productivity
- Sales Cloud Features that help improve productivity
- Design Consideration when recommending a solution
- Reporting used for improving productivity

## Key Challenges

- Four Key Challenges:
  - Data Entry
  - Finding Information
  - Keeping Current Client Data (D&B)
  - Creating Reports
- Ways to Improve:
  - More Selling Time (streamline processes)
  - Faster New Hire Ramp
  - 360 view of customer
  - Better Visibility (reporting, mgmt)
- Discover Questions:
  - Org Structure (geo, product etc)
  - Customer 360 view: what relationships are important
  - Account Responsibility (how does Reps interact with their accounts)
  - Activities for Sales Reps what needs tracking or included as activities
  - Account Managed: more than one System of Record (SOR) for the client? Ensure data consistency.
  - Contact Managed: How do reps manage contacts, sync with other systems

## Features & Design

- Features Objects:
  - Account, Contact, Opportunity, Activity allows comprehensive look at the client, provide 360 view
  - Reports help track pipeline efforts
  - Dashboards help insight to productivity
- Features Improve Productivity:
  - Account Record Types, Formula Fields, Custom links and Mash-ups should enrich the user experience
  - Contact Sync (Outlook/Lotus), WF & Approvals, Email/Mail Templates provide time saving benefits
  - Home Page/Tagging will help the rep using the system everyday
- Design Account:
  - Account Teams expands visibility (allows My/My Teams filters/reports)
  - Record Types: partner or prospect etc.
  - Rename Account Tab to ease change management (e.g. Account -> 401K)
  - Account Name is a require field (who can update it will impact back office systems etc. integration?)
  - Use Mini-Page layout to display parent account records in the hierarchy
- Design Contact:
  - Contact Creation & Synchronization, huge WIIFM for users; depends on the target sync
  - Partner Contacts should be hosted on Partner Accounts and Contact Roles can be used
  - Use Data Validation, WF, Picklists, Formula fields to ensure data quality for Email/Mail templates

## Productivity Reports

- More Selling Time:
  - # Face to Face Meetings
  - # of Deals won, lost, in-progress
- 360 View of Customer:
  - Activities by Account and Role
  - Meeting Notes
  - Upcoming Renewals
- Better Visibility:
  - Neglected Accounts
  - Activity Reports
  - Approval Status
- Faster New Hire Ramp:
  - Activities Completed By Type
  - Pipeline

- Chatter:
  - # Face to Face Meetings
  - # of Deals won, lost, in-progress
  -

# Sites & Portal Management

- Use Cases for Portals and Sites in the Sales Process
- Impacts for Partner Portals

## UCs for Sales Process

- Partner relationship management allows companies to maximize the return on their channel investments and increase channel revenues by managing, tracking, and forecasting channel business alongside their direct sales business. It also helps partners sell more effectively, close more business, and achieve greater profits.
- Empowering your partners with your Salesforce data can help you sell more without spending more. However, you want to control the information your partners can access, and you want your partners to work within an application that uses your company's branding. You can accomplish this by granting your partners access to a Salesforce partner portal.

## Partner Portals

- You can customize the web portal to show your branding, and you can configure it to meet your functional and security needs, including enabling single sign-on for portals, so your partners have a single log in to access Salesforce. You can also have multiple portals to meet your different requirements for working with partners.
- Three roles get created when partner contact is added
- <Partner Name> – Partner Executive
- <Partner Name> – Partner Manager
- <Partner Name> – Partner User

- The following Salesforce features are key to partner relationship management:
- **Partner Accounts**
- Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using the partner portal.
- **Partner User**
- Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.
- **Channel Managers**
- Channel managers are the internal users that manage your partners.

# Sales Cloud Analytics

- Reporting Solution considerations: Pipeline, Forecasting, productivity, trending and analytical snapshots
- Multi-currency on reports and dashboards

## Report Considerations

- Implementations Success:
  - # Logins per week
  - Count of Activities created
  - # New Contact created daily
- Marketing ROI:
  - Report # of closed/won sales that results from Campaigns

  - Salesforce for Google AdWords and Google Analytics complement each another. Google Analytics is a website analytics tool that allows you to view the number of website visitors, page views, clickstreams, and more. Salesforce for Google AdWords identifies the source of website visitors as they become leads in Salesforce, allowing you to track the source of leads, opportunities, customers, and revenue. Many companies use both Google Analytics and Salesforce for Google AdWords together to form a complete picture of website activity and website lead generation.
  - Google AdWords™ (http://adwords.google.com) is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers generate leads using Google AdWords.
  - Salesforce for Google AdWords connects Salesforce with Google AdWords, allowing you to track the effectiveness of your online advertising investments. With Salesforce for Google AdWords, you can:
    - Use Google AdWords as a lead generation tool
    - Correlate clicks on Google advertisements with Salesforce leads
    - Track the results of Google AdWords campaigns from Salesforce
    - Analyze which keywords and advertisements are generating leads, sales opportunities, and new customers
    - Measure effectiveness using the Google AdWords dashboard and optimize your AdWords campaigns

## Multi-Currency Impacts

- Agents:
  - Summary Reports
  - Individual Performance
  - KPIs
  - Go to: HomePage, Dashboard, Dynamic Reports via link
- Account Managers:
  - Account Summary Reports
  - Summary Stats
  - Customer Metrics
  - Go to: Dashboard Component, Dynamic Reports
- Managers/Exec:
  - KPIs
  - Agent Productivity
  - Customer Metrics
  - Team Metrics
  - Go to: Homepage, Dashboard

# Integration & Data Management

- Integration Design considerations for common use cases
- Data Migration

## Design Consideration

Salesforce to Salesforce enables business collaboration both within and across Salesforce organizations. This allows you to share lead, opportunity, account, contact, task, product, opportunity product, case, case comment, attachment, or custom object records with your business partners that use Salesforce and get real-time updates on the shared data. For example, you can share lead and opportunity data with business partners and manage your entire pipeline and programs within Salesforce.

Salesforce to Salesforce allows you and your business partners to collaborate more easily and effectively. With Salesforce to Salesforce, you can share records with one or more connections, and each connection can accept records you share with them - even if other connections have accepted the same record.

Salesforce to Salesforce allows your business partners to:

1. Access all their programs from one place
2. Easily integrate your data with the data they manage in Salesforce
3. Integrate their business processes with updates received from you using workflow, assignment rules, and reports

Salesforce to Salesforce allows you to:

1. Have 100% visibility into your partner activity
2. Manage your entire pipeline, both internal sales and channel sales, in one place
3. Rapidly and easily share data across multitiered partnerships
4. Integrate your business processes with updates received from your partners using workflow and assignment rules

Before connecting with other organizations using Salesforce to Salesforce, you must complete the following:

1. Enabling Salesforce to Salesforce**Warning**
2. Enabling Salesforce to Salesforce is not reversible, however, you control the information you share and the connections you share with. You can stop sharing or modify sharing settings at any time. By enabling Salesforce to Salesforce, you agree to allow salesforce.com to process updates to information in your organization that is shared with other organizations. Salesforce to Salesforce allows you to share your data with third-party recipients, and those recipients may in turn use Salesforce to Salesforce to share your data with further third-party recipients unknown to you. You are responsible for ensuring that appropriate contractual or other legal arrangements are in place between you and your recipients to limit those recipients' use and disclosure of your shared data.

## Data Migration

- Data