Office of Energy Efficiency and Renewable Energy's Small Business Program

Students will use a Developer Edition Org to complete this project. Ensure that your instructor is added as a user to your Developer Edition Org as a System Administrator with a unique username and their SkillStorm email address as their email.

The EERE Small Business Program is designed to help small businesses in the energy industry grow and contribute to the government's overall energy efficiency goals. The goal of this project is to provide a Salesforce implementation for managing the Small Business Program.

https://www.energy.gov/eere/eere-small-business-program

https://www.energy.gov/eere/funding/how-do-i-apply-eere-funding

Data Requirements Outline

Department of Energy needs a Salesforce Org to manage the deals, service agreements, and acquisitions of small businesses in the energy industry. They need to capture all relevant information about these businesses, including, **but not limited to**:

- Type of work they do
- Products/services offered *
- Location(s)
- NAICS codes
- Number of Employees
- Annual Revenue
- Time spent in EREE Small Business Program
- Grants/deals/agreements given by DoE *

- custom object likely required

This information needs to be easily accessible in a custom app where they can get information about all aspects of EERE's Small Business Program. This app needs to have convenient and easy-to-use features for managing associated small businesses, service agreements, types of contracts offered, reports on these grants and programs, and anything else you believe is necessary for users to have access to.

Data Access Specifications

The DoE also needs structure for their teams. They have regional sales and service teams who oversee interactions with customers in different regions across the United States. Sales teams are responsible for overseeing and approving both new and existing acquisitions while Service teams consist of technicians who will meet with these small businesses to set up any connections with EERE's systems as needed. Both departments follow the following company structure:

- Regional VPs who oversee all department related actions in that region
- Directors, who manage specific locations in a given region and report to the regional VP.
- Managers that handle day-to-day operations with their teams of Associates. Managers' report to Directors.
- Associates who handle specific tasks in their fields and report to their manager.

Ensure that Directors have access to all relevant data at their location only. VPs can have full access to everything in their region and limited access to everything in other regions. Associates should only have access to their own records while Managers can get access to everything within their teams.

Due to limitations with Developer Edition Orgs, you do not need to create users, but should still create profiles, permission sets, roles, sharing rules, etc., ensuring that users would only have access to the data they are supposed to.

Application Process

EERE would also like their existing application process to take advantage of the automation features in Salesforce. When an application comes in, an Associate will be designated as the Contracting Officer for that company. Ultimately, directors will be the final decision makers for who is and isn't accepted, but their decision will be made easier by the application first going through an automated recommendation tool (Concept Paper Stage) and being reviewed by the Contracting Officer and their Manager. Once fully approved, companies should be informed of the decision and how to proceed with the program.

Regardless of if an application would be accepted or rejected, the company's data should still be entered into the Salesforce org and all data submitted for each application step

should be entered into the org as well. You will need to parse all incoming data from the application and ensure all relevant records, fields, and relationships are inserted correctly.

Concept Paper Stage

The initial Concept Paper stage should be completely automated by analyzing applications for specific details. This stage informs applicants of the likelihood of their acceptance into the program rather than fully accepting/rejecting them. Therefore, this should not require any human involvement and encourage/discourage applicants based on designated factors you deem necessary. For example:

- Does the company meet the criteria for being a small business?
- Is there enough funding available for the specific industry the business is in?
- What products and services does the company offer and how does that compare to other businesses currently in the program? Is that product/service area over or undersaturated?

Full Application Stage

Since this stage is what determines a company's acceptance into the course, manual review is best. Ensure that all relevant information is easily accessible for Directors, Manager, and Associates. All communications that occur between EERE and the applicants should be recorded.

Selection Stage

Applicants should be automatically informed via email if they are being accepted or rejected into the program when a director makes the final decision. This email should contain information about when meetings/communications will begin for the Negotiation Stage.

Negotiation Stage

Pending meetings with applicants, the final funding amounts will be set in this stage. Ensure that funding is not allocated incorrectly, meaning that funding isn't granted where it is not available.

Project Performance Stage

In this stage, applicants will submit progress reports indicating what they are using the funding for and any updates with their products/services. This stage needs to be monitored to ensure businesses stay in compliance with their contracts.

The DoE wants an automated way to remove funding allocation to companies who no longer meet the requirements to receive their aid. Some companies' grants are contingent on their continued research, manufacturing of a product, or selling of specific services. If the small business no longer meets the requirements to receive aid, then funding should be revoked and made available elsewhere.

Before any funding is fully revoked, the company and the relevant EERE agents should be informed of any violations and given a chance to correct any issues. If issues are not resolved, then funding should be removed and acceptance in the program revoked.

This feature should also include a warning system for companies whose contracts are set to expire soon, giving them the chance to renew their contracts before they expire. Companies looking to renew existing contracts should be expedited through the automated review stage and then receive priority for the manual review stages and negotiations.