Salesforce Admin-Analyst Sprint Final Presentation

Cloud Busters Consulting- Team#03

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Agenda

- TrailblazerDX Details
- Key Business Insights
- Deliverables
- Current and future state process efficiency comparison
- Live Demo
- Key Takeaways & Challenges
- Questions & Feedback

Trailblazer Dx Conference Details

TrailblazerDX by Salesforce is the developer and learning event of the year!

- Event Manager: Veronica Corningstone
- Sponsors: Salesforce Partners, ISV and consultancies
- Sponsorship Packages: 50 Silver, 20 Gold and 5 Platinum
- Sales Team is consist of 5

Key Business Insights

Current internal process to secure sponsorships is outdated and broken

No visibilty of real time data on Leads and Opportuntiites pipeline

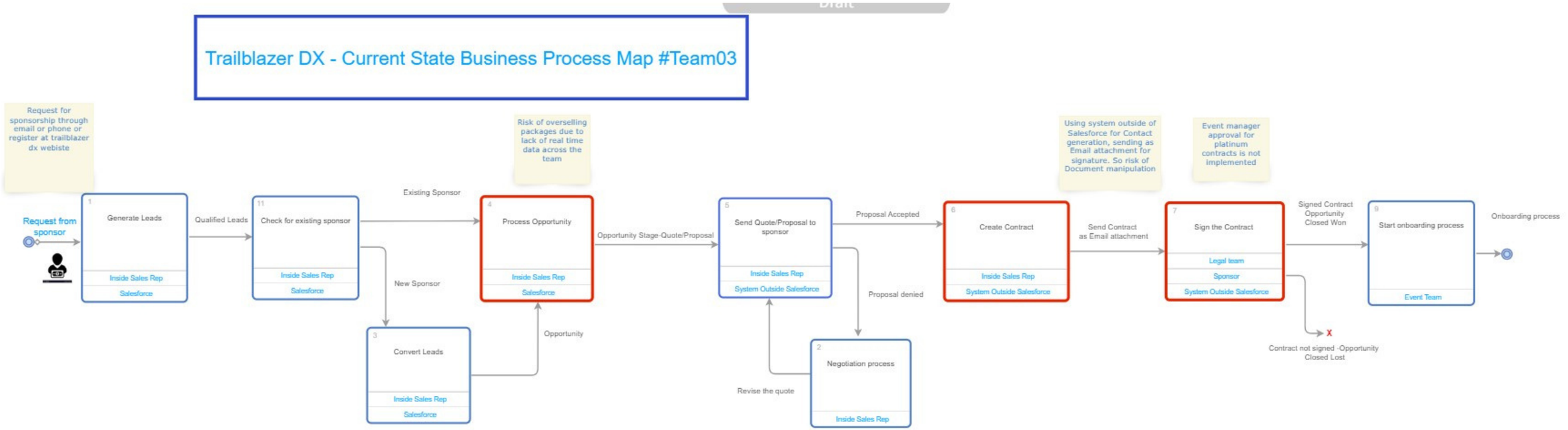
No special process was followed for the Platinum packages

Manual handling of contracts and security concerns

User Stories

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	High

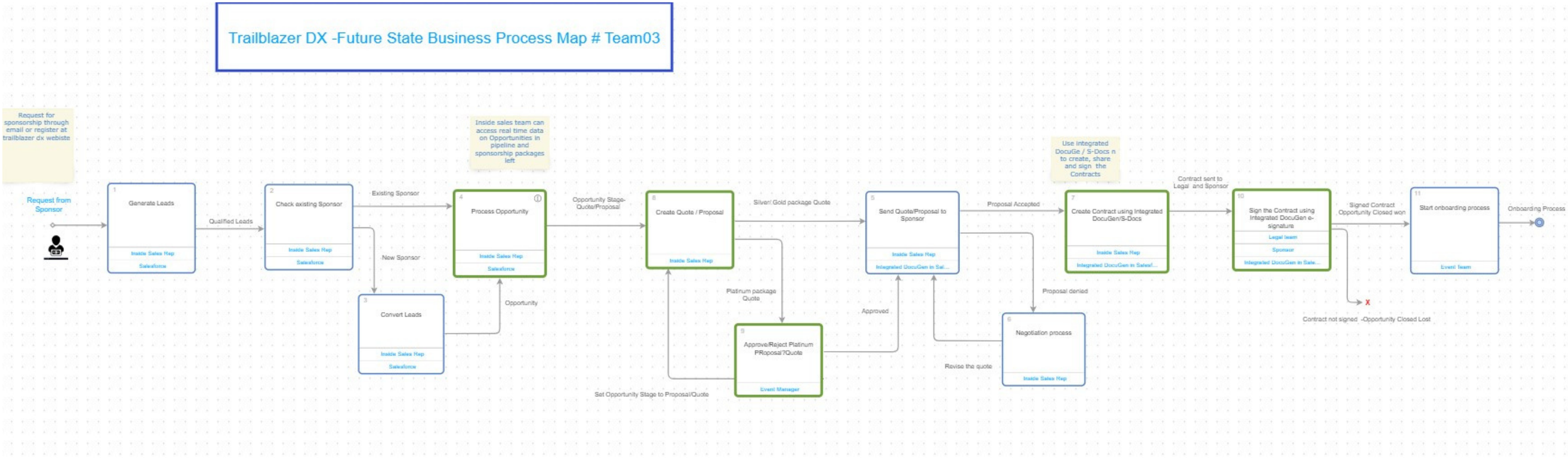
Business Process Map-Current State



Solutions / Recommendations

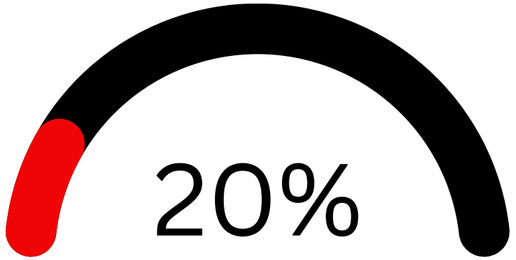
- Web -to-Lead form with Recaptcha
- A page with visibility of real-time data on Leads and Opportunities in pipeline
- Define a special process for platinum packages to obtain event manager approval
- Integrate a document generation tool/ app into Salesforce
- In-person training for users on updated process

Business Process Map-Future State



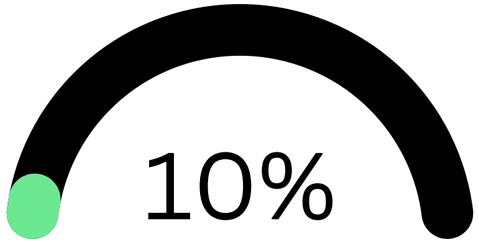
Current Process Efficiency

Risk of over or under selling pacakges



Efficiency in securing the sponsorships

Future Process Efficiency



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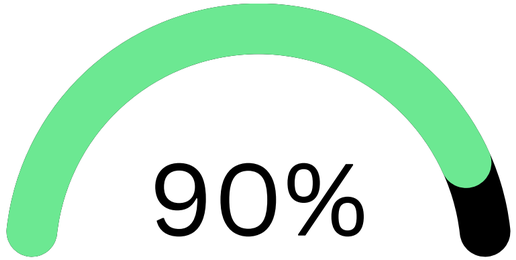


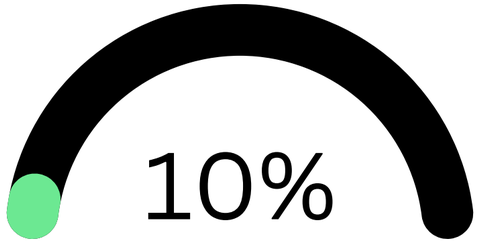
Efficiency in securing the sponsorships

Current Process Efficiency

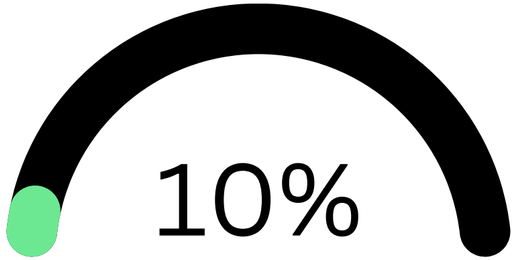
Risk of contract document manipulation

Manual process involved in contract management

Future Process Efficiency

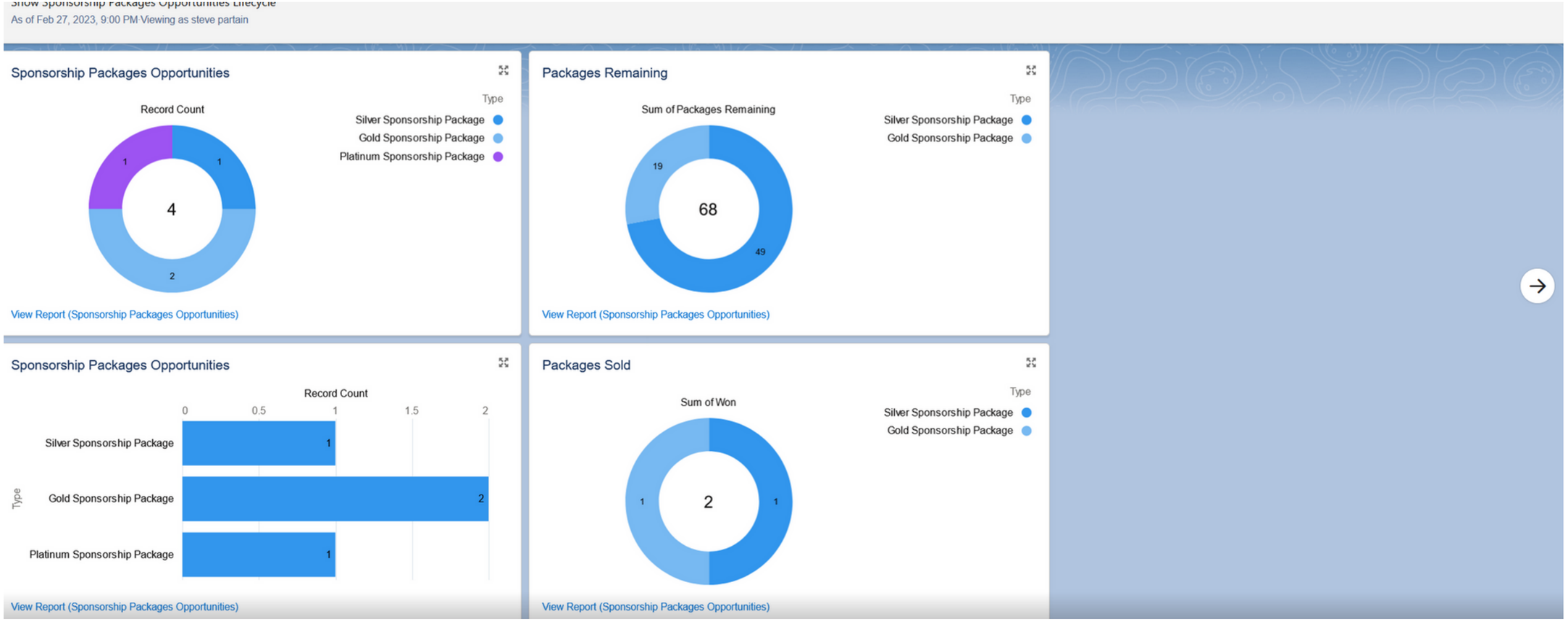


Risk of contract document manipulation



Manual process involved in contract management

Wireframe-Dashboard



User Acceptance Test 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	

Live Demo

Challenges

- Understanding the business process and requirements
- Exploring the solutions

Key Takeaways

- Understanding Admin and BA roles and responsibilities
- Exploring new tools
- Team work

Thank you!

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Thank you!
TrailblazerDX
&
Cloud Busters Consulting

Questions and Feedbck