

SOM Executive Education CRM

- Legend**
- Automated
 - Decision Point
 - User Triggered

Launch Conditions:
Web Form Located on SOM Executive Education website (Replacing email to Molly.nagler@yale.edu)
 • Required fields must be completed before user can submit form
 • **First Name, Last Name, Email & Primary Topic of Interest**

System:
 • Fields mapped to corresponding fields on Lead record
 • Displays Error message if required fields are not populated.

User Steps: User updates Lead Status = Open to work lead

System:
 • Removes record from the "EE New Lead Unattended" workflow

User Step:
 • Update lead status = Unqualified
 • Create follow-up task as appropriate

System: Auto-creates a lead record from web form.
Lead Record is pre-populated with data submitted:

- Salutation
- *Firstname
- *Lastname
- Gender
- Company
- *Email
- Phone
- Title
- Street Address
- City, State, Zip, Country
- Company Address
- Industry (If Other, Require Detail)
- Management Level
- *Primary Topic of Interest
- Secondary Topic of Interest
- Region
- Functional Area (If Other, Require Detail)
- Yale Alumni Status
- Yale Affiliation

System Auto populates fields:

- Date of inquiry
- Lead Status=New
- Lead Source= Web
- Lead Owner= Assignment Rules based on Primary Topic of Interest Selected
- Auto Alert Notification to Assigned Queue new lead is received.

Manual Leads:
User: Manually creates a lead for phone/in-person inquiries
 Enters data and assigns to a specific lead source.

*Validation Rules: If Other selected for Industry or Functional Area, system requires user to populate Other Industry/Other Functional Area Field
 Auto Alert to members of the Assigned Queue and EE Mgr Public Group if a lead remains in New status for more than 48 hours from create date. (Test Time trigger = 1 Hr)*

User Step:
 • Click Convert button
 • Select existing Contact or Account if applicable
 • Enter Name for Opportunity (required or validation Rule fires)

System:
 • Auto Create Contact and Account Record if existing not selected
 • If Contact/Account records exist Opportunity system prompts user to attach to existing records or continue with conversion
 • Workflow rule fires to assign Open Enrollment record type if Primary Topic of Interest <-> "Custom Program"
 • Stage = Qualification
 • Primary Contact added to Contact Roles and to Opportunity Primary Contact field

*Validation Rule: "EE Check Opportunity Created on Conversion"
 Apex Trigger: Adds Primary Contact from Opportunity Contact Role object to the Primary Contact field on the Opportunity.*

User Step:
 • Validate Primary Contact has been added (email can't be sent without)
 • Select specific Program that Primary Contact wishes to enroll in
 • Update Stage to "Registration Sent"
 • If interested in Multiple programs, clone Opportunity and add appropriate program

System:
 • Updates record with the correct Registration URL for program once program is saved to record
 • Auto generates email to Primary contact sending the Registration URL when Stage=Registration Sent
 • Date Registration Sent field updated (Now)

Auto Alert Opp Owner Stage = Registration Sent. Then send reminder to OPP Owner 30 days before Class Start Date and again 14 days before start date

System:
Open Enrollment Opportunities Only:
 • Auto update opportunity record Stage=Closed Won where Registrant Status = Registered

Workflow:
OE & CP Opportunities:
 • Auto Create Contacts from all Enrolled Registrants
 • Assign Opportunity Owner as the Contact Owner
 • Link to same Account as Primary Contact on Opportunity

Apex Trigger: registrantContactAssignment

User Step:
 • Click Convert button
 • Select existing Contact or Account if applicable
 • Enter Name for Opportunity (required or validation Rule fires)

System:
 • Auto Create Contact and Account Record if existing not selected
 • If Contact/Account records exist Opportunity system prompts user to attach to existing records or continue with conversion
 • Workflow rule fires to assign Custom Program record type if Primary Topic of Interest = "Custom Program" (Sets CP Indicator= True (hidden field))
 • Stage = Qualification

*Validation Rule: "EE Check Opportunity Created on Conversion"
 Apex Trigger: Adds Primary Contact from Opportunity Contact Role object to the Primary Contact field on the Opportunity.*

User Step:
 • Attach Proposal to Opportunity record
 • Update Opportunity Stage = "Proposal Delivered"

System:
 • Auto update Proposal Sent Date = Now()
 • Auto Update Proposal Status = Sent

Auto Alert to Opp Owner 10 Days after Proposal Sent if no response (Test = 1 hr)

User Step:
 • Attach Contract to Opportunity
 • Update Opportunity Stage = "Negotiation/Review"
 • Update Contract Sent Date
 • Update Contract Status

System:
 • Auto update Proposal Sent Date = Now()
 • Auto Update Proposal Status = Sent

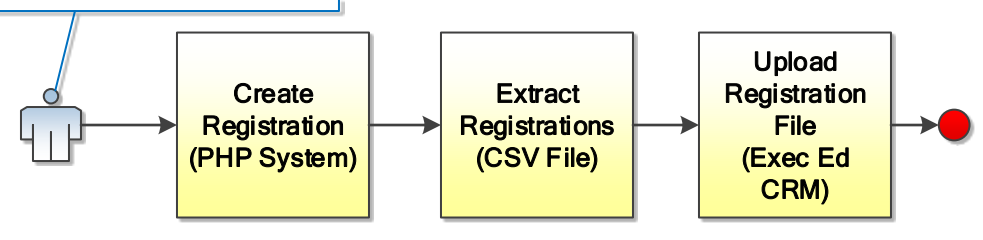
*Auto Alert to Opp Owner 10 Days after Contract Sent Date if Contract Singned Date is NULL (Test = 1 hr)
 Auto Alert to Cyndy 14 Days after Contract Sent Date if Contract Singned Date is NULL (Test = 2 hrs)*

User Step:
 • Attach Signed Contract to Opportunity Record
 • Update Opportunity Status =Closed Won or Closed Lost

Go to Program Management Process (TBD)

Registration Process

Launch Conditions:
 • User Receives Email from Salesforce containing personalized Registration URL
 • Clicks on URL to access PHP Registration system



Functional Team Questions/Tasks:

- Implement Program Survey Feedback using Qualtrics? Survey ?s
- Where do you want the feedback stored?
- Need email template
- timing of sending feedback request?
- Timing of follow-up if no response received

Please note this was not built into the estimate
 Yes Client wants to implement. Surveys are anonymous so need to store responses at the program level. Feedback evaluates the instructor as well so the program record will need to capture instructor. Send out email 3x, advise to ignore if already completed...need timing from Client.
 Client will decide if want all responses stored in SF or Qualtrics...think will want in SF. They also personalize the Survey to be specific about the Program and the Instructor advised questions would need to be the same. They will send sample.