

1: Business Process Review

Use this worksheet to organize your team's business requirements.

1.1 Objectives and Results

Organize the various objectives of your Project Team here.

Listing tangible metrics will help your team define specific, measurable objectives for your CRM Project.

Pains: Select the top area for improvement.

Pain Points
<input type="checkbox"/> Need better pipeline visibility
<input type="checkbox"/> Difficult to quantify why deals are lost to key competitors
<input type="checkbox"/> Leads tracked via email are being dropped
<input type="checkbox"/> Need to track case owners and statuses
<input type="checkbox"/> Need to associate certain leads with targeted campaigns
<input type="checkbox"/> Unable to track forecasted revenue from all profit centers
<input type="checkbox"/> Need to prioritize top customer issues
<input type="checkbox"/> Need to identify top performers in every group

I deals: Select areas for improvement.

Other Objectives
<input type="checkbox"/> Would like all marketing collateral centralized
<input type="checkbox"/> Understanding of what reports management needs
<input type="checkbox"/> Transfer knowledge from product experts to new hires
<input type="checkbox"/> Handle cases through a web form
<input type="checkbox"/> Drive prospects to an online registration form
<input type="checkbox"/> Manage mass email campaigns
<input type="checkbox"/> Other

Additional Impact: How else might SFA impact the activities of these groups? How may the actions of one group adversely affect that of another?

Areas of Potential Impact

- | |
|--|
| q Support tracking of accounts might not be sales friendly |
| q Customer data requested by Marketing is too extensive to track |
| q Other |

Tangible Results: List out what results your Project Team should actually see, that helps alleviate their pain and achieve their goals. Push towards measurability here – if the answer needs to be more concise, make some adjustments to your answers above.

Specific Metrics

- | |
|---|
| q 100% of deals shown in SFA pipeline reports |
| q Increase win rate against X by 10% |
| q Reduce dropped leads from X% to Y% |
| q Decrease average case age X% to Y% |
| q Reps increase closed case rate by Z% |
| q X% of Leads will now come from our website |
| q Other |

q 2.Reporting and Dashboards

Collect reports from the Project Team to visualize the endgame.

Defining your reports and dashboards up front helps you work backwards in designing your rollout to correctly meet your needs. You'll be matching your objectives to your reports. Use the whiteboard to describe the visual layout of the graph.


Reports: Identify key reports essential for you to manage your business/team.

#	Report Description	Objective	Describe Graph (if any)
1	q Show stale leads not touched in last 7 days	Lead follow up	Stacked bar with lead created date , grouped by lead source
2	q Opportunity pipeline		
3	q Closed business by product		
4	q Closed business by rep		
5	q Call reports		
6	q Top accounts		
7	q Competitive wins / losses		
8	q Case status report		
9	q Response time		
10	q Cases by support rep		
11	q Cases by medium		
12	q Most common problems		
13	q Monthly lead volume		
14	q Lead status		
15	q Leads by source		
16	q Qualified leads by rep		
17	q No. of campaign respondents		
18	q Campaign ROI		

3.Sales Process

Whiteboard out your typical sales process.

Start at the point where a sales rep receives a qualified lead in his hands. What happens next? Identify what a sales rep does with a prospect, and what milestones must be



accomplished before you've got a new customer. Keep the flow as linear as possible. With this visual nearby, answer the questions below.

Companies: What are the various types of businesses you work with?

- q Prospects
- q Customers
- q Partners
- q Vendors
- q Competitors

Profiles: What key characteristics do you use to profile or segment your customers?

- q Industry
- q No. of employees
- q Revenue

Contacts: What are the various characteristics that define the contacts you interact with?

- q Title
- q Role

Products/Services: Briefly list and/or describe what you sell.

Partners: What types of partners do you work with? How do they help uncover opportunities for your business?

- q Value Added Resellers
- q Original Equipment Manufacturers
- q Indirect Sales Channel
- q Implementors/Installers

Sales Funnel: List the stages in your sales cycle and the percentage of closing certainty at each stage.

- q Lead - 10%
- q Qualified - 20%
- q Presentation - 50%
- q Proposal - 75%
- q Closed Won - 100%
- q Closed Lost - 0%

Documents: What materials do you send to customers during the sales cycle? List the 5-10 documents you use most frequently.

- q Email templates
- q PDF documents
- q Proposals
- q Quotes

Competition: Do you track competitive wins and losses? List your competitors and the reasons you lose business to or win business from them.

- q Price
- q Feature X
- q Value Proposition
- q Company Viability
- q Time to Value

4. Marketing Process

Describe how leads get into the hands of your sales reps.

Lead Origins: How does your company generate leads and how do you capture them?

- q Advertising
- q Cold Calling
- q Partner Referrals
- q Inbound Emails
- q Web Forms
- q 1-800 Line

Lead Information: What important data points do you want to capture on the leads page? Remember to be considerate of your end users while balancing your reporting needs.

- q Product of Interest

- q Lead Rating
- q No. of Employees

Lead Distribution: Who gets what leads? List the various factors that drive a lead to a particular person or team

5. Service Process

Describe what happens when a customer comes to you with questions/problems.

Support Areas: Describe the various types of support you provide and how your internal or external customers communicate these issues to you.

- q Product Line X
- q Billing
- q Warranty
- q 1-800 Line
- q Inbound Email
- q Web Form

Issue Resolution: What are possible stages that an issue goes through before becoming resolved? Note similarities and differences among the types of support provided.

- q New – Hasn't been touched
- q On Hold – Waiting on the customer
- q Escalated – Needs special attention
- q Closed – Problem resolved

Accountability: Are there individuals or groups who respond to specific types of issues? When and to whom do such issues become escalated? How do you distribute your caseload?

- q First come, first served
- q Product X questions go to Person / Group Y
- q Cases untouched for 2 hours are escalated to Manager Z

Sharing Knowledge: Describe where you currently track answers to your frequently asked questions. Are these related to common customer issues? Who has or should have access to this information? Would you like to publish your knowledge base on your Web site for your customers?

- q Intranet
- q 3rd-Party Knowledgebase
- q Excel / Word

- q Pen & Paper
- q None

Most Common Answers: List the names of standardized templates you use to respond to customer inquiries. If you don't have any, list the most common questions and answers here. Would you also like your customers to have access to this information?

6. Importing Data

Sources: List out all the sources of your legacy information (e.g., Act!, Excel) in the table below.

- q ACT!
- q Excel
- q Goldmine
- q Outlook

Record Types: Describe the specific information in this data source that you want available in SFA.

- q Account Number
- q Tax ID

Data Quality: How consistent or dirty is the information in each data source? Will it likely require cleanup before importing into SFA? Consider approximately how old your records are and how often the majority of records are accessed.

Size: Approximately how much data is contained in each data source? (list file sizes where possible)

Migration Strategy: Knowing the above information, discuss possible import strategies based on available resources, cleanliness of data, and record type.

- q All inclusive - migrate everything
- q Clean slate - migrate nothing and start fresh in SFA
- q Combination - migrate active customer records created after date X
- q Manual import – upload Leads, Accounts, and Contacts
- q SFA Migration Services



Source	Description	Type of Information	Needs Cleanup?	File Size
ACT!	User contacts	Accounts and contacts	Yes	
Outlook				
Palm Pilot				

ORIGINAL

7.Next Steps: Map Your Business to SFA

Complete this section after watching the modeling Salesforce to your business breeze in the next step. Return here to see how your BPR answers map section-by-section to SFA fields and concepts.

BPR Section	SFA Field/Feature	Questions
3.1 Companies	Account Type	
3.2 Profiles	Account custom fields	
3.3 Contacts	Contacts custom fields	
3.4 Products/ Services	Opportunity custom fields, Products	
3.5 Partners	Partner related list on the Opportunity page.	
3.6 Sales Funnel	Opportunity sales stages.	
3.7 Documents	Custom email templates and mail merge documents. Upload documents to the document library.	
3.8 Competition	Opportunity custom fields (e.g., reason won/lost) and Competitor related list.	
4.1 Lead Origins	Lead Source Lead Type Website integration: Web-to-lead form if you capture leads on your Web site.	
4.2 Lead Information	Lead custom fields	
4.3 Lead Distribution	Lead assignment rules Lead queues	
4.4 Lead Qualification	Lead statuses	
4.5 Documentation	Store in the document library.	
4.6 Campaigns	Campaign types	
5.1 Support Areas	Case origins Case types Setup: Create Web-to-case connection with SFA.	
5.2 Issue Resolution	Case statuses	
5.3 Accountability	Case assignment rules Business hours Escalation rules Case queues	
5.4 Sharing Knowledge	Solutions	
5.5 Most Common Answers	Email templates. Setup: Self-service and public knowledge base.	