Project Overview

Clean Bikes (CB) is one of the leading manufacturers of zero-emission motorcycles. They sell their motorcycles exclusively through dealers across the globe. CB does sell motorcycle accessories, in addition to providing customer service directly to customers.

CB is headquartered in Canada, but has satellite offices in 8 countries to support dealers and customers in CB's 30 regions. CB works with approximately 10,000 dealers and has sold motorcycles to approximately 4 million customers. CB expects the number of dealers and customers to grow by 25% over the next 18-24 months.

CB uses three (3) separate systems to manage their sales process, customer service, and authenticated portal. They have decided to replace all three systems and consolidate onto the Salesforce platform. CB also requires the Salesforce platform to support English, French, Spanish, German, Russian, Arabic, and Japanese.

CB expects the following groups of users to interact with the Salesforce platform:

1. **Channel Managers** – Onboard new dealers and work with existing dealers to purchase new CB motorcycle models and sell off the current models. They are managed at the regional level.
2. **Customer Service Representative (CSRs)** – Responsible for handing questions/issues raised by customers. They are aligned and managed by region, except for a group of global CSRs who handle issues where a customer is injured.
3. **Dealers** – Sell motorcycles directly to end customers and occasionally assist with customer questions/issues. Each dealership consists of an owner, sales managers, and sales people.
4. **Customers –** The end-customers who buy motorcycles and motorcycle accessories.

Dealer Onboarding

Part of CB's sales growth strategy is to increase the number of dealers who can sell their bikes. They would like to use Salesforce to quickly onboard new dealers by:

1. Providing a web page for potential dealers to create a New Dealership Application that captures information such as:
   - 1.1. Details about the dealership, such as name, address, website, and tax ID. The address format should be validated at the time of entry.
   - 1.2. Name and contact information for the owner of the potential dealership.
   - 1.3. Which motorcycles they would like to sell and how many of each in the first 2 years.
2. When the application is submitted, a Channel Manager gets associated with the application based on the postal code of the dealership, as well as gets notified of the association.
3. The Channel Manager manually runs a credit check and calls the owner of the potential dealership.
   - 3.1. If the credit check passes and the Channel Manager is satisfied with the phone call, then the Channel Manager will update the status, which will:

3.1.1. Automatically send CB’s dealership contract to the dealer owner for electronic signature.
3.1.2. Upon signature, automatically notate on the application that contract has been signed and notify the Channel Manager.
3.2. If the phone call doesn’t go well or the credit check fails, then the Channel Manager can escalate the application to his/her manager to review and can:
3.2.1. Accept the risk, which will send out CB’s dealership contract for electronic signature.
3.2.2. Reject the risk, which will update the status of the application and send an email to the dealership owner.
4. Once the contract has been electronically signed, the Channel Manger should have the ability to easily create separate records corresponding to the new Dealership, the owner of the Dealership, and as a potential commitment by the Dealership to buy a specific amount of motorcycles

Dealer Management

CB works with dealerships on agreements to purchase different models and quantities of motorcycles on a yearly basis. In addition, CB’s management wants to ensure that Channel Managers do not overly discount the motorcycles. CB is looking at Salesforce to provide the ability to:

1. Allow Channel Managers to create a proposed agreement and track the various phases from initial conversations to formal signature.
   1.1. The phases and information captured vary by region, and CB wants Salesforce to provide a mechanism to support that.
   1.2. At each phase, specific guidance about the phase should be visible to the Channel Manager.
2. At a regional level, configurable by an Administrator and not requiring a developer:
   2.1. Enforce the minimum price at which a motorcycle can be sold.
   2.2. Ensure that the average discount percentage is below a certain threshold.
3. Even though dealerships commit to buying a certain quantity of motorcycles in a year for a specific price, they have the right to unevenly spread the quantity they purchase each month with in the agreement year. CB wants the Sales Managers at each dealership to create the schedule within Salesforce such that:
   3.1. Salesforce allows the Sales Managers to enter the quantity requested each month using as few clicks as possible.
   3.2. Automatically ensure the sum of each monthly quantity is never less than the agreed upon annual quantity.
   3.3. If the dealership increases the total annual quantity needed, then:
      3.3.1. A task is created for the Channel Manager to confirm with CB fulfillment that the order can be fulfilled.
      3.3.2. If it can be fulfilled, then the agreement needs to be automatically updated to reflect the correct quantity and price.
4. Occasionally dealerships will pursue bulk sales: 10+ motorcycles to a single customer in one transaction, and CB wants the ability to monitor and work with the dealership on those deals to:
   4.1. Collaborate on specific motorcycle model features and fulfillment questions.

4.2. Sign off on any discounts off the Manufacturer's Suggested Retail Price (MSRP) above a certain threshold that is configured by region.
4.3. The information captured during the bulk sales deals is different than normal sales pursuits by Channel Managers and the user interface in Salesforce needs to account for these differences.

Customer Service

One of CB's differentiators is that it handles initial customer service issues directly. CB customers submit about 10 issues per year. CB is looking to use Salesforce to:

1. Allow for questions/issues to be logged via phone, web, or email and have the issues routed to a CSR in the customer's region based on issue category and availability.
   1.1. The exception is injury-related issues, which get routed to a global team of CSRs to address.
2. Ensure that if an issue is not acknowledged within a defined time period, the manager in the region is alerted and helps resolve the issue.
3. When customers buy motorcycles from a dealership, they are automatically enrolled in a basic service plan, but have the ability to purchase one of two plans, Premier or Special, which amongst other benefits entitles customers to:
   3.1. Faster response times for issues/questions logged.
   3.2. Higher priority in the phone queue based on recognition of phone number.
4. Provide an authenticated portal that will allow customers to:
   4.1. Collaborate with other CB customers and CB product experts.
   4.2. Log issues/questions.
   4.3. Search for and read articles and manuals related to CB motorcycles, as well as topics such as motorcycle maintenance, performance tuning, and overall motorcycle safety.

Security Requirements

1. Channel Managers can only see dealerships and dealership employees in their region, but can only make changes to dealerships and dealership employees for which they are responsible.
2. New dealership applications are only visible to the Channel Manager assigned to the application and their managers.
3. Sales pursuits are usually managed by Channel Manager assigned to the dealership, but for complex deals, the Channel Manager will pull in deal support specialists who should have full access to the deal.
4. The Tax ID for the dealership should only be visible to Channel Managers and their management chain, and every effort must be made to prevent inadvertent access to the Tax ID.
5. CSRs need to have the ability to see all questions/issues across the world, but only work on questions or issues in their region, with the exception of injury issues.
6. Dealership Sales Managers and Salespersons should have visibility into all warranty questions/issues submitted by customers who bought motorcycles and their dealership.

7. The Dealership Owner and Channel Manager assigned to the dealership should have the ability to work on all bulk sales deals at that dealership.
8. Customers need to be able to view any issue they submitted by email, web, or online chat.
9. Channel Managers store free-text notes about the individuals who work at dealerships. These notes should only be visible to other Channel Managers who have access to the individuals.

Reporting Requirements

1. The Channel Sales management team requires a monthly notification of every Channel Manager who missed their quota, as well as any Channel Manager who exceed their quota by more than 10%.
2. In addition to metrics such as the average support call time, average issue length, and top issue categories, the CSR management team would also like to see the top 5 error codes generated from the motorcycles' onboard computer that are sent by each motorcycle every time the onboard computer encounters a problem. Each motorcycle generates around 100 error codes per year.