



# Specifications

Specifications describing the needs of sales team salesmen in the North and South of France

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## 1. Project framework

### 1.1. Summary

"Tours for Life" is a French company that manages bus trips. It is leader in the road passenger transport sector.

TFL has markets primarily in France, but also in other regions of the world with revenues of 300,000 euros in 2019.

TFL has sales representatives who sell trips to the northern regions of France as well as the south of France with sales managers who manage the different regions.

"Tours for Life" wants to expand its sales activity and achieve revenues of 500,000 euros in 2020. For this, the head of the company, Philippe Bouvet, with the support of sales teams and the IT director, has decided that the next step would be to implement Salesforce for the sales representatives in the North and South.

### 1.2. Challenges

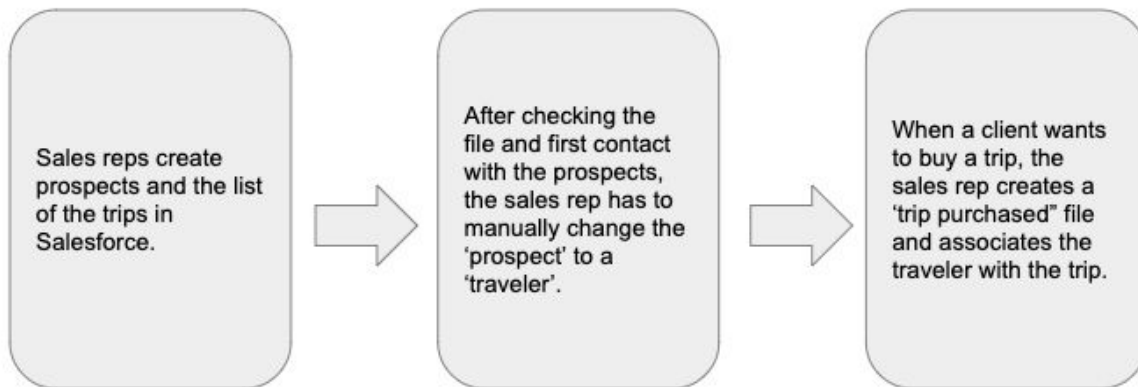
Implementing Salesforce for the sales representatives highlights several challenges for the company:

- Facilitating the work of sales representatives
- Implementing an easy-to-use application for the salespeople
- Automating the tasks of the sales representative
- Give an overall view of the sales activity for the sales managers
- Increasing the growth of company

## 2. Requested features

### 2.1. Business process

Below is the business process of the "Tours for Life" salespeople



The sales reps need to manually convert leads in order to properly verify the data and ensure the quality of the data entered in Salesforce.

The sales reps must be able to:

- Manage the prospects:
  - Create prospects;
  - Update a prospect's profile;
  - Create activities on the prospect's file;
  - Manually convert prospects into travelers;
- Manage the travelers:
  - Not create travelers directly but convert them from the prospect profiles;
  - Update a traveler's profile;
  - Create activities on a traveler's profile;
- Manage trips
  - Create trip profiles;
  - Update the trip profile;
  - Create activities on the trip profile;
- Manage the purchased trip profiles
  - Create the purchased trip profiles;
  - The purchased trip must be linked to a traveler and a trip;
- Create reports
  - A report that regroups the trips still available for the salespeople
  - A report on the number of prospects converted into travelers per salesperson. This report is available for the sales managers.
  - A report on the number of purchased trips per salesperson. This report can be viewed by the sales managers
- Create dashboards

- Create a dashboard that combines the two reports of the sales managers

## 2.2. List of fields of the prospects, travelers

## 2.3. and purchased trips

To create prospects in Salesforce, you should use the "Salesforce Lead" standard object and rename the tab to "Prospect."

To create travelers in Salesforce, you should use the Salesforce "Account" standard object and rename the tab to "Traveler."

To create trips in Salesforce, you should create a new object and name it "Trips"

To create purchased trips in Salesforce, you should create a new object and name it "Purchased Trips"

Below is the link to the list of Prospect, Traveler, and Trip fields with their description and sample data for each line:

[List of the fields](#)

## 2.4. Visibility

Tours for Life salespeople are divided into three categories:

- Salespeople in the Northern Region
- Salespeople in the Southern Region
- Sales managers

This division requires a restriction on the organized visibilities as follows:

- The salesperson data belonging to the Northern region are visible only to the salespeople from the Northern region
- The salesperson data from the Southern region are only visible for salespeople from the Southern region
- Sales managers must have visibility of all of the data from the Northern and Southern salespeople

## 2.5. Requested automation:

Below is the list of the processes and automatic checks to be implemented in Salesforce:

- Make the phone number of the prospect and traveler mandatory
- Send confirmation emails from Salesforce: the goal is to automatically send a confirmation email to the customer from Salesforce, without going through an external mail service (Gmail, Outlook, etc.), when the status of the prospect changes from "informed" to "interested."
- A traveler may have made several purchased trips registered

- The "Number of Available Places" field of the trip at issue will be automatically reduced when adding a purchased trip related to such trip.
- Adding two report-type components to the prospect page to help the salespeople in their future decision-making:
  - A component that displays the list of available trips.
  - A "donut" graphic component that displays the cumulative sum in euros, according to trip destination.

### 3. Budgetary parameters

The budget allocated to this project is €29,000.

### 4. Operation

Weekly meetings will be organized between the stakeholders in order to measure the progress of the project.