



Wine and Sunflowers Ltd

Hypothetical Scenario

Artefacts

- Actors and licences
 - Data Model
- Single Sign-On solution
- Salesforce application design
 - Integrations
 - Sharing design
 - Role hierarchy
 - Reporting
- Development Lifecycle Strategy
- System and Data Governance Strategy

Business Challenges

- Too many spreadsheets
- Manual invoicing process that relies upon sales executives
- Discrepancies between order and invoice amounts
- Too many rogue discounts
- Lack of visibility of complaints and delivery enquiries
- Sales executives stealing clients
- No visibility of margin for each deal
- IT department spends too much time on password resets & has no time for rolling out enhancements

Project Overview

Linda, CEO of Wine and Sunflowers, is at her wits' end.

All she wants to do is sell gift packages! Fans of Ladies Be Architects love their wine and sunflowers so much, they're flying off the shelves to over 100,000 customers worldwide!



To make sure they don't lose that momentum, Linda accepts that the business needs to pull its socks up. Linda wants to open a conversation with the customer base. She would like to understand them better so that the company can continually improve its product catalogue.



Wine and Sunflowers Ltd operates in the USA, Australia, South Africa and the UK. The reliance on spreadsheets means each region is doing things differently and it affects the company's results. Linda would like to standardise operations across all regions, allowing for local regulatory variations where necessary and selling in local currencies.



Linda's leadership team has put out a Request for Proposal to several companies for a brand new system and you've got the joy of this RFP landing on your shoulders - lucky you!



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Actors



Sales Executives

Responsible for following up on web enquiries and taking inbound calls with a prospect to understand and build up a potential order. They work solely on the phone and report to a regional sales director, who reports to the VP of Sales.



Customer Service Agents

This team addresses and resolves customer questions and problems. The team reports to a regional customer service director, who reports to the VP of Service. The VP of Service reports to the Chief Operations Officer.



Sales Operations

This team is responsible for raising client invoices based on the information supplied by the sales executives. The team covers all regions and reports to the Chief Operations Officer.



Customer Complaint Specialists

This specially-trained team addresses and resolves customer complaints. The team reports to a regional customer service director, who reports to the VP of Service.

Existing System Landscape - Spreadsheets



Enquiries Spreadsheet

A spreadsheet of enquiries downloaded from the company website. This will be replaced by the new system.



Orders Spreadsheet

Lists all the orders with amounts that the Sales Ops team needs to create invoices for. This will be replaced by the new system.



Complaints Spreadsheet

Maintained by the complaints team within the customer service department. This will be replaced by the new system.



Customer Service Spreadsheet

Used to record customer enquiries. This will be replaced by the new system.



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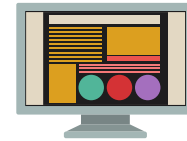


Existing System Landscape - Systems



ERP System


Used for accounting, invoicing, order processing and purchase management. On premise, but can support web services. This will continue to be used because it is the system of record for Products and costs..




Company Website

Displays products, company FAQs and includes two enquiry forms. One for sales orders, the other for customer service. This will also continue to be used.


Identity and Access Requirements

 With so many systems to log into, users are forgetting their passwords almost daily and the IT department has banned the use of password vaults for security reasons. There is no single sign-on solution currently in place. They would like your recommendation of how to resolve this problem.


 Wine and Sunflowers Ltd would like to allow customers to register and login to a secure area of their website using their Facebook credentials, to save time. This should work on any device. They would like you to recommend a solution for this.

Proposed Business Processes

Sales Order Processing

 Customers who want to place a large order can do so by making an enquiry via the website (e-Commerce is out of scope). Enquiries are routed to sales executives based on their region and current workload. Only the VP of sales may re-allocate customer enquiries.

 Sales management would like to make sure only orders with >20% gross margin are confirmed.

 There's a new rule that if any products are sold with more than a 10% discount, approval is required for the whole deal.








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Proposed Business Processes




Invoice Processing

-  When an order is confirmed, the Sales Operations team would like to avoid having to key invoices and credits into their ERP system. The documents must be emailed from the new system.
-  Prices, discounts and quantities must be shown on the invoice.
-  Invoices that are raised then credited back before month end should not be included on the monthly invoice run.

Customer Service

-  Customers should be able to log and classify their enquiry online. Enquiries are routed to agents based on their type.
-  Customers must be able to chat online with the Sales Operations and customer service teams.
-  Due to regulatory requirements, users must be able to see the current and previous owners and stages of a complaint

Integration Requirements

-  The new system will be the system of record for Customers, but the ERP system needs to know about new customers in real time so that it can allocate a customer ID. This ID is the reference number for customers to use when contacting Wine and Sunflowers Ltd.
-  Invoices and credits must be posted to the ERP system for management accounting. This has to happen in time for the monthly invoicing run.
-  New products are added to and retired from the ERP system daily.







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Sharing and Visibility Requirements

-  Within the sales organisation, Sales Executives can view the whole customer base for their region, but cannot edit any information about a customer that doesn't belong to them.
-  Regional sales directors can change any customer or Order record within their region only. Sales Executives may only access their own Orders.
-  Customer service teams need to be able to see all available information about a customer.
-  Invoices cannot be seen by any sales executives. They can be viewed by regional sales directors for up to 28 days after the order has been confirmed.



Reporting Requirements



The volume of orders per product across all regions



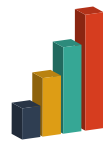
The top ten selling products by region



A breakdown of customer problems by enquiry type



A list of open complaints with owners



Linda wants to look at levels of activity by day in the month, to understand how best to distribute sales activity

Development Lifecycle



Releases are permitted once a month



There is an annual change freeze for all systems in December



The business tends to change its mind a lot on requirements.



They're hiring for 3 new development teams


An e-Commerce solution is currently being evaluated and is outside the scope of this RFP




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 Linda would like you to recommend a suitable delivery approach.

 Linda would like to know your strategy for structuring the project workstreams, sandboxes and testing.

System and Data Governance Requirements

 There are multiple versions of the truth for customer records. Wine and Sunflowers would like you to recommend a suitable data migration strategy, including cleansing and tools.

 Please recommend how you would ensure that any future data input into the system remains clean, accurate and reliable.

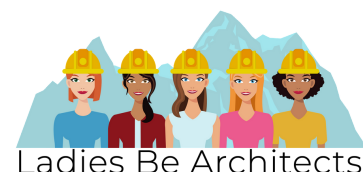
 The business has historically been liable to throw requirements at the development team. What recommendation would you make to ensure that future enhancements are appropriately managed?

Writing Credits

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This was written independently and may be distributed for use by the Salesforce community.

Please do not contact Salesforce about this scenario!



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