



Salesforce Admin & Analyst Team Sprint

Team 2 “the bull consultants”



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About the project

Project

**World Health Organization (WHO)
grant allocation process
restructuration by implementing
Salesforce**



Background

World Health Organization (WHO) emphasizes the need of improvement in grants allocation process.

WHO would like to:

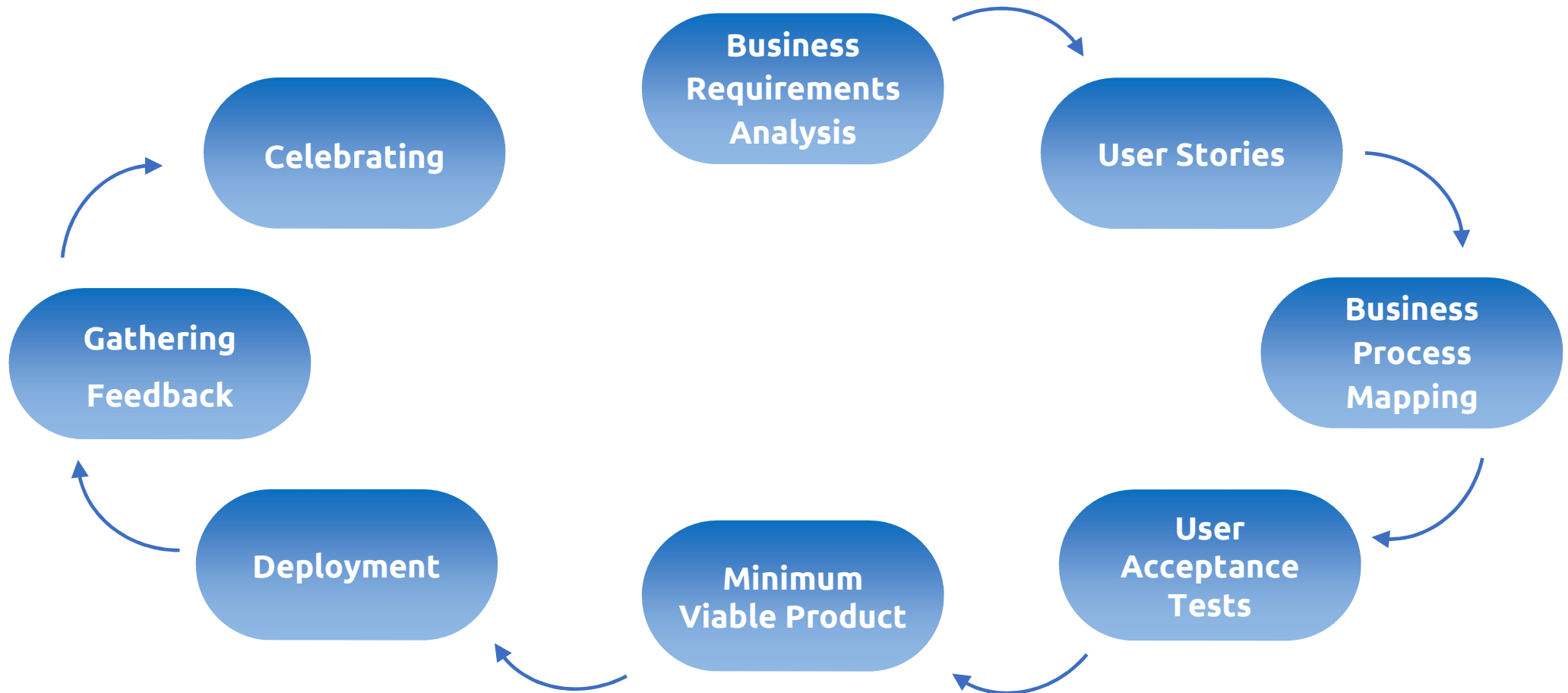
- streamline grant management,
- improve efficiency,
- enhance grant approval processes.

Pain Points

- Lots of manual administrative tasks
- Lack of centralized system
- Inefficient communication



Plan





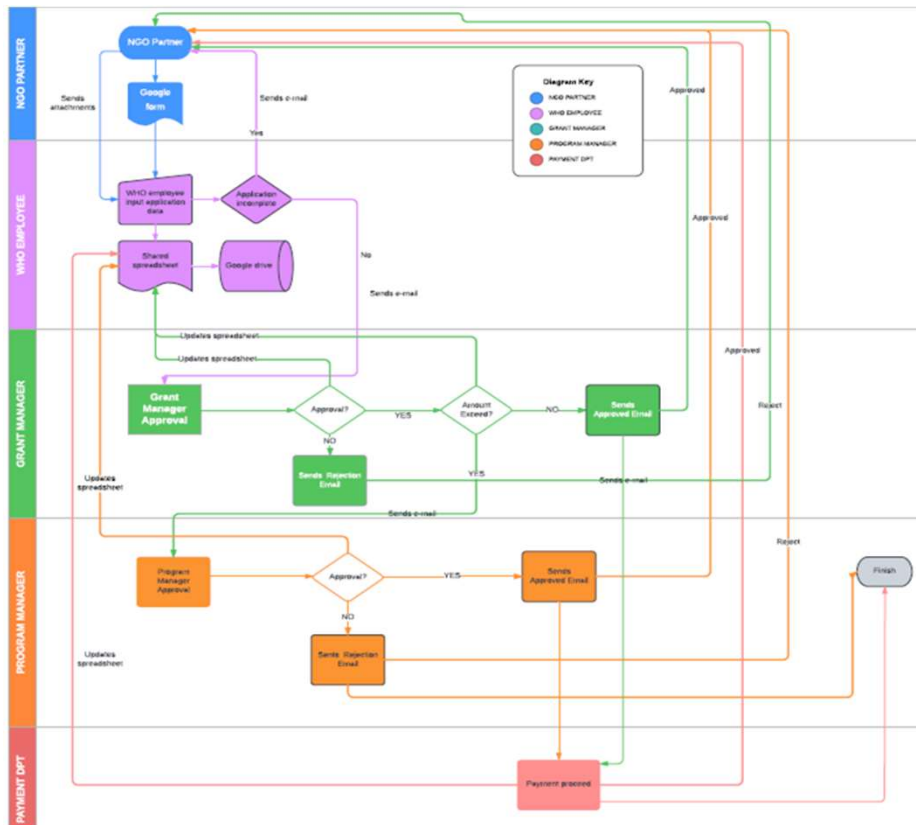
User Stories as a Program Manager

WHAT (I want)	WHY (so that)	AC (Verify that)
<ul style="list-style-type: none"> To view the count of grant applications by status track the communication with applicants ----Real time tracking and up to date reporting available on demand 	<ul style="list-style-type: none"> able to better prioritize work 	<ul style="list-style-type: none"> should be able to view the report with organization name,status (Submitted, rejected, pending approval and approved) eventually show the count of each status the only people who should be able to access this report are program manager and grant reviewers I should be able to view a corresponding chart in donut shape showing the status (submitted, reject, pending approval and approved) in percentages the report should be emailed to program managers and grant reviews every Monday morning
<ul style="list-style-type: none"> Standardize data collection + all of the information regarding grant applications to be stored in one place (application, attachments, photos, word documents, emails, calls) centralized, secured and efficient data management (collection and distribution) system 	<ul style="list-style-type: none"> to ensure the availability of relevant information. WHO complies with regulations around the world + to improve consistency and efficiency 	<ul style="list-style-type: none"> can access application (add attachments, add email, log a call)
<ul style="list-style-type: none"> applications to be submitted automatically to the system via different resource - End to end process automation that delivers efficiency to WHO's grant management processes 	<ul style="list-style-type: none"> we can eliminate the burden of manual tasks + to streamline operations 	<ul style="list-style-type: none"> automation process implemented
<ul style="list-style-type: none"> the system should be easy to use 	<ul style="list-style-type: none"> for quick adoption and timely transition from the old system 	<ul style="list-style-type: none"> adoption monitoring in place (dashboard) +training
<ul style="list-style-type: none"> efficiency in internal workflow and communication both external and internally 	<ul style="list-style-type: none"> I can reduce the number of complaints 	<ul style="list-style-type: none"> automated process of reviewing and accepting applications

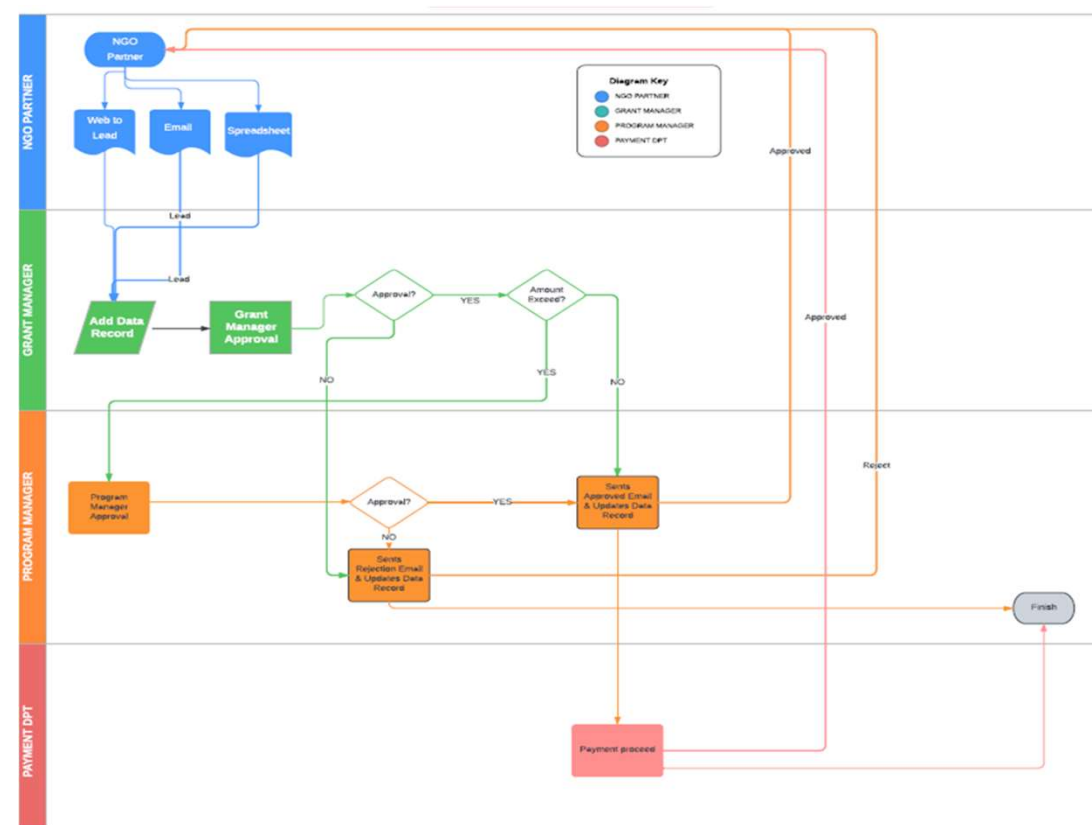


Business Process Mapping

Current state



Future state





User Acceptance Tests requirements

Define

Design

Plan

Track

Resolve

Analyze

WHO Salesforce Nonpr...

FA

Requirements

1 - 4 of 4

Search...

Code	Name	Type	Test Cases	
RQ1	Lead from application	Functional	8 test cases	
RQ2	Approval process Grant Manager	Functional	15 test cases	
RQ3	Approval process Program Manager	Functional	6 test cases	
RQ4	Payment procedure	Functional	3 test cases	



User Acceptance Tests design

Test Suites



1 - 4 of 4



Name

Test Cases

Web to lead

8 test cases



Approval process Grant Manager

15 test cases



Approval process Program Manager

6 test cases



Payment procedure

3 test cases





User Acceptance Tests plan

Milestones



1 - 4 of 4

Search...



Name

Type

Ends

Test Runs



Web-to-Lead

Release

in 2 days

2 test runs



Grant Manager approval process

Release

in 2 days

1 test run



Program Manager Approval Process

Release

in 4 days

1 test run



Payment procedure

Release

in 5 days

1 test run





User Acceptance Tests

test case structure

[Web to lead](#)


TC1 - send application through WHO web to Lead form filling in all mandator...
Updated 11 hours ago by maria sliška

Name send application through WHO web to Lead form filling in all mandatory field

Instructions

1. open application form in browser (www.application.who.org)
2. fill in all fields with TEST DATA
3. add attachments
4. click send application form to proceed

Attachments


Ultimate-Guid...

Requirements 1 **Test Runs** 2

RQ1 Lead from application

Duration 5 minutes

Draft ☐

Tags

Preconditions

You must be on WHO web form page

Expected result

From the Web-to-Lead form, the Lead record is correctly created in Salesforce after filling in the required fields in the html and you should receive a confirmation message telling you the application was send successfully.

A confirmation email should arrive shortly after your application was sent. The email should contain number of the case.

Test data

Customer Type: Lead
Name: John Doe
Company BetterLife
Project: Vaccines for COVID
e-mail: jdoe@betterlife.xyz
phone: +51123456789
Amount: \$300 000,00



Minimum Viable Product

Web to Lead



World Health Organization

Grant Application Form

First Name *

Last Name*

Project Name*

Project Value*

Company*

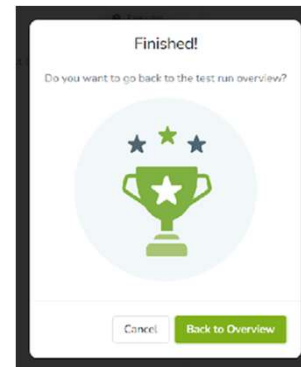
Email*

Phone*

City

State/Province

UAT RQ1 passed



Define

Design

Plan

Run

Track

Resolve

Analyze

WHO Salesforce Nonpr...

2

SA

Run Tests

1 - 2 of 2

Search...

Test Run	Period	Environment	Test Cases	Progress	
<div>></div> <div>TR2</div> <div>Grant Manager Approval Process</div>	Jun 22 - Jun 24	Salesforce Nonprofit Cloud	15 test cases	<div>0%</div>	<div></div>
<div>></div> <div>TR1</div> <div>Web-to-Lead</div>	Jun 17 - Jun 23	Salesforce Nonprofit Cloud	8 test cases	<div>100%</div>	<div></div>



Minimum Viable Product

Duplicates check

The screenshot shows a Salesforce Lightning interface. On the left, there's a sidebar with 'All Open Leads' and a list of leads. The main area shows the details of a lead named 'Fulvio Angrisani'. The lead's information includes Title, Company (Helmut Srl), Phone (+3939215456985), and Email (fulvio.angrisani@provola.it). Below this, there are tabs for 'Open - Not Contacted', 'Working - Contacted', 'Closed - Not Converted', and 'Converted'. The 'Open - Not Contacted' tab is selected. In the 'Related' section, there's a message: 'We found no potential duplicates of this Lead.' and a 'Campaign History (0)' link.

Lead converted

The screenshot shows a modal window titled 'Your lead has been converted'. It contains a red star icon and a mountain graphic. Below the icon, there are three sections: 'ACCOUNT', 'CONTACT', and 'GRANT REQUEST'. Each section displays information for a specific entity. The 'ACCOUNT' section shows 'BetterLife' with details like Type, Phone, Website, Account Owner, and Account Site. The 'CONTACT' section shows 'John Doe' with details like Title, Account Name, Phone, Email, and Mobile. The 'GRANT REQUEST' section shows 'BetterLife-' with details like Account Name, Close Date, Amount, and Grant request Ow... At the bottom right, there are buttons for 'New Task' and 'Go to Leads'.



Approval process Grant Manager

Personal Assignments | Exa | Contentful for Business An | Understand the Five Most | Team02.xlsx - Ark | Aplikacja meet.google.com udostępnia Twój ekran. [Zatrzymaj udostępnianie](#) [Udaj](#)

thebull2-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04s8e000000Xbkj

Search Setup

Setup Home Object Manager

Q appro

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

Didn't find what you're looking for?
Try using Global Search.

Approval Processes

Initial Submission Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Amount Not Exceeded		Opportunity: Project Value LESS THAN "GRP 100,000", else Approve	User Santiago Hen	Final Rejection
Show Actions Edit	2	Amount Exceeded		Opportunity: Project Value GREATER THAN "GRP 100,000"	User Maria Rodriguez	Final Rejection

Final Approval Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Email Alert	Approved
Edit Remove	Field Update	Approved

Final Rejection Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Rejection
Edit Remove	Email Alert	Rejected

Global Actions

Wyszukaj

21:29
22.06.2023



Approval process Grant Manager

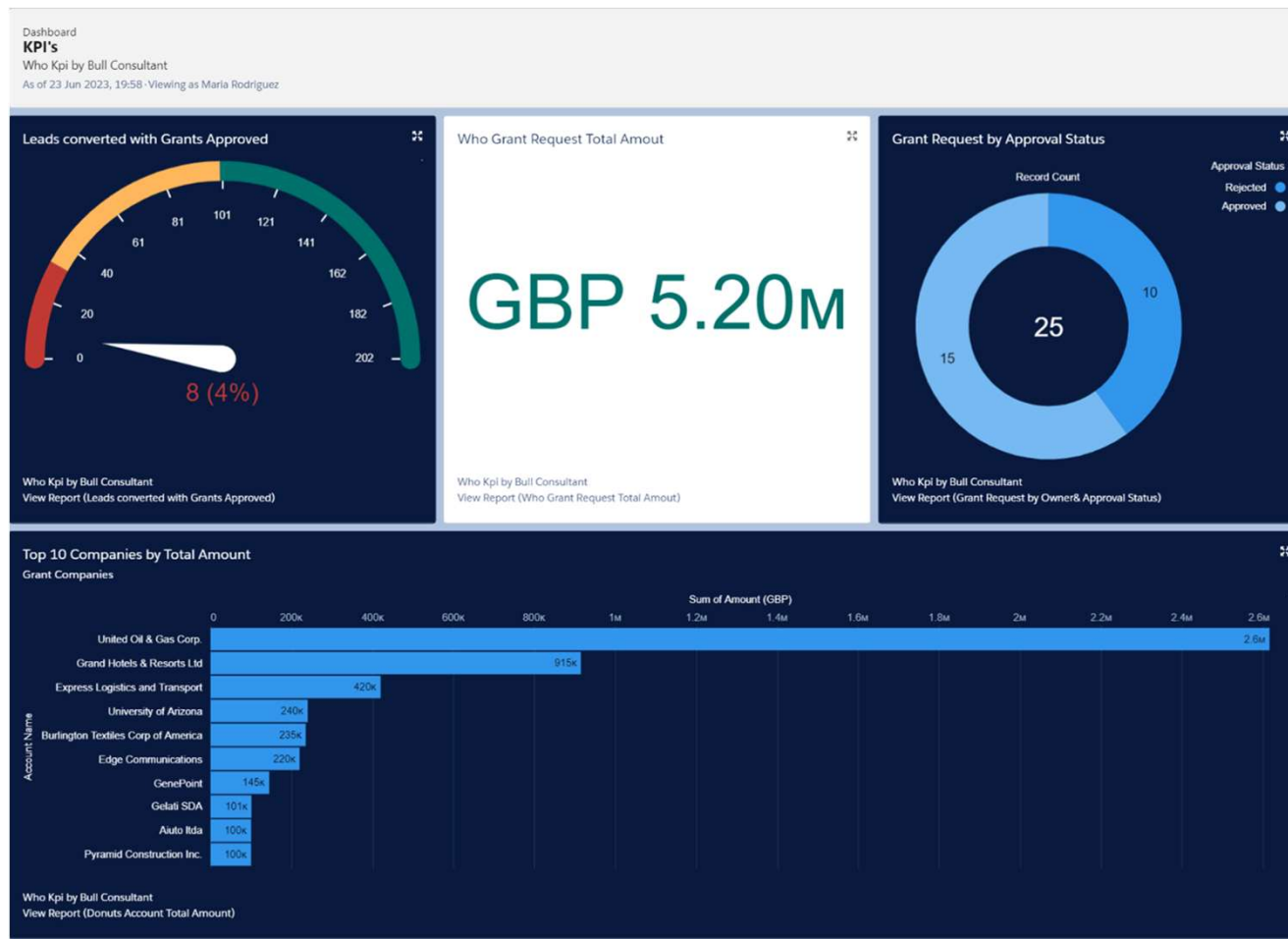
The screenshot displays the WHO Grant Manager interface. On the left, a sidebar shows a list of grant requests under the heading 'All Grant Request'. The main area shows the details of a specific grant request, 'Auto Hda', which has been approved. The approval process is shown as a 'Process Instance Step' with a status of 'Approved'. The details section includes a table with the following information:

Submitter	Date Submitted	Actual Approver	Assigned To
Maria Rodriguez	21 Jun 2023	Santiago Hern	Santiago Hern

Below the table, the 'Approval Details' section shows the 'Grant request Name' as 'Auto Hda' and the 'Grant request Owner' as 'Maria Rodriguez'. On the right, the 'Approver Comments' section shows a comment from 'Santiago Hern' dated '21 Jun 2023, 18:33:53'.

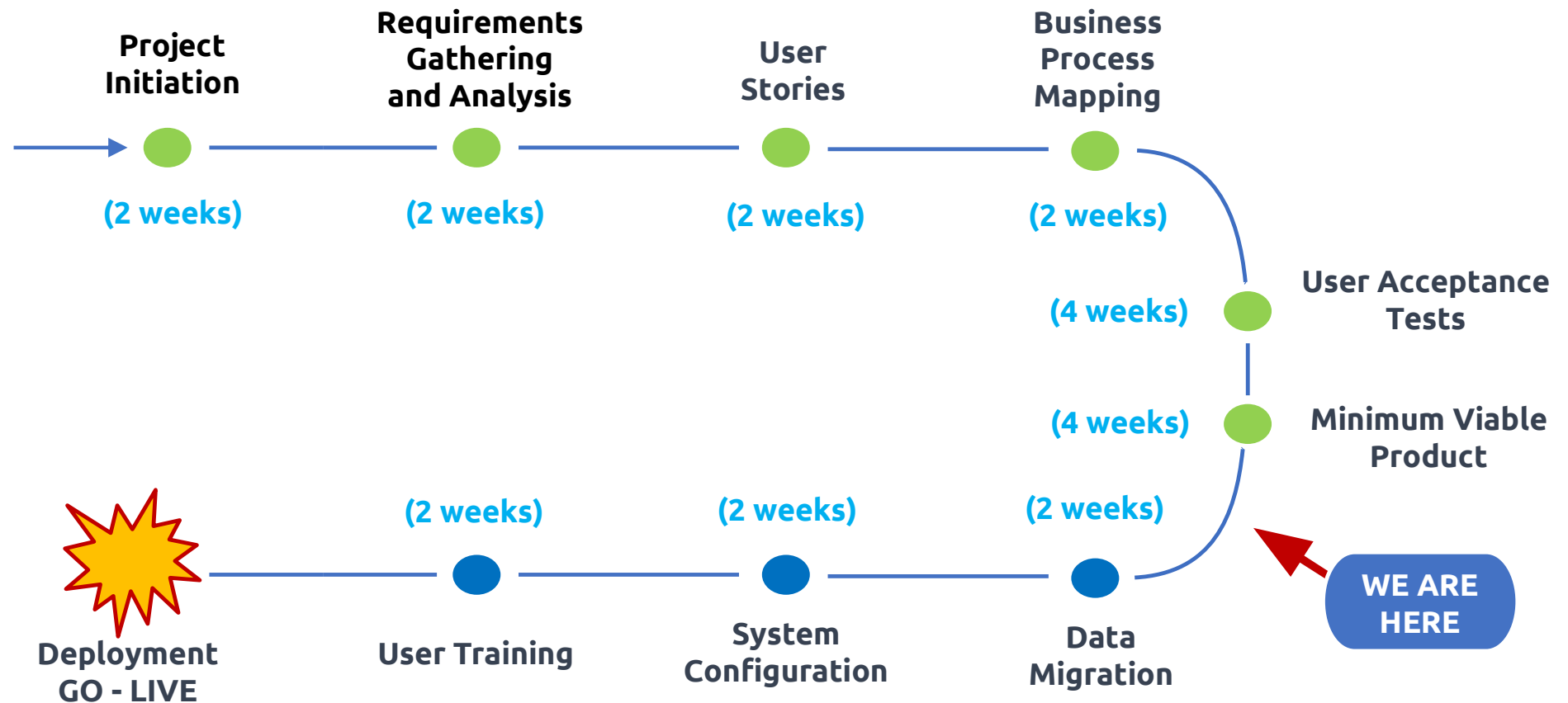


KPIs





Project timeline



the bull consultants



**Thank You
for
Your
Attention**