Tatum Salesforce Limited License Quick Guide

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KEY CHANGES

ADDING & MAINTAINING INFORMATION

- Organizations are called Accounts; Accounts are added by the SFN Salesforce administrator and cannot be added or edited by end users – this is a best practice that reduces duplicates
- We will see information from sister companies and they can see our information
- There are no notes or attachments within Salesforce; proposals and other sales support materials should be stored in TatumDirect in local office folders
- There is no Business Opportunity tab for limited license users
- All new opportunities need to be entered on the Opportunity Template and sent to your AAA, who will enter it
- New contacts can be added to existing account
- The "Request" tab enables you to submit a "New Account Setup" request, which must happen prior to adding a contact when the account is new

REPORTS

- Custom reports that you create can't be saved as PUBLIC reports; users can create, edit and save personal reports but will have to run them and send results to others rather than publishing the report for others to run
- Homepage sales news reflects wins by SFN as a whole; Dashboards are Tatum specific

SUPPORT

- Salesforce Administration questions (accounts being set up, data migration, etc.) go to the generic email box of Salesforceadmin@spherion.com
- Phone support is available via **1-866-614-7375** -> **Option 4** **Passcode: 250048**

Entering the system on Day One will require you to use your new login and password, which will be sent to you from SalesforceAdmin.

The Salesforce Master Opportunity Form is the tool to use to provide your AAA with information required to add a Contact or Opportunity.

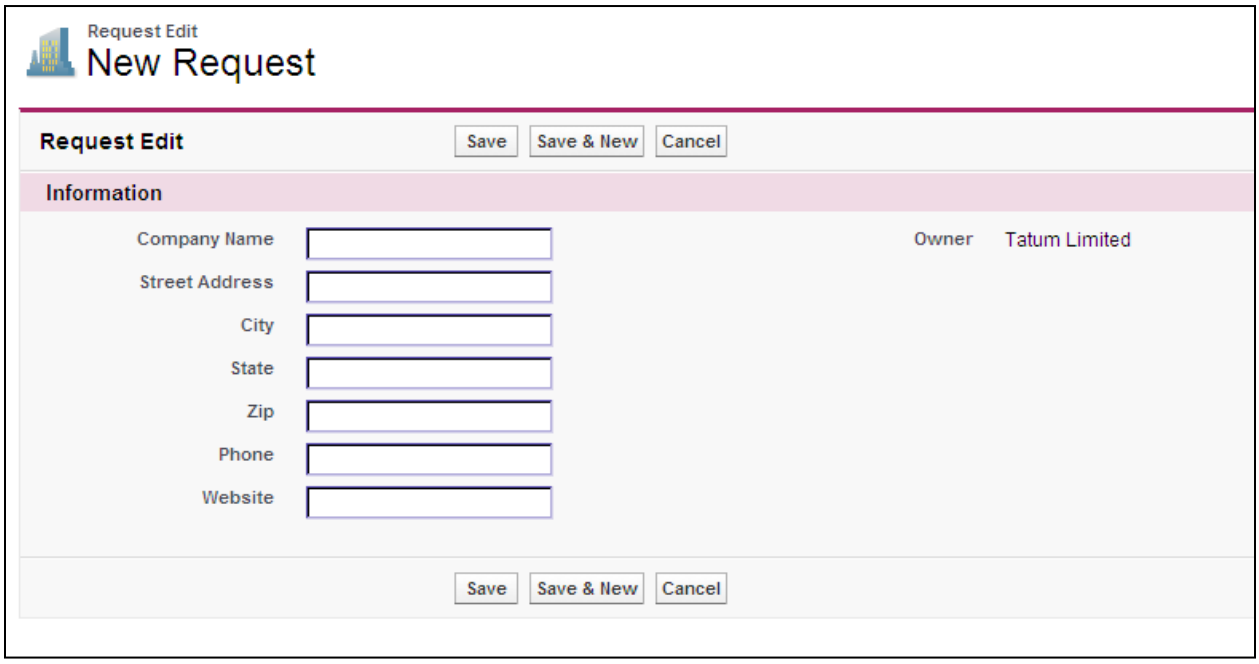
ACCOUNTS/ORGANIZATIONS

As part of the relaunch, organizations are now known as accounts and in order to maintain information integrity only system administrators can edit or add accounts. When new accounts are added, the administrator links organizations according to parent/child relationships based on account information from Hoovers, including industry, private equity status, financial data and location.

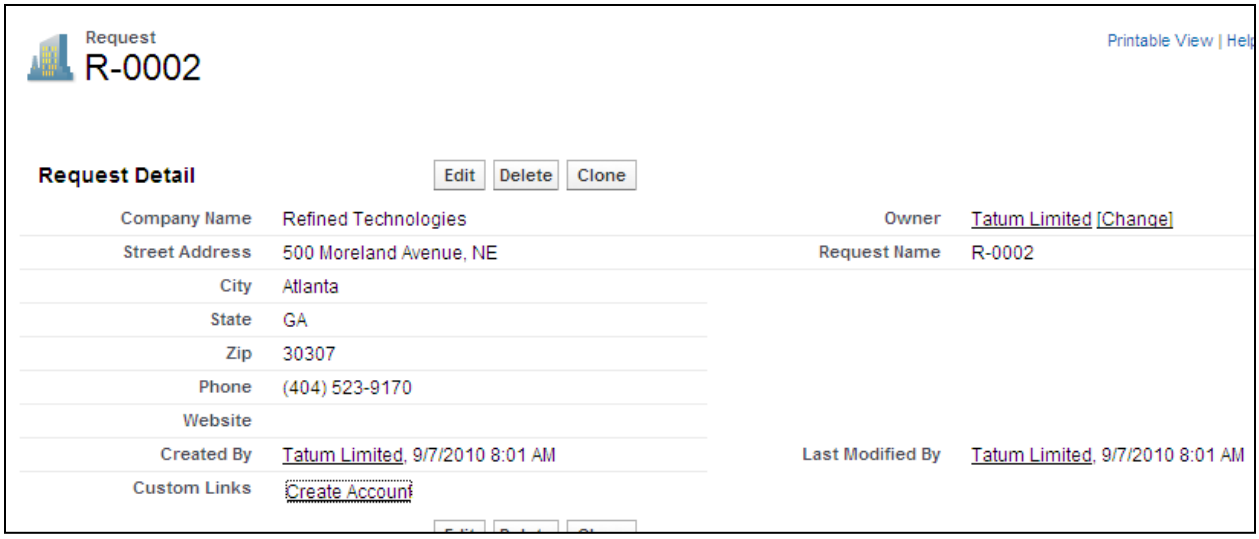
- PROCESS CHANGE: No branch office or sites are created
    - Accounts are sited with the location of their main corporate HQs
    - All Contacts are entered under this main HQ account, regardless of physical location
- Information on the screen reflects SFN account categories, such as strategic accounts, etc.
    - Indicators include Customer Type and strategic account information
- Financial information for 2009 and 2008 comes from SFN's accounting system
    - This means that numbers and statistics from Tatum are not included
- Users may still enter contacts

PROCESS CHANGE: How to add a new account, if you cannot locate a company

- A new account is added via the request tab
- Go to "REQUESTS", and click "new"



- Enter in information for the individual company, including Street Address, City, State, ZipCode, and primary phone number and click Save.
- When you save the request, you are brought to your request details, which includes a request name:



- By saving the request, an email notification is sent to the Salesforce Administrator, who will create the account using the "Create Account" link seen above.
    - Once the account is created, you will be notified and can then create your contact per the process below.

CONTACTS

QUICK NOTES

- Some Tatum customized fields have been removed
- Additional email and phone number fields are not available and will not be migrated
- Work Phone 2 and Work Phone 3 were rarely used and are no longer there
- Secondary email field is no longer there, but we have work and personal email
- Some fields have just been moved in the layout, including lead source for the contact

How to add a new contact

- Search for the company – New! Find Duplicates – search on last name, email domain, etc. – an excellent way to reduce duplicate contacts!
    - Location process change: if the headquarters of a company is Atlanta and the new contact is in Dallas, you enter the contact against the main HQ account
    - If account is not located, then you would go to "Adding an Account" (see above page 3)
- Once company is located, enter the contact.
    - The most efficient way to enter the contact is by going to the account record and then choosing "New Contact" in the contact subsection

Contact Entry Changes

- PROCESS CHANGE: Most fields are no longer mandatory – less data entry!
    - Mandatory fields are Last Name and Account, but remember if you want the person to receive newsletter and webcast invitations you must include email
- Account Site equals the location of the Contact (such as Dallas even if the HQ is Chicago)
- Professional Type is no longer mandatory, but the values are the same as those seen previously
- Contact Status indicates where the contact is active or whether the contact has left his/her firm
    - When a contact moves between firms, the older contact record is marked as "no longer with the firm" and a new one should be created on the new account/organization
- Contacts can only be edited by people in the same market (or a higher level rollup, e.g. region)
    - This same principle also works for merging duplicate contacts or deleting contacts
- Activities and other sections can be edited by all users
- New Field: Additional SFN Resources field: shows other individuals who may have a relationship with this contact
- New Field: Zone – a useful new tool for segmenting contact data at the leader's discretion– For example, you can use Zone for different size companies or geographic regions or for healthcare versus other key target groups, etc.

OPPORTUNITIES

New opportunities must be submitted to the AAA using the Salesforce Master Opportunity Form, which lists all the information the AAA must provide in order to create an opportunity. Some of the fields are new and required.

- Type = New Business, Incremental Business or Renewal
    - New = no SFN business unit is currently doing business at the client currently
    - Renewal = opportunity to do the same essential work at the client under different Statement of Work or Contract, **use this for contract extension**
    - Incremental = All others, **use this for additional people, increase to a project**
- Amount = Revenue expected in the first year of the contract
- NEW REQUIRED FIELD Steady State = revenue expected on a yearly basis after any start-up implementation revenue has been acquired
    - *For most Tatum clients, the Amount and Steady State amounts would be the same*
- NEW REQUIRED FIELD Total Client Spend = revenue expected on this project across all vendors
    - For most Tatum clients, this is the same as Amount
    - This would be different in "amount" in places where we are one of several vendors for a project, either as a subcontractor or as a part of larger project
- NEW REQUIRED FIELD Duration in Months = Time of project in months
    - This is a required field, so one should estimate the length of the potential project
    - If the indefinite, please go with 6 months
- Close Date = Expected closed won date of the project
    - PROCESS CHANGE: When an opportunity is won, please update to current date so that the win is reported appropriately. This will no longer be automatically updated.
- Stage = Stage of the proposal.
    - PROCESS CHANGE: There is no longer an Active lead Stage and stages have changed somewhat; also probability percentages are tied to stage
        - Opportunities that we have heard about but have not investigated should be entered on the "Leads" tab
    - Qualified = Need identified and has been vetted to make sure that Tatum can perform the work
    - Solution Developed = Client meetings have occurred and we have some idea as to how we are going to proceed
    - Proposal Presented = We have identified what we are going to do as well as how we are going to price the project. We have also presented these ideas to the client
    - Negotiation and Close = Pricing and/or timing is being fine-tuned. Also would be used when final approvals are being obtained
    - Won = Contract has been signed
    - Lost = no contract signed
- Probability % = dependent on stage above.

Note: it is assumed that a qualified lead has better than 0%. If probability is 0% it should still be a lead.

- NEW FIELD: Vendor Status = Whether or not Tatum is up to become the Preferred provider of services in an organization
    - Preferred Vendor = Tatum will become the preferred service provider for an organization
    - Exclusive Vendor = all others
    - IF YOU ARE UNSURE CHOOSE EXCLUSIVE
- Win Loss information is in a lower section and details the reason for the lost as well as who the business was lose to, if available

LEAD SOURCES

Lead source reflect the method by which Tatum received the lead – this list has been updated to be more useful in understanding activities that drive leads.

New Lead source: Corporate Partner is the field to use to document a lead from one of our sister companies (Technisource, Mergis, etc.)

Source Name: this field serves the purpose of "Internal Lead Source" – it is a free-form field where you indicate the internal Tatum individual(s) who first identified the lead, which is used for the **Business Development Bonus award.**

SOLUTIONS CODING

One of the biggest enhancements to the system is a different approach to capturing the solutions we are providing as part of the opportunity set up in Salesforce.

There are 3 tiers of information captured, which correlate to the way we describe our service externally rather than business unit. This will improve our ability to generate qualifications information because we will be capturing the information in Salesforce.

The first tier of information is Solution, in which the options are:

- Interim/Seated – to be used only when we are acting in a seated role rather than working with the seated CFO/CIO/Controller, etc.
- Project/Consulting – to be used for any engagement in which we are providing assistance with a specific issue, such as helping to sell a company, doing an assessment, etc.
- Search – an engagement that is any type of search, whether retained or contingent

The 2nd and 3rd tiers of information are called Services and Category/Skills, and they enable us to document the types of challenges we are helping the client resolve. We can choose as many Services and Category/Skill options as apply to the engagement.

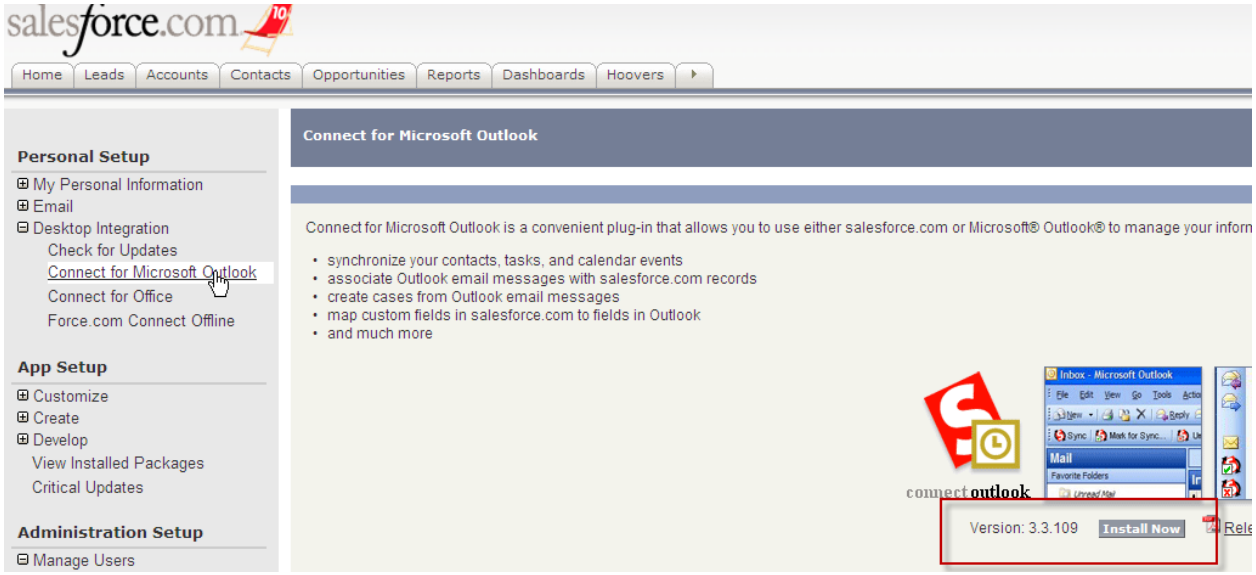
Please See the Salesforce Master Opportunity Form for the complete list of options.

OUTLOOK SYNCHRONIZATION

ENHANCEMENT: Salesforce will now be able to synchronize with your Outlook. If you need assistance with setting up Outlook Integration with Salesforce, you should follow one of two paths:

If you have a SFN-imaged computer, you will need to contact help@spherion.com to get the Outlook integration software installed on your computer.

If you are using your own computer, you can download the Outlook integration by going to Setup and then clicking the following:



ADDITIONAL PROCESS CHANGES

- Users must login into Salesforce every 30 days or their accounts will be deactivated
- Users cannot be automatically sent reports