

CASE STUDY

Sales Agent Portal on Salesforce Communities & Chatter Global Steel Products Company



ABOUT WAVE6®

Wave6 leverages Salesforce Sales, Service, Marketing Clouds and Communities to transform our clients' business. Our services include:

- Salesforce Optimizations
- Salesforce Expansion and Implementation
- Salesforce Managed Services
- Force.com & Mobile Development
- CRM Consolidation
- Cloud Application Integration

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SALESFORCE COMMUNITIES AND CHATTER PROVIDES ENHANCED COLLABORATION AND VISIBILITY

A global manufacturer of steel tubing and piping, electrical support system products, and metal conduits needed a way to collaborate with their independent agents as well as securely manage sales information in Salesforce.

THE BUSINESS CHALLENGE

The client partners with over 100 independent sales agents, who sell their products across six different business units. Agents report to Regional Sales Managers (RSMs), who are full time company employees. The RSMs use email and spreadsheets to communicate and track critical Agent forecast and pipeline data.

With over 100 Agents in the field, the client needed a solution that gave RSMs real-time visibility to collaboratively build forecasts with Agents, share quota goals, and track sales opportunities, while protecting sensitive company data within Salesforce. Agents and RSMs also needed real-time dashboards and reports to track key sales metrics across channels and regions, and a platform to share business information in a secure, collaborative environment.

THE SOLUTION

The client's RSMs had used Salesforce Sales Cloud to track sales opportunities and activities since 2011. Wave6 recommended they implement Salesforce Communities to extend key data sharing capabilities to their independent sales Agents.

Using Salesforce functionality, the Communities implementation creates a dedicated site for Agents where they can enter and receive data through Salesforce, while remaining restricted to a specialized environment configured for their needs. The dedicated site allows access to many standard Salesforce features, including the ability to

create Accounts, Contacts, Opportunities, Leads, and other records.

Salesforce Community provides the following benefits:

- Less costly licenses than full user licenses
- Granular control of data access
- Ability to brand the Agent portal
- Ability to provide different content, features, and user experience than primary Salesforce users
- Real-time dashboards and reports, allowing Agents to easily understand progress to goals, and view top client and product lines
- Collaboration between Agents and the client's Salesforce users via Chatter
- Ability to build specialized applications for Community users

Agent Management

Using Communities, the client designates key accounts as Partner Accounts, and creates Contacts within those accounts. Contacts can be designated as Partner Users (Agents), which gives them access to the custom client Community portal.

Salesforce Community allows users to share records as well as give RSMs the ability to assign records to Agents. RSMs and other authorized users have full access to Agent's sales data, including Accounts, Contacts, Opportunities, Leads, Orders, Invoices, and other records.

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ABOUT EMTEC®

Wave6 is a subsidiary of Emtec, a provider of technology-empowered business solutions for world-class organizations. Emtec's collective focus is clients for life: long-term enterprise relationships that deliver rapid, meaningful, and lasting business value. Service offerings include:

- IT Strategy Consulting
- Enterprise Application Services (CRM, ERP, EPM and HCM)
- Custom Application Development and Support
- Infrastructure Services

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Track Pipeline and Forecasting

The client requested additional functionality to allow users to create and modify custom forecast data. To accomplish this, Wave6 developed a custom Visualforce user interface that allows Agents to work collaboratively with their RSMs to define forecasts at customer and product line levels.

Client data constraints prevented using standard functionality for quotas, so Wave6 architected a solution to help RSMs track product and customer quotas for each Agent. The solution provided the flexibility needed to manage forecasts in a way that matched the client's business model.

To easily compare actual sales to quotas, Wave6 employed a batch process to summarize actual sales from Invoice Line Item data, and add it to fields on a custom object that tracks quotas. A Visualforce interface was created to enable Agents to enter their forecasts with respect to quotas assigned to them by the client's management (RSMs). The batch process runs during off-peak hours, minimizing impact to system performance.

BI Report Sharing

The client wanted to eliminate their email distribution method for Agent reports. A custom integration was developed between their internal BI tool and Salesforce, to push Agent-specific reports into Salesforce Content Libraries, where Agents can access them via Communities. Reports are removed on a schedule that can be easily modified via Custom Settings, allowing them to manage their storage space.

Security

Each Agent can report to several RSMs, which translates into complex record visibility and access requirements. An external system is used to track these relationships. A nightly process reviews any updates and adjusts sharing rules as needed for Accounts, Invoices and Orders, keeping Salesforce in sync with the dynamic nature of their business.

With a private Account security model, Account visibility and access must be granted

via sharing rules. Territory Management covers most security needs, but occasionally the client's Agents sell to Accounts that fall outside existing sharing rules and Territory Management. To associate an Agent with an Account Team, Apex triggers were developed to automatically add the Agent if they sold anything to the Account (based on Invoice and Order data). Triggers also remove Agents from Account Teams if the Agent's name no longer appears on Account Invoices.

This solution allows them to provide the right Account visibility to the right Agents with a self-adjusting security model that mirrors the client's dynamic business requirements.

Real Time Dashboards and Reports

Leveraging dashboards and reports, Wave6 extended key sales and performance metrics to Agents, allowing them to view their data in real-time. Dashboards show Agents their top customers, product line, and their progress compared to quota and forecast.

RSMs now have a comprehensive view of their Agents' sales activities, and also have the ability to drill down and view a single Agent's metrics. RSMs no longer have to sort through spreadsheets and mainframe reports, or email Agents to receive updated information.

RESULTS

Expected benefits include:

- Improved engagement of independent Agents, resulting in increased sales
- Improved forecasting accuracy, allowing the client to better forecast and meet demand
- Improved distribution and usage of key sales reports via Salesforce Content
- Better security, which increases adoption as trust in the system grows
- Reduced email and misinformation, as key information is now communicated through Communities
- Increased collaboration between Agents and RSMs via Chatter