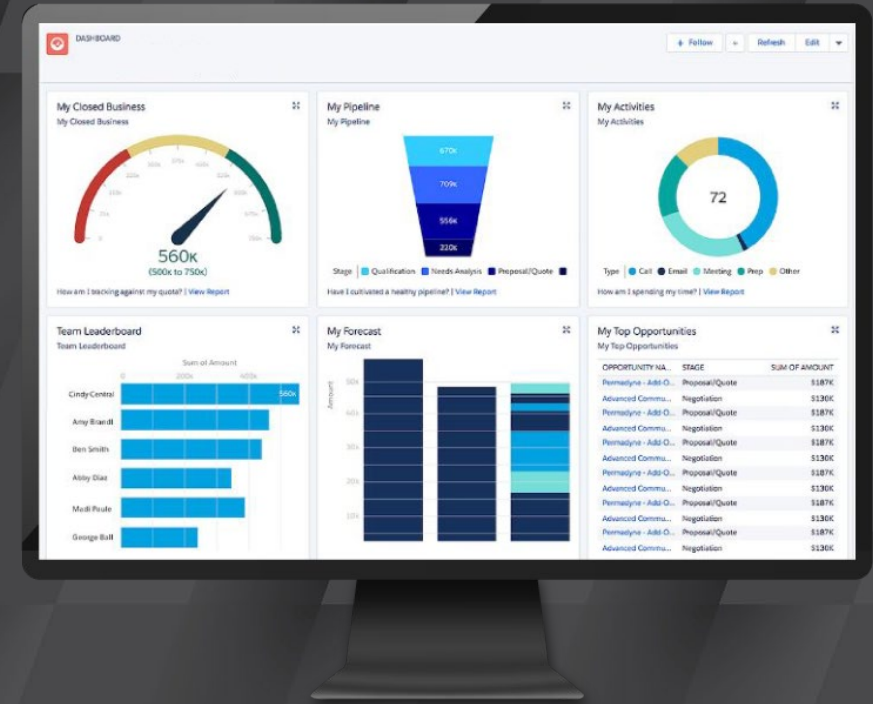


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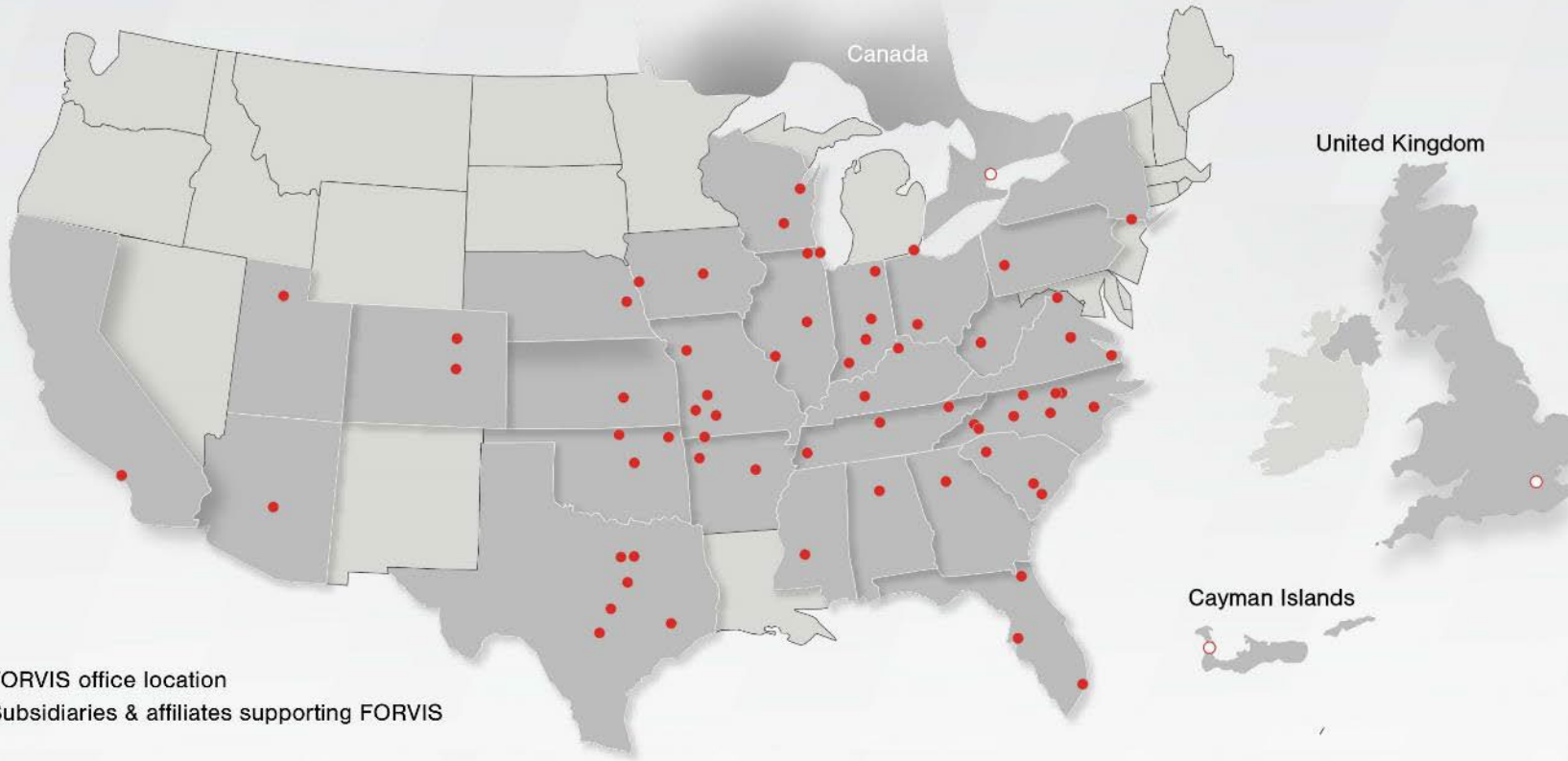


Business Technology Solutions

Accelerating Business Growth With Salesforce

April 10, 2024

Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Global Advisory Canada ULC**
- TALENT SHIFT, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Ltd. UK**

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**FORVIS was ranked number eight on Inside Public Accounting's 2022 annual ranking of accounting firms by revenue.

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

**Services outside the United States are provided through our subsidiaries and/or affiliates supporting FORVIS.

Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.



In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.

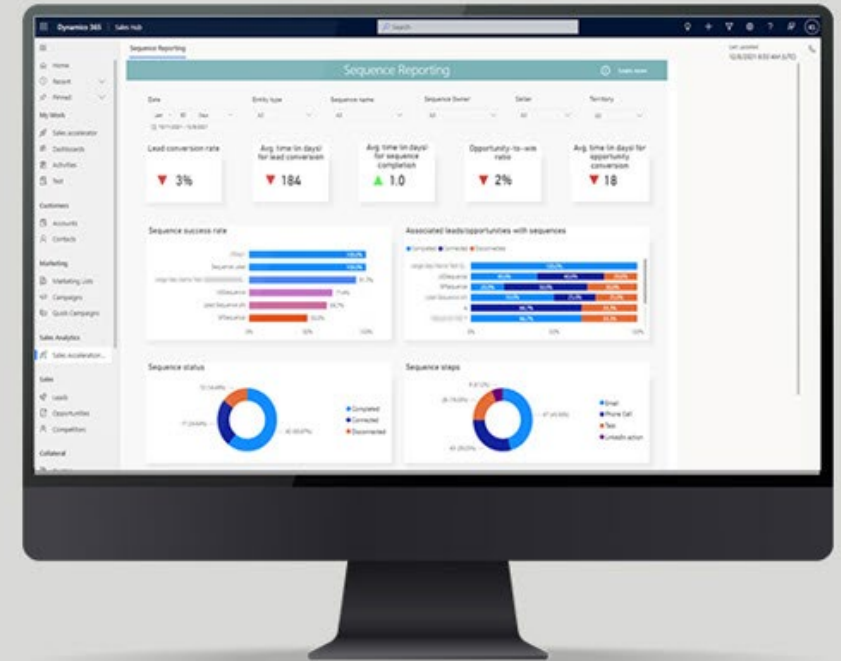
FORVIS

Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenters



Kristin Voelz
Senior Consultant

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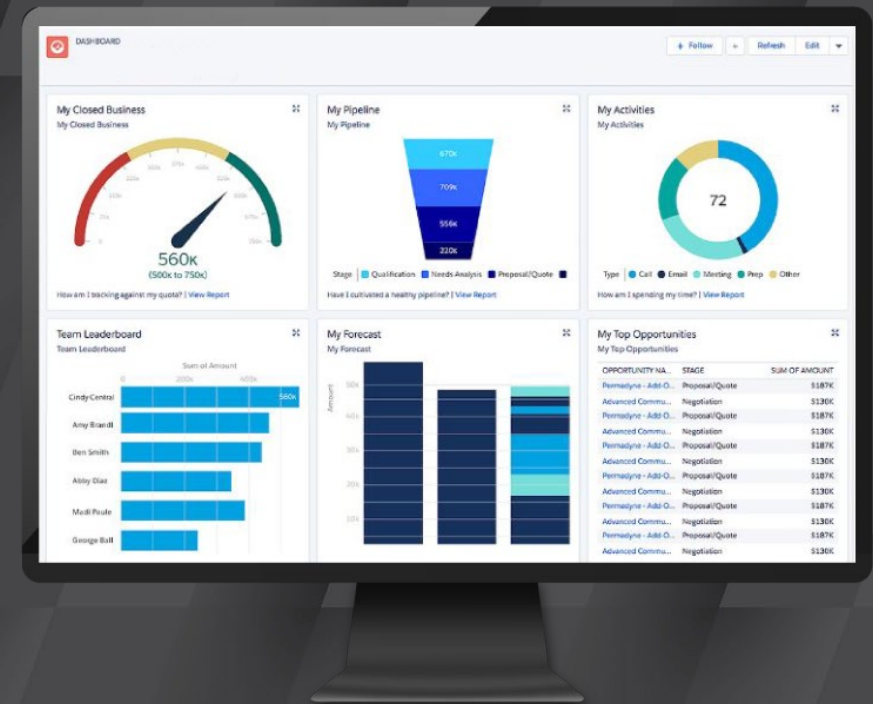


Sheri Wanasek
Senior Consultant

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Business Technology Solutions

Accelerating Business Growth With Salesforce

April 10, 2024

Objectives

- Discuss how Salesforce can help sales teams to effectively manage leads, opportunities, & accounts to help grow revenue
- Explain how Salesforce can help align sales & marketing by capturing high-value leads & converting them into revenue-driving opportunities
- Describe how to convert a lead into an opportunity in Salesforce



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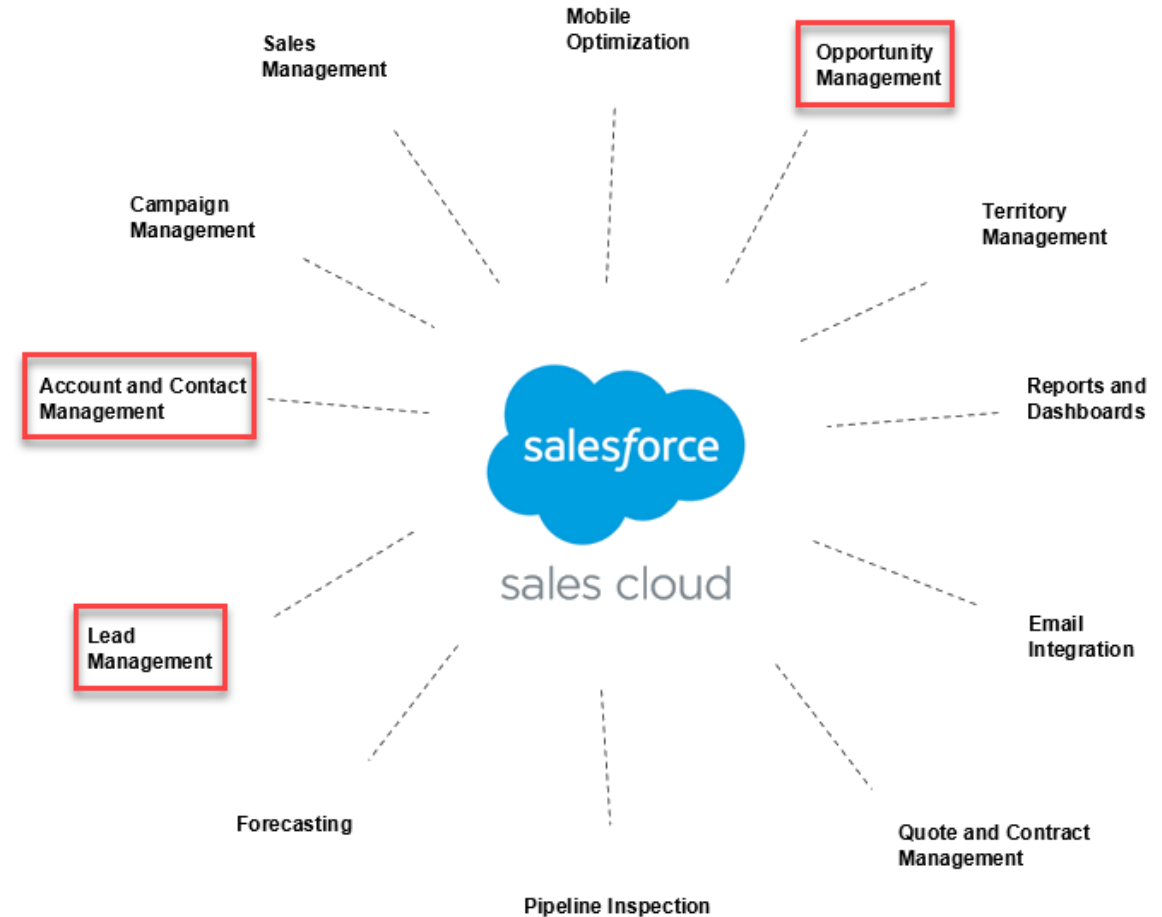
Agenda

- Salesforce: Sales Cloud
- Lead Management: Automate Lead Scoring, Convert Quality Leads
- Account & Contact Management: Manage Accounts & Contacts
- Opportunity Management: Develop Stages & Steps to Guide Sales
- Personalized Home Dashboard: Key Metrics, Tasks, Records, & Recommendations
- Q&A

Salesforce Sales Cloud

Customers are the core of your business

- Enhance your strategies
- Empower your sales teams
- Improve how you sell
- Manage sales processes from any device
- Fully customizable & configurable to fit your specific requirements



Salesforce



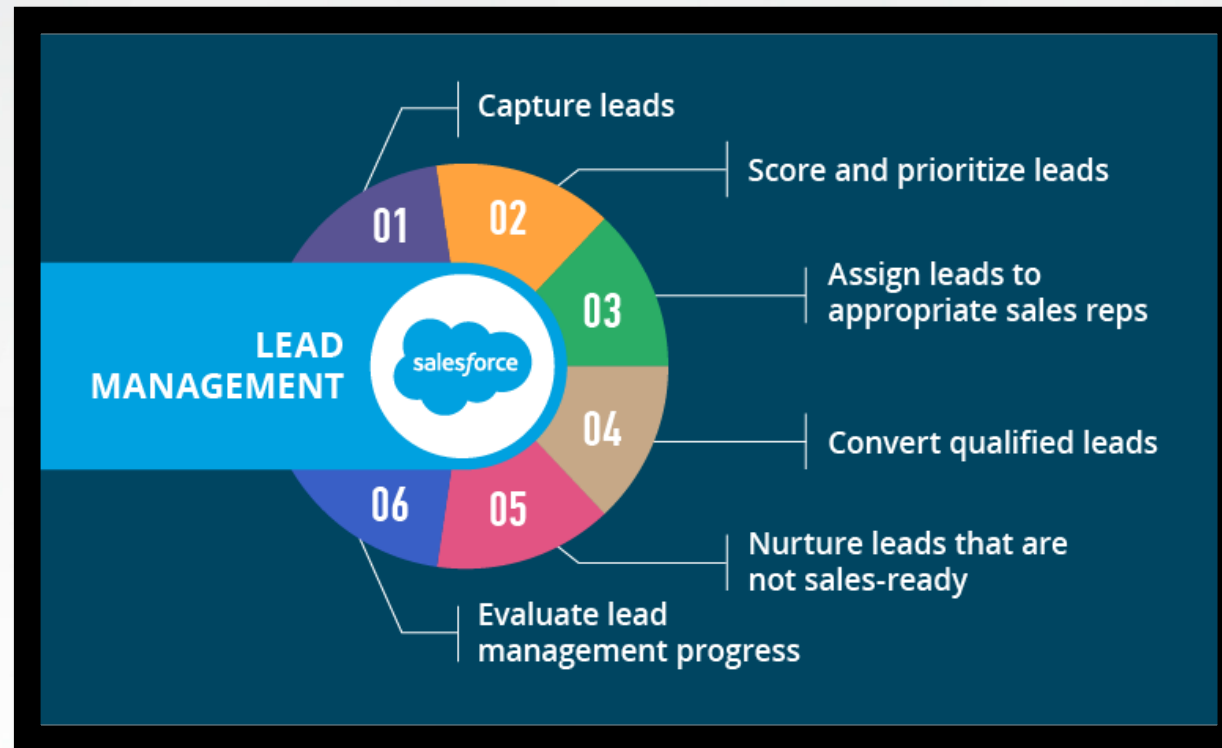
Salesforce Customer Relationship Management (CRM)

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Lead Management

Overview of Lead Management

Lead Management in Salesforce refers to the process of **generating, qualifying, & nurturing leads**, ultimately handing them off to the sales team.



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Lead Preview

The screenshot shows a CRM interface for a lead named 'Alice Wonderland'. The top navigation bar includes 'Sales', 'Home', 'Leads' (highlighted with a red box and a '1' in a red circle), 'Accounts', 'Contacts', 'Opportunities', 'Cases', 'Campaigns', 'Tasks', 'Files', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', 'People', 'Forecasts', 'Environment Hub', and 'Notes'. A search bar and a 'Quick Find' dropdown are also present.

The lead details section shows the following information:

- Title: Princess
- Company: Disney
- Phone: (555) 567-8901
- Email: alice.wonderland@example.com
- Lead Priority: (indicated by a green icon)

The lead status is 'Open', shown in a blue bar with a green checkmark. A progress bar below it shows stages: Open (green), Unqualified (blue), and Converted (grey). A 'Mark Status as Complete' button is visible.

Key Fields

Lead Status	Open
-------------	------

Guidance for Success

- Goal:** Qualify the lead and identify potential opportunities.
- Guidance:** Dive deeper into the prospect's requirements. Assess their level of interest, budget, and timeline. Provide relevant information to keep them engaged.

Related List Quick Links

- Campaign History (0)
- Files (0)
- Notes (0)

Details / Related Records

Lead Information (highlighted with a red box and a '2' in a red circle)

Lead Owner	BTS FORVIS	Lead Source Score	20
Name	Alice Wonderland	Lead Status	Open
Company	Disney	Phone	(555) 567-8901
Title	Princess	Email	alice.wonderland@example.com

Description Information

Description: The curious girl who falls down the rabbit hole into Wonderland.

Address Information

Address: 234 Rabbit Lane, Wonderland, CA 54321, USA. Website: (empty)

Activity / Chatter

Log a Call | New Task | New Event | Email

Recap your call... [Add]

Filters: All time • All activities • All types [Refresh] [Expand All] [View All]

Upcoming & Overdue

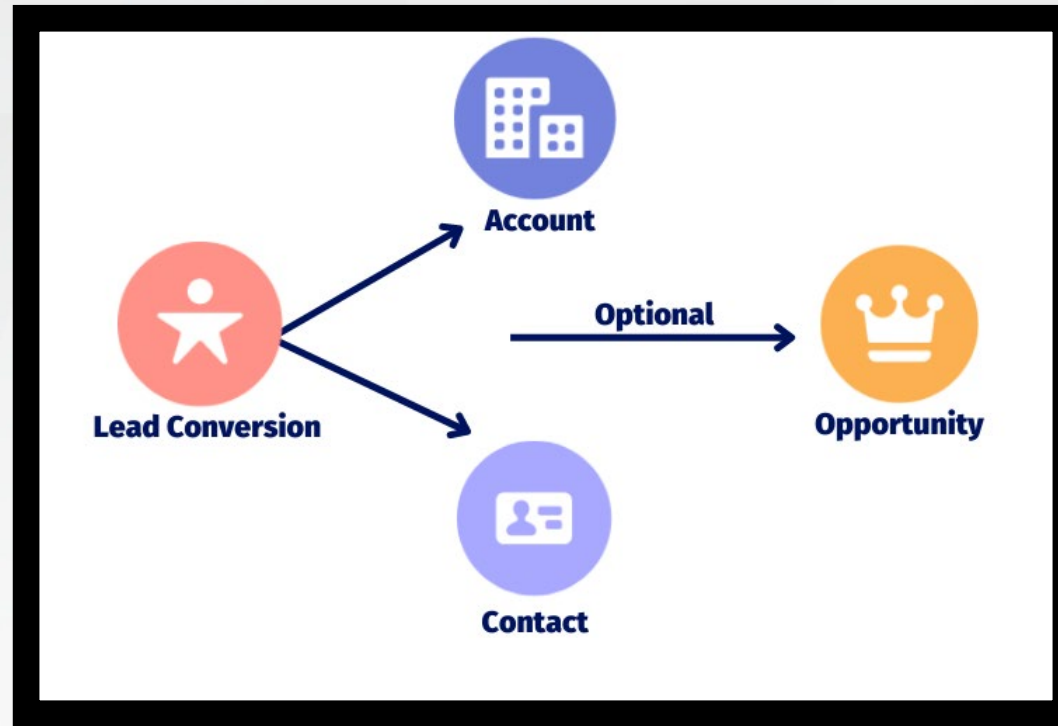
- Follow up Call (Apr 11) - You have an upcoming task
- Welcome Meeting (3:00 PM | Apr 10) - You have an upcoming event

March • 2024 / This Month

- Call (Today) - You logged a call
- Exploring Business Opportunities (11:27 AM | Today) - Unopened. You sent an email to Alice Wonderland

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Lead Conversion



Conversion of Leads → Contact, Account, & Opportunities

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Account Management

Accounts

- Business accounts = **companies**
- Person accounts = **individual people**

Business Accounts



Account Features

- Account Teams: When working on accounts collaboratively, you can use account teams
- Account Hierarchies: Track parent companies & their subsidiaries

Contact Management

Contacts

- Contacts are the individuals who work at the Business Accounts
- One Account can have many Contacts

Salesforce Features

- Interaction Tracking: Recording entries in your CRM when your sales team engages with prospects & existing customers, including phone calls, meetings, & email communications

Business Accounts

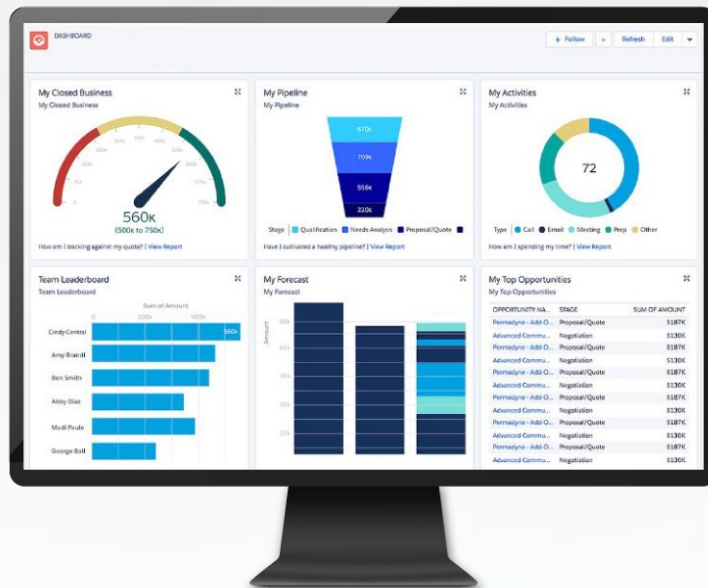


Contacts



Demo

Lead, Account, & Contact Management



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Opportunity Management

Overview of Opportunity Management

Opportunity management is the process you use to guide opportunities through the sales cycle until they close.

Key reasons why opportunity management matters:

- Can help your reps take the right steps to close a deal, every time
- Provides sales leadership a better view into the pipeline
- Helps keep deals moving forward toward the close

Opportunities

Opportunities

- Opportunities are “deals in progress”
- More qualified than leads, with an identifiable potential revenue amount & an expected close date



Opportunity Features

- Opportunity Teams: When working on opportunities collaboratively, you can use opportunity teams
- Collaborative Forecasting: Opportunities support sales forecasting by providing insights into potential revenue & expected deal closures

Opportunity Stages

The Opportunity Stage should tell you where in the sales cycle the deal is, & how close it is to an outcome.

Opportunity Stages Picklist Values					
Action	Stage Name	API Name	Type	Probability	Forecast Category
Edit Del Deactivate	Prospecting	Prospecting	Open	10%	Pipeline
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	20%	Pipeline
Edit Del Deactivate	Value Proposition	Value Proposition	Open	50%	Pipeline
Edit Del Deactivate	Id. Decision Makers	Id. Decision Makers	Open	60%	Pipeline
Edit Del Deactivate	Perception Analysis	Perception Analysis	Open	70%	Pipeline
Edit Del Deactivate	Proposal/Price Quote	Proposal/Price Quote	Open	75%	Pipeline
Edit Del Deactivate	Negotiation/Review	Negotiation/Review	Open	90%	Pipeline
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted

Opportunity Pipeline Inspection

Pipeline Inspection provides a consolidated view of your pipeline with key metrics, up-to-date changes, & insights about your deals.

Opportunities
My Pipeline

Showing Pipeline Changes

Inspection Chart

Close Date **This Quarter** Owner My Team Changes Since Start of the Period

Open Pipeline	New	Won	Increased	Moved In	Moved Out	Decreased	Lost	Overdue
\$344K	\$54K	\$54K	\$83K	\$31K	\$17K	\$12K	\$25K	\$134K

22 items - Sorted by Amount - Filtered by Close Date, My Team, Open Pipeline

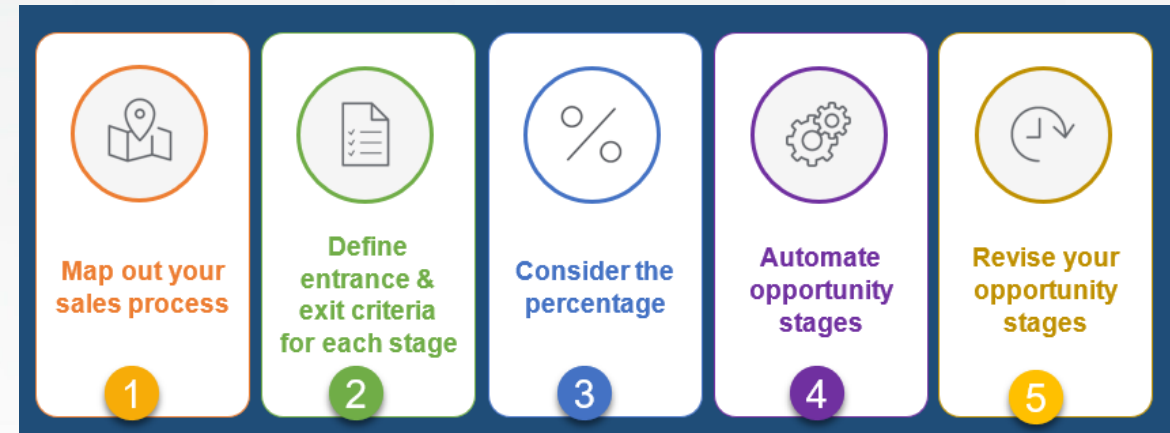
Opportunity Name	Opportunity Sc...	Amount	Close Date	Stage	Next Step	Recent Activi.
1 Green Fields Media - New Busin...	Med	USD 2,000.00	2/8/2024	Qualification	great win!	1 day ago
2 Datanet, Inc. - Services	High	USD 3,000.00	3/22/2024	Proposal/Quote	Revising quote	None
3 Red Studio Designs - Services - ...	High	USD 5,000.00	1/31/2024	Negotiation	Refine proposal with buyer team	In 3 days
4 Green Fields Media - New Busin...	High	USD 7,000.00	3/20/2024	Proposal/Quote	Identifying buyer roles	None
5 Datanet, Inc. - Add-On Business	High	USD 7,000.00	3/22/2024	Discovery	Determining customer risks	None
6 Datanet, Inc. - Services - 15K	High	USD 7,500.00	1/9/2024	Proposal/Quote	great win for us	None
7 Roseburg Products - Services	Med	USD 8,000.00	3/22/2024	Qualification		None

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Customize Opportunity Stages

Five steps to customize your Salesforce Opportunity stages:

1. Define & map the sales process
2. What happens at each stage?
3. Closing probability & forecast category
4. Automations
5. Revise – sales is an evolving process



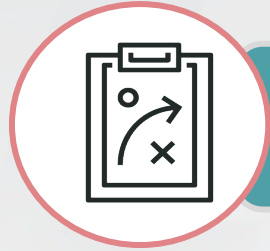
Demo

Opportunity Sales



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How We Can Assist



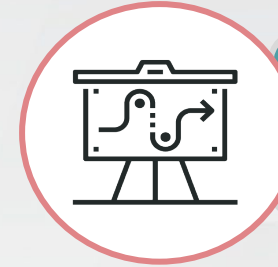
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption



Digital Transformation Execution

Solution Execution

- Business Process Assessments
- Platform Selection
- Design, Build, & Support
- Supply Chain Assessments
- Sales & Marketing Consultation
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Management
- Project Audit & Stabilization

Organizational Change Management

- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

Questions?

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What's Next

Salesforce Sales Cloud vs. Service Cloud: Finding What Fits

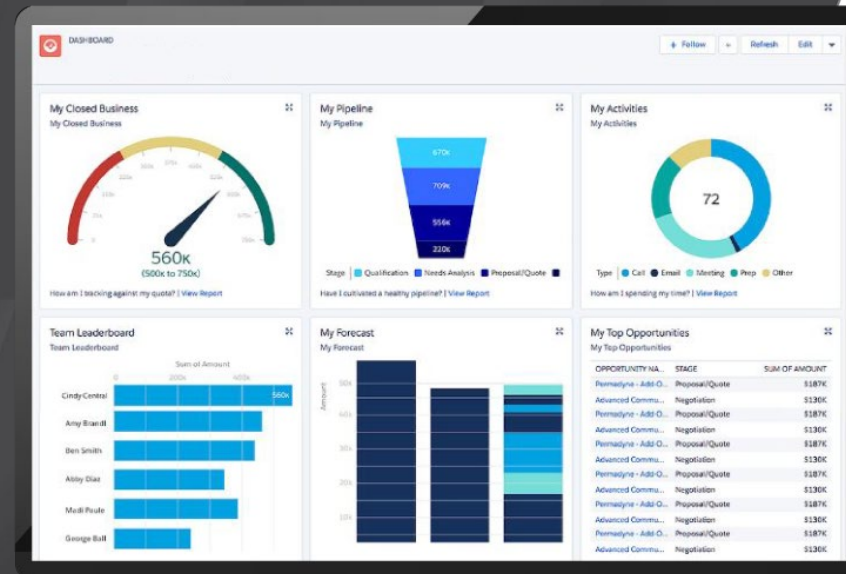
Wednesday, May 1



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Thank you!



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