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DELOITTE CONSULTING LLP- INTERNAL SALES TRANSFORMATION PROJECT

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PROJECT ROADMAP

Stakeholder Interview WEEK 1	**User Personas** WEEK 2	**Business Process Mapping** WEEK 3
User Stories WEEK 4	**POC/MVP** WEEK 5	**UAT Plan** WEEK 6

KEY BUSINESS INSIGHTS

Standardisation & Workflow Automation

Streamline sales processes and automate workflows across 12 firms for efficiency.

Simplified UI & KPI Dashboards

Design intuitive interface with customizable KPI dashboards for informed decision-making.

Reduced Data Entry & Unified Stages

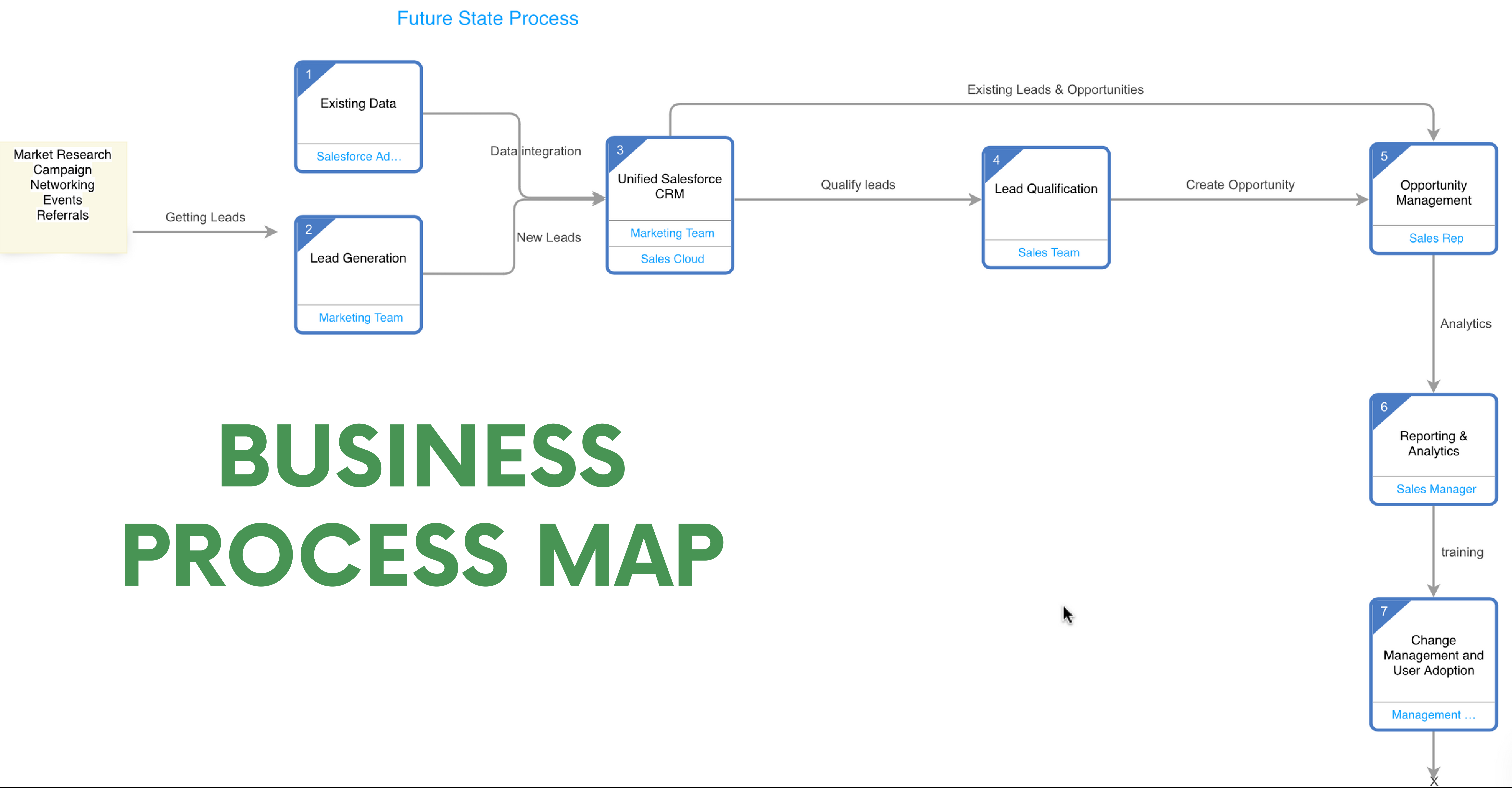
Minimize required fields, align opportunity stages for consistency, and enhance accuracy.

User-Friendly Features & Integration

Provide clear guidance, integrate with ERP system, and ensure ease of use for seamless adoption.

Change Management & Communication

Implement robust strategies to manage change effectively and communicate updates for smooth transition.



BUSINESS PROCESS MAP

User Story 1

As a Sales Representative, I want to fill in only the required field that is needed for a new opportunity so that I can save time and focus on other stages of the opportunity.

Acceptance Criteria

If the sales representative wants to create a new opportunity, they should only need to input the Opportunity Name, Description, Unique Opp Number, Expected Close Date, Estimated Account Value, Account name in other to save.

Required fields to fill in for the opportunity first Stage

1. Login to your SF org.
2. Click on the Opportunities tab.
3. Click on New.
4. Fill in details for all the fields under the “Identified” Section.
5. Click on Save.

Expected result:

The user is able to save the opportunity record, if an error message comes up, the user should check to ensure that all the fields displayed in the error message has been filled.

User Story 2

As a Senior Manager, I want to receive notifications about the discount approval requests, so that I can promptly respond to them.

Acceptance Criteria

If a sales representative submits a discount request for an opportunity, an email notification should be automatically sent to the Senior Manager for approval.

How to submit a discount Approval

1. Login to your SF org.
2. Click on the Opportunities tab.
3. Click on New to create a new record or select any open opportunity..
4. FClick on the pencil icon beside the Amount field and change the value to 500000
5. Click on Save.

Expected result:

The record is automatically submitted for approval and the manager receives an email about that.

IMPLEMENTATION PLAN

Deployment & Go Live

- Final system testing and performance optimization.
- Data migration and validation from legacy systems.
- Execute change management strategies for smooth transition.
- Conduct pilot deployment and user feedback sessions.
- Go-live with the new Sales Transformation solution.

Post-Implementation Support and Optimization

- Monitor system performance and user adoption rates.
- Provide ongoing support and troubleshooting.
- Collect user feedback and identify areas for optimization.
- Continuous improvement of processes and functionalities.
- Regular stakeholder reviews to assess ROI and alignment with business goals.

NEXT STEPS

01 Kickoff Meeting: Gather project team and stakeholders to align on project objectives and deliverables.

02 Detailed Planning: Break down high-level timelines into actionable tasks and assign responsibilities.

03 Execution: Begin solution design and development, adhering to established timelines and milestones.

04 Communication: Maintain regular communication channels for status updates, issues resolution, and stakeholder engagement.

05 Review and Adapt: Conduct regular reviews of progress and adjust plans as needed to ensure successful delivery.

THANK YOU!