Salesforce Admin & Analyst Team Sprint Final Submission

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SPRINT PROJECT DETAILS:

As a Salesforce Admin and Analyst team, we have been hired for a consulting project to support the upcoming TrailblazerDX conference hosted by Salesforce. Salesforce needs to sell sponsorship booths for the conference, but their internal process to secure sponsors is outdated, broken and needs to be improved. My team and I need to improve this process over the course of this Sprint.

Trailblazer Dx Event Details:

Event Manager: Veronica Corningstone

Sponsors: Salesforce Partners, IVS and consultancies

Sponsorship Packages: 50 Silver, 20 Gold and 5 Platinum

Sales Team Size: 5

Key Business Insights:

Current Internal process to secure sponsorships is outdated and broken

- Challenges in the qualification and prioritization of Leads
- Lack of real time data visibility on Leads and Opportunities pipeline
- The risk of overselling or underselling sponsorship packages
- Manual handling of contracts and security concerns

Sakeholder Interview Notes(provided by Clicked)

Veronica Corningstone Interview Notes Condensed version

- Veronica and her team have the goal of filling all the sponsorship booths for the upcoming TrailblazerDX Conference. To do this, they receive interest from vendors through emails and lead generation from their inside sales team.

- The team currently uses Salesforce for lead generation and opportunity tracking, but there are some limitations in the system, including a lack of real-time visibility into other sales reps' opportunity progress and the inability to sign contracts within Salesforce. This leads to challenges in effectively tracking leads and opportunities, as well as poor information retention due to high turnover rates and the use of multiple systems outside of Salesforce.
- There are three levels of sponsorship packages: Gold, Silver, and Platinum, with the Platinum package requiring Veronica's approval before being signed. However, the legal team currently sends the contract to the sponsor before approval.
- Veronica is concerned about overselling booths and the potential for vendors to modify contracts without approval. She wants a collaborative Salesforce org that would allow the inside sales and legal team to track leads and opportunities effectively, streamlining the process and improving oversight of the project.
- To achieve this, Veronica would like a system that allows for real-time access and updates to opportunity data through dashboards and the ability to send completed contracts containing all sponsorship information directly to the event management team within Salesforce.
- By simplifying the process and reducing the workload on her small team, Veronica aims to make the sales process as smooth and effective as possible.

Deliverable: User Stories:

- I have prepared the below user stories for Personas: Inside Sales Rep, Event Manager and Legal Team.

User	User Story Description	Acceptance Criteria	Priority
Inside Sales Representative	As a Inside Sales Representative ,I want to eliminate the spam leads coming through emails, so that I can avoid working on unnecessary leads.	1.Able to capture all the required fields Company name, Annual revenue, Size of the company, Sponsorship package requesting for, Previous sponsorship status to avoid spam leads. 2.Consider the emails with no subject line as Spam leads. 3.Block spam email addresses	High
Inside Sales Representative	As a Inside Sales Representative ,I want to have a real time data of status of leads my team working on as a dashboard , so that I can work on other not yet contacted leads	1.Able access to the Lead reports and Dashboard to view as Sales rep 2.Able to view the real time data on Dashboard with Leads details on which the sales team is working on : Lead , Lead status, Sponsorship Package interested	High
Inside Sales Representative	As a Inside Sales Representative ,I want to have a dashboard with opportunities in piepline , so that I can avoid under or overselling the packages	1.Able access to the Opportunity reports and Dashboard to view as Sales rep 2.Able to view the real time data on Dashboard with opportunities in pipeline on which the sales team is working on with details : Opportunity name, Opportunity Stage, Sponsorship Package name,Price,Quote,Contract status	High
Inside Sales Representative	As a Inside Sales Representative ,I want to create contract document inside Salesforce , so that I can avoid leaving salesforce to create contract documents	1.Create different contract document templates for each Silver,Gold and Platinum package sponsorships. 2.Require a tool/application to create contract document inside Salesforcet,without leaving the Salesforce environment	High

| Inside Sales Representative	**As a** Inside Sales Representative **,I want** send the contract document inside Salesforce **, so that** I can avoid leaving salesforce to create contract documents	1.Require a tool/application within Salesforce to send the contract document as email attachment within Salesforce to Event manager, Legal team, Sponsors to avoid leaving Salesforce environment	High
Inside Sales Representative	**As a** Inside Sales Representative **,I want** ability to disable the edit mode of the contracts during the signing process **, so that** I can avoid risk of contract document manipulation	1.Require tool/application within Salesforce to be used for signing process to secure the contract document to avoid risk of document manipulation 2.Able to disable the edit mode on contract document during signature	High
Event Manager	As a Event Manager, I want to approve the platinum package contracts, so that I can sign before leagl team send to sponsors to sign the contract	1.Implement an automation process within Salesforce with ability to approve/reject the platinum contract quote by Event manager 2.Event manager need to be notified once request for approval is submited for platinum packages 3.Event manager need to be notified again if no action has taken on request for approval for platinum packages within 24 hrs.	High
Event Manager	As a Event Manager, I want to sign the platinum package contracts within salesforce, so that I can avoid leaving Salesforce environment to sign the document	1.Require tool/application within Salesforce to sign the contract document without leaving salesforce environment.	High
Legal Team	As a Legal Team, I want to sign the sponsorship contracts within salesforce, so that I can avoid leaving Salesforce environment to sign the documents	1.Require tool/application within Salesforce to sign the contract document without leaving salesforce environment.	High
10	documents		
Inside Sales Representative	**As a** Inside Sales Representative **,I want** to have a ability to prioritize the leads if they are the existing sponsors **, so that** I can work on securing the existing sponsors	1.Assign high priority leads with the previously sponsored status : Yes to the Queue 2.Sales rep need access to the queue to assign self to work on the high priority leads	Medium
11			
Inside Sales Representative	**As a** Inside Sales Representative **,I want** to qualify the leads based on a given criteria **, so that** I work on high value leads.	1.Prioritize the leads by assign the Lead rating as "Hot" based Company size, Annual Revenue, Previous sponsorship status.	Medium
12			
13			

Deliverable: Business Process Maps:

I have created the below two business process maps for the current state and future state using UPN style.

Trailblazer DX - Current State Business Process Map #Team03

Trailblazer DX -Future State Business Process Map # Team03
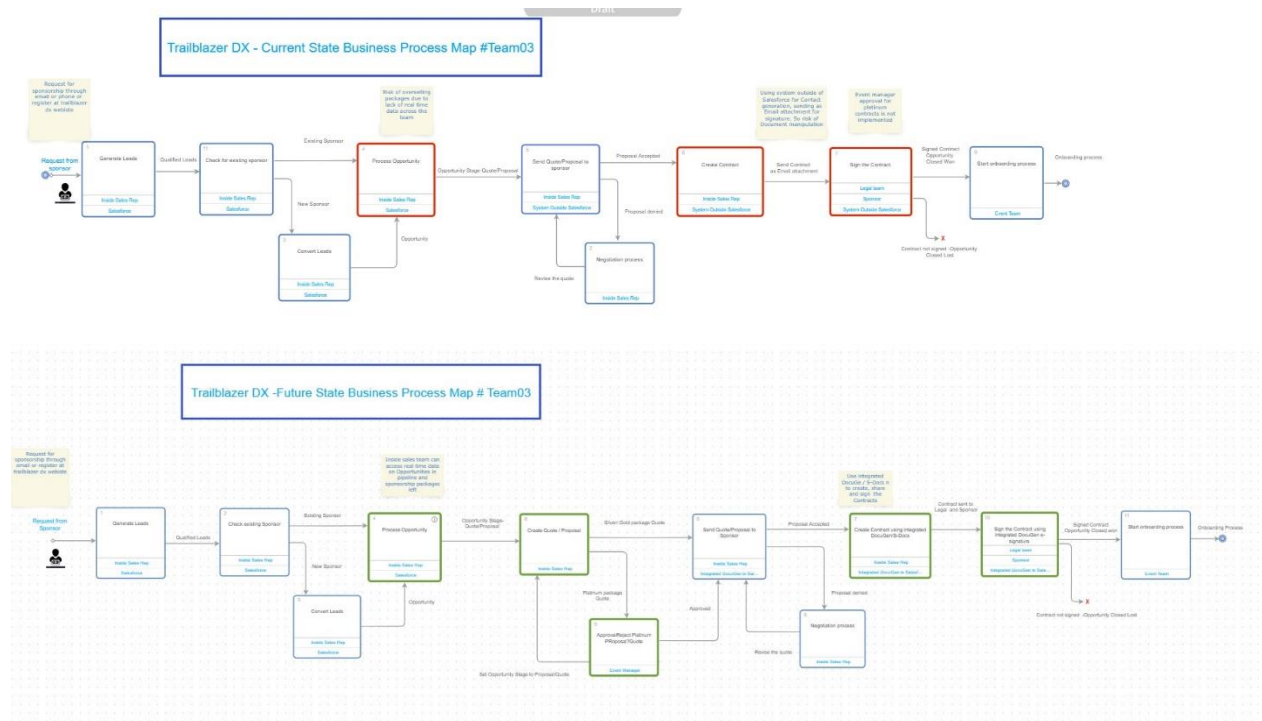
Deliverable: Wireframe :

I have contributed to the team to prepare wireframe for Dashboard using Avonni app.
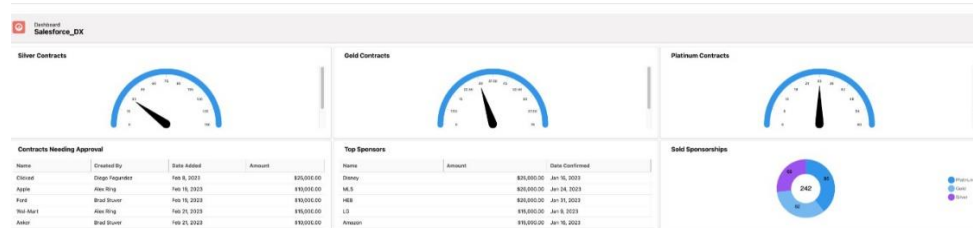
Deliverable: UAT scripts:

I have created the below document on UAT scripts.

Project Name:	Trailblazer DX Conference 2023								
Module:	Sponsorship booths- Sale Process								
Test Id	**Acceptance Requirement**	**Priority**	**Test Steps**	**Expected Results**	**Actual Results**	**Pass/Fail**	**Tester**	**Test Date**	**Comments**
TDXTest1	Inside Sales Rep should be able to view real-time data visibility of sponsorship packages sale process across sales team	High	1.Login to salesforce environment 2. Click on Applauncher 2.Goto Trailblazer DX app 3.Click on Home tab 4.On Dashboard tab can view the dashboard with real time data of opportunities in pipeline across sales team	Can view a page with real time data on opportunities in pipeline	Able to view Opportunities in pipeline by stage on Dashboard	Pass	Inside Sales Rep	2/28/2023	
					Able to view Opportunities in pipeline by owner on Dashboard	Pass	Inside Sales Rep	2/28/2023	
					Able to view sold sponsorships by package type on Dashboard	Pass	Inside Sales Rep	2/28/2023	
					Able to view in-progress sponsorships by package type on Dashboard	Pass	Inside Sales Rep	2/28/2023	
TDXTest2	Inside Sales Rep should be able to send the platinum package quote to event manager for approval	High	1.Login to salesforce environment 2. Click on Applauncher 2.Goto Trailblazer DX app 3.Click on Opportunity tab 4.Click on the opportunity check if the stage is in proposal/quote and the sponsorship package is platinum 5.Then click on submit for approval action button on top right corner 6.And enter the comments and submit 7.Check the status of the approval at the Approval History section	Can send the opportunity quote to the event manager approval for platinum packages if the stage is in Proposal/Quote	Able to send the record for event manager approval and able to view the status of the approval if the stage is in Proposal/Quote	Pass	Inside Sales Rep	3/1/2023	

Deliverable: MVP/Proof Of Concept:

I have implemented the Dashboards, Approval Process for platinum packages and Integrated S-docs for document generation into my Salesforce developer org. It is working as expected.

Final Presentation:

I have prepared the final presentation and got a chance to present it on final presentation day. I uploaded the final presentation slides pdf to Clicked.

Conclusion:

As a member of the team, I have been working hard to ensure that each deliverable is completed on time. This is our second team sprint with Clicked, and I have learned about the Admin and BA's roles and responsibilities, how to gather requirements, how to provide and implement the solutions for business problems.

 In addition to my technical contributions, which include analyzing, solving, and documenting given tasks, I have also been an active participant in team meetings and discussions. I have offered new ideas and insights to help drive the project forward.

 I am confident that the final presentation we submitted showcases our hard work and dedication. I am proud of what we have achieved as a team and grateful to Clicked for this opportunity. This has allowed me to improve my skills and gain hands-on experience.