Build-Your-Business Exercise

How Salesforce Essentials Can Make Your Business More Successful!

INTRODUCTION: ***Read through this entire assignment before getting started - this will ensure you've got the right context for the business you should "build."***

Welcome to the the *Build Your Business* exercise. This portion of the program is to put you in the mindset of a small business owner. One of the most crucial elements of being an Essentials Advisor, is understanding the challenges that small businesses are looking to solve for with Essentials. This exercise will require you to switch between "wearing" 2 hats: 1) that of a business owner, and 2) that of an Essentials Advisor. First, you'll wear the business owner hat and select the concept for your business based on the options suggested below. Second, you'll wear the Essentials Advisors hat and setup the customers Essentials org specific to their business goals.

Keep in mind that every business is different and the setup of an organization is unique. That said, this exercise allows you to think creatively and tests your knowledge of the product.

SCENARIO:

You need to build out the concept for your business that has just decided to buy and implement Essentials. You don't need to build a business plan for this exercise - just consider the industry, your product or service, and your target customer. To get you started in the right direction, we have created a set of industries for you to select from.

Industries: Professional Services (i.e. accounting, insurance, real estate, law), Manufacturing, Advertising

- Please select from one of the above options - if you have a creative idea, send Christina Keohane an email to discuss

Based on your selection, keep in mind the following:

- **What's your product or service?__________**
- **Who is your target customer?__________**
- **You should structure your business to have two key sales representatives**,
    - These two sales reps also manage the customer support inquiries from the company's accounts.
- **Kyle Dell** - Is a Sales Rep.
    - He is in charge of managing his leads and ensuring that he is consistently staying up to date with his pipeline.
    - He also handles support inquiries from customers and answers all of customer's questions in lightning speed.

- **Valerie Williams** - Is a Sales Rep.
    - She is in charge of managing her own leads and ensuring that she is consistently staying up to date with her orders and pipeline.
    - She also handles support inquiries from customers and answers all of customer's questions in lightning speed.
- **Mark Brown -** Is a Sales Manager.
    - He is in charge of managing his own set of leads as well as checking overall performance. Mark also handles customer support in the evenings that come from Kyle's clients and answers any urgent questions that come in.

Once you've thought through the specifics of your business, switch to the Essentials Advisor hat!

- **You** - The Essentials Advisor, helping set up this small business for success!

MODIFYING YOUR TRIAL SALESFORCE ORG

You've already got a trial org live with Essentials, so you're in great shape. The steps in this exercise will require you to reorganize some of your data.

LET'S START WITH SETTING UP SALES

- **Mapping out Sales Path**
    - **Customizing Sales Stages:** The first step in getting your team setup for success on Salesforce Essentials is defining your Sales Stages. As a growing business, a sales path is critical for keeping your team organized and tracking the progress of your open pipeline. In Essentials, the sales path begins at the lead stage. A lead is a prospect that you are not currently doing business with, but has the potential of becoming a customer. Once you've qualified a lead, you move them along the sales path into a phase of stages. Sales stages are the steps your sales reps take when they're working with a potential customer to close a deal.
        - **Tip:** Utilize the provided industry specific pipeline templates, for example Sales, under step 2 of the basic Sales setup. Then, customize those sales stages to fit your team's specific workflows. When you make these sales stages your own, your sales reps will feel more empowered as they move their customers through the pipeline to deal won.
        - **Exercise:** Now build out your personalized sales stages Basic Sales Setup page via the setup flow. Example, if you're using a restaurant/catering scenario: First Contact → Ordered → Confirmed → Prepped for Cook → Delivered (Deal Won) or Order Cancelled (Deal Lost)
    - **Adding any additional custom fields:** In addition to tracking the steps that your sales reps take as they close customer deals, your sales reps will also want to track other important pieces of data about your customers. This will allow your sales reps to give the most personalized service to each and every customer.

        - **Tip:** Review the default fields associated with each Object (Account, Leads, Opportunities) before adding new fields. That will ensure that your Sales Reps are only presented with relevant and useful fields to complete.
        - **Exercise**: Add an "Owner" Field (Text) to your Lead Object. By adding a text field for the lead owner, you will be able to import the owner name associated with each lead from your spreadsheet. You may notice that there is already a Lead Owner (Lookup) field associated with the Lead Object. Since you cannot import your Owner column directly into that lookup field, you will need to create the "Owner" (Text) field. This will set you up to mass transfer leads and update the Lead Owner (Lookup) field to the correct owner at a later step (see step 'Mass Transfer of Ownership').
        - Click here for more help: Customize Fields
- **Upload Lead (Prospective Customer) information**
    - **Importing your Leads:** Now that you've customized your team's Sales Stages and ensured that your team is tracking all of the necessary attributes about your customers, you'll want to import any existing leads or customer information. Since your team has been operating off an Excel spreadsheet (see below), you can easily import all of that important information into your CRM. You'll be utilizing Import Wizard to import your team's Leads.
        - **Tip:** A great way to ensure you have clean, accurate data in Salesforce is to check data before importing it. Make sure you've removed any duplicate records, blanks, and empty spaces and run a quick spell check. Additionally, Import Wizard requires import files to be formatted as CSVs so ensure that you've saved your Excel file in that format.
        - **Exercise**: Utilize the CSV below to import the Leads that your sales reps have been tracking.
            - Leads CSV
        - Click here for more help: Importing Your Contacts Workshop
- **Connecting Email**
    - **Connecting your Email:** Connecting your email to Essentials allows you and your team to send emails directly from the platform and gather insights about your customers, right from your inbox. You can also see relevant email activity for your leads and active customers in the Essentials Activity Feed. This feature is crucial for Essentials customers, as it's an automated way to stay organized and follow up with open deals in a timely manner. Connecting your email gives time back to Sales Reps to close business and manage pipeline. When you click **Connect Your Email**, you're saying Yes! to both Salesforce Inbox and Einstein Activity Capture.
        - **Exercise:**
            - Create a new account for Gmail as a **test email address** to complete this step (i.e. christinascompany@gmail.com)
                - Create an account to "Manager Your Business"
            - Complete the Connect your Email step on the Basic Sales Setup page via the setup flow to enable EAC and Inbox for your organization.
- **Collaborating with other users**
    - **Add Users:** Now it's time to invite your Sales Reps to work with you in Essentials. Team work makes the dream work. Simply fill in the Email, First Name, Last Name, and Profile fields and select Finish.
        - **Tip:** Start with default profiles and make small modifications as necessary. Most users will be defined as "Standard Users".
        - **Exercise:** Use the Basic Sales Setup page via the setup flow to add your users. Add Kyle Dell as a Standard user to your trial org - Kyle Dell, Username - select a unique username, Standard User.
    - **Mass Transfer of Ownership:** After you've imported your team's leads and added your users, you'll want to ensure that each sales rep is listed as the owner for their leads. Earlier in this exercise, you added a custom

field for “Lead Owner”. You will use this custom field to ensure each imported lead has a transferrable field for the proper ownership.

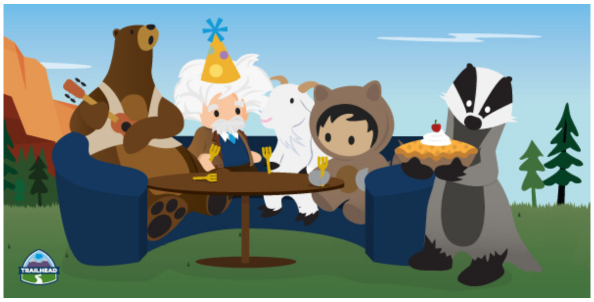
    - **Exercise**: Mass Transfer Kyle's Leads from you to Kyle to reflect Kyle as the Lead Owner. Open one of Kyle's leads to confirm the mass transfer was executed correctly.
    - Click here for more help: Mass Transfer Records
  - **List Views:** List views are a great way to help your team sort, prioritize, and analyze the records that are most important.
    - **Tip:** You can add Lists Views to your Navigation Bar to increase efficiency by decreasing clicks.
    - **Exercise:** Create a List View of Leads with Rating “Hot” and make sure it is visible to all users. This will allow your Sales Reps to prioritize the leads that are most likely to close. To ensure that it's easy to access, add that List View to your Navigation Bar.
    - Click here for more help: List Views, Adding List View to Navigation Bar
- **Leveraging Campaigns to Drive Lead Engagement:** Create campaigns to market directly to your leads so you can to turn prospects into deals.
    - **Tip:** Add relevant Contacts/Leads to a campaign via the Lead/Contacts list view
    - **Exercise**: Create a new Campaign to reach out to your Hot Leads.
- **Modify Sales Dashboards/Reports**
  - **Quarterly Performance Dashboard:** Finally, as the owner of your businesses you are very interested in seeing how the team is tracking towards their quarterly performance. To ensure that your team is working towards their goals, the Quarterly Performance Dashboard is front and center on your team's Home Page.
    - **Exercise:** As your team has been rocking their sales, you've been tasked with increasing the Quarterly Performance Goal. Update the Quarterly Performance goal to $275,000. Don't forget to always refresh your dashboard after an update has been made.

NOW THAT YOU'VE COMPLETED THE SETUP FOR THE SALES SIDE OF ESSENTIALS, TEST OUT YOUR SALES PROCESS FROM A NEW LEAD TO A CLOSED WON OPPORTUNITY AND REPEAT CUSTOMER.

1. You get a call from a potential lead, who is interested in a specific service and falls into a specific region. While on the phone, add that lead to Essentials with all pertinent details.
2. Send a confirmation email to your new lead. Verify you can see that email within the lead record (This means that EAC is working!)
3. Now that you've qualified your lead with a phone call and email, convert that lead to an active opportunity and follow the appropriate sales stages and add in additional details (Amount, Close Date)
4. Once you've closed the deal, confirm that your Quarterly Performance Dashboard reflects your new customer!

NOW IT'S TIME TO SET UP SERVICE

To access Service Setup, click on the Gear icon on the upper right hand side and navigate to “Service Setup” to access the set up flows.



1. Adding your Queues
    a. It's time to create the queues you think that are appropriate to help your team manage cases. Remember that you can group your teams along different dimensions - tier 1 vs tier 2, high risk vs. low risk, new customer vs. long term customer etc. Set up different queues based on the service.
        i. **The Big Idea:** Queues may not seem that useful right now as you only have two support agents, but as your team grows, you'll want to assign team members to queues to better manage your incoming cases. Cases can be owned by queues, and then queue members can jump in and take ownership of records.
        ii. **Tip:** After you have finished creating your queues based on services, go back to the Case page and take a look at your case list views - what do you see?
        iii. **Exercise**: create a couple of different queues
        iv. **Extra credit:** There is also an option to auto route cases to your team using omni-channel. You can learn about omni-channel here.
        v. *Click here for more help: Steps to Create a Queue (30 min)*

1. Get your Support Channels flowing
    a. **Email:** First things first, get your email connected so you don't let those cases fall through the cracks. Before adding your email, you'll need to create some gmail support mailboxes (i.e. support@company.com). Your support email will be different than the email you used to enable Einstein Activity Capture in the Sales setup.
        i. **Exercise:** Create a test email address and connect it to Salesforce using the following method:
            1. For Product/Service 1, use the Email setup flow, which you can find when you're in the Service Setup Home Page. Let's also incorporate the queues we set up in step 1 here.
            2. **Tip:** Once you've completed the email setup flow, a case will be created in Salesforce for confirmation. Find it and confirm.
            3. **Last Step:** Send some test emails to make sure cases are created and that you can reply back. Did you notice that the thread ID is in the subject line of all your emails? Turn that off. We want our emails to look pretty so let's use thread ID in the email body only.
    b. **Social:** Connect to your social accounts to Essentials to respond to your customers that contact you via social media.
        i. **Exercise:** Create a Twitter account for your business. Connect your Twitter account to Essentials to come in as cases. If you don't have a personal twitter account, you'll have to create one now as well.
            1. Create a few cases via at mentioning (Twitter), DM (Twitter)
                a. **Hint:** Make sure the Case subject is something a bit more informative than "TWEET FROM: Customer123." If the same social persona contacts you on a case that's been closed for more than 5 days, what happens? Let's change the rule from 5 days to 1 day.
        ii. **Exercise:** Create a Facebook account for your business. Then connect your Facebook account to Essentials to come in as cases.

1. Create a few cases by posting on the facebook page

3. Case Management:

There are a number of features available within Case Management for Essentials. For the purpose of this section, please **select 3 of the items below** to incorporate into your organization. Keep in mind, that although you do not need to apply each feature to your trial account, you must still understand how each feature works. During the mock consultation, you may be tested on your knowledge of the additional items.

1. **List View:** When you created your queues in step #1, the list views corresponding to the queues are automatically created for you.
   a. **Exercise:** Create a List View for Escalated Cases and display the Last Modified Date field as a column
   b. *Click here: Create a List View*
2. ***Note* - Custom Fields**: You can create custom fields at the Case, Contact or Account level (or on any standard or custom object!).
   a. *No exercise required here. Click here for more info: Creating Custom Fields; Custom Fields Limits*
3. **Email Template:** Create a new email template that includes a merge field and a nice letterhead.
   a. You can use email templates for things such as Assignment Rules, Auto-Response Rules, Macros... and more!
   b. **Exercise:** Create one email template to use for Auto-Response, one for Assignment, and one for Macros.
      i. *Tip*: you'll have to create a Letterhead first. Creating a Letterhead
      ii. *Tip 2:* you'll have to go back to Classic to see the Documents tab.
      iii. *Bonus Tip:* here's a header if you want to download and use it for your letterhead
   c. *Click here for more info: Email Templates in Lightning Experience*
4. **Case Assignment Rules:** You want to assign cases, so you'll need more than one criteria. In this case, would you create multiple assignment rules? Set up 2-3 case assignment rules.
   a. *Tips*: Click here for *Article on Setting up Assignment Rules*
5. **Case Auto-Response Rules**: We need to send our customers an auto-acknowledgement email. Make sure that the customer is able to respond to that auto-acknowledgement email.
   a. **Exercise:** Create an auto-response rule.
   b. *Tips: Creating Auto-Response Rules*; *Org Wide Email*
6. "**Automation tools**": in addition to Assignment Rules and Auto-Response Rules, other automation tools are available in Essentials. Examples of those are:- Escalation Rules, Workflow, Processes, Flow - To determine which automation tools to use for a given scenario, take a look at this link: *Which Automation Tool Should I Use?*
   a. **Exercise: Create Process for VIP customers -** Make sure cases from the VIP customers are filtered correctly and responded in a timely fashion.
   b. *Tips: Choosing Automation Tools*
7. **Macros**: And you also want to make your users super efficient so you want to create some Macros. Macros are quick shortcuts in service cloud console that save your team time by allowing them to perform multiple actions with one click. Some popular use cases for Macros include - having a prepared response for common questions and enforcing workflows.
   a. **Exercise:** Create some macros that would help speed up your Agent responses, such as:
      i. Create at least one that utilizes Email Template you created
         1. *Tip:* check out all the folders
      ii. Update the Case Status to Pending
      iii. *Tips: Article on how to create Macros in Lightning*; *Add the Utility Bar to Lightning App*

    iv. *Tips: did you know there's keyboard shortcut for macros? Try m > arrow keys to select > enter > then m again to collapse the macro widget.*

5. Knowledge:

Salesforce Knowledge is a knowledge base for creating and managing content. This gives your team the ability to access knowledge articles to provide excellent customer service.

1. **Exercise:** Set up Knowledge and create a few knowledge articles. Don't forget to give it some characteristics with images and styling. And of course, don't forget to categorize your articles by topics.
    a. Example articles you could create, based on your business
        i. How do you reset your password?
        ii. How can I track my order online?
        iii. When will my next statement arrive?
2. **Exercise:** once you have your article ready to go, make sure you can insert the article into an email, and send the email to the customer.
    a. Make sure you can insert the content of the Knowledge Article to a Case, and not just "Attach Article."

6. Help Center:

Help Center is awesome because it enables your customers to find the answers themselves, without having to contact you! But should they need to, they'll be able to submit a case right then and there.

1. **Exercise:** set up a help center
    a. Be sure to bring over your knowledge articles to Help Center and organize the articles by topics
    b. Make sure your customers can submit a ticket to you if they run into any issues! What if they have a picture of a cupcake design they want you to make?

NOW, THAT YOU HAVE YOUR SERVICE SETUP COMPLETE, GO AHEAD AND CREATE A CASE TO SEE HOW YOU CAN START SUPPORTING YOUR HUNGRY CUSTOMERS!

Exercise: Work a support case from beginning to end

1. Send in an email to your support email address as if you are a customer asking for additional information on the type of service you offer.
    a. Did each case get assigned to it's respective queue?
    b. Look at the details of your case?
    c. Can you find the email message you sent in from the case?
    d. Can you find your contact and/or account associated to that case?
2. Respond back from Salesforce as an agent
    a. Apply your macro, set your custom fields, and send your first email back to your customer. Don't forget to set your case status to Pending!

Congratulations, you have completed the exercise!