McGeever CR/ARR OneWorld 2014.2

CRM Lite

October 2014

SUITE DEMO TEAM

McGeever CR/ARR OW 2014.2 CRM Lite Demo Script

Confidential Information

Date of Document Issue

October 2014

Document Version

2014.2

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Contact

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Demo Excellence Team

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Contents

Demo Overview

Demo Description

This demo script is an overview of NetSuite's CRM capabilities related to Marketing and Support operations. It shows how NetSuite works seamlessly to support lead generation through marketing campaigns as well as how issues and the related solutions are effectively tracked and communicated.

Important Notes to SC

- This demo script will provide you with the process and steps to do a basic CRM demo. It includes marketing campaigns, lead generation, and support case handling.
- What is italicized in this demo script is what you say; what is not italicized is what you do.

Intended Audience

This demo is suited for the following audience:

- Marketing executives and staff
- Sales professionals
- Support VP and support reps

NetSuite Key Features To Highlight

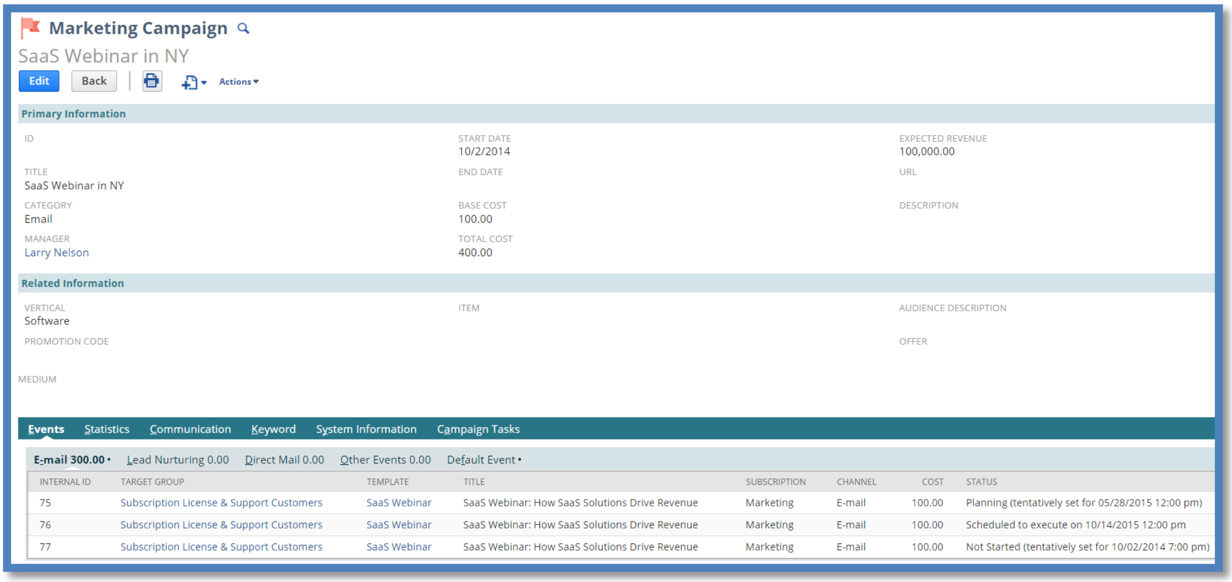
- Drive decision-making with real-time access to marketing and support data
- Generate and manage leads with integrated marketing campaigns and sales force automation
- Enable high-level of responsiveness to customer questions and issues
- Minimize time and effort of data analysis through easily-customized views and reporting
- Ensure accuracy of data with one centralized source of information

CRM Lite Demo

Marketing

Note: Prior to the demo, do the following to set up a marketing campaign event.

- From the Marketing VP – US West role, use the Marketing Campaigns portlet on the Home dashboard to access the SaaS Webinar in NY marketing campaign. Use the arrows on the top left of the portlet to find this campaign in the list. Click Edit on the campaign.
- Change the Start Date of the campaign to today's date (type "T" and hit return in the Start Date field).
- In the Events tab, add a row with the same information as the previous row except for the date. Make the date today's date. Save the campaign.


Marketing Campaign
SaaS Webinar in NY
Edit | Back | Actions

Primary Information

ID

START DATE: 10/2/2014

EXPECTED REVENUE: 100,000.00

TITLE: SaaS Webinar in NY

END DATE

URL

CATEGORY: Email

BASE COST: 100.00

DESCRIPTION

MANAGER: Larry Nelson

TOTAL COST: 400.00

Related Information

VERTICAL: Software

ITEM

AUDIENCE DESCRIPTION

PROMOTION CODE

OFFER

MEDIUM

Events | Statistics | Communication | Keyword | System Information | Campaign Tasks

E-mail 300.00 • Lead Nurturing 0.00 Direct Mail 0.00 Other Events 0.00 Default Event •

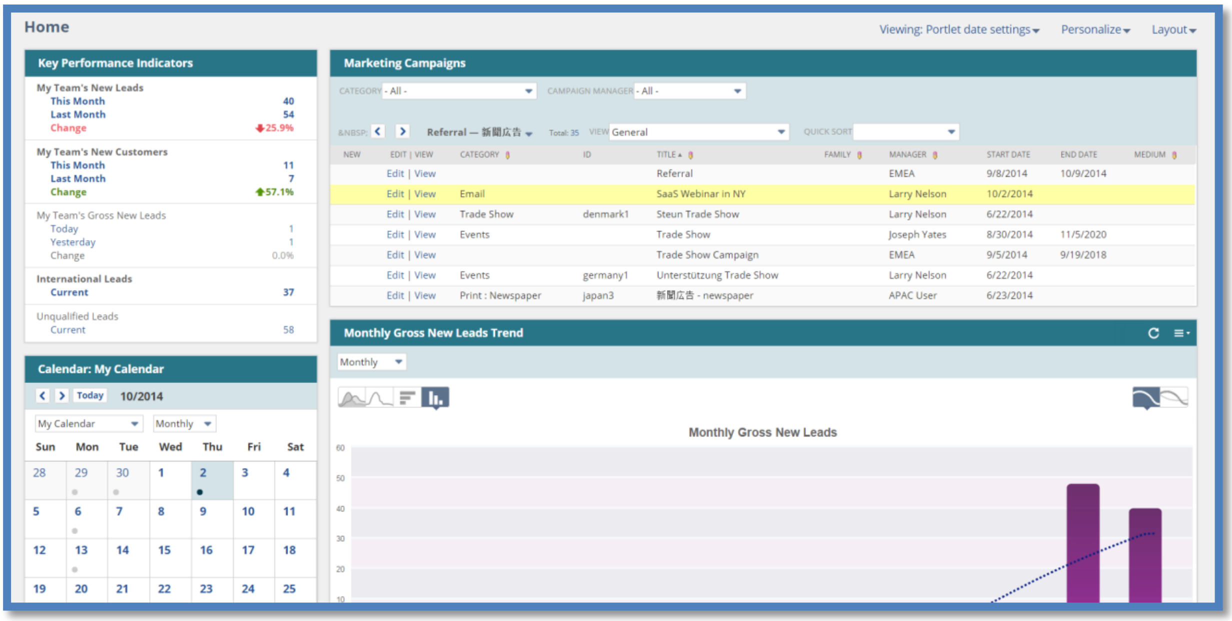
INTERNAL ID	TARGET GROUP	TEMPLATE	TITLE	SUBSCRIPTION	CHANNEL	COST	STATUS
75	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Planning (tentatively set for 05/28/2015 12:00 pm)
76	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Scheduled to execute on 10/14/2015 12:00 pm
77	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Not Started (tentatively set for 10/02/2014 7:00 pm)

Marketing VP – US West

1. From the Home dashboard, explain that from this dashboard, you can access whatever information the VP of Marketing needs. *The dashboard is customizable by the user so that the reports, Key Performance Indicators, graphs and reminders can easily be added or removed. The advantage of NetSuite's dashboard capabilities is that each user can define and edit the dashboards that are relevant to their role in the organization. Creating and editing dashboards in NetSuite does not require technical support.*

2. **Intacct-Competitive Note:** NetSuite's dashboard flexibility is a significant competitive advantage that former Intacct customers only appreciate after converting from Intacct. The ability to add and edit user dashboards in NS is both flexible and user-friendly. Intacct's dashboard solution requires technical support for additional dashboards and edits to existing dashboards.

3. Mention that there are various elements on the Marketing VP's dashboard that assist him/her in day-to-day analysis and in his/her ability to be proactive and, as necessary, reactive to performance and issues. Mention that the KPIs display real-time results and the reminders are available to assist in completing important tasks.

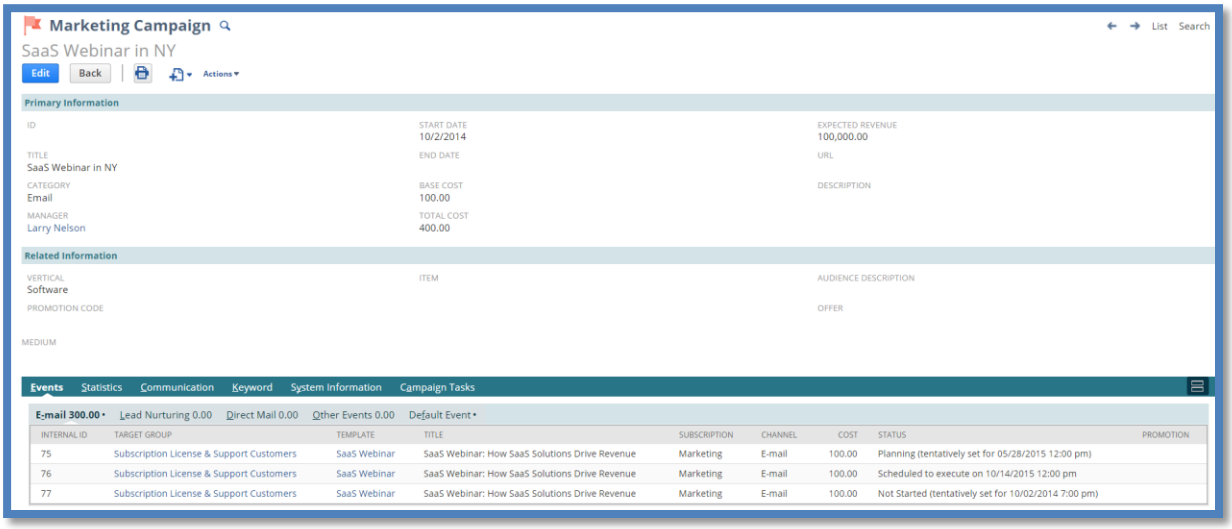


4. *From the Marketing Campaigns portlet, you can access marketing campaigns and events associated with each campaign.* Use the right arrow in the portlet to change the display until you see the SaaS Webinar in NY campaign. *We have a SaaS Webinar that customers will be invited to via email. The email campaign is scheduled to begin today.*

5. **Optional:** Scroll down slightly to show the calendar portlet on the left side of the page. *If you have the Calendar portlet on your dashboard, the campaign event (in this case the email launch) will show on the date that the event is set to execute.* Hover over the date on the calendar (today's date) to show the event. The calendar must be set up to show campaign events. **Note:** You can set this from within the Setup on the calendar portlet.

6. Click view on the SaaS Webinar In NY campaign in the Marketing Campaigns portlet. You are on the Marketing Campaign page. *We can create any kind of marketing campaign. Some that you might typically see are TV, radio, magazine and newspaper ads; email campaigns, direct mail, keyword campaigns, trade shows, other events, and referrals. You can set up as many as you need.*

7. **Note:** If you get a message on top of the Marketing Campaign page that some of the recipients in the group experienced hard bounces, explain that the system will prevent you from sending emails to recipients whose email addresses are incorrect or who choose not to receive emails. This lets you know that your campaign is not reaching certain prospects.



8. Talk about some of the elements on the form and details you can track. Discuss the ability to track cost and expected revenue for the campaign. Open the Statistics tab to discuss how NS tracks total revenue, profit and ROI as well as leads generated and number of purchasers. Explain that having all of this information in one place saves the marketing department time that it would take to gather the data and analyze the results.

9. Open the Events tab and explain that many events can be attached to each campaign. *You'll notice in the Events tab that there are several events attached to this marketing campaign. Each email event can be set up for the same or different target groups.*

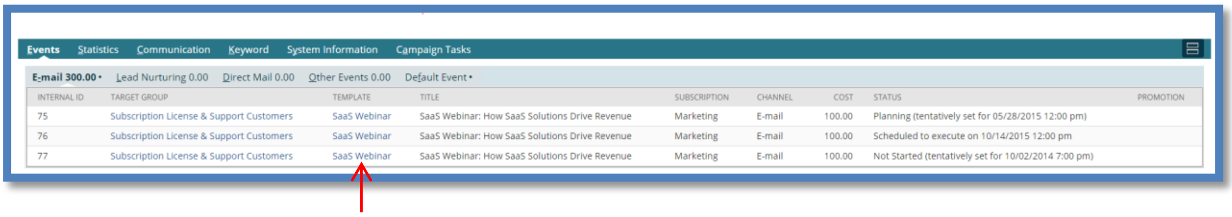
10. Explain that this is an email campaign for an invitation to a Webinar in NY. The target group for the event is based on certain criteria. *In NS, you have the flexibility to set up groups that*

are static and ones that are dynamic, meaning they are based on certain parameters. You can also use our Upsell Manager to create a group that targets customers who previously purchased a specific product. This is a powerful feature that saves the marketing department time analyzing the likelihood of future purchases based on historical ones.

11. **Note to SC:** The Upsell Manager is a powerful feature. If appropriate, explain the following to your prospect. For our SaaS Webinar marketing campaign, there is a group (Subscription License & Support Customers) based on customers who might be interested in purchasing professional services because they previously purchased subscription licenses and support. To save our customers time that would be required to do the research, the system used two measures to create the target group. The first measure is the correlation between the percentage of customers who purchased the item we want to upsell and the item they already purchased, and the second measure is the number of customers who purchased both items in the past. Based on these criteria, the system created a group of target customers, called Subscription License & Support Customers. After a group of customers is created by the Upsell Manager, you can then fine-tune the list and choose which customers from this group will constitute the final target group for the marketing campaign. With the Upsell Manager, you can create a list of customers to target, opportunity records for the sales reps to work, or a list of phone calls that display as events on the sales reps' dashboards.

12. Looking again at the email event, mention that this email will be sent to the target group at a planned time and that the user specifies when the system should execute the email.

13. Open the SaaS Webinar template by clicking on the hyperlink for the template of the event you added during demo prep. Open this template in another tab.



INTERNAL ID	TARGET GROUP	TEMPLATE	TITLE	SUBSCRIPTION	CHANNEL	COST	STATUS	PROMOTION
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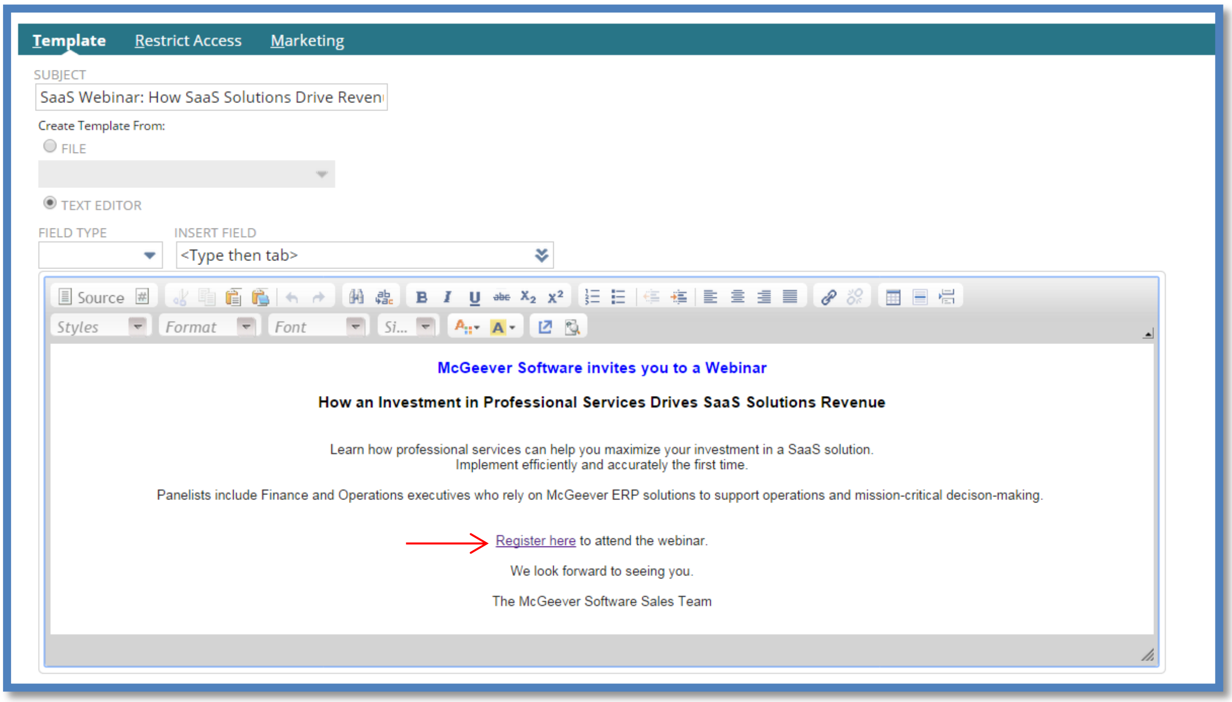
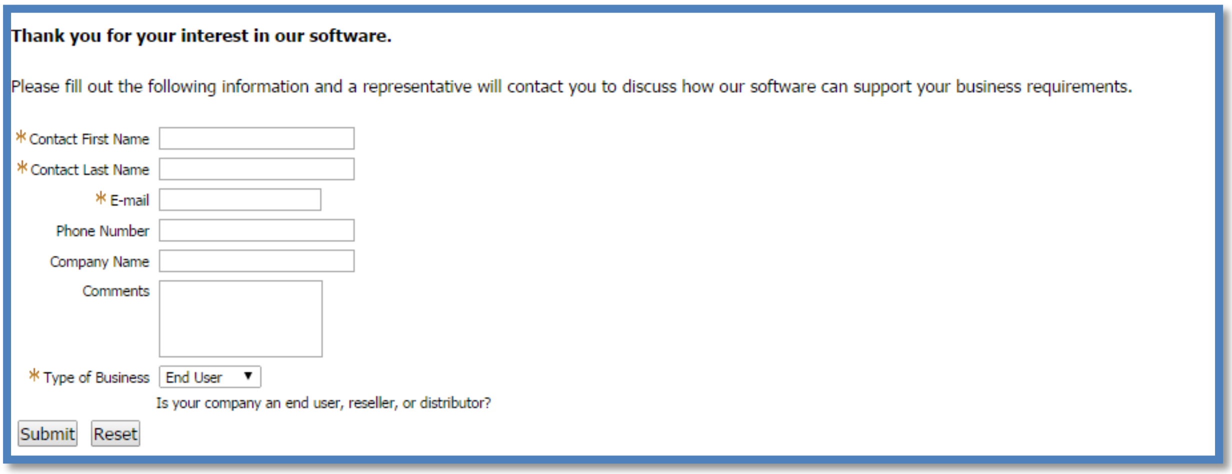
14. On the Campaign Template, click Edit. Focus on the template in the bottom half of the screen. *This is the content of the email that will be sent to customers in the target group. The hyperlink for "Register here" will bring the recipient to an online registration form for the webinar.*



15. *Let's take a look at the online registration form.* Open the shortcut for Online Registration Form. Explain that filling out and submitting information through this form will generate a lead in the system.



16. **Note:** regarding Online Customer Form setup prior to your demo. To customize the look of your registration form for your prospect:

- In Marketing VP – US West role, navigate to Setup > Sales & Marketing Automation > Online Customer Forms; choose the Online Registration Form;
- in the Set Up Appearance tab, update color theme and logo for your prospect;
- in the Set Up Workflow tab, change Redirect To URL to your prospect's url.

17. Fill in the online registration form. *Let's fill in this form so that we can see how this information is automatically set up as a lead in our system.* When you submit the form, you will be redirected to the prospect's url (or to the NetSuite url if you didn't set the Redirect To URL on the Online Customer Form setup). *After submitting the online registration, your prospect is redirected to your website.*

18. From the home dashboard, from the Shortcuts (the Star at the top or the Shortcuts portlet), choose Lead Source Analysis Summary. *With the Lead Source Analysis Summary report, we can see what leads have come in from marketing campaigns, and from our SaaS Webinar campaign, in particular.* Point out the lead from the registration for the SaaS Webinar in NY. Click View Detail to see the lead that was just generated. *Let's now change to a sales rep role and work with this lead.*

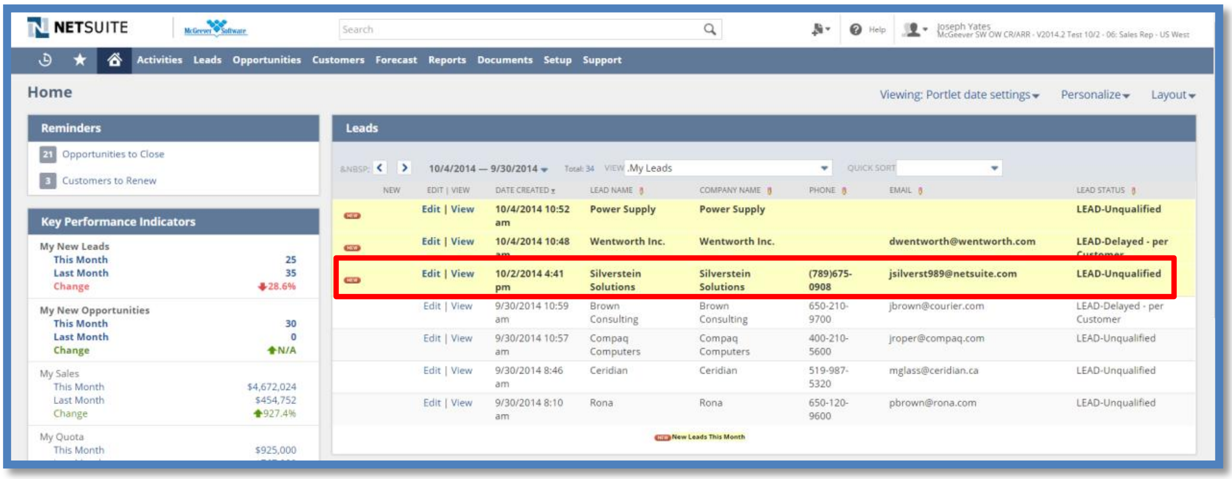
Lead Source Analysis Detail Back to Summary

Campaign Event	Lead	Company Name	Status	Sales Rep	Lead Date
Email					
SaaS Webinar in NY					
SaaS Webinar: How SaaS Solutions Drive Revenue					
	Silverstein Solutions	Silverstein Solutions	Unqualified	Joseph Yates	10/2/2014
Events					
California Launch					
- Unassigned -					
	Power Supply	Power Supply	Unqualified	Joseph Yates	10/4/2014
	International Supplies	International Supplies	Unqualified	Sara Torrance	10/4/2014
	The Market Place	The Market Place	Unqualified	Mike Daniels	10/4/2014
	Happy Corner	Happy Corner	Unqualified	Joseph Yates	10/4/2014
	Century Funding	Century Funding	Closed Won	Joseph Yates	10/4/2014
	Complex Solutions	Complex Solutions	Closed Won	Joseph Yates	10/4/2014
	Sampson Cleaning	Sampson Cleaning	Delayed - per	Joseph Yates	10/4/2014

19. Close all but one tab and **switch to the 06: Sales Rep – US West role**.

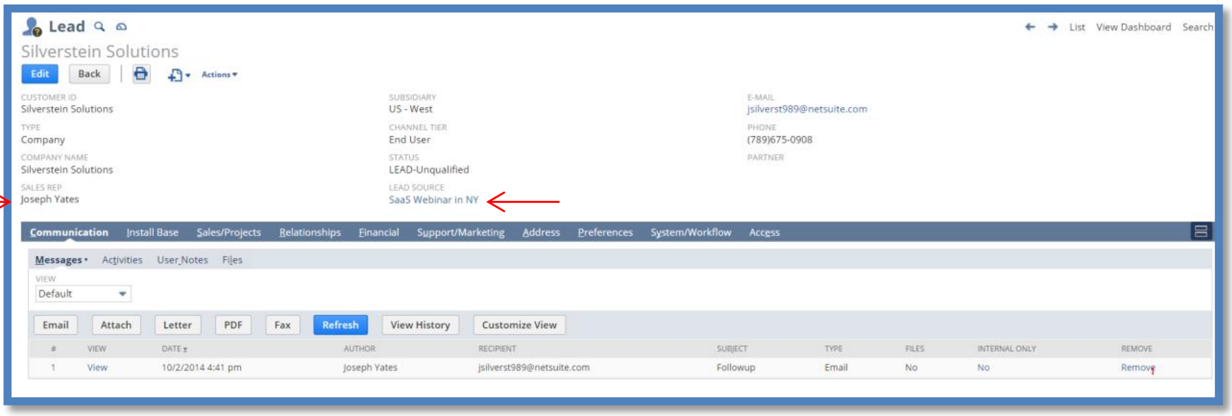
06: Sales Rep – US West

1. *Now let's look at the lead that was just created with our online registration form.* From the Leads portlet, click on the lead (highlighted in yellow) that you just created. Use the arrows to scroll to the correct date (today's date).

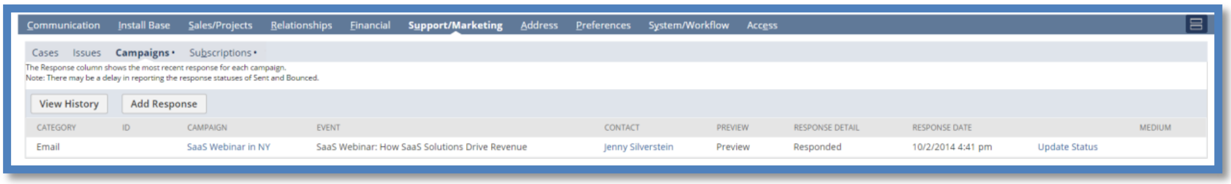


2. *Notice that the information provided through the registration form is displayed here, and the status of the lead is unqualified. Let's go to this lead and look at it further.*

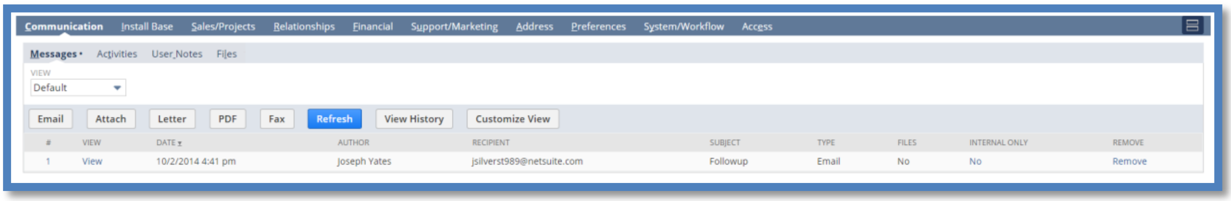
3. Click View to go to this lead. *Notice that the lead has been assigned to a sales rep (according to territory rules set in the system). Our lead source is captured so that we can track our ROI for the marketing campaign.*



4. Show the campaign that is stored with this lead. Click on the Support/Marketing tab then on Campaigns subtab. Explain that the campaign is stored with the lead record.



5. Click on the Communication tab and point out that a follow-up message was sent to the person who registered for the Webinar. You can click on View to display the message.

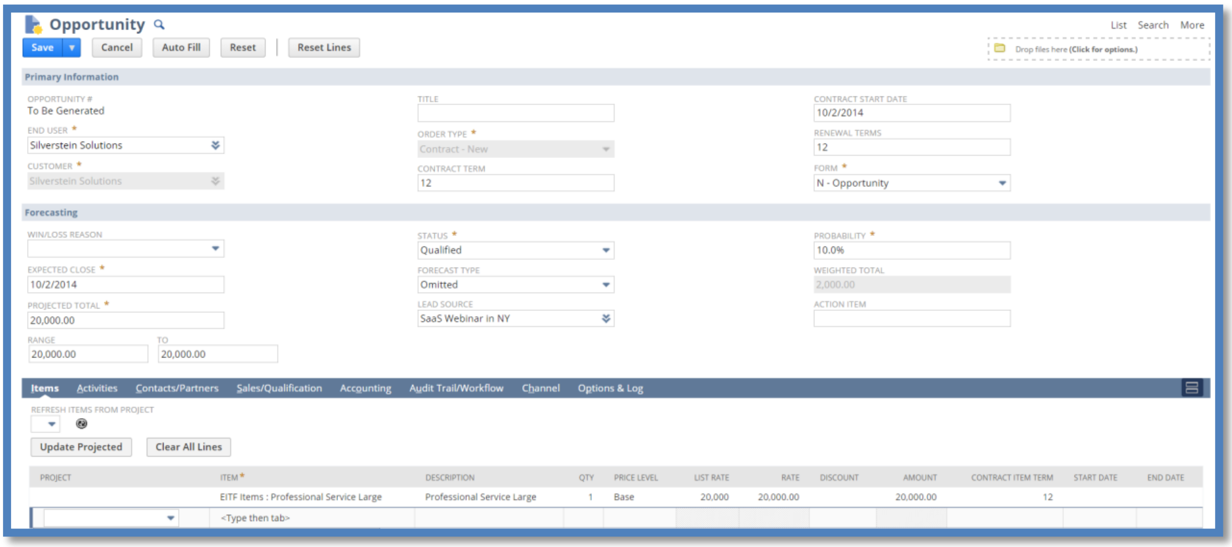


6. *We can easily turn this lead into an Opportunity.* Click on the icon with the plus sign on the top of form. Then choose Opportunity. **Note:** If you receive a message about the Ship To address not being updated, click OK and explain that our demo environment uses Ship To addresses, but we don't need to enter one now.

7. *Notice the status changed to qualified.*

8. *The probability is now 10%.*

9. *Let's say that the sales rep has spoken with the prospect and the prospect is interested in consulting services to ensure the software implementation's success. Let's add an item to this opportunity.* Enter an item (EITF Professional Service Large) and add it.

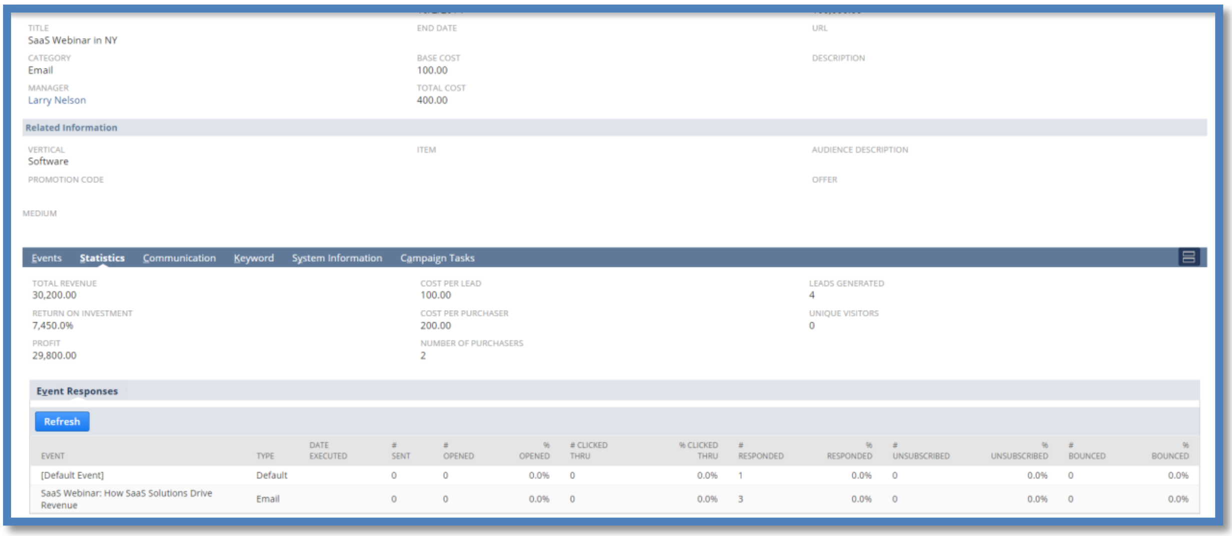


10. Save the opportunity.

11. Explain that this transaction can go through the entire sales process from here to estimate then sales order, invoice and payment without needing to re-key data.

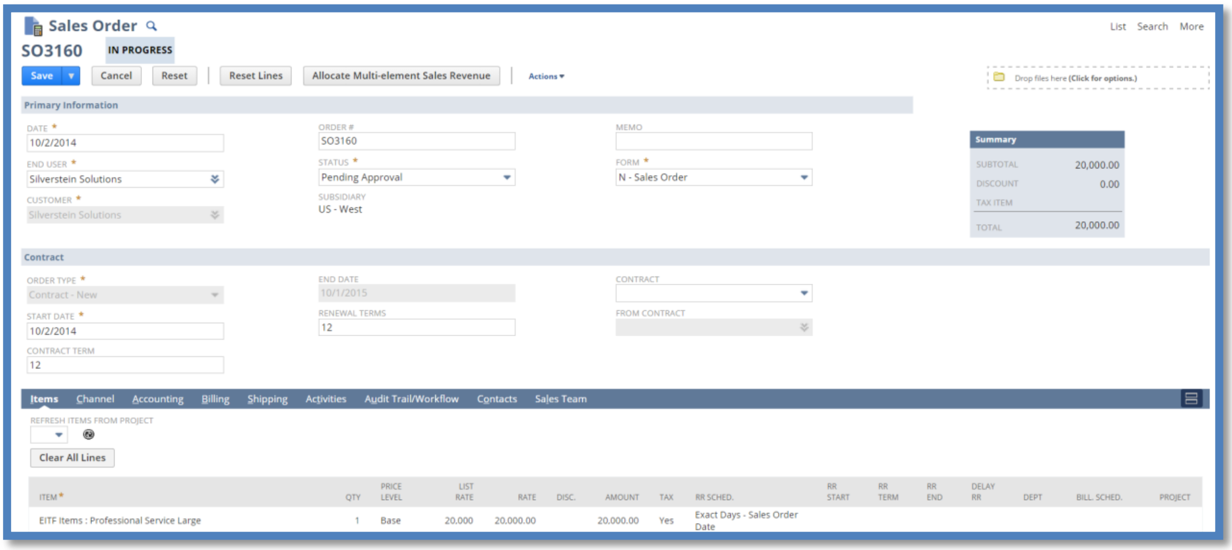
12. Return to the campaign by clicking on the SaaS Webinar in NY in the Lead Source field on the header (and open the campaign in another tab).

13. Show the information in the Statistics tab. *You'll notice that the system is tracking key information about our marketing campaign, like number of leads generated, total revenue, ROI, and profit. If our lead is converted to a sales order that is invoiced, these statistics will reflect that change.* And since this is an email event, also show the statistics regarding the email events (e.g. responses, click thru's, bounces, etc.).



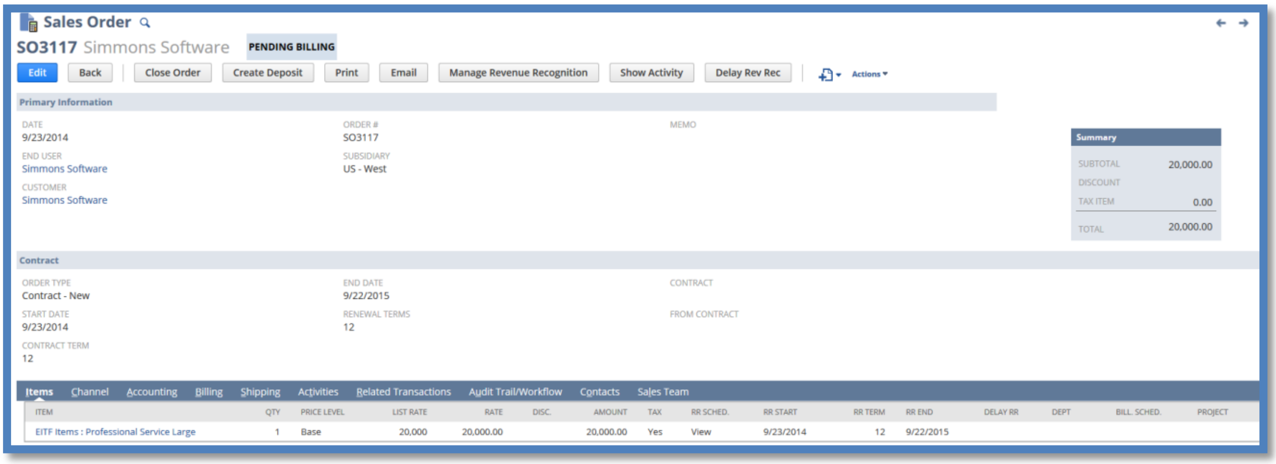
14. Return to the opportunity tab and create a sales order by clicking on Sales Order from the icon on the top of the form. If the message about the Ship To address pops up again, click OK.

15. On the Sales Order, enter T (for Today) on the header in the Contract section for Start Date.



16. Save the Sales Order.

17. Approve the sales order.



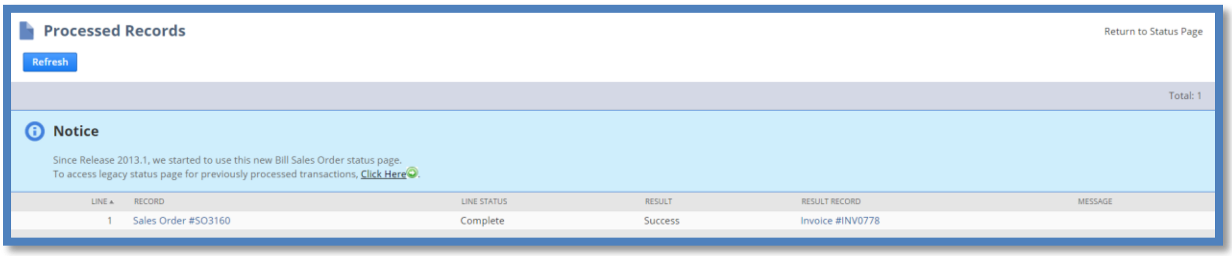
18. **Go to the 05: AR Specialist role**.

05: AR Specialist

1. Explain that we can now bill this sales order. *The AR Specialist is going to bill the sales order. We have a reminder on Specialist's Home dashboard for Sales Orders to Bill.* From the Reminders portlet, choose Sales Order to Bill. Sort on the Order #. You might have to click twice on Order # to see the most recent on the top of the list. The SO just created will be on top. Check the box for this one and click submit.

2. **Note to SC:** This step might take a minute. Refresh the screen a few times, then click the link for Complete.

3. On the next page, click the invoice number. *Let's go to the invoice.*



4. *Now that the sales order has been invoiced, this revenue has been added to the SaaS Webinar marketing campaign.*

5. *NS has a number of reports related to marketing campaigns. Let's look at the Sales by Lead Source Summary.* Open the shortcut for the Sales by Lead Source Summary. The report date is set to this month to date. *This is a report of all the leads that came in and the campaigns that generated the leads for this month to date. We see our lead that was converted to a sales order.*

Sales by Lead Source Summary

View Detail

Lead Source	Transaction Total
Email	
SaaS Webinar in NY	$20,000.00
Total - Email	**$20,000.00**
Events	
California Launch	$72,500.00
Trade Show	$98,040.00
Total - Events	**$170,540.00**
Keyword - Paid	
Google-Prospect Letter	$1,500.00
Total - Keyword - Paid	**$1,500.00**
Partner	
Customer Referral	$41,775.00
Total - Partner	**$41,775.00**
Print	
Ad	$37,600.00
Total - Print	**$37,600.00**
- Unassigned -	
-- No Lead Source --	$494,675.50
Total - Unassigned -	**$494,675.50**
Total	**$766,090.50**

DATE this month to date FROM 10/1/2014 TO 10/2/2014 COLUMN Total

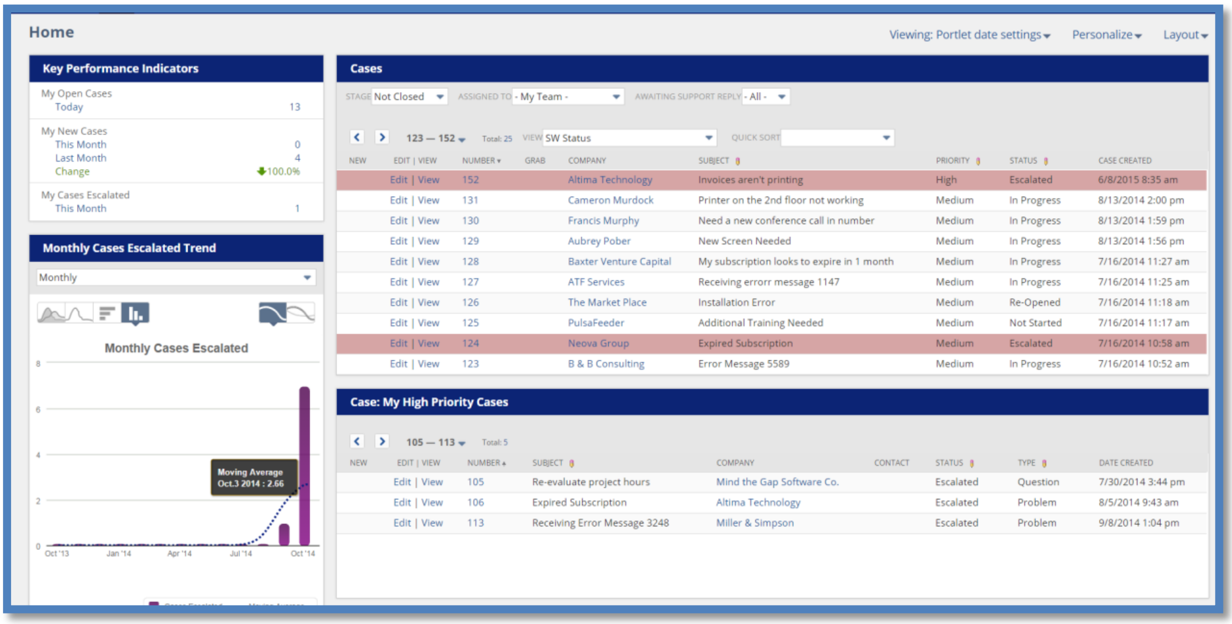
6. *With NS, you have the ability to drill down to relevant data quickly and easily. From this report, you can drill down to the marketing campaign and the invoice. Let's go to the campaign to look at the statistics.* Click on the title SaaS Webinar in NY.
7. Open the Statistics tab on the campaign page. *Our revenue, ROI, profit, leads generated and number of purchasers now reflect the lead that we processed.*

8. *With NS CRM, you are able to create your marketing campaigns and events, generate leads, convert them to sales orders, and track the revenue associated with your campaigns. All of this happens within one system that provides information in an easy-to-use interface with powerful user-friendly elements like dashboards, reminders, reports, and drill-drowns.*

Support

Support Rep – US West

1. On the Home dashboard, focus on the Cases portlet. *In the Cases portlet, we see support cases that are not closed and are assigned to this support rep's team.* Click on the drop-down arrow in the Assigned To box and scroll to Tier1 Support and Tier 2 Support. *Cases can be assigned to tiers, as well. Support reps can be associated with tiers, and they will be able to grab cases that are assigned the tiers to which they belong.* In the New column, show that you can add further information by hovering over the icon that appears when you move the cursor to this column. You can send emails, add tasks, create events, etc., for each case.

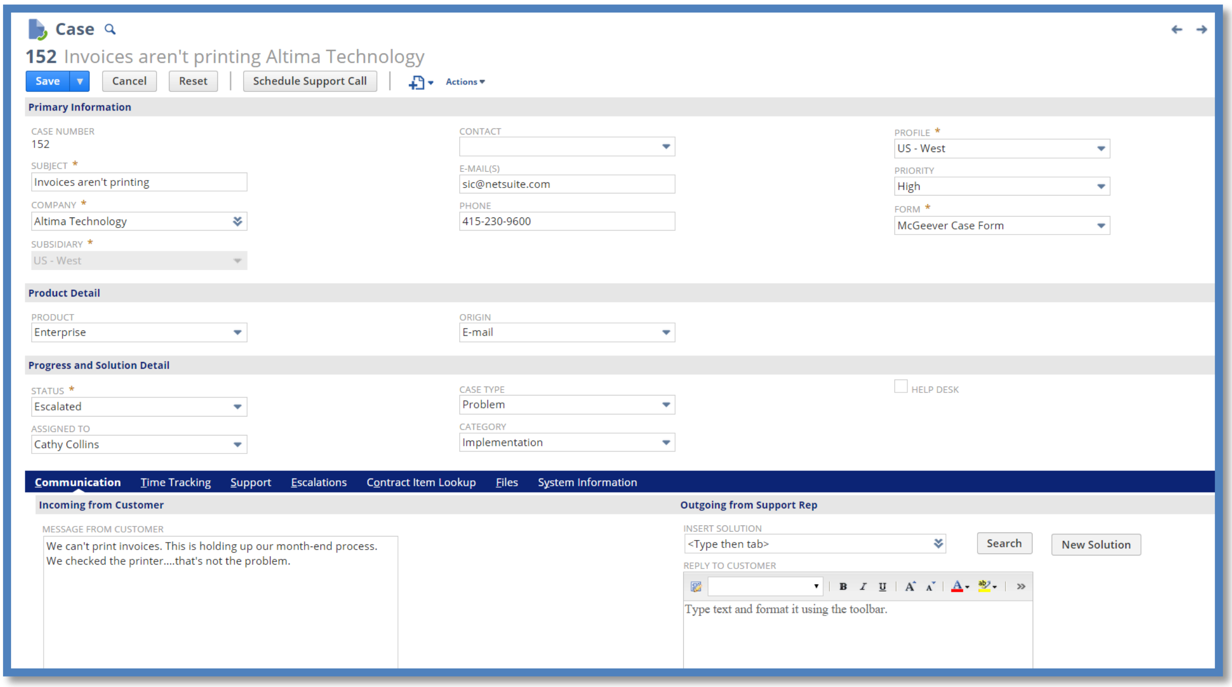


2. *Support cases can be created in four different ways in NS, giving your customers the ability to easily connect with you for their support needs:*
    - *A support rep can create a case record for a customer who calls in.*
    - *A customer can complete an online case form.*
    - *A customer can send an email to your support address.*
    - *A customer can click the Contact Support link in the Customer Center of your Web site and fill out an external case record.*

3. Focus on Case 152. The cases that have a status of escalated are highlighted in the portlet.

4. Explain that any column with a pencil on the column heading means that you can modify the content in that column. For instance, you can change the priority or status. Click on the status of Escalated to show that you can change the status.

5. Go to Case 152 by clicking Edit on the case record in the portlet.



6. *This is a problem reported by a customer.* Show the drop down on the Case Type field in the Progress and Solution Detail section. *You can choose from these defaults or add your own types.*

7. *In the Communication tab, you can add communications between your customer and your support reps. There is a great deal of flexibility in the way that communication about cases is handled. You can keep specific employees informed about progress; you can send emails to customers or just to employees; you can insert solutions from your company's knowledgebase into messages to your customer and/or employees.*

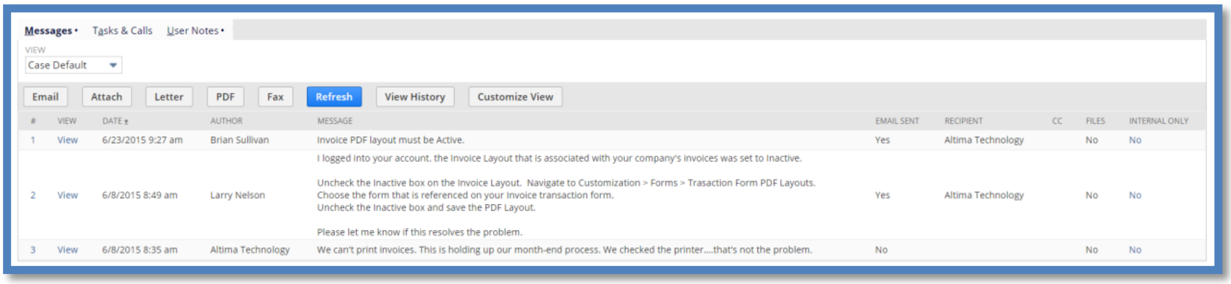
8. *If you check the Help Desk box, this means that the case was reported by an employee in your company.*

9. Mention that you can associate this case with related cases and issues and that support reps can log the time they work on a case through Time Tracking.

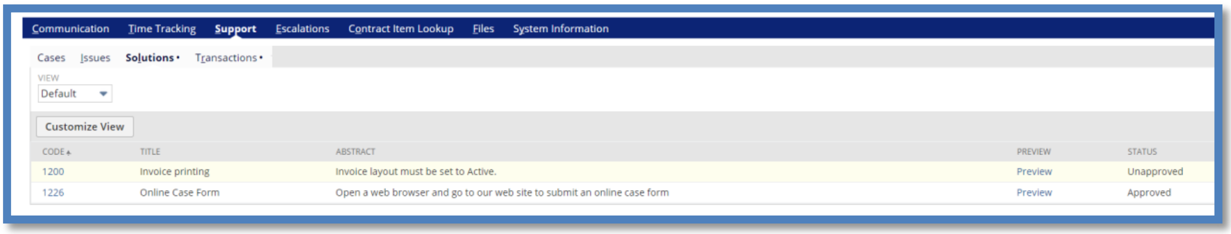
10. *If you need to escalate a case, you can do so and it will be available for searches that can be placed on dashboards for the appropriate people. If we go to to the Escalations tab, we see*

that this case was escalated. Click on the Escalations tab. *You can de-escalate this case now if you know that the problem has been resolved. Otherwise, the appropriate person will de-escalate the case after they resolve the issue.*

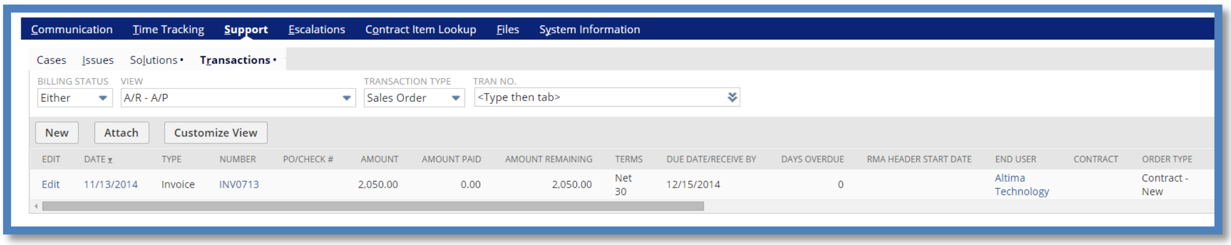
11. Click on the Communication tab and then the Messages subtab. *Here you see messages from the customer and replies from your employees.*



12. Support reps can search for solutions in your company's knowledgebase or create new solutions that will be added to it. These solutions can be either approved or unapproved, and you can tell the system whether or not unapproved solutions can be linked to a support case. To see the solutions that were attached to this case, click the Support tab and Solutions subtab.



13. **Note**: **<u>This is a new feature in V2014.2 and the attaching to a transaction is not working consistently.</u>** <u>It is safest to only show the example that is seeded here. Also, this field doesn't use any logic to determine what transactions should or shouldn't be associated with a case.</u> *You can associate a support case with a transaction.* In the Support tab and Transactions subtab, make sure the view is A/R – A/P. *You see that a transaction can be associated with a case. If a customer is withholding payment because of an open case, you can attach that invoice to this case form.* From this hyperlink, open the invoice in another tab. Open the Related Transactions tab, Support Cases subtab. *We see that the support case is cross-referenced with this invoice.*


Communication
Time Tracking
Support
Escalations
Contract Item Lookup
Files
System Information
Cases
Issues
Solutions
Transactions
BILLING STATUS
Either
VIEW
A/R - A/P
TRANSACTION TYPE
Sales Order
TRAN NO.
<Type then tab>
New
Attach
Customize View
EDIT
DATE
TYPE
NUMBER
PO/CHECK #
AMOUNT
AMOUNT PAID
AMOUNT REMAINING
TERMS
DUE DATE/RECEIVE BY
DAYS OVERDUE
RMA HEADER START DATE
END USER
CONTRACT
ORDER TYPE
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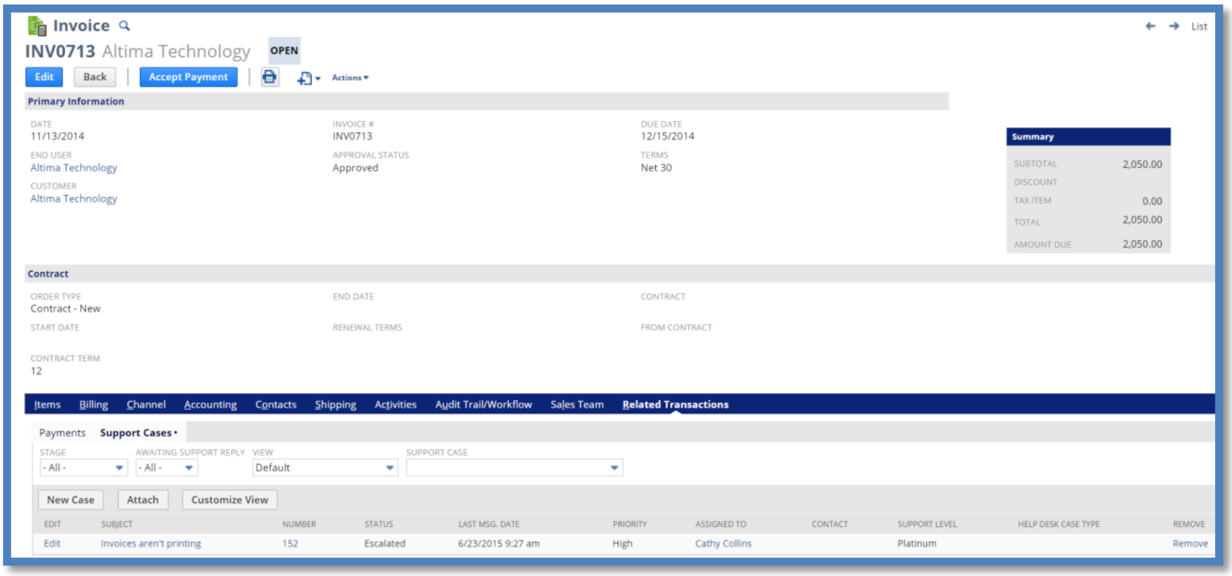
12/15/2014
0
Altima Technology
Contract - New


Invoice
List
INV0713 Altima Technology
OPEN
Edit
Back
Accept Payment
Actions
Primary Information
DATE
11/13/2014
INVOICE #
INV0713
DUE DATE
12/15/2014
END USER
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APPROVAL STATUS
Approved
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DISCOUNT
TAX ITEM
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TOTAL
2,050.00
AMOUNT DUE
2,050.00
Contract
ORDER TYPE
Contract - New
END DATE
CONTRACT
START DATE
RENEWAL TERMS
FROM CONTRACT
CONTRACT TERM
12
Items
Billing
Channel
Accounting
Contacts
Shipping
Activities
Audit Trail/Workflow
Sales Team
Related Transactions
Payments
Support Cases
STAGE
- All -
AWAITING SUPPORT REPLY
- All -
VIEW
Default
SUPPORT CASE
New Case
Attach
Customize View
EDIT
SUBJECT
NUMBER
STATUS
LAST MSG. DATE
PRIORITY
ASSIGNED TO
CONTACT
SUPPORT LEVEL
HELP DESK CASE TYPE
REMOVE
Edit
Invoices aren't printing
152
Escalated
6/23/2015 9:27 am
High
Cathy Collins
Platinum
Remove