Enterprise Architecture Assignment for ArchiMetal: Sales & Service Capabilities

#### **Assignment Title:**

**“Identifying and Mapping Sales & Service Capabilities for ArchiMetal Using Salesforce Enterprise Architecture Framework”**

#### **Objective:**

The purpose of this assignment is to analyze **Sales and Service capabilities** within **Salesforce Enterprise Architecture (Level 1 & Level 2)** and map the relevant components and KPIs. Additionally, the assignment requires assessing **which capabilities ArchiMetal should incorporate** to enhance its customer relationship management (CRM), order fulfillment, and service efficiency.

<https://prezi.com/view/vsni9VjRvbKhVT6Qb6hK/>

## **📌 Part 1: Understanding Salesforce Enterprise Architecture - Sales & Service Capabilities**

### **Step 1: Research Salesforce Enterprise Architecture for Sales & Service**

1️⃣ Explore **Salesforce Enterprise Architecture Level 1 and Level 2 Business Capabilities** for:

* **Sales Capabilities**
* **Service Capabilities**2️⃣ Understand how these capabilities map to Salesforce components and features.

📌 **Assignment Tasks:**

* Define **Sales Capabilities** and **Service Capabilities** at Level 1 & Level 2.
* Identify which **Salesforce components** (e.g., Sales Cloud, Service Cloud, CPQ, Field Service) support these capabilities.
* List **KPIs** that measure performance within these capabilities.

## **📌 Part 2: Mapping Capabilities to ArchiMetal’s Business Needs**

### **Step 2: Identify Sales & Service Gaps in ArchiMetal**

📌 **Assignment Tasks:**

* Analyze **ArchiMetal’s business challenges** in Sales and Service.
* Identify **capability gaps** that need to be filled using Salesforce capabilities.
* Prioritize capabilities based on impact and feasibility.

### **Step 3: Define an Implementation Roadmap**

📌 **Assignment Tasks:**

* Recommend a **Sales and Service capability model** tailored for ArchiMetal.
* Define the **Salesforce components required** for each capability.
* Suggest KPIs that should be tracked post-implementation.

## **📌 Deliverables:**

✅ **Documented report (or presentation) covering:**

* **Sales & Service Capabilities at Level 1 & Level 2**
* **Mapped Salesforce components and relevant KPIs**
* **Capability gap analysis for ArchiMetal**
* **Proposed implementation roadmap**

✅ **Visual Representation:**

* Capability heatmap showing **existing vs. required** capabilities for ArchiMetal.
* High-level architecture diagram **mapping Salesforce components to business functions**.

### **📌 Step 1 Completed - Next, Generating the Solution...**

Now, let's move on to the **solution** where we will define **Salesforce Capabilities, relevant KPIs, and the recommended approach for ArchiMetal.** 🚀

# 📌 Solution: Enterprise Architecture Mapping for ArchiMetal - Sales & Service Capabilities

## **📌 Part 1: Understanding Salesforce Enterprise Architecture - Sales & Service Capabilities**

### **🔹 Salesforce Level 1 & Level 2 Capabilities for Sales & Service**

Below is a **high-level breakdown** of **Sales & Service Capabilities** from Salesforce Enterprise Architecture.

| **Category** | **Level 1 Capabilities** | **Level 2 Capabilities** | **Relevant Salesforce Components** |
| --- | --- | --- | --- |
| **Sales Capabilities** | Sales Planning & Management | - Account & Contact Management  - Lead & Opportunity Management  - Territory & Quota Management | **Sales Cloud, CPQ, Forecasting, Analytics, Revenue Cloud** |
|  | Sales Execution | - Sales Pipeline & Forecasting  - Quote-to-Cash (QTC)  - Partner Relationship Management | **CPQ, Sales Cloud, Einstein Analytics, Revenue Cloud** |
| **Service Capabilities** | Case & Incident Management | - Omni-Channel Support  - Case Routing & Automation  - Service Level Agreements (SLAs) | **Service Cloud, Einstein Bots, Omni-Channel Routing, Field Service** |
|  | Customer Self-Service | - Knowledge Management  - AI-powered Chatbots  - Customer Community | **Knowledge Base, Chatbots, Service Cloud, Experience Cloud** |
|  | Field Service & Warranty | - Field Technician Scheduling  - Warranty & Claims Management | **Field Service, IoT, Asset Management** |

### **🔹 Key Performance Indicators (KPIs) for Sales & Service Capabilities**

Each capability should be measured using **key performance indicators (KPIs)** to assess its impact and success.

#### **📌 Sales KPIs**

* **Lead Conversion Rate (%)** – Measures how effectively leads turn into customers.
* **Sales Cycle Length (Days)** – The time taken to close a deal.
* **Win Rate (%)** – The percentage of opportunities won.
* **Customer Acquisition Cost (CAC)** – The cost of acquiring a new customer.
* **Quote-to-Cash (QTC) Time (Days)** – Time from generating a quote to final payment.

#### **📌 Service KPIs**

* **First Call Resolution (FCR) (%)** – Percentage of cases resolved on the first interaction.
* **Average Resolution Time (Hours)** – The time taken to resolve a customer issue.
* **Customer Satisfaction Score (CSAT)** – Based on post-service surveys.
* **Service Level Agreement (SLA) Compliance (%)** – Percentage of cases resolved within SLA.
* **Technician Utilization (%)** – Efficiency of field service teams.

## **📌 Part 2: Mapping Capabilities to ArchiMetal’s Business Needs**

### **🔹 Capability Gaps Identified in ArchiMetal**

Based on **ArchiMetal’s transformation goals and challenges**, the following gaps need to be addressed:

| **Current Issue** | **Required Capability** | **Salesforce Solution** |
| --- | --- | --- |
| **Slow and inconsistent order fulfillment** | Order Management & Tracking | **Sales Cloud, Service Cloud, Revenue Cloud** |
| **Poor customer engagement & retention** | Account & Contact Management | **Sales Cloud, Customer 360, AI Analytics** |
| **Lack of real-time visibility into orders** | Customer Self-Service & Case Management | **Service Cloud, Knowledge Base, Experience Cloud** |
| **High lead time for automotive orders** | Lead-to-Order Optimization | **CPQ, AI Forecasting, Partner Management** |
| **Limited proactive service notifications** | AI-Driven Alerts & Omni-Channel Support | **Einstein Bots, Omni-Channel Routing, IoT Monitoring** |

### **🔹 Recommended Salesforce Capabilities for ArchiMetal**

Below are the capabilities that **should be incorporated** into ArchiMetal’s architecture to **improve sales, service efficiency, and customer experience**.

| **Capability Area** | **Specific Capability** | **Salesforce Component** | **Impact on ArchiMetal** |
| --- | --- | --- | --- |
| **Sales Operations** | Account & Opportunity Management | **Sales Cloud** | Improved lead tracking & conversion |
|  | Quote-to-Cash Optimization | **CPQ, Revenue Cloud** | Faster & automated pricing/quoting |
| **Customer Service** | Omni-Channel Case Routing | **Service Cloud** | Faster response & issue resolution |
|  | AI-Powered Chatbots & Self-Service | **Einstein Bots, Knowledge Base** | Lower support costs & better customer experience |
| **Order Management** | Real-Time Order Tracking | **Experience Cloud, Customer 360** | Enhanced visibility & transparency |
| **Field Service** | Mobile Technician Scheduling | **Field Service Cloud** | Improved technician utilization |
| **Predictive Analytics** | AI-driven Forecasting & Demand Planning | **Einstein Analytics** | Optimized inventory & raw materials |

## **📌 Part 3: Defining an Implementation Roadmap**

### **🔹 Recommended Implementation Phases for ArchiMetal**

📌 **Phase 1: Foundation Setup (Q2 2025)**

* Implement **Sales Cloud** for lead and opportunity tracking.
* Deploy **Service Cloud** for Omni-Channel Case Management.
* Define key KPIs and dashboards using **Einstein Analytics**.

📌 **Phase 2: Customer Experience & CRM Optimization (Q3 2025)**

* Enable **Self-Service Portals** via Experience Cloud.
* Deploy **AI-powered chatbots and case routing** for automated customer interactions.
* Optimize order tracking and case resolution **with real-time updates**.

📌 **Phase 3: Advanced Analytics & Field Service (Q4 2025)**

* Implement **Field Service Cloud** for mobile workforce optimization.
* Use **IoT integration** for proactive service alerts.
* Enhance **predictive demand forecasting** for supply chain efficiency.

📌 **Phase 4: Expansion & Continuous Optimization (2026)**

* Expand capabilities to **automotive sector partnerships**.
* Integrate **Revenue Cloud & CPQ** for scalable, automated pricing.
* Refine AI-driven customer insights & personalization.

## **📌 Final Deliverables**

🔹 **Comprehensive Report:**

* Summary of **Sales & Service Capabilities** for ArchiMetal.
* **Salesforce Component Mapping** with required capabilities.
* KPI framework for tracking transformation success.

🔹 **Visual Representation:**

* **Capability Heatmap:** Comparing current vs. required capabilities.
* **Architecture Diagram:** Mapping Salesforce solutions to ArchiMetal’s business units.
* **Transformation Roadmap:** Timeline for implementation phases.

## **📌 Conclusion & Next Steps**

**📌 ArchiMetal’s transformation depends on three key factors:**✅ Implementing the **right Sales & Service capabilities** tailored to business needs.  
✅ Establishing **real-time, AI-driven customer engagement** through Salesforce.  
✅ Creating a **scalable and automated order fulfillment process** to boost efficiency.

💡 **Next Steps:**

* Finalize capability selection based on leadership priorities.
* Develop a **pilot project** to test **Service Cloud & Sales Cloud** integration.
* Establish an **AI-powered KPI tracking system** for continuous improvement.

🚀 **By incorporating these Salesforce capabilities, ArchiMetal will achieve:** ✔ Faster lead-to-order processing  
✔ Increased customer satisfaction  
✔ Predictive demand forecasting for efficient production  
✔ Real-time, AI-powered sales and service tracking