Customer 360 Guide for Discrete Manufacturing

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CUSTOMER 360 GUIDE FOR DISCRETE MANUFACTURING

Explore the power of multi-cloud solutions to unite marketing, omni channel selling, and service to deliver connected experiences.

The assets in this Customer 360 Guide help you build a vision for the future of your manufacturing business and implement the changes needed to fully realize your digital transformation. Learn with Trailhead

Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

Industry Blueprint for Discrete Manufacturing

Understand the context within which Salesforce defines strategy and product direction for front-end business process and relationship management software in discrete manufacturing.

Reference Architecture for Discrete Manufacturing

Map specific Salesforce products to the functional capabilities and operational activities of discrete manufacturers.

Business Scenarios for Discrete Manufacturing

Salesforce B2B business scenarios help you think about your discrete manufacturing business in terms of individual capabilities within your environment, business practices, and technology. Use business scenarios to locate areas for improvement and identify solutions that bridge that gap between your current capability and your goal.

Solution Architecture for Discrete Manufacturing

Identify specific tools and resources that deliver comprehensive automation solutions for your discrete manufacturing business.

Explore Solution Kits for B2B and Discrete Manufacturing

Enhance your cross-cloud business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

SEE ALSO:

Customer 360 Guide for Discrete Manufacturing Learning Map

Customer 360 Guides: Quick Look

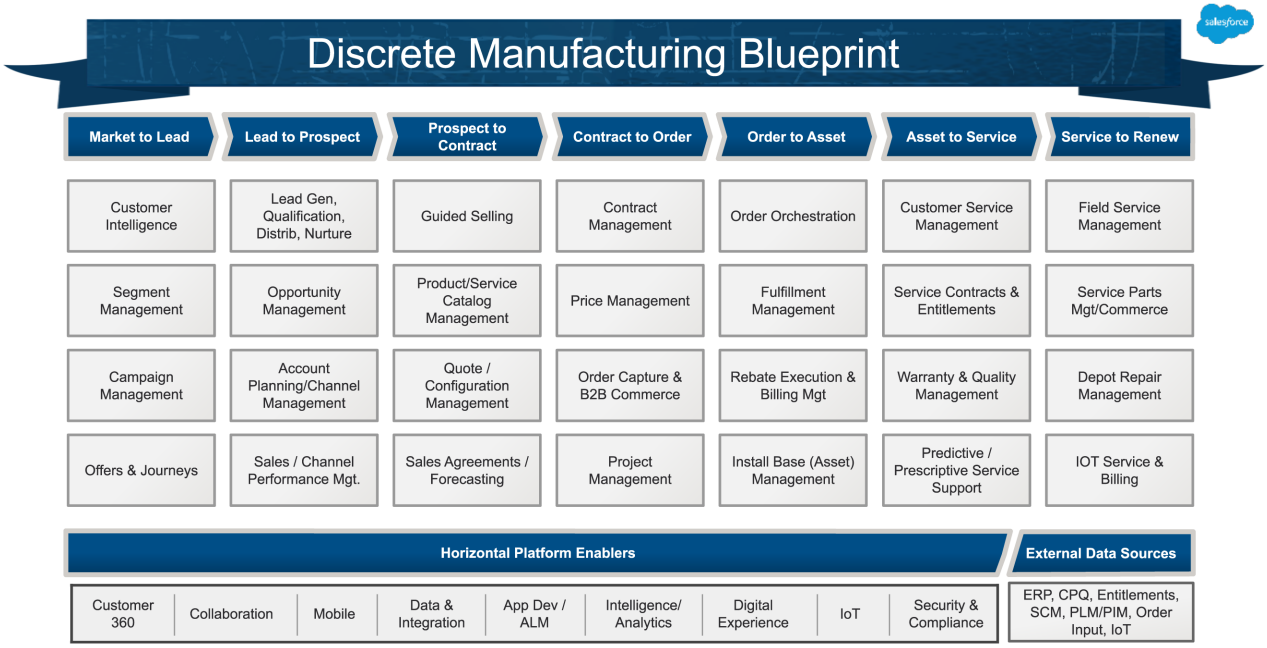
Industry Blueprint for Discrete Manufacturing

Understand the context within which Salesforce defines strategy and product direction for front-end business process and relationship management software in discrete manufacturing.

Use the industry blueprint to lay the groundwork for your digital transformation.

- Map customer-facing business capabilities common to discrete manufacturers to stages of the customer life cycle across marketing, sales, order management, and post-sales experience.
- Determine which capabilities are most important to your organization, and prioritize the implementation accordingly.
- Organize projects to deliver business value with maximum benefit.
- Gain alignment among key stakeholders who are responsible for processes represented.
- Understand the high level platform capabilities needed to power your organization's business needs.

Contact your Salesforce account team or a Salesforce partner for help assessing the business and platform capabilities most suited for your organization.



The typical lifecycle of a customer relationship in discrete manufacturing can be organized into seven major business processes. Each major process is made up of four sub-processes that together fulfill a business need for one stage of the cycle.

1. Market to Lead processes involve awareness and acquisition.
2. Lead to Prospect processes include lead management, opportunity management, and channel sales.
3. Prospect to Contract processes include product configuration, pricing, and quoting.
4. Contract to Order processes include opportunity close and order capture.
5. Order to Asset processes from order entry to fulfillment.
6. Asset to Service processes deal with post-sales servicing.
7. Service to Renew processes including post-sales servicing and subscription models.

Salesforce products provide many of the capabilities needed to implement these processes. Salesforce ISV partners offer products that help you provide additional capabilities using the Salesforce platform. And yet other capabilities are not directly available from the Salesforce ecosystem, but are still important to the context of a typical manufacturing business.

Note: To understand which business capabilities, solutions, and Salesforce products can help your organization achieve the business needs identified on the blueprint, dive deeper into the business scenarios for discrete manufacturing on page 6.

Platform Enablers, API and Data Sources are common across all lifecycle stages and business processes. Use platform enablers, APIs, and data sources as a baseline of functionality to support tailored solutions.

Note: To understand how industry and business requirements link to the underlying technologies that support them, review the Reference Architecture for Discrete Manufacturing on page 3. Use the industry blueprint as a framework for creating a reference architecture for planning customer experience enhancements.

SEE ALSO:

Industry Blueprints for Partners

Salesforce Architectural Diagrams: Quick Look

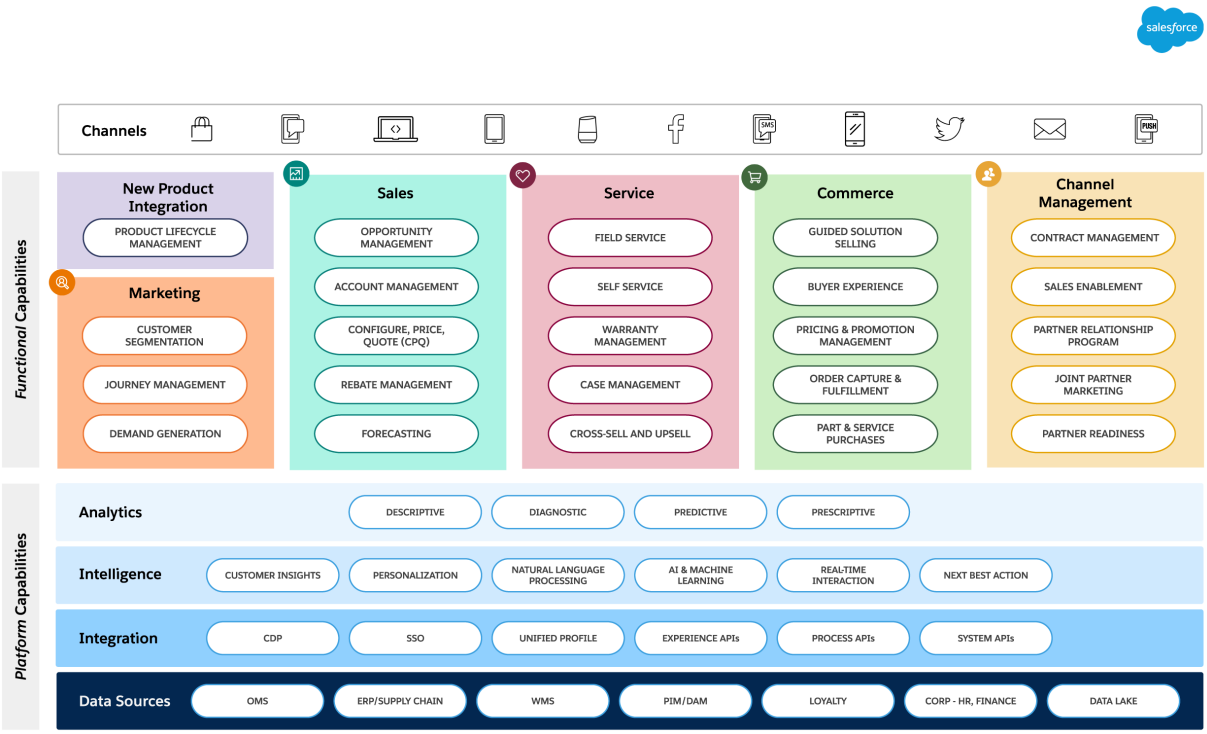
Reference Architecture for Discrete Manufacturing

Map specific Salesforce products to the functional capabilities and operational activities of discrete manufacturers.

Salesforce provides configurable product solutions that support a manufacturer's ability to effectively engage their customers and partners. The reference architecture helps communicate the vision and strategy of a solution to business executives and stakeholders. Learn with Trailhead.

Conceptualize business success in each of three categories of capabilities: *Foundational*, *Platform*, and *Functional*.

Our reference architecture presents *Platform* and *Functional* capabilities. Each layer contains a representative subset of systems or capabilities that are most relevant for Discrete Manufacturers. It doesn't list all possible systems or capabilities.



Platform Capabilities

These components form the underlying technology base for achieving your goals. Each layer in the platform builds on top of the next. B2B systems typically rely on these elements.

Data Sources

Data sources are systems that create, collect, and manage various types of data. These systems can act as systems of record. They're often purpose-built to handle particular functionality and data requirements, but some provide general system needs.

Integrations

Integrations include tools and routes that connect systems of record with each other or with higher-level experiences. Integrations can include varied tools like APIs that connect separate systems, single sign-on services to manage customer identity across different systems, and customer data platforms that segment customers.

Intelligence

Smart automation like machine learning and AI helps you optimize your use of customer data. The intelligence layer serves functions like delivering actionable customer insights, personalized product recommendations, and improving real-time customer interactions to enhance your customer relationships and drive sales.

Analytics

Analytics helps you better understand your data and make smart business decisions.

- *Descriptive analytics* summarize existing data to help you better understand the current state or past activities. Descriptive analytics typically answer "What?" questions about your data.
- *Diagnostic analytics* use the output of descriptive analytics to identify patterns and outlier data. Diagnostic analytics typically answer "Why?" questions about your data.
- *Predictive analytics* use historical data to attempt to anticipate future outcomes, such as the likelihood that a subscriber opens an email.
- *Prescriptive analytics* suggest future courses of action based on your existing data. Prescriptive analytics typically answer "Should?" questions about your future actions.

Functional Capabilities

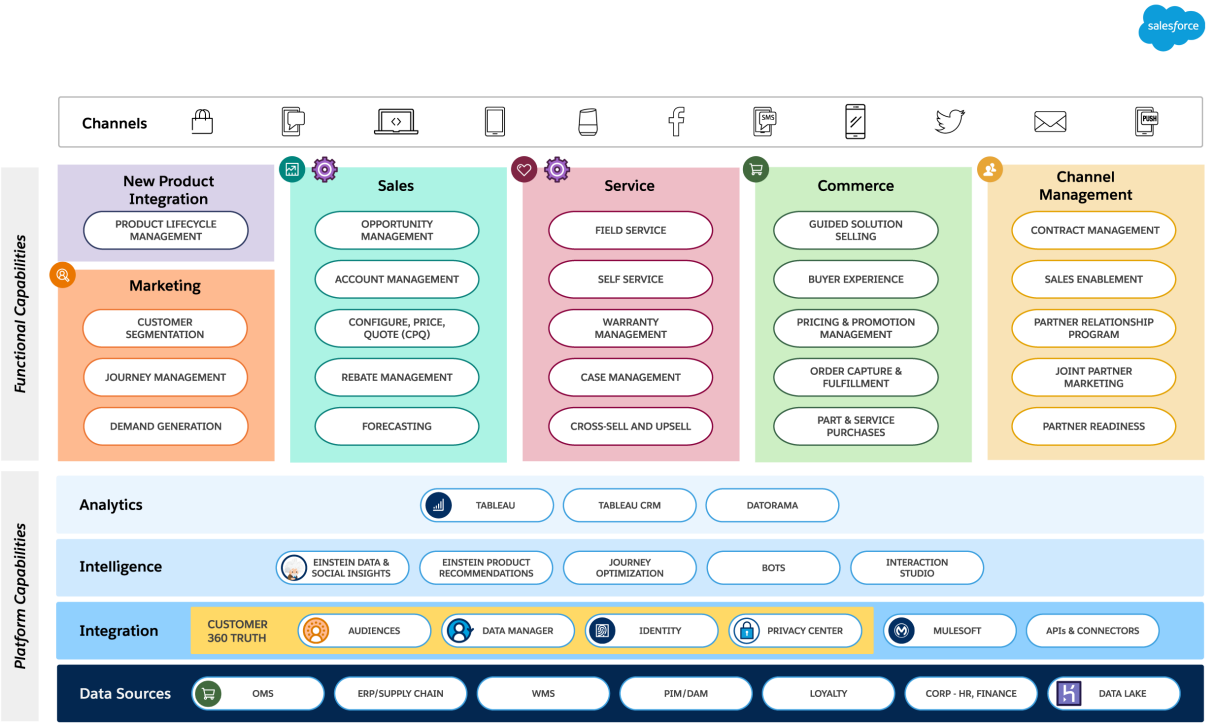
Business-specific elements at the functional capabilities level are connected more directly to the customer's experience and measured in terms of maturity. Successful implementation of functional capabilities depends heavily on implementation of the platform capabilities.

The product manufacturing lifecycle typically crosses multiple engagement channels in the areas of *Marketing*, *Sales*, *Support*, and *Commerce*. In addition to direct sales, manufacturers often require channel partners to distribute and support their products. Enabling and collaborating with the channels is a necessary component of an organization's operations. The types of capabilities in the *Operations* area can help companies address business operations needs, including those related to the Covid-19 pandemic.

Review these commonly required functional capabilities to identify strategic goals around which to focus your implementation.

A Business Capability Maturity Assessment arranged by your Success Manager or Account Executive can help you determine which areas of your business can benefit from more focus.

Mapping Platform Capabilities to Salesforce



Specific Salesforce products handle each of the needs identified at the platform capability level.

Identify gaps in your underlying capabilities by customizing this model to include other Salesforce products or third-party systems in your current technology stack. To explore the reference architecture specific to your business, contact your success manager or account team.

Tip: Business Scenarios for Discrete Manufacturing on page 6 help you better understand your business capabilities and find solutions that support your business goals.

Learn more about Salesforce products.

- Industry Solution for Discrete Manufacturing
- Manufacturing Cloud
- CPQ
- Mulesoft
- Commerce
- Communities
- Service
- Sales
- Analytics
- Work.com

- Marketing

SEE ALSO:

Salesforce Architectural Diagrams: Quick Look

Business Scenarios for Discrete Manufacturing

Salesforce B2B business scenarios help you think about your discrete manufacturing business in terms of individual capabilities within your environment, business practices, and technology. Use business scenarios to locate areas for improvement and identify solutions that bridge that gap between your current capability and your goal.

Successful execution of core functions requires an organization to have certain expertise, or business capabilities. Understanding what business capabilities are needed to achieve this scenario helps cross-functional teams in your organization align and better strategize around technology solutions.

Map Your Digital Transformation

Following best practices, and selecting the right solutions and products for your organization are key to a successful implementation of business scenarios. Follow these steps to use Salesforce business scenarios.

1. Identify a business scenario that correlates to an area of your business you'd like to enhance.
2. Review the capabilities within each scenario. Capabilities form the building blocks in specific areas such as marketing, sales, or service.
3. Assess the maturity levels of your organization's business capabilities. Use capability levels to understand your level of maturity in each area, and what the next level of maturity looks like.
4. To understand how your business can improve in each area of capability, review the best practices.
5. Review solutions recommended for each scenario. Different solutions are recommended at different levels of capability to help you provide quick time to value, and to plan for future enhancements as you increase your maturity.
6. Define a roadmap to build out your organization's functionality.

To arrange a Business Capability Maturity Assessment, contact your Success Manager or Account Executive.

Employ Sales Agreement and Account-Based Forecasts

Head off account attrition, increase revenues, and reduce costs by building more reliable sales forecasts for new and run-rate business.

Streamline the Lead to Quote Experience

Drive growth and improve manufacturing margins by orchestrating sales, service, and marketing to streamline customer experiences throughout the sales cycle.

Elevate Partner Management

Create dynamic partner B2B relationships and optimize dealer, distributor, and reseller performance with a unified platform that delivers real-time support and insights.

Modernize Commerce

Use online, self-service B2B Commerce portals and automation to drive growth, increase efficiency, and retain customers.

Deliver Intelligent Field Service

Allow B2B field technicians to provide superior service and build strong customer relationships with a unified platform and actionable, real-time information.

Employ Sales Agreement and Account-Based Forecasts

Head off account attrition, increase revenues, and reduce costs by building more reliable sales forecasts for new and run-rate business.

Forecasts created with data from across supply chain, inventory, and pipeline management give sales and operations personnel deeper insight on which to base sales, service, and marketing decisions. Better forecasts also improve your company's ability to more accurately monitor account health and handle endangered accounts. With better collaboration between sales, service, and operations, your company meets more customer commitments and benchmark performance across teams.

Products

These products can help you deliver a transformed customer experience.

- Manufacturing Cloud
- CRM Analytics
- Mulesoft
- Salesforce CPQ

Solutions

Choose from Salesforce recommended solutions divided into three levels of complexity. Put together a roadmap to build out more mature capabilities over time. Find solutions that your business is ready for right now.

Beginning

- Surface Insights with Account-Based Forecasts
- Set Up and Configure Manufacturing Cloud
- Get the Most Out of Forecasting
- Track Sales Compliance with Sales Agreements
- Deploy CRM Analytics for Manufacturing
- Convert Growth Plans into Measurable Targets
- Get Started with Enterprise AI Overview (video)
- How AI Can Boost Your Sales Productivity (video)

Intermediate

- Bring Predictability to Your Manufacturing Business
- Manage Manufacturing Activities
- Convert Growth Plans into Measurable Targets with Account Manager Targets
- Use Manufacturing Actions in Process Builder and Flow Builder
- Get Near Real-time View of Your Entire Forecast with Territory Based Forecasting (video)
- Forecast by Territory

Advanced

- Einstein Opportunity Scoring
- Access Your Data from Any System to Enhance Forecasting with Mulesoft APIs
- Build Great APIs and Integrations with Mulesoft
- Use Prebuilt Assets from Mulesoft
- Turn Business Questions into AI Predictions

- Quantify the Value of Your AI Predictive Model
- How to create Predictions and Business Insights Toolkit
- Understanding Your Scorecard Metrics and AI Prediction Quality

For more information, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information that you can use to increase your business' maturity.

Sales Capabilities to Employ Sales Agreement and Account-Based Forecasts

Improve your sales, operations, and finance experiences with more accurate forecasting that offers clear visibility across your business.

Sales Capabilities to Employ Sales Agreement and Account-Based Forecasts

Improve your sales, operations, and finance experiences with more accurate forecasting that offers clear visibility across your business.

FORECASTING APPROACH

Implement the concepts and methods necessary for successful forecasting.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We have a separate but dependent forecast process that uses defined forecast categories. Begin by relating forecast rollups and actuals.
Recommended Maturity Level	4 (Optimized)	Our forecasting process and cadence are maturing. We use intelligence and insights to improve prediction accuracy.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish a culture that ensures effective forecasting.
2. Align on expectations by role.
3. Understand the relationship between pipeline management and forecasting. Align on the definition of a sale.
4. Establish the purpose of forecasting as part of strategic business planning. Align on definitions of forecast categories.
5. Understand the behavior of commit and best case over time, and establish best coaching practices for subpar behaviors.
6. Establish a consistent forecasting process based on the company's go-to market strategy.
7. Align forecast categories with opportunity stages, and understand the value of subjectivity.
8. Define your weekly snapshot and rollup cadence.
9. Establish a process for understanding and closing the commit versus quota gap.

FORECAST INSIGHTS TO ACTION

Fully integrate AI and machine learning technology to bring more certainty and visibility to your forecasts. Design insights with capabilities pulled from new and run-rate business forecasts and channel needs, such as identifying account planning whitespace opportunities or optimizing demand planning with operations.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We introduced AI and machine learning into our forecasts, but don't have a strategy for assimilating insights into business processes and ways of working.
Recommended Maturity Level	5 (Leading)	We place a priority on data and learning, allowing for the assimilation of technology in forecasting.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Promote a culture of continued learning and an engaging environment across traditional and digital channels.
2. Develop foundational knowledge of the data structures so that AI and machine learning can support Omni-Channel cross-sell and upsell recommendations. Consider recommendations in the areas of aftermarket, service, subscription, and third-party offerings.
3. Focus on big-picture and long-term learning instead of short-term and single instances of accuracies or inaccuracies.
4. Establish a methodology for closing the gap between commit and quota.
5. Combine AI and machine learning with human predictors and recommendations that increase understanding and learning.
6. Aim for updated and accurate data, especially actuals and results, to allow improved and accelerated machine learning.
7. Generate actions based on data. If insights aren't providing clear next steps, make adjustments.
8. To understand results and drive accelerated learning, execute next steps.

CHANNEL STRATEGY APPROACH

Develop a go-to-market strategy for channels, from implementation and ongoing management to optimization and rationalization.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	An annual process is in place to measure and create programs for the channel strategy and approach with minimum necessary stakeholder management.
Recommended Maturity Level	5 (Leading)	The annual channel management planning process is collaborative, incorporating inputs from relevant cross-functional teams and proactively monitoring Omni-Channel feedback from stakeholders.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Measure and review channel performance regularly. Forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics by channel, product, and customer. Use the results to identify areas of underperformance and overperformance.
2. Ensure that sales leaders and sales teams have a complete view of the customer, including interactions on all sales channels.
3. Make specific plans for the organization to stay connected and responsive to cross-functional relationships with customers, employees, partners, and extended communities across all channels. Proactively monitor the social channels.

MANAGE A DIRECT SALES CHANNEL

Run a company's customer facing sales team, potentially comprising field and inside sales and virtual selling capabilities.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We have a process to ensure that a set of activities and outputs meets the organization's goals in an effective and efficient manner.
Recommended Maturity Level	5 (Leading)	Our process creatures targets and measures to provide insights for business value realization.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Measure what you manage. Establish sales team methodology for internal sales channels to be able to measure forecasting and new and run-rate business.
2. Ensure that forecast owners and managers feel that they have ownership of their forecasts. And ensure that they're held accountable for the accuracy of their opportunities and forecasts.
3. Align on clear definitions of opportunity amount and opportunity expected close date.
4. Link management's sales approach directly to company strategy. In the sales forecasting methods, account for and measure growth from current and new customers, such as run-rate and new business opportunities.
5. Align operations with sales channel management for greater efficiency and productivity.
6. Analyze the sales process, key activities, and support requirements that align with the channel management.

ACCOUNT AND CONTACT MANAGEMENT APPROACH

Use this process to establish roles and responsibilities. Create, augment, govern, and manage accounts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A multifaceted view of the customer exists in a single system allowing account teams to collaborate because they have a full view of the company's relationship with the customer.
Recommended Maturity Level	5 (Leading)	Sales leaders use advanced analytics like customer lifetime value and customer satisfaction to identify the highest performing accounts. It's easy to view and apply practices such as telling techniques and similar opportunities within the account.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the roles within the account and contact management process, and assign specific resources to those roles.
2. Align on expectations by role for the account and contact management process.
3. Establish account teams that encourage collaboration. Promote a culture of continued learning and an engaging environment across traditional and digital channels.
4. Focus on big-picture and long-term learning instead of short-term and single instances of accuracies or inaccuracies.
5. Establish a methodology for closing the gap between commit and quota.

LEAD MANAGEMENT APPROACH

Use these capabilities and best practices to generate, score, prioritize, and qualify new potential business.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Strong alignment between marketing and sales results in high lead conversion rates.
Recommended Maturity Level	5 (Leading)	Artificial intelligence is used to drive lead management and create an optimized seller and buyer experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Leads are created and assigned to the appropriate person, allowing average time to opportunity creation to decrease.
2. Establish the right culture that ensures effective lead management.
3. Establish a consistent lead management approach for lead entry, qualification, lead assignment approach, sales working leads, and lead conversion.
4. Establish a consistent lead content approach.
5. Align on leading and lagging indicators to measure the success of the lead management process.
6. Align on detailed reports and dashboards to measure the success of the lead management process.

7. Determine security and access for leads, reports, dashboards, and so on.

SALES ENABLEMENT

Provide sellers with the product knowledge and selling practices to facilitate sales.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We use cutting-edge enablement methodology such as gamification and in-app enablement.
Recommended Maturity Level	5 (Leading)	Enablement is a C-suite priority, and a correlation can be shown between enablement and performance.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the tools and processes for creating, contacting, and managing your accounts, contacts, and leads.
2. Use enablement and training to emphasize the behaviors that are necessary to manage and gain insights from the pipeline.
3. Educate sellers on their compensation plans and performance objectives that connect to the business goals.
4. Determine what tools salespeople require to do their job based on role or otherwise.
5. Create a plan for creating, maintaining, and sharing materials that the sales team uses.
6. Use sales tools to provide sellers with updated customer, product, and industry knowledge. And use sales tools to streamline interactions between customer and seller and interactions between sales managers and sellers.

SALES METHODOLOGY

Select and enable a sales methodology that guides sellers on actions that reflect the desired business outcomes. Keep the sales methodology updated based on trends such as forecasting approach and coaching by sales management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Emerging)	A process is defined, but it isn't iterative and it's conducted using a static training approach.
Recommended Maturity Level	5 (Leading)	A high degree of alignment and frequent iteration on sales methodology exists among opportunity management, pipeline management, and the forecasting processes.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Ensure that a strong correlation exists between a sales methodology and sales performance. Alignment on channel methodology is key to setting realistic expectations, creating clear success metrics, and seeking cross-functional executive sponsorship.
2. Implement Paths that show each stage of the sales process. Provide Guidance for Success at each stage to help users align with the forecasting process.
3. Update, revise, and review the sales methodology regularly. Make accurate data forecasts that provide tips, links, and practices for sales methodology.
4. Align the default forecast categories with opportunity stages, and ensure that there's a clear understanding of when and how a forecast category can be changed.
5. Reward accurate forecasts in the sales methodology. Analyze inaccurate forecasts, and target sales teams for development or coaching.

ACCOUNT PLANNING

This process helps an account team foster team selling, increase customer satisfaction, and decrease customer turnover using a living account plan and business reviews.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A formal account planning process exists for the most important accounts. Account plans are "living" and collaborative with the account team, which serves to drive continuous goal setting and knowledge sharing.
Recommended Maturity Level	5 (Leading)	Account plans are co-created with the customer and reflect their highest priorities and desired outcomes. A closed-loop feedback process is in place with analytics to measure the effectiveness of the account planning process.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the benefits and cadence of account planning with programs that infuse behavior of people, process, and technology.
2. Design teams for engagement paths.
3. Consider how to integrate systems to help the organization shift to customer-centric operations. Optimize for these essential practices.
   - Renewal negotiation workflows
   - Account-level and category forecast editing
   - Forecast collaboration
   - Forecast and actuals tracking
   - Forecast versioning
   - Multiple forecasts sources
   - Forecast waterfall
   - Integration with CPQ

- Integration with commerce
- ERP integration

4. Agree about which components of an account plan template that the internal team, partners, and customers must populate.
5. Create an online user experience that allows the account plan to be collaborative and updatable.
6. Enable account plans to define renewal-driven value realization and net new business, and specify actions to take throughout the year.
7. Identify key account management and account practices. Use customer profile management, contact curation, account hierarchy management, territory planning, channel partner contracts, and partner collaboration.

PIPELINE STRATEGY AND PROGRAMS

Use data to analyze pipeline generation, the open pipeline, and pipeline conversion, and to generate pipelines for specific products and services.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A robust pipeline programs team drives the pipeline by product and service.
Recommended Maturity Level	5 (Leading)	Sales leaders and managers use AI to tailor pipeline insights.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create programs for cross-channel alignment that incorporate a shared vision for the organization's approach to key business use cases.
   - Incentive compensation management
   - Training and enablement
   - Sales content engagement platform
   - Partner performance and score carding
   - Partner onboarding, training, and certification
   - Partner marketing programs
   - Partner collaboration
   - Rebates, incentives, and promotions
   - Channel loyalty
2. Establish a culture and organizational alignment that ensure effective pipeline strategy and programs. Consider your level of ambition, maturity of channel processes, clarity of value, and strength of use cases.
3. Align on roles and responsibilities within the pipeline process. Assign specific resources to each role.
4. Establish a consistent pipeline strategy process with pipeline stages. To move from stage to stage, define entry and exit criteria.
5. Make supporting product and service documentation available to engage or educate the seller as needed.
6. Create a set of parameters that define the quality of pipeline generation.

7. Define a metric that defines how much pipeline generation is required to hit targets based on historical trends.
8. Establish a consistent process that assigns a score and prioritizes deals in the pipeline.
9. Establish a process that guides a seller on how to work the pipeline when it's assigned.
10. Align on leading and lagging indicators by which to measure the success of the pipeline strategy process.
11. Create seller and leader dashboards and reports that help the sales organization run its daily business.

Streamline the Lead to Quote Experience

Drive growth and improve manufacturing margins by orchestrating sales, service, and marketing to streamline customer experiences throughout the sales cycle.

When teams and tools are in sync, pipeline velocity accelerates and more deals get closed. Providing insight into a lead's behavior and background helps marketing nurture the pipeline. A collaborative customer acquisition process lets sales teams strategically engage each lead where the marketer left off, rather than starting cold with a generic email or call. Implementing coordinated workflows, price quote automations, and real-time updates to the product catalog lets teams build a better customer experience, focus on each touchpoint, and develop stronger relationships.

Products

These products can help you deliver a transformed customer experience.

- Manufacturing Cloud
- Sales Cloud Einstein
- Marketing Cloud
- Salesforce CPQ
- Experience Cloud

Solutions

Choose from Salesforce recommended solutions divided into three levels of complexity. Put together a roadmap to build out more mature capabilities over time. Find solutions that your business is ready for right now.

Beginning

- Power Your Sales Process with Leads and Opportunities
- Create a Better Opportunity Management Process (Webinar)
- Coordinate More Effectively with Opportunity Workspace (Accelerator)
- Configure Price Books, Templates, and Contracts
- Strategies for Using Account Data to Close Deals (Accelerator)
- Salesforce CRM Dashboards (AppExchange)
- Sales Cloud Productivity Best Practices
- Use Salesforce Collaboration Tools to Sell as a Team
- Effective Lead Management (Webinar)
- Generate Leads from Website for Your Sales Teams
- Get Started with Customer Journeys with Marketing Cloud

Intermediate

- Increase Sales Team Productivity with Salesforce Mobile
- Align Marketing and Sales Teams with Account Engagement Integration
- Generate Leads with Account Engagement Landing Pages and Forms
- B2B Marketing Analytics Basics
- Get Started with CPQ (Accelerator)
- Get Started with Guided Selling (Accelerator)
- Deploy CRM Analytics for Manufacturing
- Use Digital Engagement for Sales Cloud
- Use Einstein Prediction Builder for Opportunity Scoring
- Use Einstein Prediction Builder to Predict Opportunity Amounts
- Nurture Prospects with Salesforce Engage
- Create and Manage an Optimized Product Catalog (Accelerator)
- Best Practices for Price Rules (Accelerator)
- Put Predictions In Action with Einstein Prediction Builder

Advanced

- Use AI to Log Your Activities, Target the Right Leads, and Close More Deals
- Automate Marketing to Businesses with Account Engagement Lightning App
- Increase Engagement and Nurture Leads
- Streamline Your Sales and Marketing Efforts into One Platform
- Use Scoring and Grading to Identify the Best Leads
- Acquire, Qualify, and Convert Prospects into Customers
- Deploy CRM Analytics for Manufacturing
- Predicting Upsell and LTV in Einstein Prediction Builder
- Three Ways AI Can Improve Your Marketing (Video)
- Enhance the Ordering Process for Sales Agreements and Extend to Channel Partners PRM (AppExchange)
- Automate Data Management (AppExchange)
- Enhanced Configurator with CAD Automation (AppExchange)
- Deliver Real-Time SAP Data and Pricing (AppExchange)
- Implement Real-Time SAP Integration and Data Synchronization (AppExchange)
- Implement End-to-End Order, Inventory, Fulfillment, Invoice Management (AppExchange)
- Recommend Automation with Einstein Next Best Action

For more information, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information that you can use to increase your business' maturity.

Sales Capabilities to Streamline the Lead to Quote Experience

Collaborate with customer and channel partners to properly align your sales and operations, including schedules and forecasts.

Marketing Capabilities to Streamline the Lead to Quote Experience

Optimize marketing strategies, and give cross-functional teams tools to cross-sell, upsell, and activate their audiences. Implement mobility and analytics that optimize the customer experience from lead to loyalty and retention programs.

Sales Capabilities to Streamline the Lead to Quote Experience

Collaborate with customer and channel partners to properly align your sales and operations, including schedules and forecasts.

PIPELINE STRATEGY AND PROGRAMS

Use data to analyze pipeline generation, the open pipeline, pipeline conversion, and to generate pipelines for specific products and services.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A robust pipeline programs team drives the pipeline by product and service.
Recommended Maturity Level	5 (Leading)	Sales leaders and managers use AI to tailor pipeline insights.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create programs for cross-channel alignment that incorporate a shared vision for the organization's approach to these key business use cases.
   - Incentive compensation management
   - Training and enablement
   - Sales content engagement platform
   - Partner performance and score carding
   - Partner onboarding, training, and certification
   - Partner marketing programs
   - Partner collaboration
   - Rebates, incentives, and promotions
   - Channel loyalty
2. To ensure effective pipeline strategy and programs, establish the right culture and organizational alignment. Consider your ambition level, channel process maturity, value clarity, and use case strength.
3. Align on roles and responsibilities within the pipeline process. Assign specific resources to each role.
4. Establish a consistent pipeline strategy process with pipeline stages. To move from stage to stage, establish entry and exit criteria.
5. Make supporting product and service documentation available to engage or educate the seller as needed.
6. Create a set of parameters that define the quality of pipeline generation.

7. Define a metric that defines how much pipeline generation is required to hit targets based on historical trends.
8. Establish a consistent process for assigning a score and prioritizing deals in the pipeline.
9. Establish a process that guides a seller on how to work the pipeline when it's assigned.
10. Align on leading and lagging indicators by which to measure the success of the pipeline strategy process.
11. Create seller and leader dashboards and reports that help the sales organization run its daily business.

ACCOUNT AND CONTACT MANAGEMENT

Use this process to create accounts and drive growth. Identify, create, and map contacts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A single system contains complete data about the customer, allowing account teams to collaborate because they have a complete view of the company's relationship with each customer.
Recommended Maturity Level	5 (Leading)	Sales leaders use advanced analytics like customer lifetime value and customer satisfaction to identify the highest-performing accounts. Sales leaders easily view and use practices such as selling techniques, similar opportunities, and more within the account.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish the right culture that ensures effective account and contact management.
2. Set up account teams to encourage collaboration.
3. Establish a consistent approach to account management, contact and relationship management, account planning, whitespace analysis, and renewal management.
4. Align on leading and lagging indicators to measure the success of the account and contact management process.
5. Create detailed reports and dashboards that measure the success of the account and contact management process.
6. Determine security and access for accounts, contacts, reports, dashboards, and other shared information.

LEAD MANAGEMENT APPROACH

Use these capabilities and best practices to generate, score, prioritize, and qualify new potential business.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Strong alignment between marketing and sales results in high lead conversion rates.

Type	Level	Description
Recommended Maturity Level	5 (Leading)	We use AI to drive lead management and optimize seller and buyer experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Leads are created and assigned to the appropriate person, allowing average time to opportunity creation to decrease.
2. Establish the right culture that ensures effective lead management.
3. Establish a consistent lead management approach for lead entry, qualification, lead assignment approach, sales working leads, and lead conversion.
4. Establish a consistent lead content approach.
5. Align on leading and lagging indicators to measure the success of the lead management process.
6. Align on detailed reports and dashboards to measure the success of the lead management process.
7. Determine security and access for leads, reports, dashboards, and so on.

OPPORTUNITY AND PIPELINE MANAGEMENT

Create, qualify, configure, price, quote, negotiate, and close opportunities. Use sales coaching to move opportunities through the pipeline efficiently.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Defined processes exist for cross-selling and upselling. A pricing and quoting system is in place. Pipeline calls focus on sales managers helping sales reps close opportunities.
Recommended Maturity Level	5 (Leading)	AI drives opportunity management and creates an optimized seller and buyer experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish the right culture that ensures effective account and contact management.
2. Set up account teams to encourage collaboration.
3. Establish consistent approaches for account management, contact and relationship management, account planning, whitespace analysis, and renewal management.
4. Align on leading and lagging indicators to measure the success of the account and contact management process.
5. Create detailed reports and dashboards that measure the success of the account and contact management process.
6. Determine security and access for accounts, contacts, reports, dashboards, and other shared information.

ACCOUNT SEGMENTATION

Identify and prioritize groups of customers with similar needs, growth potential, complexity, or other attributes. Align the resources that match them.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We have defined processes to group accounts into segments. Segmentation attributes are identified and used by sales leaders to group their accounts and organize their teams for the greatest impact.
Recommended Maturity Level	5 (Leading)	AI drives account segmentation and assesses the quality and completeness of the account data, sorting and ranking, and helps define the segment boundaries. The segments are used to focus on specific markets, to align resourcing, and to provide a career trajectory for sellers.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align segmentation to the organization's business goals.
2. Classify accounts by segment.
3. Consider how segment attribute information is structured, captured, and maintained to support account segmentation.
4. Consider how to handle complex segmentation scenarios in a consistent way across the business.
5. Consider which of the other business capabilities are influenced by or supported through account segmentation.
6. Consider the sales team structure, and match it to the account segments and tiers.
7. Analyze the resources required to deliver the best servicing approach.
8. Consider the geography of the accounts.
9. Allocate resources to the segments and tiers.

CAPACITY AND QUOTE MANAGEMENT

Align a company's financial objectives with the capability of sales employees to meet those objectives. Capacity planning, quota setting, and quota maintenance phases form a key part of the annual financial planning cycle, in addition to providing ongoing insights to leaders.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	An established annual planning process targets new growth, supported by relevant resource investment.

Type	Level	Description
Recommended Maturity Level	5 (Leading)	The annual planning process uses AI to generate insights for improvement.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create and communicate clear definitions and acronyms for essential terminology that support effective capacity and quote management (CQM).
2. Identify the roles needed for capacity planning and quota management, define responsibilities, and staff the roles.
3. Align your CQM approach and workflow to fuel your annual corporate business planning cycle.
4. Build automated reports, dashboards, and visualizations that track and support CQM and engage with key stakeholders.
5. Put processes and tools in place that help make CQM robust, sustainable, and manageable for business partners and key contributors.

Marketing Capabilities to Streamline the Lead to Quote Experience

Optimize marketing strategies, and give cross-functional teams tools to cross-sell, upsell, and activate their audiences. Implement mobility and analytics that optimize the customer experience from lead to loyalty and retention programs.

AUDIENCE NURTURING

Increase the size and scale of your audience using audience or segment overlaps or lookalike models.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use lookalikes from advertising platforms extensively and extend our reach through overlaps, but we do almost no performance testing.
Recommended Maturity Level	4 (Optimized)	We use lookalikes from advertising platforms, extend audience reach through overlaps, and curate some of our own lookalikes. We do some performance testing.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create marketing programs that drive more customers into the segment, encouraging or rewarding the behavior you seek in the segment definition. For example, offer a coupon for registering on your new website or watching a video.
2. Run segment overlap analysis. Find segments that have low overlap existing segments but that represent complementary audience attributes you want to target. Update your original segment, or create a segment by combining the original segment with the low overlapping segments.

3. Use marketing platform features or a data science modeling approach to generate lookalikes for the segment you created. Evaluate the accuracy (similarity) versus scale (incremental size of segment).
4. If you want to maximize reach and aren't concerned with targeting precision, opt for a lookalike that has greater than 50% similarity with maximum size. If you want targeting precision, opt for a lookalike that has greater than 70% similarity.
5. To identify other devices likely owned by the users in your segment, use marketing platform features, an identity partner"s solution, or data science modeling. Adding those devices improves the likelihood of reaching or suppressing the segment and drive better results.
6. To determine if more nurturing is required, evaluate the change in segment size each month.
7. Set up consistent testing to measure the incremental value of each lookalike.

LIFECYCLE MARKETING

Tailor marketing messages based on each stage of the customer's lifecycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Marketing messages are tailored to each stage, but not coordinated across stages.
Recommended Maturity Level	4 (Optimized)	Marketing messages are tailored to each stage and coordinated across stages, but teams are siloed.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Define the lifecycle. A basic lifecycle consists of awareness, acquisition, onboarding, engagement, and retention. You can tailor the definition by industry or even specifically for an organization.
2. Define customer needs and moments that matter to customers at each stage of the lifecycle.
3. Develop a well-defined customer lifecycle, and use it to orchestrate messages across touchpoints.
4. Use analytics to place contacts, leads, prospects, or customers in a lifecycle stage.
5. Develop a set of tactics for each stage of the lifecycle that addresses customer and contact needs and company goals. For example, lapsed customers can be assigned to a win-back campaign when they haven't opened or clicked an email in the past 6 months.
6. Build automations and audience segmentation activities that orchestrate the correct messages and channels to use at each lifecycle stage.
7. Implement a system that can move customers efficiently through current lifecycle stages and into new areas.
8. Coordinate channels, and then use personalization to engage customers at each stage of the lifecycle.

JOURNEY DESIGN

Use a consistent approach to the design and development of customer journeys across all channels and stages of the customer lifecycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Lifecycle stage or segment-specific journeys are defined and include one or two channels.
Recommended Maturity Level	4 (Optimized)	Individualized, personalized, and cross-channel journeys are defined and include almost all channels.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify marketing objectives, campaigns to support each objective, audience targeting requirements, data variables, and attributes needed, then map where and how they're sourced. Apply a journey design roadmap.
2. Hold a cross-functional workshop that identifies customer lifecycle and moments that matter. Create journeys for four types of moments that matter. Define a goal, audience, data needs, content, and channels for each journey.
3. Identify the content based on two types. In-journey content is the delivered message that can be consumed without leaving the inbox or screen. Outside-journey content includes resources that the customer navigates to with a click or tap, such as web content.
4. Prioritize journeys based on evaluation criteria, and create a journey backlog.
5. Design a simple, single-channel journey to start. For example, a welcome email triggered by registration or a conversion event.
6. Evolve journeys to multiple channels, connecting multiple journeys.
7. Incorporate experience design principles in journeys.

CROSS-SELL AND UPSELL

Prioritize, develop, manage, and measure customer cross-sell and upsell offers and journeys.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We coordinate targeted messaging across at least two channels to support cross-sell or upsell based on multiple criteria such as the customer's segment, purchase history, and lifecycle stage.
Recommended Maturity Level	4 (Optimized)	We use individualized cross-channel journeys to support cross-selling and upselling. Journeys have no real-time interaction management or next-best-offer AI.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify the right trigger point for cross-sell and upsell opportunities for your organization. Think beyond the standard scenario of recommending one product based on another. Use your insights to build cross-sell and upsell campaigns.
2. Use lifecycle and behavioral data to enter customers into personalized cross-sell and upsell journeys on the appropriate channels.
3. Use personalization to deliver the right message to customers.
4. Use AI to recommend the best cross-sell or upsell opportunities.
5. Identify the correct data points to use to activate cross-sell and upsell campaigns. For example, the expiration date of an insurance policy or a medication refill. Deliver messages through the correct channels based on past behavior.
6. Apply the correct tactic to drive the highest conversion rates possible. Include user-generated content, expert recommendations, and discounts and promotions.
7. Use real-time interaction management to arbitrate cross-selling and upselling messages effectively with other messages for which the customer is potentially eligible.

Elevate Partner Management

Create dynamic partner B2B relationships and optimize dealer, distributor, and reseller performance with a unified platform that delivers real-time support and insights.

Prioritize partner success by designing engaging digital experiences across the entire partner lifecycle. Capabilities in this area help you align on values, methods, and measures used to enhance partner relationship management (PRM) practices.

Eighty percent of manufacturers have a significant portion of revenue coming from indirect sales. Manufacturers often depend on partners to extend their reach in the marketplace. PRM simplifies channel management and accelerates time to value by connecting partner programs with sales quoting processes and resources, including price books and product catalogs.

Smooth partner management gives partners onboarding, enablement, and sales support. A unified platform helps sales channels build better forecasts through stronger partnerships and collaboration. To enable optimal partner performance and support collaboration through customized channel programs, co-create account plans and track key performance indicators (KPIs) with partner scorecards.

Products

These products can help you deliver a transformed customer experience.

- Manufacturing Cloud
- Experience Cloud
- Partner Relationship Management (PRM)
- Marketing Cloud
- Sales Cloud
- AppExchange

Solutions

Choose from Salesforce recommended solutions divided into three levels of complexity. Put together a roadmap to build out more mature capabilities over time. Find solutions that your business is ready for right now.

Beginning

- Build a Lightning Partner Community (Accelerator)
- Drive Engagement in Your Partner Community (Accelerator)
- Manage Partner Community Sharing (Accelerator)

- Plan Your Partner Experience Roadmap (Accelerator)
- Partner Relationship Management Best Practices for Sales
- Recruit and Grow Channel Partners
- Manage Sales Teams and Channel Partners
- Manage Digital Experience and Workspaces with Experience Cloud
- Extending Channels to Direct and Indirect Sales
- Target Personalized Recommendations
- Best Practices To Set Up And Deploy Sales Cloud PRM For Channel Sales
- Set Up a PRM Experience with Out-of-the-Box Features
- Knowledge Centered Service with Service Cloud

Intermediate

- Customize and Enhance the Digital PRM Experience
- Amplify Channel Marketing
- Enable Distributed Marketing
- Scale Service with Self-Help
- The Secrets to Successful Channel Sales Management
- Configure Lead Distribution for Partners
- Launch Deal Registration Workflows
- Help Partners Build Demand (video)
- Offer Market Development Funds
- Provide Real-Time Support and Visibility with Self-Service and Cases (video)
- Recruiting, Onboarding, and Enabling Partners (video)
- Get Insights into Partner Performance (video)

Advanced

- Extend Digital 360 Solutions with Pre-built Solutions on AppExchange (AppExchange)
- Build a Community with Knowledge and Chat
- Track Adoption and Traffic with Google Analytics
- Refine Digital User Experience
- Assess Your Self-Service Community Experience
- Put Predictions In Action with Einstein
- Launch a PRM Experience from a Branded Mobile App with Push Notifications
- Make Service Cloud Smarter with Bots and AI
- Configure, Price, Quote for Custom, Complex Manufactured Products (AppExchange)

For more information, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information and practices that you can use to increase your business' maturity.

Marketing Capabilities to Elevate Partner Management

Use market development funds and incentives to engage, grow, retain, and increase partner loyalty.

Service Capabilities to Elevate Partner Management

Partner with sales and operations to support forecasts and launch a joint market approach.

Sales Capabilities to Elevate Partner Management

Align partner relationship management (PRM) strategies and sales methodologies to make the best use of forecasting, pricing, and channel management with sustainable virtual selling and channel approaches.

Marketing Capabilities to Elevate Partner Management

Use market development funds and incentives to engage, grow, retain, and increase partner loyalty.

PARTNER MARKET DEVELOPMENT FUNDS

Use a defined approach to the role each marketing channel plays in supporting customer-centric marketing and in deciding how the channels are used in combination to achieve marketing objectives.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We have strategies for some channels, including how the channel is used on its own. We don't do much to coordinate with other channels or determine ideal mixes.
Recommended Maturity Level	4 (Optimized)	We have clear strategies for most channels, including how they're used on their own, coordinated with other channels, and the relative mix of channels used.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Make a strong connection with customers starting with their first interaction with your brand by remaining consistent with your message.
2. Give the customer something of value and multiple touchpoints.
3. Know your customer, including their behaviors and expectations. Consider creating personas.
4. Have a flexible channel switching strategy according to how customers are using your channels.
5. Clearly articulate the role each channel plays in delivering a great customer experience for different customer lifecycle stages and segments.
6. Evaluate channels based on cost effectiveness and the ability of each to reach a large percentage of your target audience.

DISTRIBUTED MARKETING

Enable sales reps to use and customize curated content to market directly to customers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We provide many options for the field to select from, but we don't use a distributed marketing system.
Recommended Maturity Level	4 (Optimized)	We use a fairly robust approach and system for distributed marketing whereby the field can use curated and customized content with their end customers.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. To better understand your customers, bring all customer data from across sales, marketing, service, and commerce into one system. Then gather and unify all your first-party marketing.
2. Use AI to personalize every communication.
3. Enable distributed sellers, agents, advisers, or representatives to pull from a library of marketing-created and approved content to deliver personalized and customized content at every touchpoint.
4. Enable distributed marketers to initiate their end customers on marketing-created and approved journeys that engage the customer across lifecycle stages, moments, touchpoints, and channels. Provide easy-to-use templates for onboarding or engaging with customers.
5. Track and analyze performance to improve and optimize content, messages, and journeys that your distributed marketers update and prepare for use.
6. To maintain quality and efficiency, ensure that distributed marketers have easy, frequent feedback loops to marketing.

CHANNEL STRATEGY AND MIX

Target customers with products, services, marketing, and channels, usually including direct sales, B2B commerce, and partner relationship management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Our channel management process follows an established cadence and incorporates change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.
Recommended Maturity Level	5 (Leading)	We use cross-channel data to consistently improve customer experience and drive business decisions, including use of AI and marketing automation journeys. We tailor channels to the nuances for each type of sale.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align the channel strategy with the organization's wider go-to-market strategy.
2. Collaborate with sales, marketing, business units, and other key leaders to define a clear channel strategy. Align with the overall go-to-market strategy.
3. Establish the role, objectives, and targets of each channel.
4. Establish a framework for deciding the optimal customer, product, and channel combinations for serving customers.
5. Design for the downstream effects of the channel strategy on your sales capability and the wider business.
6. Create a consistent customer-centric experience across channels.
7. Create a uniform buying experience within and across channels.
8. Use design thinking and customer-centric processes to build experiences that align with how customers behave. Align with their preferred way of being served wherever possible.

CAMPAIGN EXECUTION AND AUTOMATION

Campaigns deploy, monitor, adjust, and automate.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We practice a robust approach, but we can optimize reductions in the lead time, the number of steps, handoffs, and errors from marketing execution.
Recommended Maturity Level	4 (Optimized)	Our campaign strategy is coordinated across many, but not all, teams, channels, and lifecycle stages.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. To execute scheduled import activities, use automation or application programing interfaces (APIs).
2. To enable automation of segmentation activities, build a robust data model.
3. Send updates to external systems using automations or APIs.
4. Ensure that expected activities are performed by automating check activities for oversight purposes.
5. Implement monitoring and auditing logs of key processes.
6. Reduce risk with Marketing Cloud verification activities.
7. Monitor to ensure that data ingestion steps contain records.
8. Set up alerts to monitor for normalized data volumes outside a range.
9. Verify that activities are adding data.

Service Capabilities to Elevate Partner Management

Partner with sales and operations to support forecasts and launch a joint market approach.

CASE MANAGEMENT APPROACH

Manage a service request through to resolution. Include the routing, assignment, ownership, tracing, and related interactions.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Cases are worked primarily through one system and on-screen UI. Extra systems and swivel-chairing still exist as needed.
Recommended Maturity Level	4 (Optimized)	Cases are worked primarily through one system and on-screen UI. Extra systems and swivel-chairing still exist as needed.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create and define queue priority, and align business and IT to the case routing process.
2. Define case record types and support processes.
3. Set up Email-to-Case and Web-to-Case.
4. Add an actions and recommendations lightning component to lightning service console or other case record page layouts.
5. Set up a dashboard that surfaces a manager's team cases by status.
6. Set the organization that is aligned to actions associated with lifecycle stages.
7. Create escalation rule criteria. Sort rules from most complex to least complex.
8. Define business hours.
9. Define escalation actions. When a case escalates, you can send it to a different queue or user and send an email that notifies the case owner or others.
10. Create email templates that notify users when a case escalates, and include quick actions.
11. To let service agents quickly respond to customers in a structured way, set up macros.
12. Create email templates for case open, case close, and a case that escalates. Communication is key to ensuring better customer satisfaction (CSAT) score.
13. Understand, track, and resolve customer service issues that align with priorities and affect strategic business value.

SELF SERVICE REQUEST TYPES

Allow customers to circumvent agent interaction by providing a direct, contextual channel. Offer issue resolution, profile management, learning, buying, service, and community questions and answers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Customers work more complex service requests through the self-service channel. We surface recommended Knowledge articles based on key service request characteristics.
Recommended Maturity Level	5 (Leading)	Customers work complex requests through multiple self-service channels. Analyze key performance indicator (KPI) trends to identify more use cases for self-service to reduce volume on other channels. Most requests are deflected with the use of AI and chatbots.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. To create efficient and effective connected experiences, consider customer expectations with sales, service, and commerce.
2. Be aware of partner relationship management (PRM) strategies in a blended channel approach. Don't cause clashing or competing behaviors.
3. Create a dedicated ecommerce B2B manager role that manages the company's B2B commerce portal. Implement a digital team strategy, appoint ownership to an existing sales or service role, and identify process optimizations for service, sales, and PRM.
4. To ensure that sales and marketing leaders design in a customer-centric way, engage design thinking concepts.
5. Suggested solutions from self-service, such as Knowledge articles, help users solve cases quickly without interaction from agents.
6. Enable suggested articles when a partner, employee, or customer enters a new case. Configure the search engine to automatically look for articles that have keywords in common with the admin-selected case fields.
7. To create optimizations in service for agents and channels, enable AI for machine learning.
8. Manage variations in relationships across the channel mix by creating a support steering committee that aligns with the go-to-market strategy. Consider these angles for all variations.
   - What teams are in place to support across programs?
   - Are there enough resources to support?
   - What is the plan to address resource scarcity?
   - How are resources shared among the teams?
9. Ensure that actions reflect the desired customer perception of your company values by selecting and enabling customers with the right capabilities.
10. Consider policies in areas such as customer claims management and return material authorizations (RMAs), channel partner claims management, corrective action and preventive action (CAPA) root cause analysis, and supplier recovery.

KNOWLEDGE MANAGEMENT APPROACH

Capturing and distributing reusable, relevant, and accurate knowledge content to customers and partners across one or more internal or external channels.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Our knowledge management efforts align with the organization's business objectives. We use knowledge assets across the organization and with customers.
Recommended Maturity Level	5 (Leading)	Knowledge management practices and knowledge centered support (KCS) principles are embedded in key business processes. Our focus is on competency of the business.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the article lifecycle stages and actions associated with each stage. Common stages are draft, review, approve, publish, and archive.
2. Identify owners for each stage of the lifecycle and approval process by article type or data category.
3. Identify subject matter experts who can write articles about your products and services.
4. Enable Email-to-Case so that agents can send articles to customers.
5. To help track individual, group, and organizational article quality trends and effectiveness across time, install the Article Quality Index managed package from AppExchange
6. Install the Knowledge Article Feedback managed package from AppExchange.
7. To help find and classify articles, questions, or ideas, define data categories.
8. Enable feed tracking on knowledge articles and tagging on knowledge articles.
9. Add an actions and recommendations Lightning Web Component to the case page layout or console layout.
10. Ensure that case titles are accurate, clear, and follow the structure defined by the business or IT.
11. Decide which languages you want to translate in-house versus sending articles to a localization vendor. If there are at least three languages, ensure that there's a version management process in place for all translated articles
12. Ensure that communication goes out to team members involved in the knowledge lifecycle process.
13. To help find and classify articles, questions, or ideas, define data categories.
14. Define article record types.
15. Enable feed tracking on Knowledge articles.
16. Enable tagging on Knowledge articles.
17. Ensure that articles are rated so that agents can get an understanding of how effective the article is.

Sales Capabilities to Elevate Partner Management

Align partner relationship management (PRM) strategies and sales methodologies to make the best use of forecasting, pricing, and channel management with sustainable virtual selling and channel approaches.

CHANNEL STRATEGY APPROACH

Develop a go-to-market strategy for channels, from implementation and ongoing management to optimization and rationalization. Targets customers with products, services, marketing, and channels, usually including direct sales, B2B commerce, and PRM.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Our channel management process follows an established cadence and incorporates change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.
Recommended Maturity Level	4 (Optimized)	Predictive analysis from measuring trends and customer behavior across channels is well-established and regularly reviewed across the business. Connected sales and marketing data allow for journeys that let customers engage on their terms with consistent buying and selling experiences.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Measure and review channel performance regularly. Forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics by channel, product, and customer. Use the results to identify areas of underperformance and overperformance.
2. Ensure that sales leaders and sales teams have a complete view of the customer, including interactions on all sales channels.
3. Make specific plans for the organization to stay connected and responsive to cross-functional relationships with customers, employees, partners, and extended communities across all channels. Proactively monitor the social channels.

MANAGING AN INDIRECT SALES CHANNEL

Run partner resellers, distributors, or channel partners. Include a combination of field sales and direct sales.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Direct channels are integrated and have visibility across the operations and direct sales team. We practice a consistent approach to meet customer expectations.
Recommended Maturity Level	4 (Optimized)	We optimize virtual and guided selling with established change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Deploy finite direct sales resources where they're most productive, cost-effective, and impactful on customer relationships.

2. Create a matrix of direct seller types (field, inside, and virtual) with the values, activities, skills, and customer preferences across the sales cycle.
3. Place field, inside, and virtual sellers where they have the most impact vs. cost. Shape their role, focus, objectives, and targets.
4. Reimagine direct sales motions with virtual selling approaches.
5. Elevate virtual selling from an afterthought to an essential component of a channel and its go-to-market strategy.
6. Drive the sales process by giving sellers the right tools, infrastructure, enablement, content, and virtual coaching.
7. Focus field sales on new revenue generation, closing key deals, and essential relationship-based sales motions.
8. Encourage sellers to obtain new revenue, close deals, and build important relationships with customers.
9. Use inside sales for high productivity and cost efficiency where customers prefer a remote experience.
10. Analyze the sales process, key activities, and support requirements for field sales. Understand which selling occasions customers prefer to be remote.
11. Deploy inside sales where they can have the most impact. Own smaller customers end to end. Provide targeted resources at specific parts of the sales process, for example, Lead Development Rep roles. Team with field sellers to drive transactional and repeat business on larger accounts. Serve a customer's non-core territories or business lines.
12. Use AI to sort and prioritize seller activities. Focus on customers and deals with the highest likelihood of success. Give sellers real-time insights and prompts to make better decisions and improve the outcome of activities.
13. Drive efficiencies by automating activities that don't need human interaction, such as lead scoring, credit checks, workflow onboarding, and report creation.

MANAGE A PARTNER RELATIONSHIP CHANNEL

Identify, manage, and enable suitable partners to sell a defined set of products and services to specific customers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Sales, service, and marketing champion and implement channels. Basic processes are in place and reviewed for change management yearly to review the foundational program features, framework, and performance.
Recommended Maturity Level	4 (Optimized)	We frequently review our partner relationship management and associated channel program framework to gather and surface insights. We experiment with enrichment opportunities for AI and machine learning capabilities to maximize commercial performance and automate some of the portal self-service capabilities.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Craft a shared vision across marketing, business technology, sales, and service channel programs through a cross-functional steering committee.
2. As a team, define goals and measurements, explore recruiting and onboarding, and plan how to manage and grow a partner program.

3. Explore cross-functional misalignment identified during design of your partner management program. Seek cross-functional executive sponsorship to correct internal alignment, identify business cases, set realistic expectations, define success metrics, and seek cross-functional executive sponsorship.
4. Use a configure, price, quote (CPQ) tool to automate partner lead routing and streamline quoting for partners.
5. To help partners generate leads, use a market development fund (MDF) with clear budgets, rules, goals, and objectives.
6. Create a mission statement, and define a shared purpose for your company and your partners. Focus on why they would want to do business with you. Move your mindset from what you can do to or for your partner to what you can do with your partners.
7. Define use cases for your partner portal. Select the cases most important for your program, prioritize them, pilot an initial set, and then take a graduated approach to rolling out as you scale.
8. Secure executive engagement to show your sales org and partners your commitment to the relationship, drive alignment with corporate strategy, and foster innovation and collaboration.
9. Understand what resources and staffing you need. Consider identifying sales and marketing leaders to help define and champion your partner relationship program. Find PRM channel managers, digital engagement specialists, content creators, and enablement leads.
10. Create rich personas exploring who engages with your program. Develop journeys mapping what the partner persona's experience looks like.
11. Set up partners for success by implementing a service and support strategy, including self-service, that brings together the tools and content that they need.
12. To handle complex account relationships and personas, set up an alignment and shared structure for operations and channel systems in sales, service, commerce, and marketing.
13. Moving capabilities to external partners is often complex and involves extra levels of risk and security design. Consider possible data security concerns.

ACCOUNT SEGMENTATION APPROACH

Define, prioritize, and combine segment attributes. Group accounts to support business goals.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use basic processes to group accounts into segments. We identify account attributes, but sales and service don't use them to define resource focus.
Recommended Maturity Level	4 (Optimized)	We have defined processes to group accounts into segments. Sales leaders use segmentation attributes to group their accounts and organize their teams for the greatest impact.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align segmentation to the organization's wider business goals.
2. Ask sales, marketing, service, the business unit, and other key leaders to define the overarching business goals.
3. Let sales leaders derive objectives that support business goals.

4. Ask sales leaders and sales operations to identify key attributes that help profile accounts. Use qualitative and quantitative data such as industry, number of employees, and future revenue potential.
5. Combine multiple attributes for a well-rounded segmentation approach.

ACCOUNT TIERING AND SERVICING

Rank and prioritize accounts to define the appropriate pre- and post-sales service levels for each tier. Define the segmentation using analysis, such as understanding how the customer perceives a supplier. Look at channel relationships like box shifter, solution provider, and strategic provider.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We establish programs to train and coach segment requirements. Direct sales (inside, virtual, and sales) and indirect sales (distribution partners and value-added resellers) have defined segmentation approaches using multiple attributes. We use fact-based firmographics and commercial history attributes.
Recommended Maturity Level	4 (Optimized)	Our cross-functional teams meet regularly to review performance and implement changes as needed. We blend them with the qualitative assessments and a future perspective. We manage the downstream impact across channels when sales methodologies, management, and programs shift.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Prepare account segmentation programs for scale upfront. Define rules for handling complexity, and understand how the organization manages segmentation within multiple tech stacks in each domain (sales, service, operations, and channel strategy and mix).
2. Gather existing account data, and assess the completeness and quality of the selected segmentation attributes.
3. Assess the consistency and availability of key segmentation attributes. For example, industry classification codes can differ from region to region.
4. To empower cross-functional teams, align on an approach to analyzing tiers, allocating accounts, and service approaches to each tier.
5. To build the most complete and consistent dataset, add missing data.
6. Ensure that all relevant elements of the tech stack are updated to surface the tiers.
7. Define processes that support the classification of new accounts, and define processes to update an account's assigned tier over time. Assign clear ownership of both processes.
8. Deploy tiering.

ROLE ALIGNMENT

Set up personnel to deliver the required focus and service levels for the account segments and tiers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We deploy an established structure to the direct and indirect sellers. We hold yearly reviews to support how the organization maintains upskilling, enablement, turnover, and channel optimization.
Recommended Maturity Level	5 (Leading)	Our business uses historical data to make qualitative and quantitative assessments that drive how to optimize roles. We use theoretical models to predict and identify deficiencies.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Consider how the sales team is structured relative to key capabilities such as lead management and pipeline programs.
2. Follow lead generation, qualification, demonstrations, and closing through the production line model. Build specialists and channel programs around each step of the sales process.
3. Match the sales structure to the account segmentation and tiers.
4. Allocate resources to the segments and tiers. Create a structure where the resources are aligned to the strategy using growth, customer retention, and profitability.
5. Train, measure, and compensate sellers and channel program teams according to the segments and tiers.

ACCOUNT AND CONTACT MANAGEMENT APPROACH

Use this process to establish roles and responsibilities. Create, augment, govern, and manage accounts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A multifaceted view of the customer exists in a single system. The view provides account teams with a full view of the company's relationship with the customer and enabling collaboration.
Recommended Maturity Level	5 (Leading)	Sales leaders use advanced analytics, like customer lifetime value and customer satisfaction, to identify the highest performing accounts. It's easy to view and apply practices such as selling techniques and similar opportunities within the account.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the roles within the account and contact management process, and assign specific resources to those roles.
2. Align on expectations by role for the account and contact management process.

3. Establish account teams to encourage collaboration.
4. Promote a culture of continued learning and an engagement across traditional and digital channels
5. Focus on big-picture and long-term learning instead of single instances of accuracies or inaccuracies.
6. Establish a methodology for closing the gap between commit and quota.

VIRTUALLY LEAD THROUGH CHANGE

Motivate sellers, strengthen essential business partnerships, and provide direction and inspiration to customers and employees when virtual selling disrupts the field sales channel.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Sales, service, and marketing champion and implement channels. Basic processes are in place and regularly monitored so that sales reps remain focused on their goals while understanding what changes and what remains the same. We adjusted the yearly review process by cross-functional teams.
Recommended Maturity Level	4 (Optimized)	We elevated virtual selling from an afterthought to an essential and realigned resource to ensure cross-functional teams work together. We implemented system infrastructure, training, and toolboxes that are regularly reviewed and maintained by the channel strategy and programs teams.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Determine how the virtual environment impacts these existing capabilities.
   a. Account segmentation
   b. Channel strategy
   c. Sales analytics
   d. Territory management
   e. Pipeline strategy and programs
   f. Sales support
   g. Sales performance management
   h. Sales enablement
2. Establish a process that ensures open and transparent communication channels throughout all levels of the organization.
3. Enhance communications with videos and recordings.
4. Stay aligned and keep connected by establishing a meeting framework.
5. Drive alignment through extended stakeholder participation across verticals.
6. Create a process to motivate reps, and help them learn new ways of working that embrace digital options.

7. Adjust existing goals, processes, and technology to achieve digital transformations.
8. Communicate and align changes with the company's vision, values, and objectives.
9. Elevate virtual selling to become a primary lens that develops the go-to-market strategy.
10. Measure and review channel performance in the assisted digital engagements.
11. Regularly forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics by channel. Include service and sales channel engagements. Use the results to identify areas of under performance and over performance.
12. Ensure that sales leaders and sales teams have a complete view of the customer in a single, unified system, including interactions on all sales channels.

SALES METHODOLOGY APPROACH

Select and enable sales with the sales methodology that guides sellers on actions that reflect the desired business outcomes. Keep sales methodology updated based on trends such as forecasting approach and coaching by sales management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	A process is defined, but it isn't iterative and it's conducted using a static training approach.
Recommended Maturity Level	3 (Practicing)	A high degree of alignment and frequent iteration on sales methodology exists among opportunity management, pipeline management, and the forecasting processes.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Ensure that a strong correlation exists between a sales methodology and sales performance. Alignment on channel methodology is key to setting realistic expectations, creating clear success metrics, and seeking cross-functional executive sponsorship.
2. Implement Paths that show each stage of the sales process. Provide Guidance for Success at each stage to help users align with the forecasting process.
3. Update, revise, and review sales methodology regularly. Look to forecasting accuracy data to provide tips, links, and practices for sales methodology.
4. Align the default forecast categories with opportunity stages, and ensure that there's a clear understanding of when and how a forecast category can be changed.
5. Reward accurate forecasts in sales methodology. Analyze inaccurate forecasts, and target sales teams for development or coaching.

ACCOUNT PLANNING

This process helps an account team foster team selling, increase customer satisfaction, and decrease customer turnover using a living account plan and business reviews.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A formal account planning process exists for the most important accounts. Account plans are collaborative with the account team and updated as needed, which serves to drive continuous goal setting and knowledge sharing.
Recommended Maturity Level	5 (Leading)	Account plans are co-created with the customer and reflect their highest priorities and desired outcomes. A closed-loop feedback process is in place with analytics to measure the effectiveness of the account planning process.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the benefits and cadence of account planning with programs that infuse behavior of people, process, and technology.
2. Design teams for engagement paths.
3. Consider how to integrate systems to help the organization shift to customer-centric operations. Optimize for these essential practices.
   - Renewal negotiation workflows
   - Account-level and category forecast editing
   - Forecast collaboration
   - Forecast and actuals tracking
   - Forecast versioning
   - Multiple forecasts sources
   - Forecast waterfall
   - Integration with CPQ
   - Integration with commerce
   - Enterprise resource planning (ERP) integration
4. Agree about which components of an account plan template the internal team, partners, and customers must populate.
5. Create an online user experience that allows the account plan to be collaborative and updatable.
6. Enable account plans to define renewal-driven value realization and net new business, and specify actions to take throughout the year.
7. Identify key account management practices. Use customer profile management, contact curation, account hierarchy management, territory planning, channel partner contracts, and partner collaboration.

SALES ENABLEMENT

Provide sellers with the product knowledge and selling practices to facilitate sales.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We use cutting-edge enablement methodology such as gamification and in-app enablement.
Recommended Maturity Level	5 (Leading)	Enablement is a C-suite priority, and a correlation can be shown between enablement and performance.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the tools and processes for creating, contacting, and managing your accounts, contacts, and leads.
2. Use enablement and training to emphasize the behaviors that are necessary to manage and gain insights from the pipeline.
3. Educate sellers on their compensation plans and performance objectives that connect to the business goals.
4. Determine what tools salespeople require to do their job based on role or otherwise.
5. Create a plan for creating, maintaining, and sharing materials that the sales team uses.
6. Use sales tools to provide sellers with updated customer, product, and industry knowledge. And use sales tools to streamline interactions between customer and seller and interactions between sales managers and sellers.

LEAD MANAGEMENT APPROACH

Use these capabilities and best practices to generate, score, prioritize, and qualify new potential business.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Strong alignment between marketing and sales results in high lead conversion rates.
Recommended Maturity Level	5 (Leading)	Leads shared with a seller are prioritized based on AI scoring, ensuring that the highest value leads get priority attention. The lead funnel is used as designed, and opportunities have a clear connection to the lead. Information is gathered to create a feedback loop on lead quality, lead sources, and other information.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Leads are created and assigned to the appropriate person, allowing average time to opportunity creation to decrease.
2. Establish the right culture to ensure effective lead management.
3. Establish a consistent lead management approach for lead entry, qualification, lead assignment approach, sales working leads, and lead conversion.
4. Establish a consistent lead content approach.
5. Align on leading and lagging indicators to measure the success of the lead management process.

6. Align on detailed reports and dashboards to measure the success of the lead management process.
7. Determine security and access for leads, reports, dashboards, and so on.

SALES FORECASTING APPROACH

Understand the concepts and methods necessary for successful forecasting.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We have defined forecast categories and a separate but dependent forecast process. Optimizations aren't an established process for predicting what is likely to happen in the future.
Recommended Maturity Level	5 (Leading)	We maximize commercial performance using trends and historical data analysis. Regular experiments with sales forecasting increase accuracy. Sellers have insight into what is likely to happen in the future, which helps them meet rising customer demands.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Determine who sees sales data and why. Discover necessary strategic, operational, and usage data. Find out the source of the data. Align on expectations by role.
2. Understand the relationship between pipeline management and forecasting.
3. Align on the definition of a sale.
4. Establish the purpose of forecasting as part of strategic business planning.
5. Align on the definitions of forecast categories. Understand the behavior of commit and best case over time. Establish coaching for subpar behaviors.
6. Establish a consistent forecasting process based on the company's go-to-market strategy.
7. Align forecast categories with opportunity stages, and understand the value of subjectivity.
8. Define your weekly snapshot and rollup cadence.
9. Establish a process for understanding and closing the commit versus quota gap.

PIPELINE STRATEGY AND PROGRAMS

Use data to analyze pipeline generation, the open pipeline, and pipeline conversion, and to generate pipelines for specific products and services.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A robust pipeline team drives the pipeline by product and service.

Type	Level	Description
Recommended Maturity Level	5 (Leading)	Sales leaders and managers use AI to tailor pipeline insights.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create programs for cross channel alignment that incorporate a shared vision for the organization's approach to these key business use cases.
   - Incentive compensation management
   - Training and enablement
   - Sales content engagement platform
   - Partner performance and score carding
   - Partner onboarding, training, and certification
   - Partner marketing programs
   - Partner collaboration
   - Rebates, incentives, and promotions
   - Channel loyalty
2. Establish the right culture and organizational alignment to ensure an effective pipeline strategy and programs. Consider your level of ambition, maturity of channel processes, clarity of value, and strength of use cases.
3. Align on roles and responsibilities within the pipeline process. Assign specific resources to each role.
4. Establish a consistent pipeline strategy process with pipeline stages, and define entry and exit criteria to move from stage to stage.
5. Make supporting product and service documentation available to engage or educate the seller as needed.
6. Create a set of parameters that define the quality of pipeline generation.
7. Define a metric that defines how much pipeline generation is required to hit targets based on historical trends.
8. Establish a consistent process for assigning scores and prioritizing deals in the pipeline.
9. Establish a process to guide a seller on how to work the pipeline when it’s assigned.
10. Align on leading and lagging indicators by which to measure the success of the pipeline strategy process.
11. To help the sales organization run its daily business, create seller and leader dashboards and reports.

CONFIGURE, PRICE, QUOTE

Facilitate the selling process by providing a structure and consistent method for configuring, pricing, and quoting a deal.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	Quotes are generated in an ad hoc manner with a high degree of variability. The quoting process is manual.

Type	Level	Description
Recommended Maturity Level	2 (Emerging)	Quotes follow a standardized process using an online tool and generate outputs that align to compliance standards. Only a single quote can be created for an opportunity.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish open and transparent communication channels throughout all levels of the organization.
2. Define a consistent configuration, pricing, and quoting approach.
3. Align on the set of tools used company-wide to support the CPQ process and, if applicable, align on integrations that support CPQ.
4. Enable a process to support the configuration, pricing, and quoting of an opportunity.
5. Create a price book with a consistent set of product families with associated products, services, and prices.
6. Enable a quote to be generated based on the information provided on an opportunity.
7. Enable a methodology to drive CPQ activities in the sales process.
8. To assemble an accurate and complete configuration, enable guided selling.
9. Determine how to manage discounts, for example, implementing a delegation of authority matrix and an automated approval process.
10. Establish a consistent approach to requesting support for deals from varying parts of the organization. For example, use a formal mechanism for an account team or opportunity team.
11. Create a consistent approach for handling price exceptions and an approval process matrix to standardize price exceptions.
12. Establish a consistent approach to large deal desk support.
13. Create a formalized engagement process for the sales team.
14. Develop an approach to contract management and request for proposals (RFPs).

Modernize Commerce

Use online, self-service B2B Commerce portals and automation to drive growth, increase efficiency, and retain customers.

Transform how you interact with stakeholders by using digital innovation that lets you connect with and personalize every touchpoint in the customer journey.

Deliver the complete and convenient digital experience customers expect by connecting multiple Salesforce products to form a cohesive customer experience. Connected experiences help you go beyond a simple digital storefront to engage customers with an easy self-service buying experience. Support Omni-Channel quoting with customer pricing on specific products from self-service carts, with up-to-date product information and availability. Provide partners with a fully integrated experience by making commerce, sales, and service portals accessible from a central location. Respond to customers more quickly with automated order processing alerts and status updates.

Products

These products can help you deliver a transformed customer experience.

- Manufacturing Cloud

- B2B Commerce Cloud
- Service Cloud
- Marketing Cloud
- Salesforce CPQ
- Experience Cloud
- CRM Analytics
- Mulesoft

Solutions

Choose from Salesforce recommended solutions divided into three levels of complexity. Put together a roadmap to build out more mature capabilities over time. Find solutions that your business is ready for right now.

Beginning

- Read the Manufacturer's Guide to Digital B2B Commerce
- Sell Everywhere with Commerce Cloud
- Administer Salesforce B2B Commerce on Lightning Experience
- Build Omni-Channel B2B Service for Your Agents (video)
- Learn about the One Platform Advantage: Use Sales and Service Together
- Review Sales and Service Analytics: Fast Start
- Organize teams for Implementation and After Launch: B2B Commerce
- Get Started: Metrics and Analytics B2B Commerce
- Predict Upsell and LTV in Einstein Prediction Builder
- Use AI to Deliver Personalization in Retail and Commerce (Video)

Intermediate

- Create Engagement in Digital Experience with Shared Purpose
- Watch Insights: Account Engagement: B2B Marketing Analytics (video)
- View Account Engagement: B2B Marketing Analytics
- Use Mulesoft to Connect your Apps, Data, and Devices
- Build Manufacturing Integration Solutions with Mulesoft
- Increase Productivity with Partner Relationship Management
- Measure, Monitor, and Grow with Self-Service Experience Best Practices
- Accelerate Adoption and Engagement in Digital Experience
- Get Pre-built Solutions on AppExchange

Advanced

- Track Adoption and Traffic with Google Analytics
- Use Advanced Search Engine Optimization (SEO) Strategies for Lightning Communities
- Deliver Great Customer Service with Einstein Bots and Other AI Features
- Drive Manufacturing and Quality Excellence with a Connected Platform (video series)
- Reimagine Digital Transformation in Manufacturing Industry
- Use ERP on the Salesforce Platform with Rootstock and Manufacturing Cloud

- Synchronize Product and Pricing Data (Solution Kit)
- Integrate with CPQ Billing by Linking Cart to Cash (Solution Kit)
- Integrate an Omni Experience from Sales Reps to Self Service eCommerce by Linking Cart to Quote (Solution Kit)
- Drive Seamless Experiences for Manufacturing Cloud, CPQ, and B2B Commerce (video)

For more information, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information that you can use to increase your business' maturity.

Marketing Capabilities to Modernize Commerce
Optimize awareness, engagement, self-service, and ecommerce marketing strategies. Help cross-functional teams strategically cross-sell, upsell, and activate audiences.

Service Capabilities to Modernize Commerce
Develop a blended approach for self-service ecommerce with strategies that create opportunities for cross-selling and upselling. Maintain a high-quality customer and order support experience.

Sales Capabilities to Modernize Commerce
Shift to digital commerce to increase revenue, improve customer experience, and reduce supply chain disruption.

Marketing Capabilities to Modernize Commerce

Optimize awareness, engagement, self-service, and ecommerce marketing strategies. Help cross-functional teams strategically cross-sell, upsell, and activate audiences.

MARKETING STRATEGY ALIGNMENT

Share well-defined goals from marketing initiatives with other teams to drive collaboration. Co-owning these goals with respective teams drives collaboration.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We share relevant goals across sales, service, and marketing to streamline key performance indicators across the business.
Recommended Maturity Level	5 (Leading)	We share all relevant goals across the teams.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create an alignment plan for marketing strategy and goals.
2. To ensure collaboration, distribute and co-own goals with marketing and other relevant teams.

3. Develop and share your internal Walking Deck. Summarize the marketing strategy and goals for internal stakeholders and partners. Understand priorities and key performance indicators (KPIs). Incorporate feedback. If used, include the V2MOM.
4. Review and update marketing roles based on the marketing strategy, goals, and KPIs, and identify gaps.
5. Review job descriptions and postings to stay current on emerging roles.

REAL-TIME INTERACTION MANAGEMENT

Deliver contextually relevant experiences, value, and utility in the customer lifecycle via preferred customer touchpoints.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use an interaction management system or tool like this on an ad hoc basis to a moderate degree of success.
Recommended Maturity Level	4 (Optimized)	We use an interaction management system or tool like this on a regular, but not continuous, basis to a relatively strong degree of success.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Optimize initiation and progression of campaigns based on real-time individual behavior and intent.
2. Add real-time triggers, responses, personalization, and cross-channel.
3. Use known user data to personalize and contextualize the campaign message.
4. Attribute campaign influence to downstream milestones such as lead generation and opportunities.
5. To control saturation and fatigue, orchestrate across channels. Add AI next best offer and orchestration across all channels.

CHANNEL STRATEGY AND MIX

Target customers with products, services, marketing, and channels, usually including direct sales, B2B commerce, and partner relationship management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Our channel management process follows an established cadence and incorporates change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.
Recommended Maturity Level	5 (Leading)	We use cross-channel data to consistently improve customer experience and drive business decisions, including use of AI and marketing automation journeys. We optimize channels for tailored incentives to the nuances for each type of sale.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align the channel strategy with the organization's wider go-to-market strategy.
2. Collaborate with sales, marketing, business units, and other key leaders. Define a clear channel strategy. Align with the overall go-to-market strategy.
3. Establish the role, objectives, and targets of each channel.
4. Establish a framework for deciding the optimal customer, product, and channel combinations for serving customers.
5. Design for the downstream effects of the channel strategy on your sales capability and the wider business.
6. Create a consistent customer experience across channels.
7. Create a uniform buying experience within and across channels.
8. Use design thinking and customer processes to build experiences that align with how customers behave. Align with their preferred way of being served wherever possible.

CAMPAIGN EXECUTION AND AUTOMATION

Campaigns deploy, monitor, adjust, and automate.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We practice a robust approach, but we can optimize for reductions in lead time, number of steps, handoffs, and errors from marketing execution.
Recommended Maturity Level	4 (Optimized)	Our campaign strategy is coordinated across many, but not all, teams, channels, and lifecycle stages.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Use automations or APIs to execute scheduled import activities.
2. Build a robust data and contact model that enables automation of segmentation activities.
3. Send updates to external systems using automations or APIs.
4. Ensure that expected activities are performed by automating check activities for oversight purposes.
5. Implement monitoring and auditing logs of key processes.
6. Reduce risk with Marketing Cloud verification activities.
7. Monitor to ensure that data ingestion steps contain records.
8. Set up alerts to monitor for normalized data volumes outside a range.
9. Verify that activities are adding data.

JOURNEY DESIGN

Use a consistent approach to the design and development of customer journeys across all channels and stages of customer lifecycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Lifecycle stage or segment-specific journeys are defined including 1–2 channels.
Recommended Maturity Level	4 (Optimized)	Individualized, personalized, and cross-channel journeys are defined and include almost all channels.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify marketing objectives, campaigns to support each objective, audience targeting requirements, data variables, and attributes needed. Map where and how they're sourced. Use a journey design roadmap.
2. Hold a cross-functional workshop that identifies customer lifecycle and moments that matter. Journey workshop four types of moments that matter. For each journey, define a goal, audience, data needs, content, and channels.
3. Identify the content based on two types. In-journey content is the delivered message that can be consumed without leaving the inbox or screen. Outside-journey content is resources that the customer navigates to with a click or tap, such as web content.
4. Prioritize journeys based on evaluation criteria, and create a journey backlog.
5. Design a simple single-channel journey to start. For example, a welcome email triggered by registration or conversion event.
6. Evolve journeys to multiple channels, connecting multiple journeys.
7. Incorporate experience design principles in journeys.

CROSS-SELL AND UPSELL

Prioritize, develop, manage, and measure customer cross-sell and upsell offers and journeys.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We coordinate targeted messaging across at least two channels to support cross-sell or upsell based on multiple criteria such as the customer's segment, purchase history, and lifecycle stage.
Recommended Maturity Level	4 (Optimized)	We use individualized cross-channel journeys to support cross-sell and upsell. Journeys have no real-time interaction management or next-best-offer AI.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify the right trigger point for cross-sell and upsell for your organization. Think beyond the standard scenario of a customer buying similar items. Use your insights to build cross-sell and upsell campaigns.
2. Use lifecycle and behavioral data to enter customers into personalized cross-sell and upsell journeys on the appropriate channels.
3. Use personalization to deliver the right message to customers.
4. Use AI to recommend the correct cross-sell or upsell opportunities.
5. Identify the correct data points to use to activate cross-sell and upsell campaigns. For example, the expiration date of an insurance policy or a medication refill. Deliver messages through the correct channels based on past behavior.
6. Apply the correct tactic to drive the highest conversion rates possible. Including user-generated content, expert recommendations, and discounts and promotions.
7. Use real-time interaction management to effectively manage cross-sell and upsell messages with other messages the customer is eligible for.

Service Capabilities to Modernize Commerce

Develop a blended approach for self-service ecommerce with strategies that create opportunities for cross-selling and upselling. Maintain a high-quality customer and order support experience.

CASE MANAGEMENT APPROACH

Manage a service request through to resolution. Include the routing, assignment, ownership, tracing, and related interactions.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Cases are worked primarily through one system and on-screen UI. Other systems and swivel-chairing still exist as needed.
Recommended Maturity Level	4 (Optimized)	Cases are worked through one cohesive system that intakes cases, sorts, and routes them into queues, and enables full case lifecycle tracking and assistance.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create and define queue priority, and align business and IT to the case routing process.
2. Define case record types and support processes.
3. Set up Email-to-Case and Web-to-Case.
4. Add an actions and recommendations lightning component to the Lightning Service Console or other case record page layouts.
5. Set up a dashboard that surfaces a manager's team's cases by status.
6. Set the organization that is aligned to actions associated with lifecycle stages.
7. Create escalation rule criteria. Sort rules from most complex to least complex.
8. Define business hours.

9. Define escalation actions. When a case escalates, you can send it to a different queue or user and send an email that notifies the case owner or others.
10. Create email templates to notify the users when a case escalates, and include quick actions.
11. Set up macros to let service agents quickly respond to customers in a structured way.
12. Create email templates for case open, case close, and a case that escalates. Communication is key to ensuring a better customer satisfaction (CSAT) score.
13. Understand, track, and resolve customer service needs and questions that align with priorities and impact strategic business value.

SELF SERVICE APPROACH

Provide customers with a direct and contextual channel for issue resolution, profile management, cross-sell, and upsell. Publish formal knowledge. Moderate and nurture crowdsourced knowledge from the community to empower customers, resolve issues, and deflect the direct cost of service.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Customers interact with a chatbot via website, community, or interactive voice response (IVR) virtual guide solution to resolve easy questions or help direct requests to the right agent.
Recommended Maturity Level	5 (Leading)	We solve most issues using self-service, freeing up customer service representatives to solve more complex issues and add value in other ways.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Deploy Omni-Channel programs and self-service support.
   a. Use knowledge management.
   b. Implement surveys, loyalty, and Net Promoter Score (NPS).
   c. Set up case management and escalation paths.
   d. Use call deflection, chatbots, and self-service connected resources.
2. Analyze current agent issues and identify the ones the bot can resolve. Examples include password reset requests, order status, and routine questions like store locations and hours.
3. Develop a set of Knowledge articles to support the questions for your customers via direct channels.

SELF SERVICE ADOPTION

Monitor engagement for customers to use virtual self-service. Empower customers to resolve self-service requests. Let service agents and customers work across the business with digital engagement across channels.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We structure the self-service portal so that customers find the information they're looking for. Customers are aware of the self-service option and often go to this channel first to resolve issues.
Recommended Maturity Level	4 (Optimized)	We provide guided actions to resolve customer issues. We measure a key performance indicators (KPI)s and use them to inform actions around customer usage and trends.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Formalize your business process, and carry it through to the portal. For example, give service agents access to the same FAQs as your customers.
2. Identify your self-service users, and define the member experience.
3. Create solutions to answer commonly asked questions.
4. Determine the information your users need when answering their own questions and logging cases.
5. Decide how to notify your users of the self-service portal.

SELF SERVICE REQUEST TYPE

Provide customers with a direct contextual channel for issue resolution, profile management, and cross-sell and upsell opportunities. Publish formal knowledge. Moderate and nurture crowdsourced knowledge to empower customers, resolve issues, and deflect the direct cost of service.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	A proper scheduling system is in place. Schedule changes are performed manually.
Recommended Maturity Level	4 (Optimized)	All work is managed in the scheduling system. Changes are automatically managed within the system. Change type is agnostic. All changes automatically create schedules for agents.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Reward adoption of the ecommerce channel with a loyalty program. Further encourage use of simple reorders and self-service commerce.

2. Be aware of partner relationship management (PRM) strategies in a blended channel approach. Don't cause clashing or competing behaviors.
3. Create a dedicated ecommerce B2B manager role to manage the company's B2B commerce portal. Implement a digital team strategy, appoint ownership to an existing sales or service role, and identify process optimizations for service, sales, and PRM.
4. Engage sales and marketing leaders with design thinking to ensure that they design in a customer focused way.
5. Discuss each trend in your Channel Strategy, and align on what use cases affect customers of commerce and channel partners.
6. Identify key challenges. For example, focus on winning mind share from partners when they're juggling so many other vendors and operating in digital spaces.
7. Provide partners with access to these materials in a digital format on demand.
8. Prepare for a changing workforce. Are you seeing younger people in the channel? Are you doing business with them in a different way, or do you implement more self-service request channels, such as social, chatbots, or other experiences for self-service?
9. Push for analytics. How much visibility do you have into your channel? How well are your customers and partners able to monitor their own performance?

Sales Capabilities to Modernize Commerce

Shift to digital commerce to increase revenue, improve customer experience, and reduce supply chain disruption.

CHANNEL STRATEGY APPROACH

Develop a go-to-market strategy for channels, from implementation and ongoing management to optimization and rationalization.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Our channel management process follows an established cadence and incorporates change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.
Recommended Maturity Level	4 (Optimized)	Predictive analysis from measuring trends and customer behavior across channels is well-established and regularly reviewed across the business. Connected sales and marketing data allow journeys that let customers engage on their terms with consistent buying and selling experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Offer self-service commerce, but allow service or sales direct teams to order on behalf of a customer or partner.
2. Measure operational cost reduction by using the most efficient channels in the sales channel.
3. To further encourage use of simple reorders and self-service commerce, reward adoption of the ecommerce channel with a loyalty program.
4. To avoid clashing or competing behaviors, be aware of partner relationship management (PRM) strategies of a blended channel.

5. Companies with a mature B2B Commerce operation have a dedicated ecommerce B2B Manager role to manage the company's B2B Commerce portal.
   - Implement a digital team strategy.
   - Appoint ownership to an existing sales or service role.
   - Identify process optimizations for service, sales, and PRM.
6. To ensure that the approaches of sellers in the new channel are designed for customers, engage sales and marketing leaders with design thinking concepts.

VIRTUALLY LEAD THROUGH CHANGE

Motivate sellers, strengthen essential business partnerships, and provide direction and inspiration to customers and employees when virtual selling disrupts the field sales channel.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Sales, Service, and Marketing champion and implement channels. Basic processes are in place and regularly monitored so that sales reps remain focused on their goals while understanding what changes and what remains the same. We adjusted the yearly process for reviews by cross-functional teams.
Recommended Maturity Level	4 (Optimized)	We elevated virtual selling from an afterthought to an essential, realigned resources, and created motions to ensure cross-functional teams work together. We put in place system infrastructure, training, and toolboxes that are regularly reviewed and maintained by the channel strategy and programs teams.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Determine how the virtual environment impacts these existing capabilities.
   a. Account segmentation
   b. Channel strategy
   c. Sales analytics
   d. Territory management
   e. Pipeline strategy and programs
   f. Sales support
   g. Sales performance management
   h. Sales enablement
2. Establish a process that ensures open and transparent communication channels throughout all levels of the organization.
3. Enhance communications with videos and recordings.

4. Stay aligned and keep connected by establishing a meeting framework.
5. Drive alignment through extended stakeholder participation across verticals.
6. Create a process that motivates reps and helps them learn new ways of working that embrace digital options.
7. Adjust existing goals, processes, and technology to achieve digital transformations.
8. Communicate and align changes with the company's vision, values, and objectives.
9. Elevate virtual selling to become a primary lens that develops the go-to-market strategy.
10. Measure and review channel performance in the assisted digital engagements.
11. Regularly forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics by channel. Include service and sales channel engagements. Use the results to identify areas of under performance and over performance.
12. Ensure sales leaders and sales teams have a complete view of the customer in a single, unified system, including interactions on all sales channel.

CONFIGURE, PRICE, QUOTE

Facilitate the selling process by providing a structure and consistent method for configuring, pricing, and quoting a deal.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Integration exists between the CRM, quoting, and contracting systems to provide final visibility into products and services sold and pricing.
Recommended Maturity Level	5 (Leading)	Quote creation is supported by a high degree of automation, allowing sellers to focus on what differentiates the offer, as opposed to investing time in the creation process itself.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish open and transparent communication channels throughout all levels of the organization.
2. Define a consistent configuration, pricing, and quoting approach.
3. Align on the set of tools used company-wide to support the CPQ process and, if applicable, on integrations that support CPQ.
4. Enable a process to support the configuration, pricing, and quoting of an opportunity.
5. Create a price book with a consistent set of product families, including associated products, services, and prices.
6. Allow a quote to be generated based on the information provided on an opportunity.
7. Enable a methodology to drive CPQ activities in the sales process.
8. Enable guided selling to assemble an accurate and complete configuration.
9. Determine how to manage discounts, for example, implementing a delegation of authority matrix and an automated approval process.
10. Establish a consistent approach to requesting support for deals from varying parts of the organization. For example, create a formal mechanism for an account team or opportunity team.

11. Create a consistent approach for handling price exceptions and an approval process matrix to standardize price exceptions.
12. Establish a consistent approach to large deal desk support.
13. Create a formalized engagement process for the sales team.
14. Develop an approach to contract management and request for proposals (RFPs).

SALES METHODOLOGY APPROACH

Select and enable sells with the sales methodology that guides sellers on actions that reflect the desired business outcomes. Keep sales methodology updated based on trends such as forecasting approach and coaching by sales management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A high degree of alignment and frequent iteration on sales methodology exists among opportunity management, pipeline management, and the forecasting processes.
Recommended Maturity Level	5 (Leading)	Appropriate data quality and quantity exist to use intelligence tools to generate automated insights.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Ensure that a strong correlation exists between a sales methodology and sales performance. Align on a channel methodology. Align on a channel methodology. Set realistic expectations, create clear success metrics, and seek cross-functional executive sponsorship.
2. Implement Paths that show each stage of the sales process. Provide Guidance for Success at each stage to help users align with the forecasting process.
3. Update, revise, and review sales methodology continually.
4. Forecast accurate data that provide tips, links, and best practices for sales methodology.
5. Align the default forecast categories with opportunity stages and ensure that there's a clear understanding of when and how a forecast category can be changed. Reward accurate forecasts in sales methodology. Analyze inaccurate forecasts and target sales teams for development or coaching.

SUSTAINABLE VIRTUAL SELLING APPROACH

Elevate virtual selling from an afterthought to an essential piece of a company's go-to-market strategy. Reimagine how best to align resources and create sales processes to meet each customer's needs.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We have a strategic alignment framework for virtual sales. We embrace new digital ways of working.

Type	Level	Description
Recommended Maturity Level	4 (Optimized)	We score opportunities within our pipeline to look for viability and gaps. We develop and optimize success metrics. We automate seller tasks to allow more time for research and outreach.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish a strategic goal alignment framework for virtual sales like Salesforce's V2MOM.
2. Enable a process to establish open and transparent communication channels throughout all levels of the organization.
3. Embrace and learn how to use digital work environments and platforms.
4. Innovate new ways to capture the attention and imagination of prospects and customers.
5. Reskill the workforce for virtual selling that aligns with customer needs.
6. Address barriers by creating a mechanism to segment portfolios that lack turnkey virtual selling solutions.
7. Score the opportunities within your pipeline to assess viability and gaps.
8. Identify which new enablement capabilities support the virtual selling process.
9. Develop and optimize virtual sales success metrics.
10. Create a mechanism that automates seller tasks to allocate more time for customer research and outreach initiatives.

MANAGING A B2B COMMERCE CHANNEL

Deliver personalized and relevant B2B ecommerce experiences to enterprise customers across research, discovery, browsing, and buying activities.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use self-service to automate repetitive, simple, and lower-value transactions.
Recommended Maturity Level	4 (Optimized)	We support a high degree of automation in ecommerce and direct sales quote creation with a single source of truth on customers across channels.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Deploy finite direct sales resources where they're most productive, cost-effective, and impactful on customer relationships.
2. Focus field sales on new revenue generation, closing key deals, and essential relationship-based sales motions.
3. Use inside sales where high productivity and cost efficiency are needed. Use inside sales where customers prefer a remote experience.
4. Recruit and onboard your partners.

5. Think of B2B commerce as an extension of the sales team.
6. Design B2B commerce platforms for features, when practical. For example, use self-service for large B2B orders, two-click reordering, and visibility with inventory, order status, and lead time.
7. Create personalized storefronts with customer price books and agreements.
8. Ship to multiple locations on fulfillment of a self-service order in ecommerce.
9. Use AI for relevant upsell and cross-sell opportunities.
10. Send automated marketing journeys for abandoned carts, reorders, and renewal of subscription notifications.
11. Address the consumerization of B2B commerce with a focus on delivering functionality such as powerful search and mobile-friendly storefronts. Use multiple payment options like transfer, PayPal, credit card, and optional invoice agreements per the customer Sales Agreement Terms and Conditions.

MANAGING A DIRECT SALES CHANNEL

Run a customer-facing sales team made up of field sales, inside sales, and virtual selling capabilities.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our process ensures that a set of activities and outputs meets the organization's goals in an effective and efficient manner.
Recommended Maturity Level	3 (Practicing)	Our process creates targets and measures to provide insights for business value realization.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Establish a sales team methodology for internal sales channels. Measure forecasting, new, and run-rate business. Measure what you manage.
2. Ensure that owners and managers own forecasts. Hold them accountable for the accuracy of their opportunities and forecasts.
3. Align on clear definitions of opportunity amount and expected close date.
4. Link the sales approach in management directly to company strategy. Use run-rate and new business opportunities in your sales forecasting methods. Include current and new customers.
5. Align operations with sales channel management for greater efficiency and productivity.
6. Analyze the sales process, key activities, and support requirements that align with the channel management.

MANAGING AN INDIRECT SALES CHANNEL

Run partner resellers, distributors, or channel partners. Include a combination of field sales and direct sales.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Direct channels are integrated and have visibility across the operations and direct sales team. We practice a consistent approach to meet customer expectations.
Recommended Maturity Level	4 (Optimized)	We optimize virtual and guided selling with established change management, enablement, and execution. Our process ensures that sellers have the right incentives, tools, methodologies, and coaching to perform.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Deploy finite direct sales resources where they're most productive, cost-effective, and impactful on customer relationships.
2. Create a matrix of direct seller types (field, inside, and virtual) with the values, activities, skills, and customer preferences across the sales cycle.
3. Place field, inside, and virtual sellers where they have the most impact vs. cost. Shape their role, focus, objectives, and targets.
4. Reimagine direct sales motions with virtual selling approaches.
5. Elevate virtual selling from an afterthought to an essential component of channel and go-to-market strategy.
6. Drive the sales process by giving sellers the right tools, infrastructure, enablement, content, and virtual coaching.
7. Focus field sales on new revenue generation, closing key deals, and essential relationship-based sales motions.
8. Encourage sellers to obtain new revenue, close deals, and build important relationships with customers.
9. Use inside sales for high productivity and cost efficiency where customers prefer a remote experience.
10. Analyze the sales process, key activities, and support requirements for field sales. Understand which sales experiences customers prefer to be remote.
11. Deploy inside sales where they can have the most impact. Own smaller customers end to end. Provide targeted resources at specific parts of the sales process, for example, Lead Development Rep roles. Team with field sellers to drive transactional and repeat business on larger accounts. Serve a customer's non-core territories or business lines.
12. Use AI to sort and prioritize seller activities. Focus on customers and deals with the highest likelihood of success. Arm sellers with real-time insights and prompts to make better decisions and improve the outcome of activities.
13. Drive efficiencies by automating activities that don't need human interaction, such as lead scoring, credit checks, workflow onboarding, and report creation.

ACCOUNT SEGMENTATION APPROACH

Define, prioritize, and combine segment attributes. Group accounts to support business goals.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use basic processes to group accounts into segments. We identify account attributes, but sales and service don't use them to define resource focus.

Type	Level	Description
Recommended Maturity Level	4 (Optimized)	We have defined processes to group accounts into segments. Sales leaders use segmentation attributes to group their accounts and organize their teams for the greatest impact.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align segmentation to the organization's wider business goals.
2. Ask sales, marketing, service, the business unit, and other key leaders to define the overarching business goals.
3. Let sales leaders derive objectives that support business goals.
4. Ask sales leaders and sales operations to identify key attributes that help profile accounts. Use qualitative and quantitative data such as industry, number of employees, and future revenue potential.
5. Combine multiple attributes for a well-rounded segmentation approach.

ACCOUNT TIERING AND SERVICING

Rank and prioritize accounts to define the appropriate pre- and post-sales service levels for each tier. Define the segmentation using analysis, such as understanding how the customer perceives a supplier. Look at channel relationships like box shifter, solution provider, and strategic provider.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We establish programs to train and coach segment requirements. Direct sales (inside, virtual, and sales) and indirect sales (distribution partners and value-added resellers) have defined segmentation approaches using multiple attributes. We use fact-based firmographics and commercial history attributes.
Recommended Maturity Level	4 (Optimized)	Our cross-functional teams meet regularly to review performance and implement changes as needed. We blend them with the qualitative assessments and a future perspective. We manage the downstream impact across channels when sales methodologies, management, and programs shift.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Prepare account segmentation programs for scale upfront. Define rules for handling complexity, and understand how the organization manages segmentation within multiple tech stacks in each domain (sales, service, operations, and channel strategy and mix).
2. Gather existing account data, and assess the completeness and quality of the selected segmentation attributes.

3. Assess the consistency and availability of key segmentation attributes. For example, industry classification codes can differ from region to region.
4. To empower cross-functional teams, align on an approach to analyzing tiers, allocating accounts, service approaches to each tier.
5. To build the most complete and consistent dataset, add missing data.
6. Ensure that all relevant elements of the tech stack are updated to surface the tiers.
7. Define processes that support classification of new accounts, and define processes to update an account's assigned tier over time. Assign clear ownership of both processes.
8. Deploy tiering.

ROLE ALIGNMENT

Set up personnel to deliver the required focus and service levels for the account segments and tiers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We deploy an established structure to the direct and indirect sellers. We hold yearly reviews to support how the organization maintains upskilling, enablement, turnover, and channel optimization.
Recommended Maturity Level	5 (Leading)	Our business uses historical data to make qualitative and quantitative assessments that drive how to optimize roles. We use theoretical models to predict and identify deficiencies.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Consider how the sales team is structured relative to key capabilities such as lead management and pipeline programs.
2. Follow lead generation, qualification, demonstrations, and closing through the production line model. Build specialists and channel programs around each step of the sales process.
3. Match the sales structure to the account segmentation and tiers.
4. Allocate resources to the segments and tiers. Enable structure where the resources are aligned to the strategy using growth, customer retention, and profitability.
5. Train, measure, and compensate sellers and channel program teams according to the segments and tiers.

Deliver Intelligent Field Service

Allow B2B field technicians to provide superior service and build strong customer relationships with a unified platform and actionable, real-time information.

Manufacturers make complex products that can't often be fixed with just a phone call. Build a field service team that delivers faster, smarter service and avoids small but costly errors with better access on mobile devices.

The value of a customer relationship far exceeds the original product purchase price. Connect customers, agents, dispatchers, and technicians with a single platform where everyone can access the most up-to-date information.

Service agents and field technicians can have a 360-degree customer view and data on warranties and entitlements, while an intelligent scheduler can dispatch the right technician to the right job.

Products

These products can help you deliver intelligent field service.

- Manufacturing Cloud
- Service Cloud
- Salesforce Field Service
- Experience Cloud
- CRM Analytics
- Visual Remote Support

Solutions

Choose from Salesforce recommended solutions divided into three levels of complexity. Put together a roadmap to build out more mature capabilities over time. Find solutions that your business is ready for right now.

Beginning

- Build a Foundation With the Digital Customer Service Playbook
- See the Customer Experience "State of Service" Report
- Get Started with Service Cloud for Lightning Experience
- Learn Knowledge Centered Service with Service Cloud
- Review Salesforce Customer Service Strategies
- Measure Service KPIs and Customer Satisfaction with Salesforce Surveys
- Add Knowledge and Chat to Delight Customers
- Connect Sales and Service Teams to a Shared Engagement Platform
- Engage with Customers on Any Device to Deliver Exceptional Experiences
- Deploy Chat
- Enhance Self-Service Chat with Bots
- Get Started: Service Digital Engagement
- Cross-Sell & Upsell with Digital Engagement for Sales
- Discover Field Service Lightning for Manufacturing
- Dispatch the Right Resource
- Use Mobility for Field Service Technicians
- Set Up Service Inventory Management
- Improve Your Customer Service with AI (video)
- Predict Case Escalation with Einstein

Intermediate

- Deliver On-site Service with Salesforce Field Service
- Get on the Road with Field Service
- Design Field Service for Success

- Dispatch the Right Resource
- Use Mobility for Field Service Technicians
- Increase Field Service Team Productivity with the Dispatcher Console
- Enhance Dispatcher Productivity
- Implement Field Service Center on Mobile
- Set Up Field Service Lightning Mobile App
- Review Common Inventory Management Tasks
- Create Maintenance Plans
- Customize the Field Service Mobile App by User Profile
- Create Service Report Templates on FSL Mobile
- Optimize Scheduling Based on Desired Business Outcomes
- Surface the Right Content
- Create Service Reports to Monitor and Measure KPIs
- View Common Solutions Inventory Situations

Advanced

- Set up Customer Engagement for Field Service
- Book Field Service Appointment with Self-Service Chatbots & Digital Engagement
- Optimize Just-in-Time Scheduling for Emergencies or Priority Assignments
- Create Scheduling Recipes for Common Events
- Connect Field Service to External Capabilities
- Enhance Workflows to Support Field Trip Workflow
- Set Up Advanced Inventory Management
- Remotely Solve Issues with Virtual Assistance (AppExchange)
- Automate and Optimize your Warranty Process with Aftermarket 4.0 & Warranty On-Demand (TWOD) (AppExchange)
- Use SightCall Visual Support for Salesforce (AppExchange)
- Get Started with Salesforce Integration Patterns Using MuleSoft
- Improve Your Customer Service with AI (Video)
- Predict Case Escalation with Einstein
- Use Product Lifecycle Management (AppExchange)
- Use AI Service and Augmented Knowledge Management (AppExchange)

For more information, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information that you can use to increase your business' maturity.

Marketing Capabilities to Deliver Intelligent Field Service

Optimize marketing strategies and cross-functional teams to cross-sell, upsell, and activate their audiences.

Service Capabilities to Deliver Intelligent Field Service

Connect disparate data to give your agents a complete view of the customer in a single console that includes purchase, service, contract, and billing history.

Sales Capabilities to Deliver Intelligent Sales

Take advantage of cross-selling and upselling when servicing customers in the field. Optimize capabilities with foundational knowledge of the data structures.

Marketing Capabilities to Deliver Intelligent Field Service

Optimize marketing strategies and cross-functional teams to cross-sell, upsell, and activate their audiences.

CHANNEL STRATEGY AND MIX

Target customers with products, services, marketing, and channels, usually including direct sales, B2B commerce, and partner relationship management.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Our channel management process follows an established cadence and incorporates change management, enablement, and execution. The process ensures seller performance with the right incentives, tools, methodologies, and coaching.
Recommended Maturity Level	5 (Leading)	We use cross-channel data to consistently improve customer experience and drive business decisions, including use of AI and marketing automation journeys. We optimize channels for tailored incentives to the nuances for each type of sale.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align the channel strategy with the organization's wider go-to-market strategy.
2. Collaborate with sales, marketing, business units, and other key leaders. Define a clear channel strategy that is aligned with the overall go-to-market strategy.
3. Establish each channel's role, objectives, and targets.
4. Establish a framework for deciding the optimal customer, product, and channel combinations for serving customers.
5. Assess and design for the downstream effects of the channel strategy on your sales capability and the wider business.
6. Create a consistent customer experience across channels.
7. Create a uniform buying experience within and across channels.
8. Use design thinking and customer processes to build experiences that align with how customers behave. Align with their preferred way of being served wherever possible.

REAL-TIME INTERACTION MANAGEMENT

Deliver contextually relevant experiences, value, and utility at the appropriate moment in the customer lifecycle via preferred customer touchpoints.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use a system or tool on an ad hoc basis to a moderate degree of success.
Recommended Maturity Level	4 (Optimized)	We use a tool or system on a regular, but not continuous, basis to a relatively strong degree of success.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Optimize initiation and progression of campaigns based on real-time individual behavior and intent.
2. Add cross-channel real-time triggers, responses, and personalization.
3. To personalize and contextualize the campaign message, use known user data.
4. Attribute campaign influence to downstream milestones such as leads and opportunities.
5. To control saturation and fatigue, orchestrate across channels. Add AI next best offer and orchestration across all channels.

AUDIENCE NURTURING

Grow an audience using audience, segment overlaps, or lookalike models to increase size and scale.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use lookalikes from advertising platforms extensively and extend our reach through overlaps, but we do almost no performance testing.
Recommended Maturity Level	4 (Optimized)	We use lookalikes from advertising platforms, plus we extend reach through overlaps and curate some of our own lookalikes. We do some performance testing.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create marketing programs that drive more customers into the segment. Encourage and reward behavior in the segment definition. For example, offer a 10% coupon for registering on your new website or for watching a video.

2. To find segments that have low overlap with the segment you created, run segment overlap analyses. Find complementary audience attributes that you want to target. Update your original segment or create a segment by combining the original segment with the low overlapping segments.
3. Use marketing platform features or a data science modeling approach to generate lookalikes for the segment you created. Evaluate the accuracy (similarity) versus scale (incremental size of segment).
4. If you're looking to maximize reach and aren't concerned with targeting precision, opt for a lookalike that has greater than 50% similarity with maximum size. If you're looking for targeting precision, opt for a lookalike that has greater than 70% similarity.
5. To identify other devices likely owned by users in your segment, use marketing platform features, an identity partner's solution, or data science modeling. Adding those devices improves the likelihood of reaching or suppressing the segment and drives better results.
6. To determine if another nurturing is required, evaluate the change in segment size each month.
7. Set up consistent testing to measure the incremental value of each lookalike.

LIFECYCLE MARKETING

Tailor marketing messages based on each stage of the customer's lifecycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Marketing messages are tailored to each stage, but not coordinated across stages.
Recommended Maturity Level	4 (Optimized)	Marketing messages are tailored to each stage and coordinated across stages. However, teams are siloed.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Define the lifecycle by industry or organization. A basic lifecycle consists of awareness, acquisition, onboarding, engagement, and retention.
2. Define customer needs and moments that matter to customers at each stage of the lifecycle.
3. Develop a well-defined customer lifecycle, and use it to orchestrate messages across touchpoints.
4. Use analytics to place contacts, leads, prospects, or customers in a lifecycle stage.
5. Develop a set of tactics for each stage of the lifecycle that address customer needs and company goals. For example, assign lapsed customers a win-back campaign when they haven't opened or clicked an email in the past 6 months.
6. To orchestrate the correct messages and channels in each lifecycle stage, build automations and audience segmentation activities.
7. Implement a dynamic system that can move customers through the current lifecycle stages and into new stages.
8. Coordinate channels. Use personalization to engage customers at each stage of the lifecycle.
9. To create experiences that are lifecycle-driven, build customer capability.

JOURNEY DESIGN

Use a consistent approach to the design and development of customer journeys across all channels and stages of customer lifecycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Lifecycle stage or segment-specific journeys are defined and include 1–2 channels.
Recommended Maturity Level	4 (Optimized)	Individualized, personalized, and cross-channel journeys are defined and include almost all channels.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify marketing objectives, campaigns to support each objective, audience targeting requirements, data variables, and attributes needed. Map where and how to source this information. Use a journey design roadmap.
2. To identify customer lifecycle and moments that matter, hold a cross-functional workshop. Workshop journeys for four types of moments that matter. For each journey, define a goal, audience, data needs, content, and channels.
3. Identify the content based on two types. In-journey content is the delivered message that can be consumed without leaving the inbox or screen. Outside-journey content includes the resources that the customer navigates to with a click or tap, such as web content.
4. Prioritize journeys based on evaluation criteria, and create a journey backlog.
5. Design a simple, single-channel journey to start. For example, a welcome email triggered by registration or conversion event.
6. Evolve journeys to multiple channels, connecting multiple journeys.
7. Incorporate experience design principles in journeys.

CROSS-SELL AND UPSELL

Prioritize, develop, manage, and measure customer cross-sell and upsell offers and journeys.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We coordinate targeted messaging across at least two channels to support cross-sell or upsell based on multiple criteria, such as the customer's segment, purchase history, and lifecycle stage.
Recommended Maturity Level	4 (Optimized)	We use individualized cross-channel journeys to cross-sell and upsell. Journeys have no real-time interaction management or next-best-offer AI.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Identify the right trigger point for cross-sell and upsell for your organization. Think beyond the standard scenario of recommending one product based on another. Use your insights to build cross-sell and upsell campaigns.
2. Use lifecycle and behavioral data to enter customers into personalized cross-sell and upsell journeys on the appropriate channels.
3. Use personalization to deliver the right message to customers.
4. Use AI to recommend correct cross-sell or upsell opportunities.
5. Identify the correct data points to use to activate cross-sell and upsell campaigns. For example, the expiration date of an insurance policy or a medication refill. Deliver messages through the correct channels based on past behavior
6. Apply the correct tactic to drive the highest conversion rates possible. Including user-generated content, expert recommendations, and discounts and promotions.
7. Use real-time interaction management to coordinate cross-sell and upsell messages with other eligible messages.

Service Capabilities to Deliver Intelligent Field Service

Connect disparate data to give your agents a complete view of the customer in a single console that includes purchase, service, contract, and billing history.

CASE MANAGEMENT APPROACH

Manage a service request through to resolution. Include the routing, assignment, ownership, tracing, and related interactions.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Cases are worked primarily through one system and on-screen UI. Extra systems and swivel-chairing still exist as needed.
Recommended Maturity Level	4 (Optimized)	Cases are worked through one cohesive system that intakes cases, sorts, and routes them into queues, and enables full case lifecycle tracking and assistance.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create and define queue priority, and align business and IT to the case routing process.
2. Define case record types and support processes.
3. Set up Email-to-Case and Web-to-Case.
4. Add an actions and recommendations Lightning component to the Lightning Service Console or other case record page layouts.
5. Set up a dashboard that surfaces a team's cases by status for a manager.
6. Set the organization that's aligned to actions associated with lifecycle stages.
7. Create escalation rule criteria, and sort rules from most complex to least complex.

8. Define business hours.
9. Define escalation actions. When a case escalates, you can send it to a different queue or user and send an email that notifies the case owner or others.
10. Create email templates that notify users when a case escalates, and include quick actions.
11. Set up macros to let service agents quickly respond to customers in a structured way.
12. Create email templates for case open, case close, and a case that escalates. Communication is key to ensuring a better customer satisfaction (CSAT) score.
13. Understand, track, and resolve customer service needs and questions that align with priorities and affect strategic business value.

CASE EXPERIENCE DESIGN

Provide customer and agent experiences to understand, track, and resolve issues.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	The user design team balances business needs and end-user needs. Fields are sorted and grouped to maximize user efficiency. Set up multiple case page layouts by case record type or user persona.
Recommended Maturity Level	5 (Optimized)	The design approach improves the entire case lifecycle process. A feedback process improves UI and UX.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Incorporate feedback from agents and pilot super users for new features.
2. Implement Salesforce Knowledge for reusing content for support so agents can understand, track, and resolve customer needs. Focus support methodology on knowledge.
3. Use case routing so the appropriate agent with interaction and lifecycle history handles any issues. Agents have access to the 360-degree view of the customer.
4. Design the data architecture to include From Service, Case, Work Order, Service Appointment, and other advanced considerations. Optimize data automation between use cases that transform maturity, and allow the organization to scale from simple to complex when evaluating the agent and customer experience.
5. Manage the internal apps for Service and Field Service so they're optimal for the persona and teams process. Make the case tab visible with defined case record types, queues, assignment rules, case classification, and automated processes.
6. Consider optimizations in the key performance indicators (KPIs) that showcase customer value and optimal customer entitlement data, product information, and case history. Drive supporting and routing considerations such as a Service Contract with a service-level agreement (SLA).
7. From the customer perspective, ensure capabilities across the customer lifecycle and journey. Ask yourself, from the customer perspective, if each handoff in Service includes the following.
   a. **Personalized:** "Know who I am."
   b. **Accessible:** "Let me get help, my way."

c. **Seamless:** "Agents need smoother handoffs."
d. **Transparent:** "Keep me informed."
e. **Effective:** "Empower agents to be effective quickly."
f. **Smart:** "Be proactive, and learn to be better."
g. **Collaborative:** "I want insight from others."
h. **Empowering:** "Enable me to help myself."

CASE COLLABORATION

Allow service agents to work cross-functionally and communicate in real time to address customer needs and resolve service requests.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Multiple stakeholders can collaborate on the same service request. Agents are trained to @mention relevant personnel to assist on service requests.
Recommended Maturity Level	4 (Optimized)	We use feedback to enhance knowledge management. We implemented cross-service sharing and collaboration.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create public chatter groups for each entitlement level that allows reps to ask their colleagues questions.
2. Create chatter groups for each service team.
3. Create reports and dashboards for service leadership to monitor chatter adoption.
4. Encourage service leadership to use chatter.
5. Use Quip for service, and connect Quip to Salesforce. Add Quip as a tab on the case record so agents can collaborate in real time on documents.

SKILLS MANAGEMENT

Train agents as new products and services are introduced.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Capturing and maintaining agent skills is a priority across our organization. Agents are trained to take cases that are flagged as matching their skills.

Type	Level	Description
Recommended Maturity Level	4 (Optimized)	Most cases are assigned to agents based on their associated skills or expertise, but some cases must be reassigned.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align to a skills matrix for each service agent group.
2. Outline which skills are needed for each tier, product, and service.
3. Require training and certifications for each service tier.
4. Allow Omni-Channel to route cases to agents or queues with the right skills within a defined queue.

SCHEDULING AND WORKFORCE OPTIMIZATION APPROACH

Balance customer satisfaction, service levels, workforce scheduling, operational costs, and other key performance metrics to maximize employees' time.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	A proper scheduling system is in place. After the schedule is in place, changes must be performed manually.
Recommended Maturity Level	4 (Optimized)	All work is managed in the scheduling system. Changes are automatically managed within the system. The change type is agnostic, and all changes automatically create a schedule for agents.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. To understand their current process and deliverables to service operations, engage with the workforce management (WFM) team.
2. Review the current scheduling process and outputs such as agent schedule.
3. Understand calculations that determine how many agents are needed, based on:
   a. Service level and speed of answer (80/20 or 80/30)
   b. Productivity and how it's calculated (occupancy and utilization)
   c. The cost to service compromise
   d. Erlang calculations used for staffing needs
   e. The relationship between contact center, skill group size, and efficiency
4. Determine usage of the Erlang Calculator tool for scheduling. What is the number of calls expected over a time period, for example, per half hour? What's the average Handling Time (AHT)? What is the service level, target answer time, maximum

occupancy, and shrinkage? The calculator uses these details to calculate the number of advisors required to handle the expected call volumes over the reporting period. The calculator gives exact figures for service level and occupancy to account for decimal point numbers.

5. Review real-time reports generated for adherence and variations.
6. Understand operations team processes for managing real-time spikes, service level adherence, and performance management.
7. Assess data about following causes for unexpected spikes in contact volumes at the organizations.
8. Assess how to manage attendance and adherence to schedules.
9. Understand reaction strategy, including any service disruption strategy in place.
10. Schedule a business continuity plan (BCP) review. The likelihood of these disasters varies according to location. Ensure that the BCP is an all-encompassing document that identifies any type of disaster, the impact of that disaster, and the recovery procedures.

SELF SERVICE ADOPTION

Monitor engagement for customers to use virtual self-service. Allow customers to resolve self-service requests. Let agents and customers engage digitally across business channels.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Customers are aware of the self-service option and often go to this channel first to resolve issues.
Recommended Maturity Level	4 (Optimized)	Guided actions are available for customers to resolve their issues. KPIs are measured and used to inform actions around customer usage and trends.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Formalize your business process, and carry it through to the portal. For example, give agents access to the same FAQs as your customers.
2. Identify your self-service users, and define the member experience.
3. Create solutions that answer commonly asked questions.
4. Determine the information your users need when answering their own questions and logging cases.
5. Decide how to notify your users about the Self-Service portal.

SELF SERVICE APPROACH

Provide customers with a direct contextual channel for issue resolution, profile management, and cross-sell and upsell. Publish formal knowledge. Moderate and nurture crowdsourced knowledge from the community to let customers, resolve issues, and deflect the direct cost of service.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Customers interact with a chatbot via website, community, or interactive voice response (IVR) virtual guide solution to resolve easy questions or help direct requests to the right agent.
Recommended Maturity Level	5 (Leading)	Most issues are solved via self-service, freeing up customer representatives to solve more complex issues and add value in other ways.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Deploy Omni-Channel programs and self-service that support.
   a. Knowledge Management
   b. Surveys, Loyalty, and Net Promoter Score (NPS)
   c. Case Management and Escalation Paths
   d. Call deflection, chatbots, and self-connected resources
2. Analyze current agent issues, and identify issues the bot can resolve. Examples include password reset requests, order status, and routine questions like store locations and hours.
3. Develop a set of knowledge articles to support the questions for your customers via direct channels.

SELF SERVICE REQUEST TYPES

Allow customers to circumvent agent interaction by providing a direct, contextual channel. Offer issue resolution, profile management, learning, buying, service, and community questions and answers.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Customers work more complex service requests through the self-service channel. We surface recommended knowledge articles based key service request characteristics.
Recommended Maturity Level	5 (Leading)	Customers work complex requests through multiple self-service channels. Analyze KPI trends to identify more use cases for self-service to reduce volume on other channels. Most requests are deflected with the use of AI and chatbots.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Ensure that actions reflect the desired customer perception of your company values by selecting and enabling customers with the right capabilities.

2. Consider policies in areas such as customer claims management and return material authorizations (RMAs), channel partner claims management, corrective action and preventive action (CAPA) root cause analysis, and supplier recovery.

Sales Capabilities to Deliver Intelligent Sales

Take advantage of cross-selling and upselling when servicing customers in the field. Optimize capabilities with foundational knowledge of the data structures.

CHANNEL STRATEGY APPROACH

Develop a customer retention and support strategy for channels. Enable your customer channels to engage with you in the method they choose. Channel Strategy allows the organization to connect products and services to your customers. Optimize channels for mobile use with the intent to provide a flexible Omni-Channel experience on any device from anywhere.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Agent visibility is integrated across channels. A strategy is in place to meet customer expectations.
Recommended Maturity Level	4 (Optimized)	Cross-channel support exists, allowing agents to begin an interaction in one channel and continue it in another.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Provide the right tools that support infrastructure and content to enable sellers and drive the sales process.
2. Use chatbots to upsell and cross-sell.
3. Measure and review channel performance regularly. Forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics. Use the results to identify areas of underperformance and overperformance.
4. Ensure that sales leaders and sales teams have a 360-degree view of the customer, including interactions on all sales channels.
5. To identify where to deploy chat, define customer touchpoints and navigation.
6. Determine clear use cases, case types, and support teams ideal for chat support.
7. Assess the need for more training for agents, including chat etiquette.
8. To capture customer data and exception handling, standardize a process.
9. Create plans that manage volume increases.
10. Develop quality assurance, monitoring, and feedback loops for customers.
11. Clear key performance indicators (KPIs) for chat cases that focus on quality and customer experience.
12. Optimize the experience using automation, such as canned responses.
13. Adjust routing and skills assignments of teams.
14. Balance capacity management across channels.

VIRTUALLY LEAD THROUGH CHANGE

Develop a strategy for channels, including awareness, customer retention, and support. Enable your customer channels to engage with you in the method that they choose. Allow channel strategy to connect products and services to your customers. Use channels that are optimized for mobile use with the intent to provide a flexible Omni-Channel experience on any device from anywhere.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Optimized)	Sales, Service, and Marketing are championing and successfully implementing channels as needed.
Recommended Maturity Level	3 (Leading)	This process elevates the intent of virtual selling from an afterthought to an essential. Create motions designed to meet the new needs of each customer from Prospect to Retention. Create loyalty strategies across the customer experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Elevate virtual selling to become a primary lens that develops the go-to-market strategy.
2. Find cross-functional company goals. To support the customer buying journey, develop virtual selling competencies.
3. Measure and review channel performance in the assisted digital engagements.
4. Forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics regularly by channel. Include Service and Sales Channel engagements.
5. Measure and review channel performance. Forecast, measure, and analyze sales, cost-to-serve, and satisfaction metrics regularly by channel, product, and customer. Use the results to identify areas of underperformance and overperformance.
6. Ensure that sales leaders and sales teams have a 360-degree view of the customer, including interactions on all sales channels.
7. To identify where to deploy chats, define customer touchpoints and navigation.
8. Develop clear use cases, case types, and support teams ideal for chat support.
9. Assess the need for more training for agents, including chat etiquette.
10. Standardize a process that captures customer data and exception handling.
11. Manage volume increases.
12. Establish quality assurance, monitoring, and feedback loops for customers.
13. Clear KPIs for chat cases that are focused on quality and customer experience.
14. Optimize the experience using automation, such as canned responses.
15. Adjust routing and skills assignments of teams.
16. Balance capacity management across channels.

PIPELINE STRATEGY AND PROGRAMS

Use data to analyze pipeline generation, the open pipeline, and pipeline conversion, and to generate pipelines for specific products and services.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A pipeline programs team drives pipeline by product and service.
Recommended Maturity Level	5 (Leading)	Sales leaders and managers use AI to tailor pipeline insights.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Create programs for cross-channel alignment that incorporate the organization's approach to key business use cases.
   a. Compensation management
   b. Training and enablement
   c. Sales content engagement platform
   d. Partner performance and score-carding
   e. Partner onboarding, training, and certification
   f. Partner marketing programs
   g. Partner collaboration
   h. Rebates, incentives, and promotions
   i. Channel loyalty
2. To ensure effective pipeline strategy and programs, establish the right culture and organizational alignment. Consider your level of ambition, maturity of channel processes, clarity of value, and strength of use cases.
3. Align on roles and responsibilities within the pipeline process. Assign specific resources to each role.
4. Establish a consistent pipeline strategy process with pipeline stages. To move from stage to stage, establish entry and exit criteria.
5. Provide supporting product and service documentation to engage or educate the seller as needed.
6. Create a set of parameters that tell teams the quality of pipeline generation that has been qualified.
7. Define a metric that tells teams how much pipeline generation is required to hit targets based on historical trends.
8. Establish a consistent process that assigns a score in the pipeline for prioritization.
9. Establish a process that guides a seller on how to work the pipeline when it's assigned.
10. Align on leading and lagging indicators by which to measure the success of the pipeline strategy process.
11. Create seller and leader dashboards and reports that help the sales organization run its daily business.

ACCOUNT AND CONTACT MANAGEMENT APPROACH

Use this process to establish roles and responsibilities. Create, augment, govern, and manage accounts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	A multifaceted view of the customer exists in a single system, allowing account teams to collaborate because they have a complete view of the company's relationship with the customer.
Recommended Maturity Level	5 (Leading)	Sales leaders use advanced analytics like customer lifetime value and customer satisfaction to identify the highest performing accounts. It's easy to view and use practices such as telling techniques and similar opportunities within the account.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Align on the roles within the account and contact management process, and assign specific resources to those roles.
2. Align on expectations by role for the account and contact management process.
3. To encourage collaboration, establish account teams.
4. Institute a beginner's mindset to support a culture of agile learning. Be open to increased digital to human engagement.
5. Focus on big-picture and long-term learning instead of short-term and single instances of accuracies or inaccuracies.
6. Establish a methodology for closing the gap between commit and quota.

LEAD MANAGEMENT APPROACH

Use these capabilities and best practices to generate, score, prioritize, and qualify new potential business.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	Strong alignment between marketing and sales results in high lead conversion rates.
Recommended Maturity Level	5 (Leading)	Artificial intelligence is used to drive lead management and create an optimized seller and buyer experience.

Best Practices

To increase your business maturity for the capability, implement these recommendations.

1. Leads are created and assigned to the appropriate person, allowing the average time to opportunity creation to decrease.
2. To ensure effective lead management, establish the right culture.
3. Establish a consistent lead management approach for lead entry, qualification, lead assignment approach, sales working leads, and lead conversion.
4. Establish a consistent lead content approach.
5. Align on leading and lagging indicators to measure the success of the lead management process.
6. Align on detailed reports and dashboards to measure the success of the lead management process.

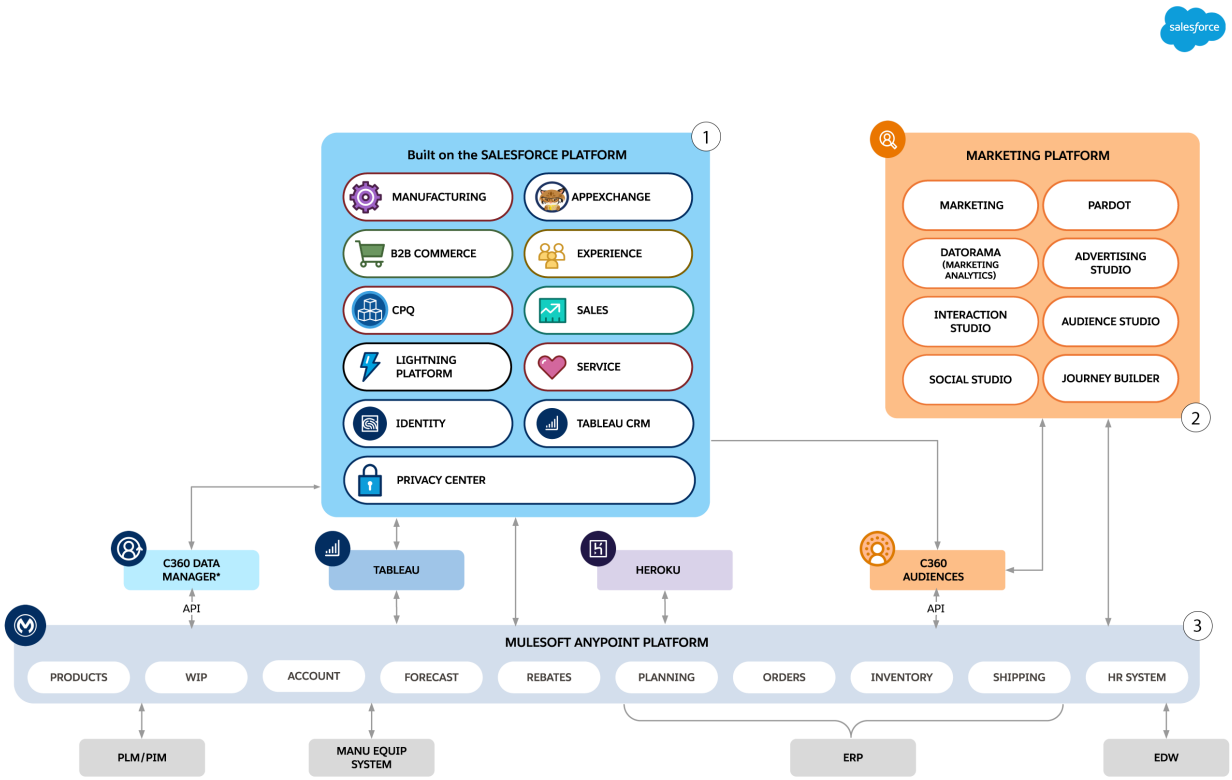
7. Determine security and access for leads, reports, dashboards, and other assets.

Solution Architecture for Discrete Manufacturing

Identify specific tools and resources that deliver comprehensive automation solutions for your discrete manufacturing business.

Solution architecture diagrams show you how recommended products interoperate with backend systems and how data is passed between them. Learn with Trailhead.

B2B Solution Architecture with Key Salesforce Clouds



The Salesforce B2B architecture runs on two highly scalable and interoperable platforms: Salesforce and Marketing.

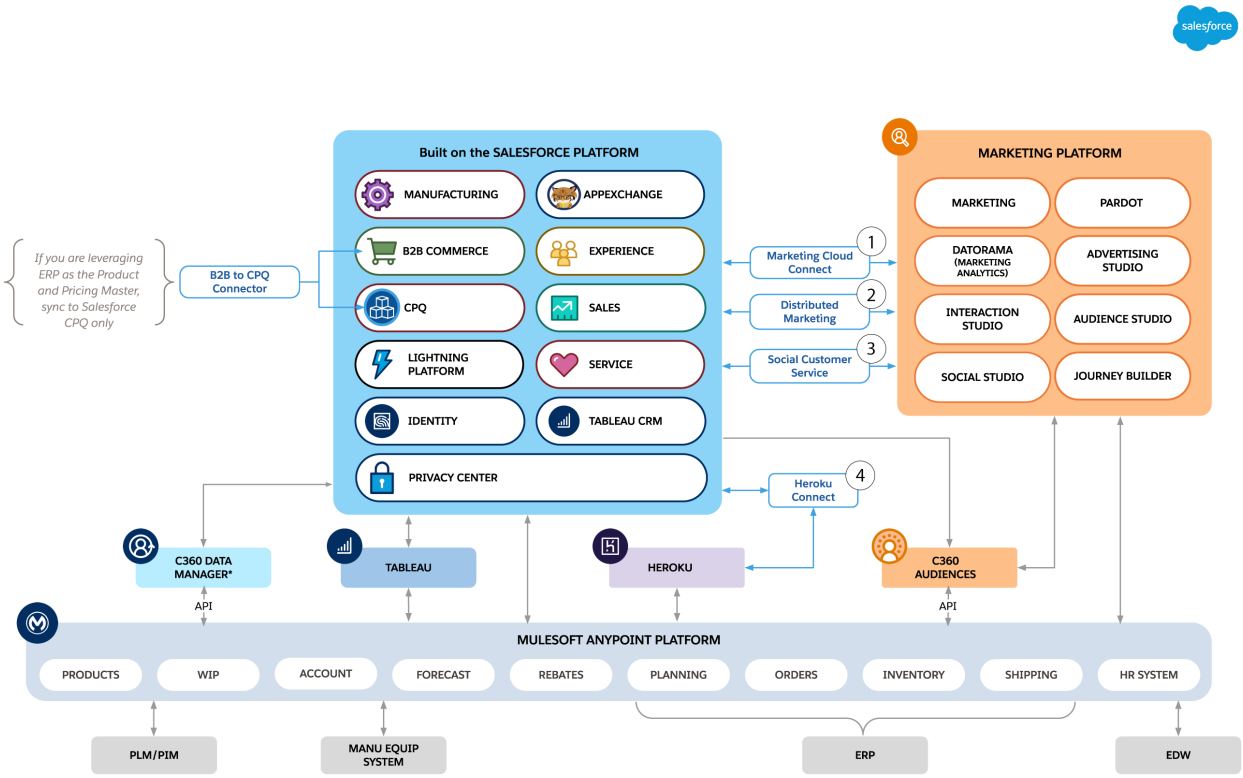
- Products built on the Salesforce Platform (1) include Sales, Service, CPQ, B2B Commerce, Manufacturing, and Experience. They all run on the same logical platform and share a common interoperable data model.
  - APIs enable integration with other Salesforce and non-Salesforce platforms.
  - The Salesforce Platform can be used for customer and consent management, or it can integrate with a third-party Master Data Management system.
- Marketing Platform (2) is a grouping of Marketing Automation products designed for interoperability.
  - Datorama organizes deep marketing analytics.
  - Interaction Studio provides real-time interaction management, personalization, and AI driven recommendations.
  - Social Studio includes social monitoring and interaction.

  - Marketing Cloud Account Engagement (Pardot) offers powerful marketing automation to help marketing and sales teams find and nurture the best leads, close more deals, and maximize ROI.
  - Advertising Studio enables you to use your first-party data to shape and guide your advertising.
  - Audience Studio helps companies offer their customer a personalized advertising and media experience based on segmentation and audience insights.
  - Journey Builder delivers cross-channel personalized experiences at every step of the customer lifecycle with campaign management.
- MuleSoft Anypoint Platform (3) provides API management and system-to-system integration.
  - MuleSoft can integrate third-party systems such as Enterprise Resource Planning (ERP), Product Information Management (PIM), and Enterprise Data Warehouse (EDW) with Salesforce.
- Tableau provides business intelligence analytics independent of data source.

Connectors enable the connectivity that allows cross-cloud actions required to support sophisticated use cases such as handling abandoned carts and personalized marketing recommendations.

B2B Solution Architecture with Salesforce Connectors

Connectors are point-to-point connections provided by Salesforce that accelerate implementations across applications and cloud platforms.



Marketing Cloud Connect (1) connects Marketing platform products with Sales and Service Cloud products. The connector allows data to sync between clouds. It also allows Marketing Cloud products to trigger events such as emails and journeys based on Sales and Service Cloud data.

- Automatically sync data from Sales or Service Cloud to Marketing Cloud.
- Connect Journey Builder to other clouds.
- Use Sales and Service Cloud data to construct email.
- Provide Marketing Cloud email tracking data such to Sales and Service Cloud products.

Distributed Marketing (2) allows users in Sales and Service Clouds to view, personalize, and send on-brand, best practice content through Marketing Cloud.

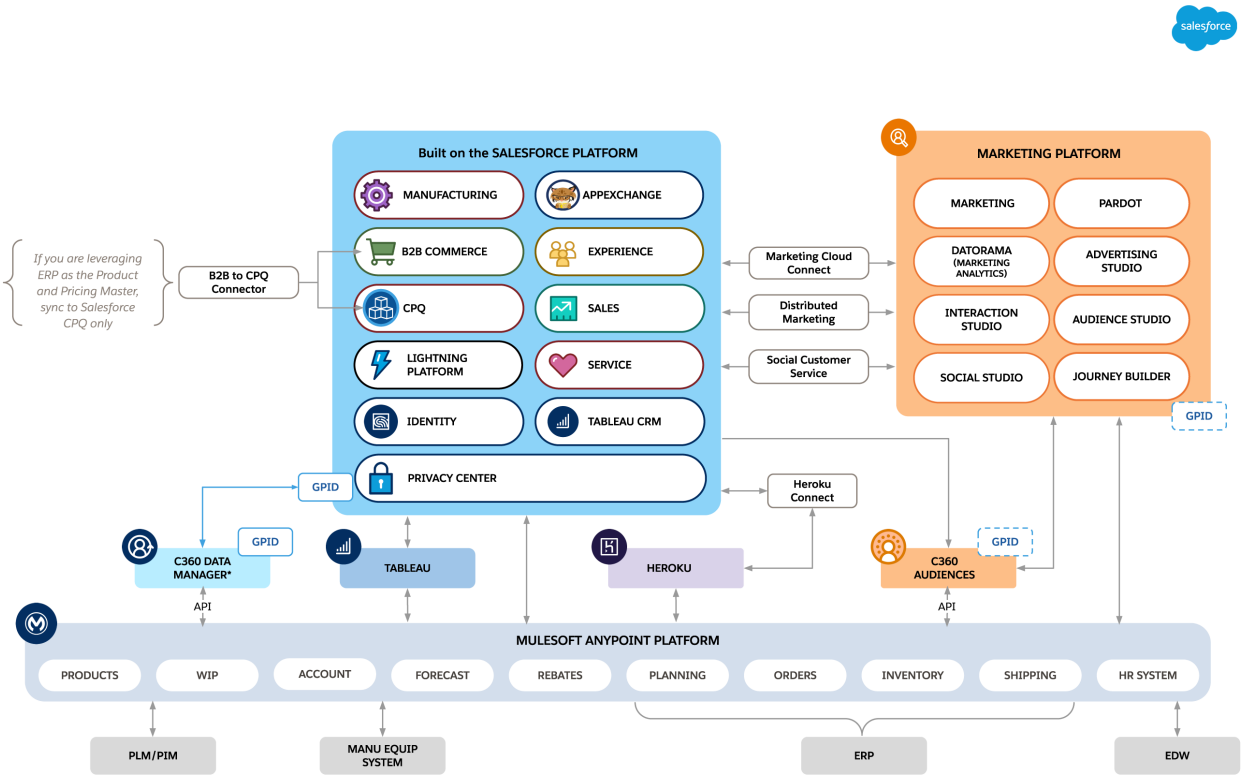
- Use data stored in contact, lead, or person account records to address emails.
- Craft email to a segment of customers based on a list view.
- Send email about a campaign to a group of customers based on a touchpoint cadence managed by Marketing Cloud.

Social Customer Service (3) turns social network posts into case or lead records.

Heroku Connect (4) syncs data between the Heroku app platform and the core platform.

- Create a data lake.
- Build, deploy, and monitor other highly scalable customer-facing mobile and web applications.

B2B Solution Architecture with Global Party ID (GPID)



Customer 360 Data Manager identifies the same customer across different systems using rules that you define to combine the data into a single Global Profile and Global Party ID (GPID). Unlike a Connector, Data Manager doesn't provide mechanisms for activating functionality in integrated systems.

Various key use cases can be implemented by using Connectors and Customer 360 Data Manager together.

Use Cases Initiated from Core

- Explore Cross-Cloud Engagement Data Models
- Distributed Marketing
- Enable Sales to engage Customer with Marketing Campaigns

Use Cases Initiated from CPQ to Commerce

- Synchronize Product and Pricing Data
- Link Cart to Quote
- Link Cart to Cash

Use Cases Initiated from Marketing

- Turn Social Media Posts into Leads and Cases
- Run Conversational Campaigns with WhatsApp
- Run Conversational Campaigns with SMS

SEE ALSO:

Salesforce Architectural Diagrams: Quick Look

Explore Solution Kits for B2B and Discrete Manufacturing

Enhance your cross-cloud business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

Related Content

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Synchronize Product and Pricing Data Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.	View Now on page 99	Download PDF
Link Cart to Quote Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.	View Now on page 91	Download PDF
Link Cart to Cash Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.	View Now on page 81	Download PDF
Streamline Mass Reorders	View Now on page 109	Download PDF

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Provide a seamless reorder experience using the negotiated Sales Agreement object in an industry cloud, such as Consumer Goods Cloud or Manufacturing Cloud.		
Take on B2B and B2C Marketing with Account Engagement and Journey Builder Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multi-channel messaging, journeys, and transactional messaging.	View Now on page 116	Download PDF

SEE ALSO:

Salesforce Solution Kits: Quick Look

Link Cart to Cash

Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

This solution kit helps you:

- Use a connector to synchronize transactions from cart to cash with minimal development.
- Connect data flows for billing and order orchestration.
- Collect transaction data across clouds to improve retention.
- Empower marketing, sales, and support teams by improving subscription payments and processing.

Required Products

- B2B Commerce Cloud
- Salesforce CPQ
- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud

- B2B Commerce and CPQ Connector

Implement This Solution

Workflow
Learn how data flows through the configurations to link cart to cash.

Design Considerations
For the best outcomes, keep these design considerations in mind. Links and other resources help you link cart to cash.

Connector
Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to link cart to cash.

Configurations
Use these configurations to link cart to cash.

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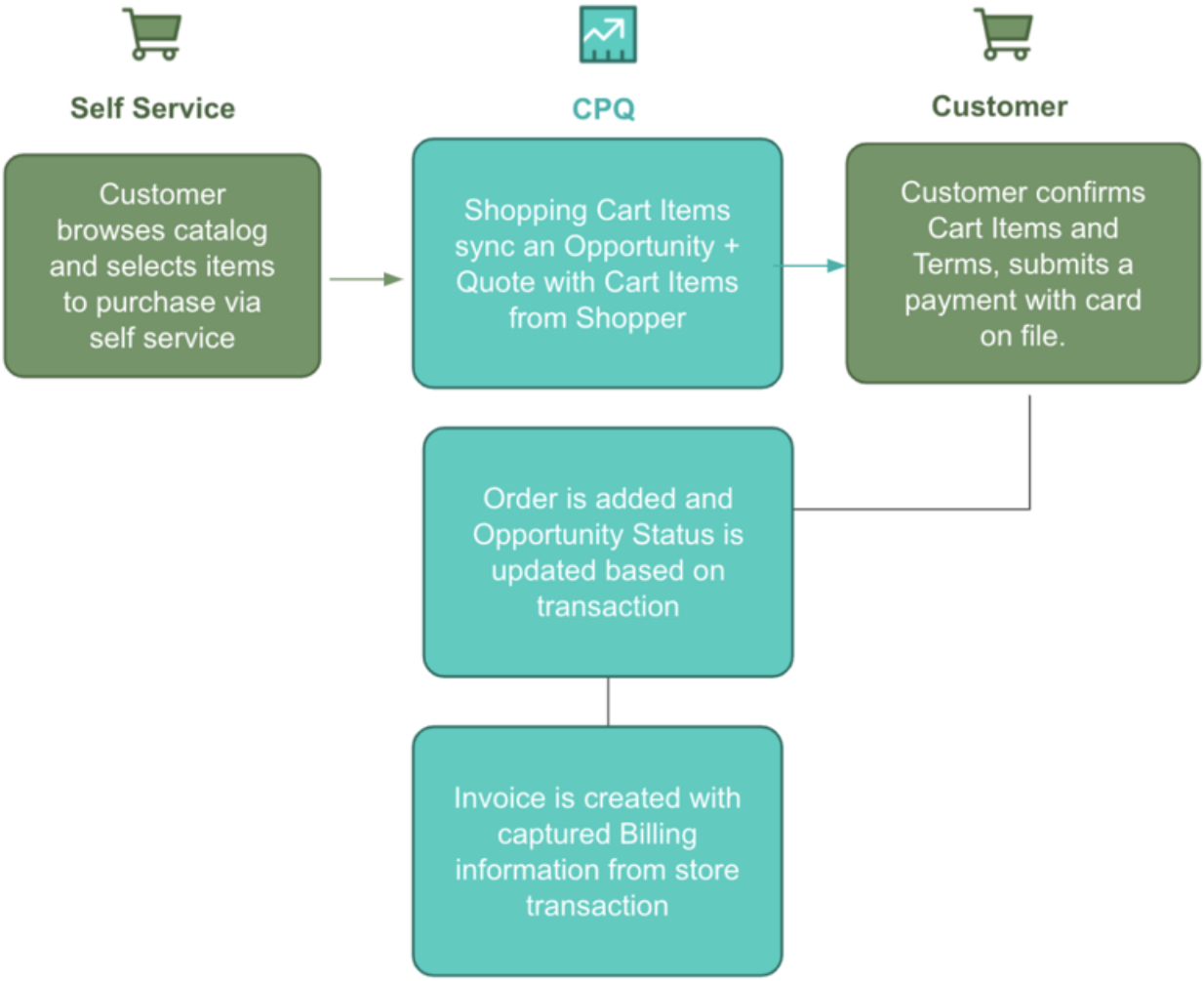
Workflow



Related Content

Take the next steps in this implementation.

- Design Considerations
- Connector
- Configurations

Design Considerations

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Best Practices

Invoice Integration Between B2B and Billing

- We recommend that you directly surface the billing invoices in the B2B Storefront, rather than synchronize the invoices between B2B Invoice and Billing Invoice objects.
- Use a custom component that surfaces the invoices and payments directly from Salesforce Billing to the B2B storefront.

Billing-Related Data Capture at Sign Up or Check Out

- Frequency, Method
- Billing contact info
- All subscription (terms, length, and so on) at sign up or check out

Invoice Integration Between B2B and Billing

Use the B2B Commerce data model flow "CC Invoice" and "CC Payment" objects to capture the Invoice and Payment details.

Salesforce Billing Fields

We recommend that you don't synchronize the "CC Invoice" and "CC Payment" objects with "Invoice" and "Payment" objects in Salesforce Billing.

Key Considerations

Cybersource Marketplace Template

If you're using the Cybersource marketplace template available on the out-of-box B2B storefront, set the "Auth and Capture" value to "False".

Storefront Guest User Access Orders

If the storefront allows unregistered users to check out, add the necessary Apex class permissions to your community's guest user profile.

Performance and Scalability Considerations

ERP Integrations

- This model lets the user extend functionality to an ERP or any backend system for enhanced revenue recognition or fulfillment.
- When activated, the Order object is the trigger point when sending any order information to an external system. It's also the entry point back when updating any fulfillment-level details.
- Implement the Order-to-Cash (OTC) integration between Salesforce Billing and the underlying ERP. It's the single source of truth for orders, invoices, and electronic payments regardless of whether it originated in B2B or CPQ.
- Integrating OTC with B2B isn't necessary.

Tax Integration

If using an external tax engine like Avalara, Vertex, or Sabrix, integrate B2B and Billing with the tax engine to avoid any discrepancies.

Pricing

Whether the order amounts come from a B2B (self-service) or CPQ (sales rep) transaction, ensure that the orders match.

- We recommend that you set the rounding precision to two decimal places. This precision must be the same in both B2B and CPQ.
- A self-service B2B order automatically creates CPQ Orders. The net price from the B2B Order publishes and discounts as the "Special Price" and "Net Price" on the CPQ Quote Lines.

Ensure that any price rules in CPQ ignore the B2B system-generated quotes as part of the self-service flow. Track it by adding a custom attribute on the Quoting object. For example, "Quote_Source__c" B2B. Check for this value in all Price Rules or Quote Calculator Plugin (QCP) customizations.

Billing and Charge Types

Set up the Billing and Charge types to have the same values between B2B and CPQ for any supported products that use these cross-cloud scenarios.

See Also

- CPQ | B2B Connector Setup and Implementation Guide
- B2B Commerce Data Model
- Salesforce Billing Hosted Payment Page
- CyberSource for B2B Commerce
- Salesforce Order Data Model

Related Content

Review earlier steps in this solution.

- Workflow

Take the next steps in this implementation.

- Connector
- Configurations

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to link cart to cash.

The CPQ B2B Commerce Cloud Connector is an unmanaged package from Salesforce Labs. It allows B2B Commerce and CPQ customers to configure or customize functionality. Sync products, pricing, quote requests, and orders in both clouds.

Use one data model, pricing engine, and a unified process built around customer engagement from CPQ. Create Omni-Channel customer-driven experiences.

The connector supports the following use cases:

1. Synchronize Product and Price Data
2. Convert Cart to Order
3. Request for a Quote
4. Buy Again with Synchronized Order History

General Connector Information

- Connectors are a developer enablement framework that accelerates cross-cloud integration. Connectors aren't a standalone product.
- Connectors support a core set of use cases and can be extended to support more customer-driven use cases.
- Connectors require customization and configuration in B2B Commerce and Salesforce CPQ.
- Plan your connector implementation with a data strategy and governance policy.

What Your Company Can Do with This Connector

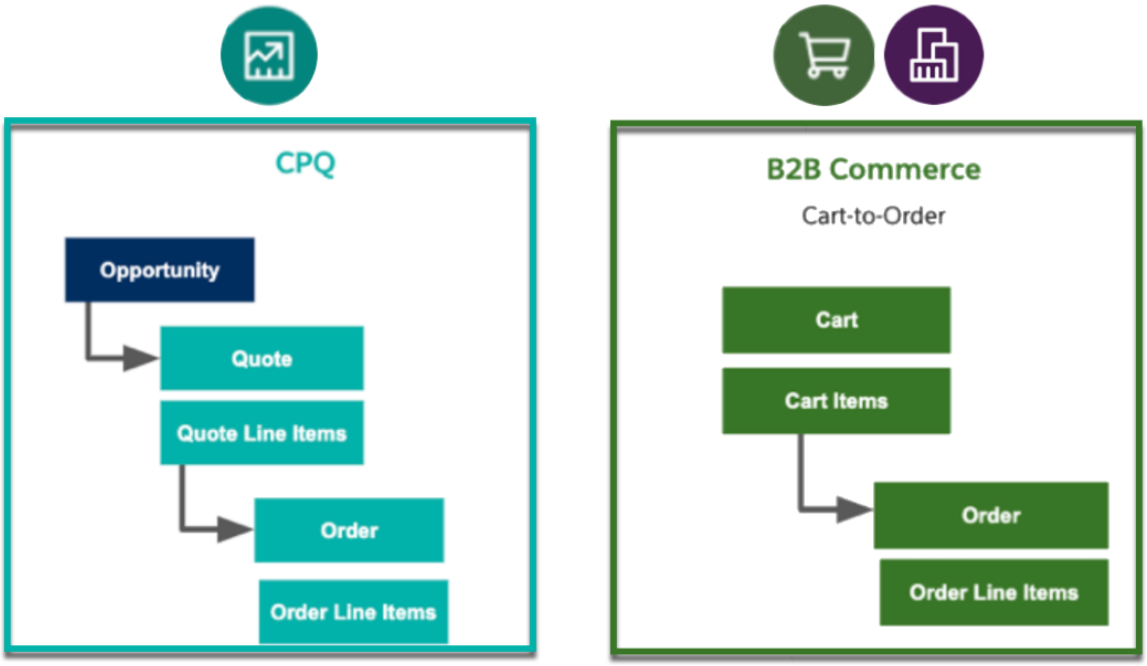
Each connection point supports a core set of use cases enabled individually through custom metadata configurations. These connections meet your specific business requirements. You can disable them as needed, such as for scheduled maintenance or data ETL activities.

- Product and Price book
- Cart and Quoting
- Orders and CC Order

Note: See the following visualized data flows. You reduce system complexity with a unified master data, shared data model, and single source of truth.

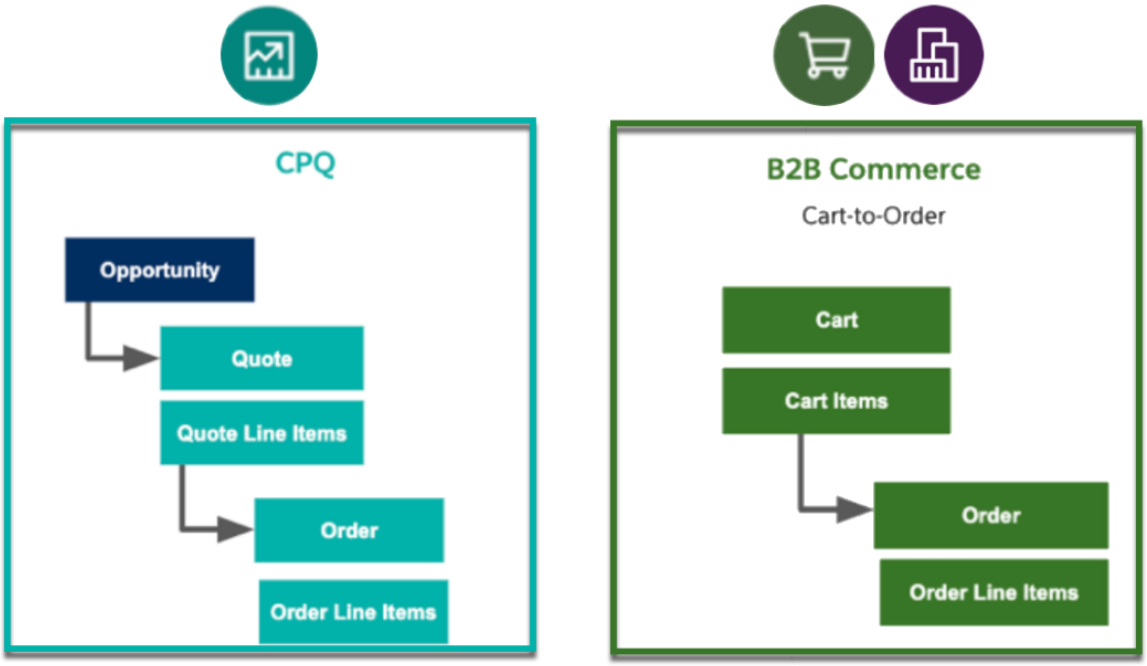
Connected Selling and Buying

Synchronize Quoting and Order History.



Connected Products and Pricing

Create CPQ Product and Price Data and Sync to B2B Commerce.



Note: The CPQ + B2B Connector supports a one-way sync for Product and Pricing logic.

Table 1: Data Synchronization

Data Sync	Approach
Products and Pricing	• Platform Events • Scheduled Batch Classes • Queue-able Framework
Transactional Carts, Quotes, and Orders	• Triggers • Future Methods

Factors to Consider

- Volume of data (product catalog and price lists)
- Frequency of changes in business process impacting Pricing or Product Data
- Integrated systems and other data flows.
- Scalability and performance

Considerations

Product and Pricing Assumptions

The Connector lets you sync Simple Products with a flat price.

Connector Guardrails

Unsupported Product Types

To support the following B2B products, make other customizations in the Connector sync:

- Aggregate Products
- Assembly Products

Unsupported Complex CPQ Product Bundles

Without other customizations, we don't recommend using complex CPQ Product Bundles with many Options and Constraints. They're not ideal for using with self-service or the Connector.

B2B Product Entitlements

The Product and Pricing Sync process doesn't automate the B2B Product Entitlements. Associate The "Account Groups" to the "Price Lists" after completing the Product and Pricing Sync in B2B Commerce.

Discounts and Promotions

We recommend that you manage discounts and promotions for B2B Commerce in B2B. Don't sync the information from CPQ.

Data Strategy

Connector Data Flow Strategy and Governance

Advanced product and pricing capabilities within CPQ aren't available inB2B. For example, Bundles and Rules.

ERP as the Product and Pricing Master

Don't directly integrate B2B Commerce with the ERP. The functionality supported in the Connector and the approaches listed here assume that CPQ is the publishing data source for B2B Commerce.

Product Index Synchronization

Synced Products in B2B appear only in a Storefront after refreshing the Product Index.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations

Take the next steps in this implementation.

- Configurations

Configurations

Use these configurations to link cart to cash.

Invoice and Payment Steps

Manage revenue with B2B Commerce and CPQ. This section contains definitions, followed by two strategies for adding business value to the user case and requirements.

Definitions:

Payment Gateways

Gateways are third-party software that provides connectivity to various payment processing networks, such as Visa and American Express. The Payment Method object provides a token that the Payment Gateway can use to process a payment.

Use a Payment Gateway for customer security, including:

- Cybersource
- Authorize.net
- Payeezy
- Salesforce Billing, which integrates with any payment gateway or API integration

Payment Transactions

These records of attempted payments store information such as Invoice, Payment Method, Gateway used and response, and reason for failure (if applicable).

Payment Schedulers

The Payment Scheduler automatically collects electronic payments for outstanding invoices.

You can configure Payment Scheduler to run once or schedule recurring payment runs.

Self-Service Payments

They allow the customer to pay their own invoices.

You can expose a Payment Terminal through an Experience Cloud site or use Lightning Platform to create public websites and applications that directly integrate with your Salesforce organization.

Strategy 1: Use Salesforce Billing Hosted Card Payment

Embed Salesforce Billing as an iFrame in the B2B Checkout flow for payment processing. Directly collect customer payments into Salesforce CPQ+. Salesforce Billing eliminates the need to integrate transactional data objects from the storefront data model to Salesforce.

Pros	Cons
Salesforce Billing directly captures payment details (tokenized credit card or electronic payment details). PCI compliance is better because there's no transfer of secure information like credit card details.	The payment page has limited styling options. Authorization and Settlement (Charge) happen in a single action with the out-of-box payment gateway connector for billing.

Salesforce Billing lets you manually collect and allocate payments or automate the payment process. You can then post the payment to keep your books up to date.

Apply and process CC and ACH payments through payment gateways and lockbox integrations. You can also apply manual payments.

Implementation Steps:

1. Enable the Billing HPP Component setting in Salesforce Billing.
2. Modify the component based on your org's payment and card-saving needs for the attributes.
3. There's no requirement for syncing payment details between B2B and Billing.
4. After the Payment Scheduler runs in Salesforce Billing, it processes the outstanding invoices with the selected payment method.

5. Payment Scheduler generates data for the "Payment" and "Payment Transaction" records.

Strategy 2: Use Default Storefront Gateway and Custom Integration

Use the out-of-the box Payment Gateway with Storefronts and custom integration. Connect to Salesforce Billing or external ERP. Use out-of-the box Commerce Storefront to process payment directly in Commerce Storefront. It uses a default Payment Gateway Connector option.

Pros	Cons
There are no changes to the out-of-box Payment Gateway connector or the checkout flow in B2B. Authorization and Settlement can happen as part of a separate transaction.	Storefront Gateway requires customization to sync the B2B Transaction Payment details to Billing.

Process Payment using the default Payment Gateway connectors in B2B. Sync the Electronic Payment transaction details to Salesforce Billing.

Prerequisites

- Configure Payment Gateway in Salesforce Billing.
- Enable Hosted Payment Page (HPP) for the Org by contacting Salesforce support.
- Clone the Permission set "Hosted Payment User", and enable it.
- Enable "Allow Payment Using Card Hosted Payment Component" for the Experience site users.
- Add Permissions to the Community user profile.

Implementation Approach

1. To design a Component that loads the HPP component, create the Lightning Component.
2. Publish the "ccrz__E_StoredPayment__c" and "ccrz__E_TransactionPayment__c" associated with the B2B Order to the Billing Payment Method "blng__PaymentMethod__c."
3. To publish Payment Method details to Billing, publish details from B2B to Salesforce Billing. Refer to sample code. Use a trigger on the "CC Stored Payment" or "CC Transaction Payment" records. Note: the code snippet is for guidance only.
4. The lightning component has the "transactionType" as "SavePaymentCard." It ensures a capture of payment details without immediate processing.
5. Create a Lightning component with "force:cardPayment."
6. Create a Lightning app with the extension "ltng:outApp."
7. Create the Visual Force page for payments. Refer to sample code.
8. Update CC Admin Config:
   a. Create a module from the CC Admin Storefront configuration setting, and select "Create Module."
   b. The checkout module includes a newly created module.
   c. Approve the Visual Force page in the Payment Module.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations
- Connector

Link Cart to Quote

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

This solution kit helps you:

- Integrate customer carts sent from B2B Commerce to CPQ for the Sales Rep to finalize and create complex quotes.
- Send quotes back to the cart for the customer to purchase or complete from CPQ.
- Reduce abandoned customer self-service transactions.

Required Products

- B2B Commerce Cloud
- Salesforce CPQ
- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud
- B2B Commerce and CPQ Connector

Implement This Solution

Workflow
Learn how data flows through the configurations to link cart to quote.

Design Considerations
For the best outcomes, keep these design considerations in mind. Links and other resources help you link carts to quotes.

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to link cart to quote.

Configurations

Use these configurations to link carts to quotes.

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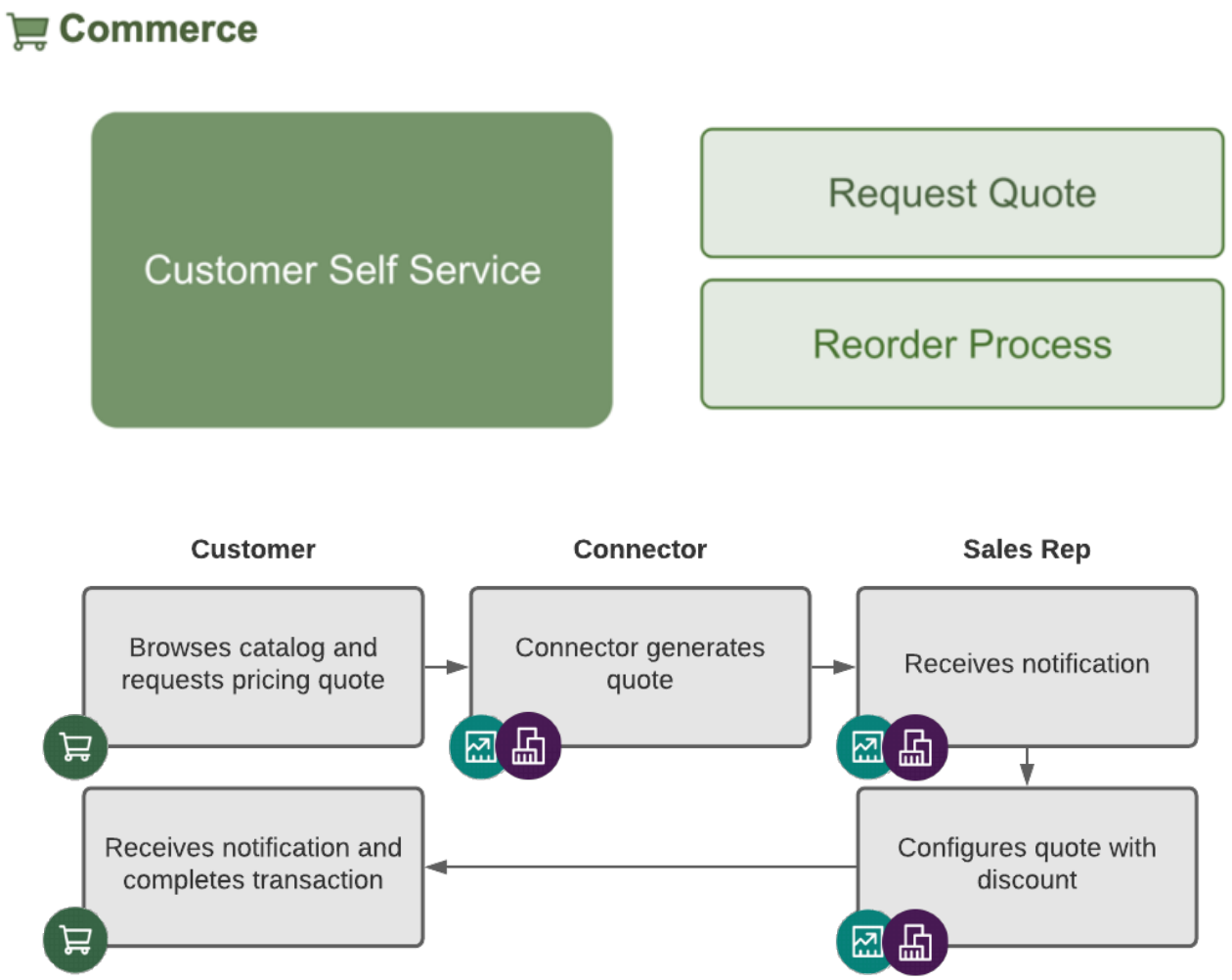

Related Content

Take the next steps in this implementation.

Design Considerations

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Configuring the Marketing Cloud Connector Data Feeds

Best Practices

Identify Scope, Requirements, Validate Alignment

Plan for your budget, timeline, and out-of-the-box options.

- Plan and gather alignment on your data strategy and connected cloud. Consider your timeline and budget.
- Define an MVP solution by preparing a crawl, walk, and run prioritization for storefront and CPQ requirements.
- To implement new functionality, assign ownership of work items to cross-functional teams.

Monitor error logs, and subscribe to reports.

- Assign ownership for bugs, and issue tracking with a SLA across system, functional, and business analysis to monitor error logs between tools.

Validate your data strategy when adding to user stories or a business process.

- Refer to the Product and Price Master Data flow and Design Considerations for ERP. This solution kit assumes that you use the Product CPQ Master approach.

Key Considerations

Data from the Connector

- Storefront and Connector Orders also create Opportunities.
- Carts that generate quotes and quotes that generate carts don't require an Opportunity record.

Cart-to-Quote Requests

- Request Quote runs at any time from the customer's cart or the "CC Order" creation." Either way, CPQ makes Quote then Quote Items data after the storefront makes a request.
- After Request a Quote initiation from an Order, CPQ data populates in the following order: Opportunity, Quote, Quote Line Items and Order, and Order Items.

Limitations and Guardrails

Transfer Orders to Storefront Cart

- When a sales rep transfers a quote to a cart in the customer's view, a custom Lightning Action on the Quote page supports this action.

Cart-to-Quote Behavior with CPQ Price Rules and Overrides

- Exclude Quotes created from the Cart for any "Pricing rules" or "Quote Calculator Plugin (QCP)" overrides. The price published from "Cart to Quote" drives price overrides.

Performance and Scalability Considerations

Notifications

- Configure transactional alerts through the Cart-to-Quote or Quote-to-Cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Marketing Cloud Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. Learn more about native notification options.

Monitor and Manage the Error Log

- Cart Order and Quote errors appear in the CPQB2B Log object.
- Create reports by setting up a Custom Report Type. Monitor performance and swarm issues that negatively affect the customer shopping experience.

Permissions and Security

- Record ownership from Connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates CC Cart and CC Order under the logged in Salesforce Experience site user context or the Anonymous User Context.

See Also

- CPQ | B2B Connector Setup and Implementation Guide
- B2B Commerce Data Model
- Service Agent Order on Behalf Flow

Related Content

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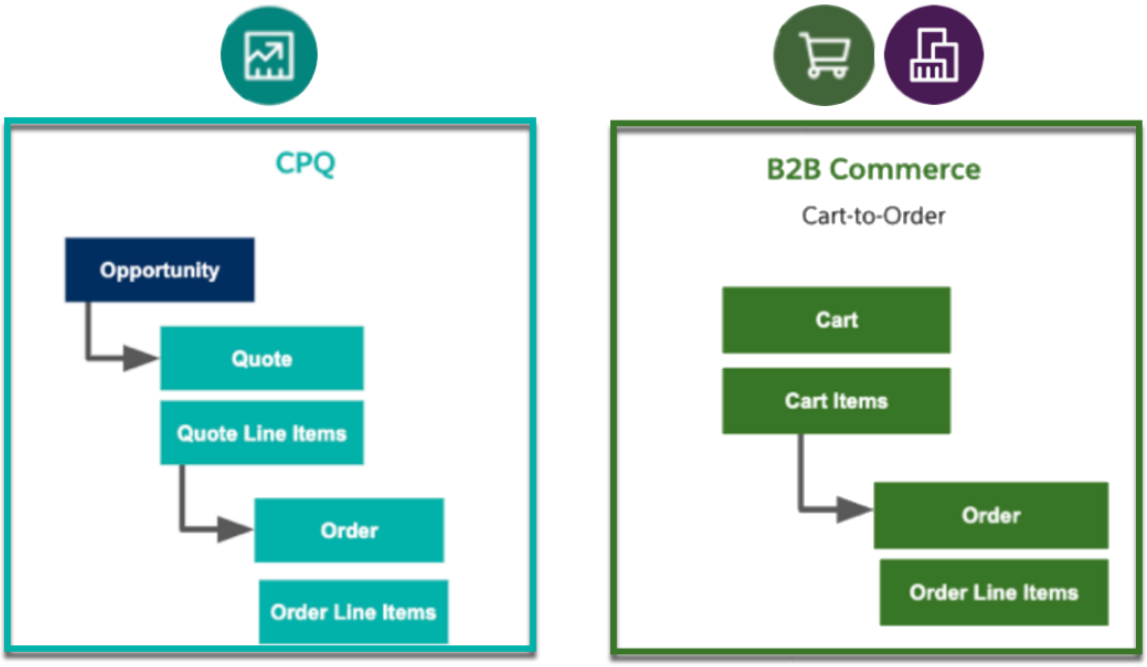

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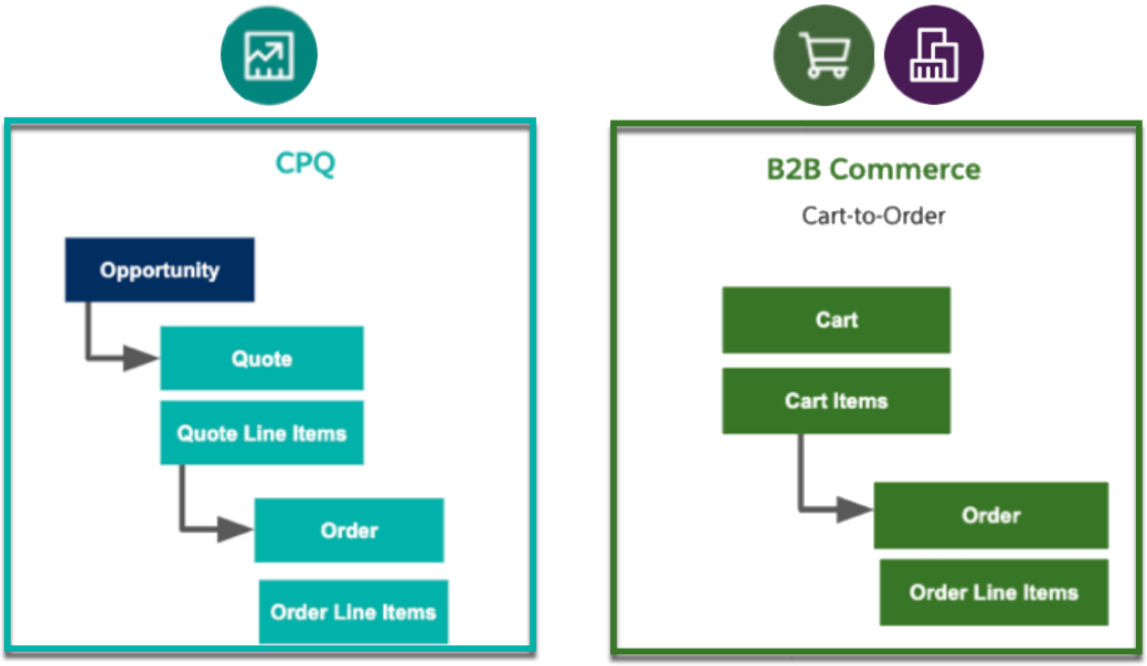

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- Assembly Products

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Connector Data Flow Strategy and Governance

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ERP as the Product and Pricing Master

Don't directly integrate B2B Commerce with the ERP. The functionality supported in the Connector and the approaches listed here assume that CPQ is the publishing data source for B2B Commerce.

Product Index Synchronization

Synced Products in B2B appear only in a Storefront after refreshing the Product Index.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations

Take the next steps in this implementation.

- Configurations

Configurations

Use these configurations to link carts to quotes.

Prerequisites

This configuration requires a permission set assignment to CPQ B2B Connector Admin and the CPQ and B2B Commerce Administration areas. The steps here assume that you completed the Product and Pricing setup.

Package Settings

Configuration Steps

1. Enable Request a Quote.
   - Implement a customer message modal from Storefront (Buttons and Confirmation Page).
   - To edit storefront screens in the customer interface, update the Modal Metadata. To modify messaging, update the Custom Label "CPQB2B_CartToQuote_Confirm_Msg."
2. Implement a custom interface and button (optional).
3. Add the B2B Source field to the Quote Page Layout.

   Ensure proper Field Level Security requirements and layout updates per audience.
4. Adjust the Request a Quote cart status.

   Modify the Cart Status attribute by updating the "Source_Value__c" from the CPQ_B2B_Mapping metadata record CartStatusFieldUpdate.
5. Enable order syncing from the storefront.
   - Optionally, review your approach for Orders. Enable custom metadata to allow self-service customer orders to flow from the storefront to CPQ orders.
   - CC Order creates a new standard order record using the CPQ Quote API when the "Sync to CPQ" checkbox is checked or set to "true".
6. Configure the CC Order field update.

   Update the CC Order field. Set the "Sync to CPQ" field to "true" to meet necessary business requirements in the Process Builder or Workflow Rule.
7. Update Opportunity fields via the connector.

   In Custom Metadata, set the Opportunity Stage Mapping to the appropriate connector value.
8. After the opportunity, quotes created using the Connector populate.

   Connector updates the "Ordered" checkbox on the Quote and sets it to Primary to sync the quote with Opportunity.
9. Quotes populate Order and Order Item records when set to"Ordered."

   Configure the mapped Order status from the custom metadata settings.
10. Update the order page layouts.

    Use "B2B_Source_Order__c".
11. The connector creates the Order and Order item

    Configure the mapped Order status from the custom metadata settings.

Note: Refer to the Implementation Guide for detailed instructions on Custom Metadata Mapping.

CPQ and B2B Commerce (CC objects) relationship fields:

CC Cart

- Opportunity__c
- Quote__c

CC Cart Item

- Product_Id__c (Use the formula data type to pull in “Product 2 Id” based on its mapping to “CC Product” on the Cart Item)

Opportunity

- CC_Cart__c

Quote

- CC_Cart__c
- CC_Order__c

Quote Line

- CC_CartItem__c

Order Item

- CC_CartItem__c

Quotes Metadata requires B2B Commerce Fields Sync:

Map values for Quote__r.CC_Cart__c, Quote__r.CC_Order__c on the Quote.

Update Quote__r.CC_Order__c on the Quote record when the CC_Order__c populates (if not created at the time of Quote creation).

Pricing on Quote Lines

Publish the pricing overrides on these fields on the “Quote Lines” when the Cart publishes Pricing details:

- SBQQ__SpecialPrice__c The Cart Item price publishes it after any discounts or coupons.
- SBQQ__SpecialPriceType__c Set the value as “Custom”.

Subscriptions

Populate the following fields in the Quote lines for or Subscription products based on the defined Subscription Product Term (SPT)

- SBQQ__ChargeType__c Set to “One-Time” for regular products and “Recurring” for Subscriptions.
- SBQQ__BillingFrequency__c Set to “One Time” for regular products and “Upfront”, “Monthly,” or “Annual” for Subscriptions.
- SBQQ__BillingType__c Set to “Advance” or “Arrears” for Subscriptions.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations
- Connector

Synchronize Product and Pricing Data

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

This solution kit helps you:

- Establish a connected, single source of truth for products and price data.
- Store all product data in CPQ and B2B Commerce.
- Maintain a separate product catalog between channels to sync any or all products needed.

Required Products

- B2B Commerce Cloud
- Salesforce CPQ
- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud
- B2B Commerce and CPQ Connector

Implement This Solution

Workflow
Learn how data flows through the configurations to synchronize product and pricing data.

Design Considerations
For the best outcomes, keep these design considerations in mind. Use the connector and other required products to synchronize product and pricing data

Connector
Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to synchronize product and pricing data.

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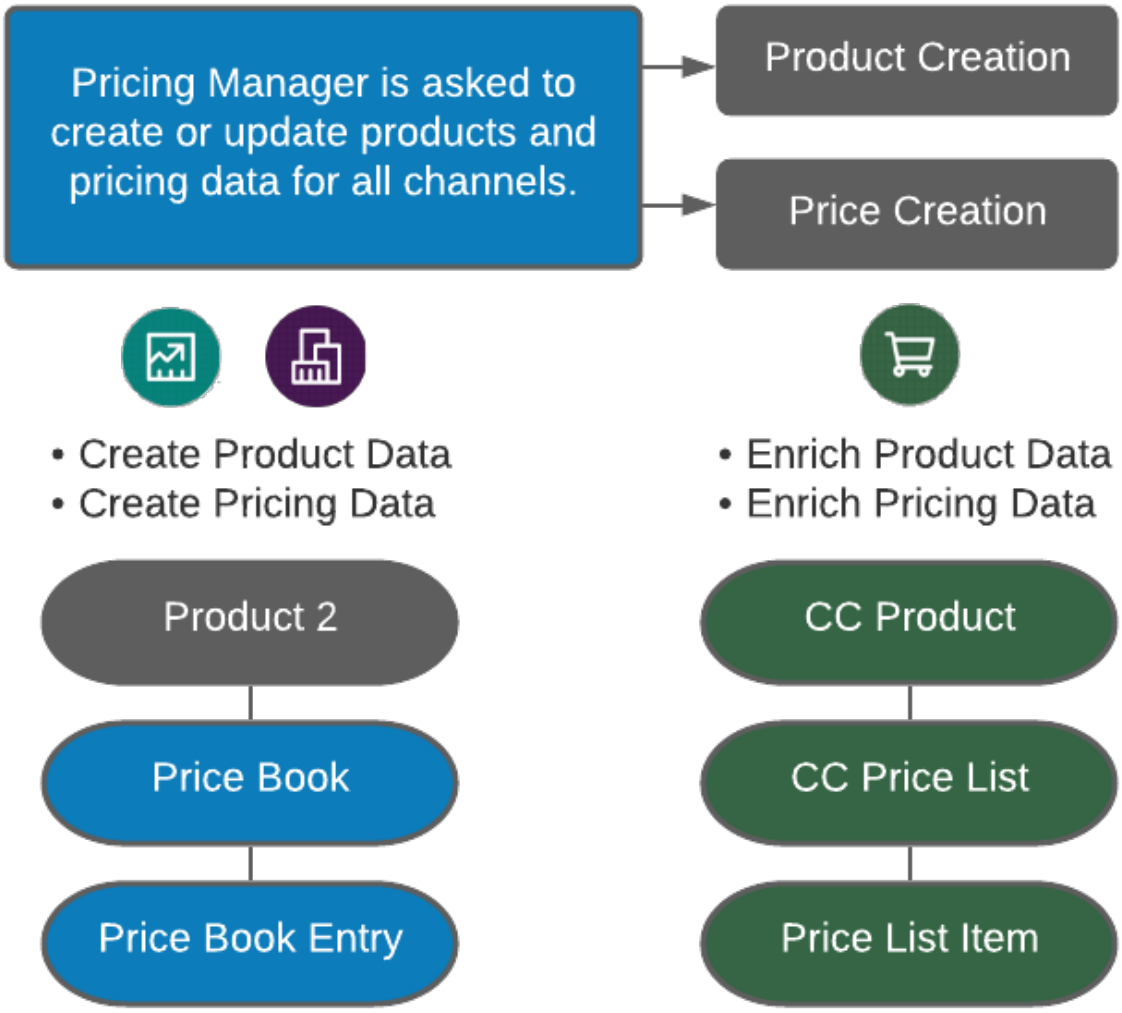


Note: We assume that the Pricing Manager is the CPQ Admin. This Admin is responsible for creating all product and pricing data. The B2B Admin enriches the data to meet the needs of the Commerce tool using Discounts, Promotions, and other features.

Related Content

Take the next steps in this implementation.

- Design Considerations
- Connector
- Configurations

Design Considerations

For the best outcomes, keep these design considerations in mind. Use the connector and other required products to synchronize product and pricing data

Avoid Duplicating All Data Between the B2B Commerce and CPQ Clouds

We recommend that you enrich B2B Commerce-specific metadata in B2B only. Don't replicate on the core Product2 object. Examples are B2B Product Categories, Product Images, and SEO-related information.

Test Data Strategy and Use a Partial or Full Sandbox

Test connector and data synchronization from a sandbox environment. Don't start by completing the process from a Production Instance.

Create Reports with a Custom Report Type for the CPQB2B Log Object

- Monitor performance and effectively swarm issues that affect the customer shopping experience.
- Monitor and manage the Error Logs and LastSync_Date__c field.

Database of Record (DBOR)

Make updates to the core metadata only in CPQ. The connector doesn't use a bi-directional sync between B2B Commerce and CPQ.

Follow the following sequence to update:

1. Update to CPQ standard objects.
2. Sync to CC objects.
3. Run product index in B2B. Ensure that all integrations, scheduled loads, and related actions follow the data flow sequence. Align data between CPQ and B2B, and share with external community users.

Product Index Monitoring

Manually refresh your index at any time. Schedule the Batch Apex Jobs to automatically run from the Apex Jobs Queue.

Key Considerations

Localization

The connector doesn't currently handle localization. To localize, customize the unmanaged package for the connector. It uses a storefront localization Product i18n object.

Multi-Currency Price books

For pricing, publish Currency ISO Code on the Commerce Price List data model, "CC Price Lists". It uses a Commerce Price List data model.

- Commerce uses one currency in the CC Price Lists mappings to support price books as multi-currency.
- This links CC Price List currency as items to accommodate a multi-currency path. For example, if a Price book has USD and CAD prices and links to a USD currency CC Price List, it syncs only USD prices. To sync the two prices, the user must create a second CC Price List with CAD currency.

Limitations and Guardrails

Business requirements rely on modifications to the code in the package.

Customize package and object configurations to support more CPQ functionality and CPQ Product Types:

- Contract Pricing Sync.
- Managing Kits, Dynamic Kits, and Product Bundles for CC Commerce.
- Managing Tier Pricing for CC Commerce Products.
- Supporting Percent of Total Products in CC Commerce.

- A payment integration or implementation is necessary and not included in the connector.
- B2B Commerce assumes that a certain level of information exists for order details. Customize the B2B order page or sync other shipping and payment information. The Connector doesn't sync them.

B2B Commerce to CPQ Connector currently syncs core product and pricing objects between CPQ and B2B. It doesn't support Contract Pricing sync, but you can extend them with customizations.

Contract Pricing

SBQQ__ContractedPrice	CC Price Group Account	CC Price Group
CC_LastSyncDate__c	SBQQ__Contracted_Price_Id__c	SBQQ__Contracted_Price_Id__c

SBQQ__ContractedPrice	CC Price Group Item	CC Price Group Pricelist
CC_LastSyncDate__c	SBQQ__Contracted_Price_Id__c	SBQQ__Contracted_Price_Id__c

Related Solution Kits cover key mapping fields for objects.

Performance and Scalability Considerations

- When the Product and Pricing sync completes, it enriches B2B Commerce-specific metadata like SEO and Product Categories in B2B Commerce.
- Data Syncing processes run regardless of CPQ and B2B permissions. It includes permissions added to users who modify metadata in Salesforce CPQ after the connector setup.
- Refer to the Implementation Guide Technical section for instructions on code modifications required to support the desired automation requirements.

Data Sync	Approach
Products and Pricing	• Platform Events • Scheduled Batch Classes • Queue-able Framework

Related Content

Review earlier steps in this solution.

- Workflow

Take the next steps in this implementation.

- Connector
- Configurations

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to synchronize product and pricing data.

The CPQ B2B Commerce Cloud Connector is an unmanaged package from Salesforce Labs. It allows B2B Commerce and CPQ customers to configure or customize functionality. Sync products, pricing, quote requests, and orders in both clouds.

Use one data model, pricing engine, and a unified process built around customer engagement from CPQ. Create omnichannel customer-driven experiences.

The connector supports the following use cases:

1. Synchronize Product and Price Data
2. Convert Cart to Order
3. Request for a Quote
4. Buy Again with Synchronized Order History

General Connector Information

- Connectors are a developer enablement framework that accelerates cross-cloud integration. Connectors aren't a standalone product.
- Connectors support a core set of use cases and can be extended to support more customer-driven use cases.
- Connectors require customization and configuration in B2B Commerce and Salesforce CPQ.
- Plan your connector implementation with a data strategy and governance policy.

What Your Company Can Do with This Connector

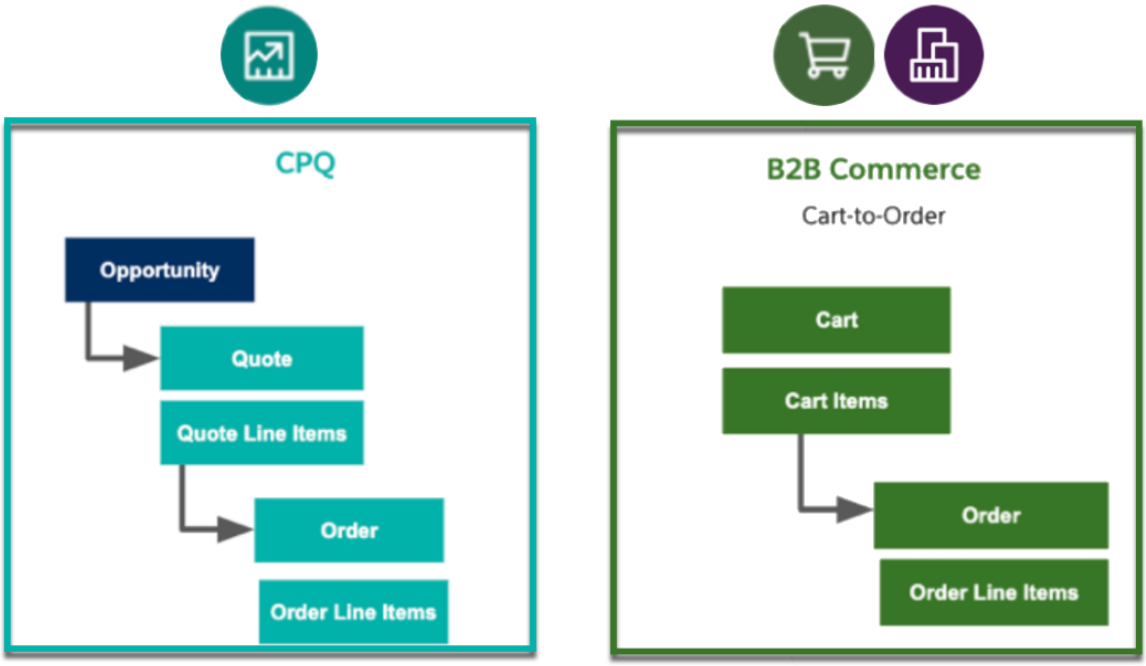
Each connection point supports a core set of use cases enabled individually through custom metadata configurations. These connections meet your specific business requirements. You can disable them as needed, such as for scheduled maintenance or data ETL activities.

- Product and Price book
- Cart and Quoting
- Orders and CC Order

Note: See the following visualized data flows. You reduce system complexity with a unified master data, shared data model, and single source of truth.

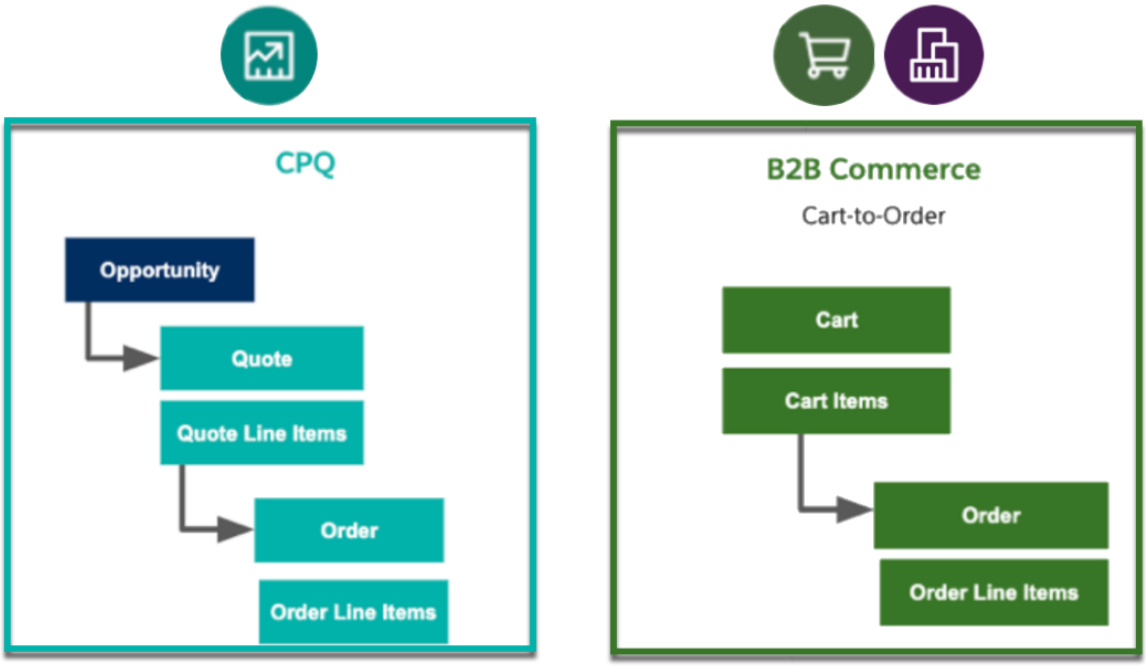
Connected Selling and Buying

Synchronize Quoting and Order History.



Connected Products and Pricing

Create CPQ Product and Price Data and Sync to B2B Commerce.



Note: The CPQ + B2B Connector supports a one-way sync for Product and Pricing logic.

Table 3: Data Synchronization

Data Sync	Approach
Products and Pricing	• Platform Events • Scheduled Batch Classes • Queue-able Framework
Transactional Carts, Quotes, and Orders	• Triggers • Future Methods

Factors to Consider

- Volume of data (product catalog and price lists)
- Frequency of changes in business process impacting Pricing or Product Data
- Integrated systems and other data flows.
- Scalability and performance

Considerations

Product and Pricing Assumptions

The Connector lets you sync Simple Products with a flat price.

Connector Guardrails

Unsupported Product Types

To support the following B2B products, make other customizations in the Connector sync:

- Aggregate Products
- Assembly Products

Unsupported Complex CPQ Product Bundles

Without other customizations, we don't recommend using complex CPQ Product Bundles with many Options and Constraints. They're not ideal for using with self-service or the Connector.

B2B Product Entitlements

The Product and Pricing Sync process doesn't automate the B2B Product Entitlements. Associate The "Account Groups" to the "Price Lists" after completing the Product and Pricing Sync in B2B Commerce.

Discounts and Promotions

We recommend that you manage discounts and promotions for B2B Commerce in B2B. Don't sync the information from CPQ.

Data Strategy

Connector Data Flow Strategy and Governance

Advanced product and pricing capabilities within CPQ aren't available inB2B. For example, Bundles and Rules.

ERP as the Product and Pricing Master

Don't directly integrate B2B Commerce with the ERP. The functionality supported in the Connector and the approaches listed here assume that CPQ is the publishing data source for B2B Commerce.

Product Index Synchronization

Synced Products in B2B appear only in a Storefront after refreshing the Product Index.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations

Take the next steps in this implementation.

- Configurations

Configurations

Use these configurations to synchronize product and pricing data.

Prerequisites: These configurations require a Permission Set assignment to CPQ B2B Connector Admin and the CPQ and B2B Commerce Administration areas.

1. Install and Perform Initial Setup

After installation of the connector package, enable CPQ B2B Commerce Connector Settings for SKU (Product) and Pricing Sync records.

- Navigate to Setup > Custom Metadata Types > Connector Sync Config > Manage

Update Page Layouts using the Product and Pricing Sync Instructions of the installation guide.

2. Create Custom Fields on Pricing and Product Objects

The following tables show the recommended core metadata CPQ and B2B Commerce fields. They represent a 1-to-1 mapping with the SKU and Pricing Sync Process. Include other custom fields for more business requirements.

Table 4: Product Fields

Product2	CC Product
CC_Quantity_Per_Unit__c	Product_Id__c
CC_Start_Date__c	Product_Type__c
CC_End_Date__c	
CC_Long_Description__c	
CC_Storefront__c	
CC_ProductType__c	
CC_LastSyncDate__c	

Table 5: Pricing Book Fields

Price book	CC Price List
CC_Start_Date__c CC_End_Date__c CC_Storefront__c CC_LastSyncDate__c	PriceBook_Id__c

Table 6: Pricing Book Entry Fields

PriceBookEntry	CC Price List Item
CC_Price_List_Id__c (*Formula) CC_Product__c (*Formula) CC_Start_Date__c CC_End_Date__c CC_Item_Type__c CC_Min_Qty__c CC_Max_Qty__c CC_Reoccuring_Price__c CC_LastSyncDate__c	PriceBook_Entry_Id__c Price_Book_Id__c (*Formula)

Custom Field Notes:

CC_LastSyncDate__c;

Use this field for managing Data Events that link data from one cloud to the other. Add this field on all source CPQ Objects mapped to a sync process with the Connector for reporting and monitoring.

Product2

CC_ProductType__c

- *Picklist for Commerce Products, Simple Product, Tier Priced Product, Product Bundle, Kit, Dynamic Kit, Percent of Total Product.

CC Product

Use an extra custom attribute "Product_Type__c" to capture the value passed. Track product types that aren't supported B2B Commerce out-of-box, such as Percent of Total.

PriceBookEntry

CC_Price_List_Id__c

- *Formula field links to CC Price List based on Price Book Id.

CC_Item_Type__c

- *Field type of pricing (tiered, simple). If this value is "tiered,"publish the Discount Schedule associated with this Product as tier pricing on the Price List Entry.

CC_Recurring_Price__c

- *Subscription field attribute captures support for recurring billing (typically used for subscriptions).

Managing Tier Pricing for B2B Commerce Products

Publish the product and pricing details for B2B Tier Priced Products. Set up the product in CPQ with a Discount Schedule matching the Tier Pricing structure.

Stamp the value "CC_Item_Type__c" on the object "Price Book Entry" as Tiered.

Use a sync job to look at the Price Book Entry for this value. If it's set up as "Tiered", publish the Discount Schedule associated with this Product. Publish as JSON value on the attribute "ccrz__PricingTiers__c" related to "CC Price List Entry" object.

3. Supplement the Installed Package CPQ B2B Mapping Custom Metadata

Follow this path: Setup > Custom Metadata > CPQ B2B Mapping > Manage Records.

Create a metadata record to manage the field sync for the SKU Process. For example, the Connector process that uses the mapping record logic.

Select the source object from the picklist options. Lead with CPQ objects first for SKU and Pricing process types with destination objects of CC Commerce.

Source Field picklist maps the from field to the Destination Field picklist, including the custom fields created in step one.

Choose the Field-Mapping Service Class. Select the option that matches your technical implementation setup and process.

4. Review Data Between CPQ and B2B Commerce

Determine the need for data load insert or update to CC Commerce Product and Pricing Objects.

Test Batch and Sync to ensure that the setup carried over expected synchronized field sets.

Review the CC Commerce Product Index. Manually run and schedule future Product Index.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations
- Connector

Streamline Mass Reorders

Provide a seamless reorder experience using the negotiated Sales Agreement object in an industry cloud, such as Manufacturing Cloud or Consumer Goods Cloud.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

Customer expectations during the 4th Industrial Revolution (4IR) are shifting dramatically. The experience a company provides is as important as its products and services.

This solution kit describes cross-channel collaboration from your sales representatives to Salesforce CPQ. Connect B2B Commerce storefronts with industry clouds to provide fluid interactions and optimize revenue streams.

This solution kit helps you:

- Use the Sales Agreement object in an industry cloud to easily reorder products and services.
- Integrate customer carts from B2B Commerce to CPQ for the sales rep to finalize and create complex quotes with customers interacting from the storefront.
- Send quotes back to the cart for the customer to purchase or complete from CPQ.

Required Products

- B2B Commerce Cloud
- Industry Cloud such as Manufacturing Cloud, Consumer Goods Cloud, or other cloud
- Salesforce CPQ
- B2B Commerce Cloud and CPQ Connector

Implement This Solution

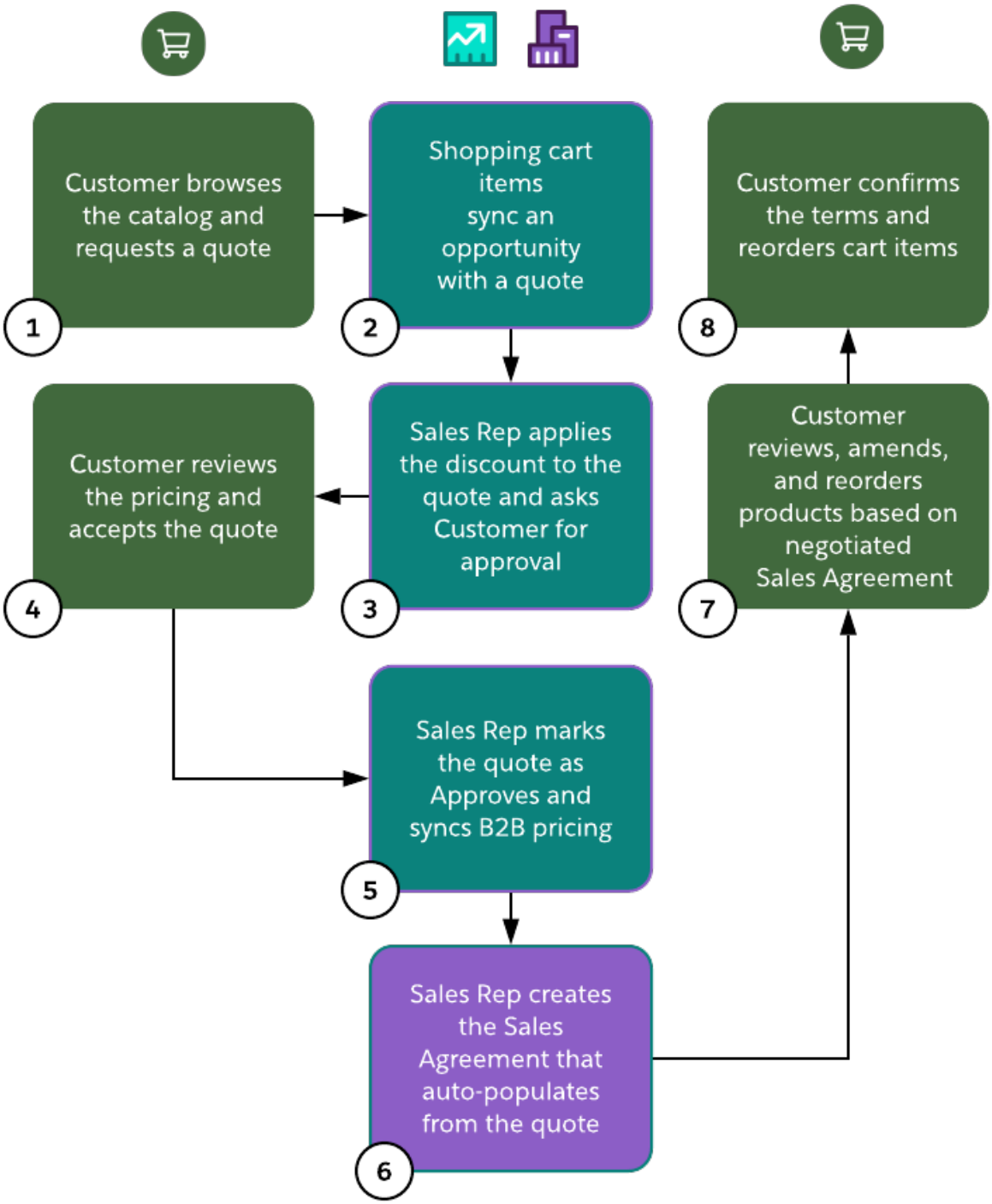
Workflow

Learn how data flows through the configurations when you streamline mass reorders.

Workflow

Learn how data flows through the configurations when you streamline mass reorders.

Workflow


Customer browses the catalog and requests a quote
1
Shopping cart items sync an opportunity with a quote
2
Customer confirms the terms and reorders cart items
8
Customer reviews the pricing and accepts the quote
4
Sales Rep applies the discount to the quote and asks Customer for approval
3
Customer reviews, amends, and reorders products based on negotiated Sales Agreement
7
Sales Rep marks the quote as Approves and syncs B2B pricing
5
Sales Rep creates the Sales Agreement that auto-populates from the quote
6

Related Content

Take the next steps in this implementation.

- Design Considerations on page 113
- Configurations on page 115

Design Considerations

Keep these design considerations in mind when you streamline mass reorders.

Identify the scope and requirements.

Plan your budget, timeline, and out-of-the-box options.

- Plan and gather alignment on your data strategy and connected clouds, considering your timeline and budget.
- Define an MVP solution by preparing a crawl, walk, and run prioritization for storefront and CPQ requirements.
- To implement new functionality, assign ownership of work items to cross-functional teams.

Monitor error logs, and subscribe to reports.

- Assign ownership for bugs and issue tracking with a service-level agreement (SLA) across system, functional, and business analyses. Monitor error logs between tools.

Validate your data strategy when adding to user stories and business processes.

- Refer to the product and price master data flow and design considerations for Enterprise Resource Planning (ERP). This solution kit assumes that you use the product CPQ master approach.

Key Considerations

Data from the Connector

- Storefront and connector orders create opportunities.
- Carts that generate quotes and quotes that generate carts don't require an opportunity record.

Cart-to-Quote Requests

- Request Quote runs at any time from the customer's cart or the B2B Commerce Order creation. Either way, CPQ makes a quote and then item data after the storefront makes a request.
- After Request a Quote initiation from an order, CPQ data populates in the following order:
  - Opportunity
  - Quote
  - Quote line items and order
  - Order items.

Limitations and Guardrails

Order Transfer to Storefront Cart

- A custom Lightning action on the quote page supports the action when a sales rep transfers a quote to a cart in the customer's view.

Cart-to-Quote Behavior with CPQ Price Rules and Overrides

- Exclude cart quotes for any pricing rules or quote calculator plugin (QCP) overrides. The price published from cart to quote drives price overrides.

Performance and Scalability Considerations

Notifications

- Configure transactional alerts using the cart-to-quote or quote-to-cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. For more information, see native notification options.

Monitor and Manage the Error

- Log Cart order and quote errors appear in the CPQB2B Log object.
- Create reports by setting up a custom report type. Monitor performance and swarm issues that negatively affect the customer shopping experience.
- Use permissions and security record ownership from connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates B2B Commerce Cart and B2B Commerce Order under the logged in Salesforce community user context or the anonymous user context.

Performance and Scalability Considerations

ERP Integrations

- This model allows the user to extend functionality to an ERP or any backend system for enhanced revenue recognition or fulfillment. When activated, the Order object is the trigger point when sending any order information to an external system. The Order object is also the entry point when updating any fulfillment-level details.
- Implement the Order-to-Cash (OTC) integration between Salesforce Billing and the underlying ERP. It's the single source of truth for orders, invoices, and payments (electronic) regardless of whether the transaction originated from B2B or CPQ.
- If ERP is the Product & Pricing Master, sync all Product & Pricing information to Salesforce CPQ. Expect the connector to push the data to B2B Commerce.

  Note: Don't directly integrate B2B with the ERP. The functionality supported in the connector or the integrations assumes that CPQ is the source for publishing data to B2B Commerce.

- If the ERP is the target application for downstream order fulfillment, use the Order object as the exit and entry point from Salesforce.
- If you must link B2B Commerce with an industry cloud without CPQ's robust list of features, you can integrate the sales agreement to the appropriate B2B objects. Integrating the sales agreement significantly changes the data model and any related ERP integrations.

Notifications

- Configure transactional alerts through the cart-to-quote or quote-to-cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. For more information, see native notification options.

Monitor and Manage the Error Log

Cart order and quote errors appear in the CPQB2B log object.

Create reports by setting up a custom report type. Monitor performance and swarm issues that negatively affect the customer shopping experience.

Permissions and Security

- Record ownership from connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates B2B Commerce Cart and B2B Commerce Order under the logged in Salesforce Community user context or the anonymous user context.

Related Content

Review earlier steps in this solution.

- Workflow on page 111

Take the next steps in this implementation.

- Configurations on page 115

See Also

- B2B Commerce Data Model
- Service Agent Order on Behalf Flow

Configurations

Use these configurations to streamline mass reorders.

These steps assume that you completed the product and pricing setup and reviewed or implemented quote to cart solutions. Synchronize products and price lists between B2B Commerce and CPQ.

To learn more, watch Driving Seamless Experiences for Manufacturing Cloud, CPQ, and B2B Commerce

Industry Cloud with a Quote to Sales Agreement Data Flow

1. Create the opportunity.
   a. Stamp PriceBook based on the B2B Commerce PriceList mapping associated with the B2B Commerce Cart.
2. Create the quote associated with the opportunity based on cart information.
   a. Populate the account and contact on the quote based on cart information.
   b. Stamp Cart Id on the quote.
   c. Pass Bill To and Ship To details from the cart to the quote.
   d. Create sales agreements from quotes with a custom Lightning action. Use a custom Apex class for your specific business requirements. Drag the Create Sales Agreement Lightning action onto your main Quote page layout.
3. Add Quote Lines to the quote based on the art items.
   a. Publish each cart item and B2B Commerce product mapped to Product2 on the quote line along with quantity.
   b. Publish the pricing from the B2B Commerce Cart item.
4. If a sales representative is processing the transaction, you can stop here with no further integration steps.
5. To publish an approved quote back to the cart with the finalized price, use a custom Lightning action on the quote page.
   a. Because the quote and quote lines refer to the cart and cart items, publish the finalized price back to the cart.
   b. Publishing the finalized price allows the customer to complete the transaction using the published and negotiated price.
6. Publish pricing overrides using these fields on the quote lines:
   a. Publish SBQQ__SpecialPrice__c from the cart item price after any discounts or coupons.
   b. Set the SBQQ__SpecialPriceType__c value to Custom.

7. Create the sales agreement.
   a. After approving the quote, sync the price back to B2B Commerce using the Sync To B2B field. To create a sales agreement that uses pricing and product information from the quote, click the Create Sales Agreement button. This action automatically creates product schedules based on the length of time provided.
   b. Drag the Amend Sales Agreement Lightning action to your main Sales Agreement page layout.
8. Amend the sales agreements.
   a. If a customer wants to renegotiate their sales agreement price, use the Amend Sales Agreement Lightning action. This action clones the primary quote associated with the sales agreement.
   b. Drag the Is_SA_Active__c checkbox to your main Sales Agreement page layout.
   c. If the quote is linked to a sales agreement, add a validation rule that checks to prevent a quote from being deleted.

Review the B2B Commerce CPQ Connector setup.

Refer to other solution kits for detailed setup and solution considerations for other objects.

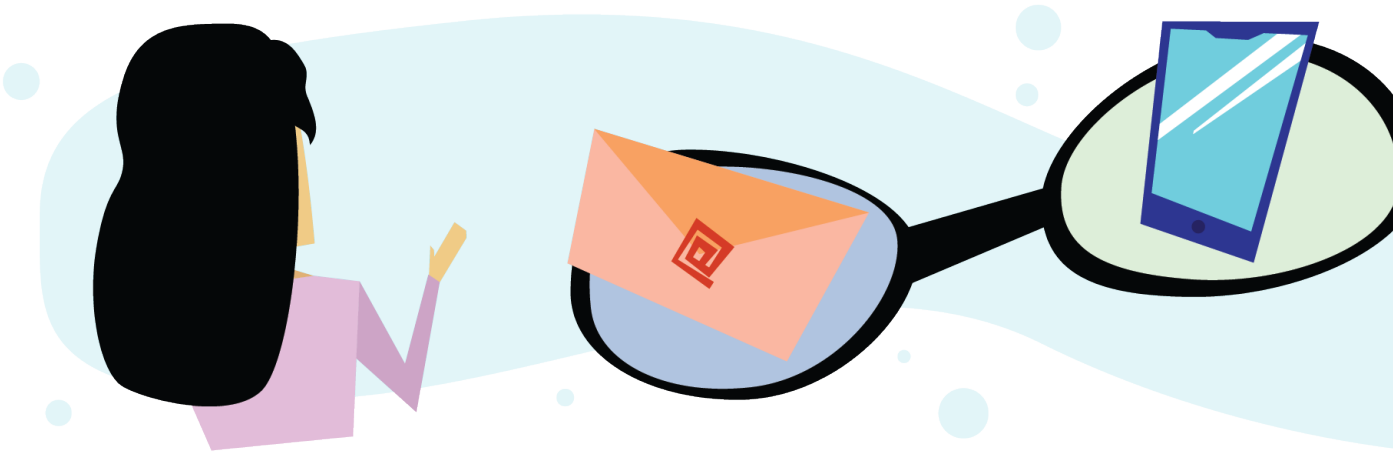
Related Content

Review earlier steps in this solution.

- Workflow on page 111
- Design Considerations on page 113

Tackle B2B and B2C Marketing Together

Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multichannel messaging, journeys, and transactional messaging.



Get Started

Take Trailhead modules related to this solution.

- Use Account Engagement Forms and Form Handlers
- Account Engagement Scoring and Grading Account Engagement Lightning App

Marketing to personas throughout the buyer's lifecycle requires tools for lead generation, lead scoring, sales alignment, and multi-channel consumer marketing via journeys and transactional messaging. To manage marketing efforts across your business, learn how to harness the power of Salesforce for Marketing, including Account Engagement and Journey Builder.

This solution kit helps you:

- Generate new prospects.
- Qualify prospects using scoring and grading.
- Create qualified leads in Salesforce.
- Send customers through a journey using email, mobile, and web.

Required Products

- Account Engagement
- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud (edition must support Marketing Cloud Connect)
- Marketing Cloud (Contact Builder, Journey Builder, and Email Studio. Edition must support Marketing Cloud Connect. Marketing Cloud Connect is supported only in Salesforce Classic.)

Implement This Solution

Workflow

Learn how different buyer persona scenarios inform workflow with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

Design Considerations

Keeps these considerations in mind to support the flow of data between Marketing Cloud Account Engagement (Pardot), industry clouds, and Journey Builder.

Marketing Cloud Connect

The Marketing Cloud Connect (MC Connect) helps you integrate industry clouds with Marketing Cloud products like Contact Builder and Journey Builder.

Configurations

Use these configurations to market with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

Workflow

Learn how different buyer persona scenarios inform workflow with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

A buyer persona is essentially a collection of attributes that make an individual a good fit for a specific suite of products or services. In this solution kit, we cover two marketing scenarios: a buyer with one persona and a buyer with multiple personas.

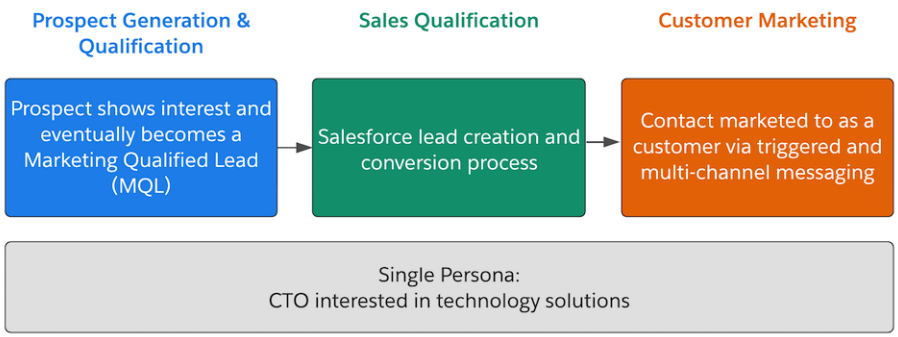
When a company has one buyer persona, a buyer moves through the interest, purchase, and customer phase with that persona. For example, a company sells a suite of educational technology products. A target buyer persona is a chief technology officer (CTO) of a school district who is interested in purchasing technology solutions. The CTO persona remains consistent throughout each stage of the customer lifecycle and, in this case, remains a B2B buyer persona.

If a business sells a wide suite of products and services, it's possible they have multiple buyer personas. In this case, each persona has different attributes that indicate their fit for each product or service. For example, an enterprise company selling healthcare technology solutions and healthcare treatment for patients has two different buyer personas. In this case, marketing tools must support the B2B and B2C sales processes.

B2B marketing supports considered purchases, where a salesperson is involved in facilitating a sale. B2B marketing strategies can also apply to B2C transactions with a considered purchase, such as real estate, recruiting, or general contracting.

B2C marketing supports transactional, direct-to-consumer sales. A salesperson isn't involved in facilitating the transaction, and most sales are done digitally. In this solution kit, transactional purchases are referred to as B2C and salesperson-facilitated sales are referred to as B2B.

Scenario 1: Single Persona (One Contact Record Type)



Functionality Considerations:

- Buyer persona is consistent throughout the prospect-to-customer lifecycle. A single set of data attributes is used for contacts.
- Account Engagement forms and qualification features are used to prioritize net-new prospects for sales reps. Use cases that include product interest forms that receive hundreds or thousands of submissions a day benefit most from this setup.
- When a prospect becomes a customer, use Journey Builder and Automation Studio to enable complex journeys and transactional and multi-channel messaging.

If customers sometimes repeat the B2B buying process, but must be marketed to as a consumer through Journey Builder, accommodate for this scenario in your design. You must keep contacts that originated in Account Engagement in your Account Engagement database. Keep these considerations in mind.

- Using Marketing Data Sharing (MDS) rules, allow contacts who originated from Account Engagement to meet your MDS criteria. Setting up MDS isn't retroactive, so existing contacts don't automatically sync to Account Engagement. Configure MDS in such a way that makes Account Engagement-generated contacts unique, and therefore lets them remain visible to Account Engagement. When an existing contact who is visible in Account Engagement submits another form, their existing prospect record and contact record are updated. If an existing contact in Salesforce who doesn't meet your MDS criteria submits a form, a duplicate lead is created rather than syncing with the existing contact record. Account Engagement can't sync with Salesforce records that don't meet the MDS criteria. Use deduplication tools in Salesforce for merging and managing lead and contact records.

- In this setup, contacts are messaged to only through Journey Builder. In Account Engagement, use an automation that marks all contacts as Do Not Email. Marking contacts as Do Not Email keeps them from receiving emails from Account Engagement and counting towards your database limit.

Pros of this approach:

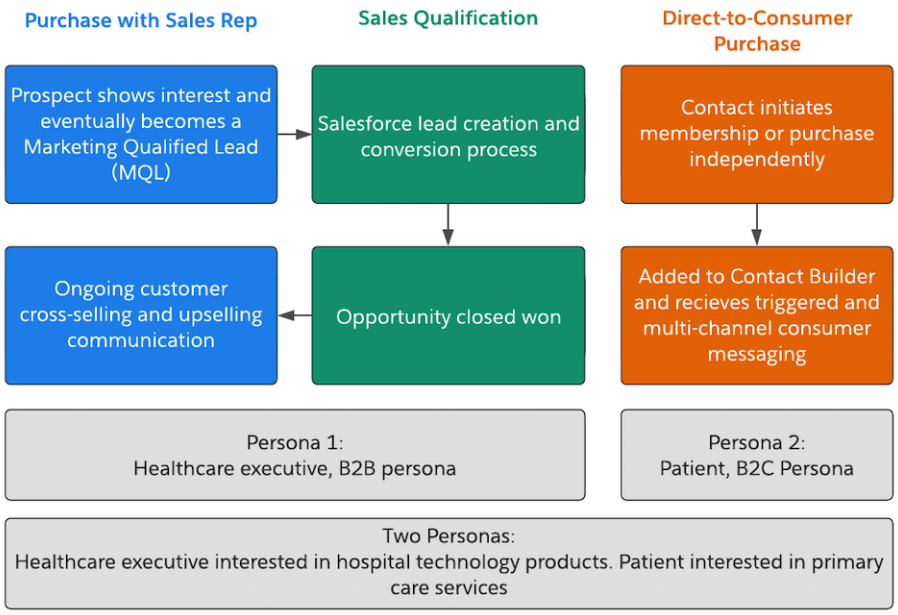
- Account Engagement data remains intact on contact records in industry clouds.
- If a contact in Account Engagement submits an Account Engagement form again, it updates the existing contact and prospect records in Account Engagement and industry clouds.

Cons of this approach:

- Your Account Engagement database is larger because it includes contacts that aren't messaged from Account Engagement. When a business unit's database exceeds 10 million prospects, it can experience performance issues. If you anticipate having a large database, talk to your Salesforce account team.
- New contacts that submit forms that don't meet your MDS criteria create a duplicate lead.

If you want to intentionally share and message to contacts in Account Engagement and Journey Builder, you must make further design considerations. We plan to address this use case in a future solution kit.

Scenario 2: Different Personas (Two Contact Record Types)



Functionality Considerations:

- Buyer persona differs based on the type of product or service being sold. For B2B sales, B2B marketing features such as industry clouds integration, account-based marketing (ABM), and ROI reporting are used in Account Engagement throughout the prospect-to-customer lifecycle. In direct-to-consumer sales, consumer marketing via transactional and multi-channel messaging at scale is done through Journey Builder messages and journeys.
- Two separate attribute datasets for contacts are used. For example, the persona for an executive that purchases healthcare technology for their company has different data than their second persona as a patient of a health plan. These separate datasets (record types) normally have different security, viewing, and retention settings.

- This use case usually fits an enterprise business model that has various brands, products, or services that span the B2B and B2C landscape, and function independently from each other.
- The contact object's record type in an industry cloud is used to separate B2B contacts that sync only to Account Engagement and person accounts that sync only to Contact Builder. To make sure that Account Engagement has visibility only for B2B contact record types, use Marketing Data Sharing rules.

Considerations for Both Scenarios

In both proposed solutions, a single persona is messaged only from Account Engagement OR Journey Builder. If you want to message the same persona across multiple platforms, you must make more design considerations. For example, if you're using Account Engagement for an ABM strategy and Journey Builder for all other marketing communication, Account Engagement and Journey Builder share the contact. Look for details about sharing and messaging contacts between these solutions in a future solution kit.

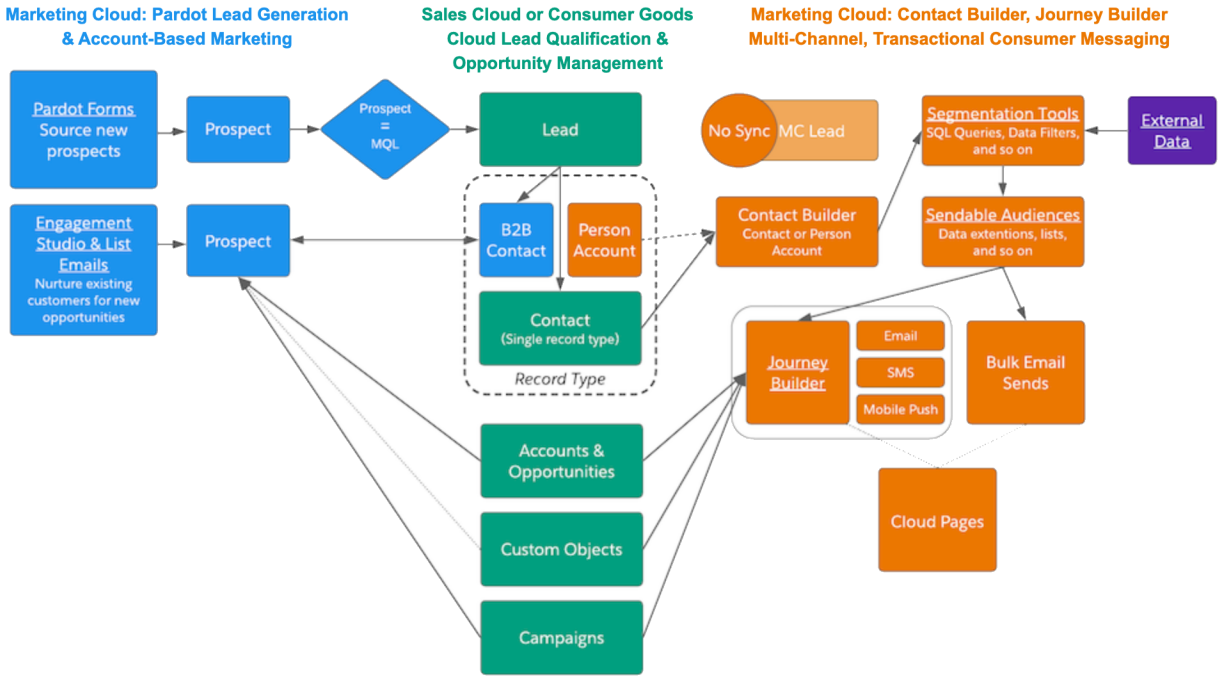
Take the next steps in this implementation.

- Design Considerations on page 120
- Marketing Cloud Connect on page 123
- Configurations on page 123

Design Considerations

Keeps these considerations in mind to support the flow of data between Marketing Cloud Account Engagement (Pardot), industry clouds, and Journey Builder.

Understand the Flow of Data



Design Considerations

Single Persona (One Contact Record Type)

Visibility

- Account Engagement syncs with leads and some contacts. Contacts aren't messaged with Account Engagement. Marketing Data Sharing (MDS) rules are used to see all leads and contacts.
- Journey Builder only syncs with contacts. Limit the contacts that Contact Builder syncs with by applying filters (Boolean flag, date range, or All records with an email address) in the records collection sync process. You can also configure Marketing Cloud Connect with an API user who has access only to the records designated to be owned and transferred to Journey Builder.

Consent Management

- In this scenario, an individual is messaged from one system at a time. If a person is a prospect or lead, they're messaged from Account Engagement. After that persona becomes a contact, they're messaged from Journey Builder.
- We recommend setting up an automation in Account Engagement that sets all prospects that sync with a contact to Don't Email.
- The Email Opt Out field in Account Engagement automatically maps to the HasOptedOutofEmail field in an industry cloud. Make sure that this field is mapped to the contact object and is readable in other Marketing Cloud messaging features.
- Email preferences for Account Engagement lists don't map to industry clouds by default. If you need list subscriptions to carry over to the contact in Contact Builder, you can set up a series of automations. First, set up an automation that maps list subscriptions to custom fields on the lead record, then map the fields to the contact or person account record. You can also create a custom unsubscribe center that uses the API to write subscription preferences across all messaging platforms.

Duplication Management

- If an industry cloud contact with a prospect record submits an Account Engagement form, both records are updated.
- If an industry cloud contact submits an Account Engagement form but doesn't have a prospect record because it didn't meet the MDS criteria, a duplicate lead is created.

Data Architecture

- Account Engagement syncs with prospects, leads, and some contacts. However, in this scenario, Account Engagement sends emails only to prospects and leads.
- Contact Builder only syncs with contacts.
- In this scenario, Account Engagement and Contact Builder can both sync with the same contact record. However, only Journey Builder emails the contact.

Performance

- If you expect a single Account Engagement business unit to have more than 10 million prospects, talk to your account manager.
- In Contact Builder, use filters in the records collection when configuring Synchronized Data Extensions. Filters let you limit the number of Contact records that you bring into Journey Builder by including only relevant records and fields.

Different Personas (Two Contact Record Types)

Visibility

- Account Engagement syncs with prospects, leads, and contacts with a B2B record type. Use MDS rules to limit contact visibility to contacts with the B2B record type.
- Contact Builder only syncs with person accounts, which is a separate record type from B2B Contacts. Limit the contacts that Contact Builder syncs. Apply filters (Boolean flag) in the records collection sync process or configure the MCC integration with an API user that has access only to the B2C record type.

Consent Management

- In this scenario, a single persona is messaged from one system at a time. A B2B contact persona is messaged only through Account Engagement. A B2C contact persona is messaged only through Journey Builder.
- You can use the subscription management tools included in all Salesforce for Marketing products to manage email subscriptions separately.

Duplication Management

- In some use cases, a single person can exist as both personas. For example, a healthcare company that markets to a healthcare executive who is a decision maker for B2B sales and a patient at their hospital. This person would have separate contact records and would be marketed to as two separate entities.

Data Architecture

- Account Engagement syncs with prospects, leads, and contacts associated with the B2B record type. Account Engagement sends emails to prospects, leads, and contacts.
- Contact Builder syncs with person accounts. When adding person accounts in Contact Builder, use Account:PersonContactID as the unique identifier.
- You can sync leads to Contact Builder, but we strongly recommend that Account Engagement manage leads when a salesperson is involved in the sales process.
- In this scenario, Account Engagement and Contact Builder never sync with the same contact record.

Performance

- If you expect a single Account Engagement business unit to have more than 10 million prospects, contact your account manager.

Related Content

Review earlier steps in this solution.

- Workflow on page 117

Take the next steps in this implementation.

- Marketing Cloud Connect on page 123
- Configurations on page 123

See Also

Account Engagement

- Marketing Data Sharing Rules
- Do Not Email and Opted Out Fields

Marketing Cloud

- Explore Cross-Cloud Engagement Data Models
- Implement Synchronized Data Sources Best Practices

Industry Cloud

- Record Types
- Person Accounts

Marketing Cloud Connect

The Marketing Cloud Connect (MC Connect) helps you integrate industry clouds with Marketing Cloud products like Contact Builder and Journey Builder.

The Salesforce connector integrates Marketing Cloud Account Engagement (Pardot) with an industry cloud. All Account Engagement business units purchased after February 11, 2019 are provisioned from and connected to a designated industry cloud, Sales Cloud, or Service Cloud instance. Business units purchased before February 11, 2019 can set up the Salesforce connector.

Related Content

Review earlier steps in this solution.

- Workflow on page 117
- Design Considerations on page 120

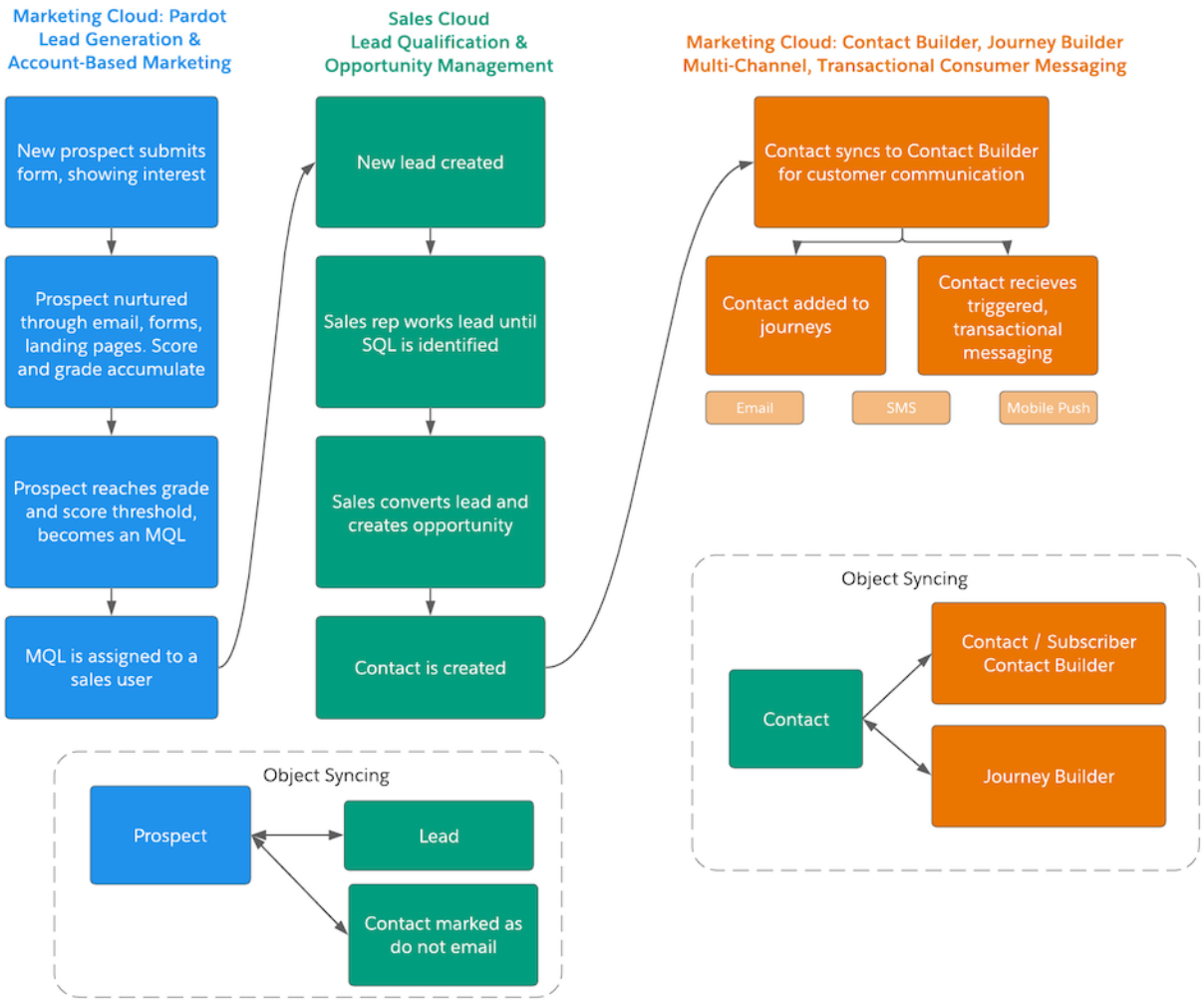
Take the next steps in this implementation.

- Configurations on page 123

Configurations

Use these configurations to market with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

Scenario 1: Single Contact Record Type

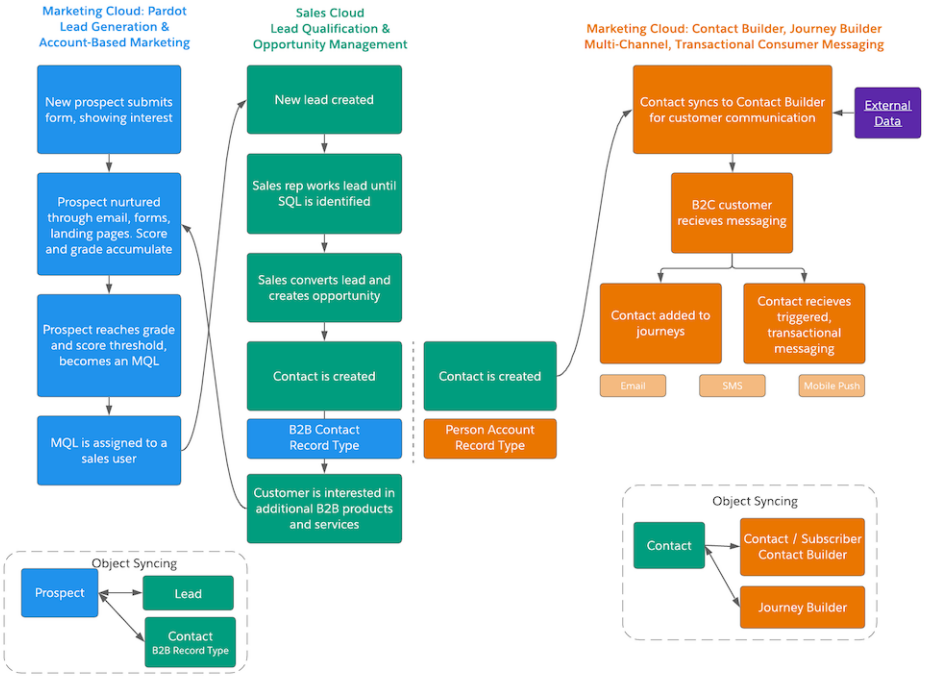


Configuration Details

1. A person with an email address that doesn't exist in Account Engagement or Salesforce submits an Account Engagement form. A prospect record is created.
2. The standalone prospect record is emailed from Account Engagement or an engagement program. The prospect continues to interact with other Account Engagement assets like forms and landing pages. Using the default scoring model and other automation features, the prospect's score and grade values adjust.
3. You set up an automation rule to find all unassigned prospects who meet a certain score and grade threshold. For example, you want to find all prospects with a score of at least 100 and a grade of at least B-. These prospects are considered a Marketing Qualified Lead (MQL).
4. The automation rule assigns these prospects to a sales user in Salesforce. Assignment can be via Salesforce lead assignment rules, queues, groups, or individual users.
5. The assignment automation triggers Salesforce to create a lead. The lead has a bidirectional syncing relationship with the corresponding prospect record in Account Engagement.
6. A sales rep qualifies the lead.

7. A sales rep determines that there's a potential opportunity with this lead, making it a Sales Qualified Lead (SQL). The sales rep converts the lead to a contact, creates an account, and creates an opportunity.
8. The lead is converted to a contact. This contact still has a bidirectional syncing relationship with the prospect. However, the contact is messaged only through Journey Builder. An automation rule is triggered in Account Engagement to set all prospects that are syncing with contacts in Salesforce as Don't Email. Account Engagement can't message these prospects.
9. The contact becomes available in Contact Builder via Marketing Cloud Connect in synchronized data extensions. Any other custom object that is needed for segmentation, personalization, or journey routing can also be synced from Sales Cloud, Service Cloud, or Consumer Goods Cloud to Marketing Cloud Contact Builder.
10. After the opportunity is closed won and the contact is officially a customer, customer marketing begins in Journey Builder. Use Contact Builder and other segmentation tools to add the customer to multi-channel journeys, bulk email sends, or triggered messaging based on their consumer behaviors and interests.
11. (OPTIONAL) Journey Builder has more features to interact with Sales Cloud or an industry cloud such as Consumer Goods Cloud directly. Journey Builder entry sources listen for changes in Sales Cloud, such as a contact added to a campaign, and add them to a journey. Sales, Service Cloud, and Consumer Goods Cloud canvas activities in Journey Builder. They can be used to create or update Sales, Service, and Consumer Good's Cloud object records for connected Marketing Cloud contacts. Although Journey Builder canvas activities provide a data connection to Sales Cloud and Consumer Goods Cloud, they're intended for specific campaign actions like creating a task or updating a person account. Don't use Journey Builder as a large-scale bulk data transformation tool to bulk update Sales Cloud and Consumer Goods Cloud objects.

Scenario 2: Two Contact Record Types



Configuration Steps

B2B Persona

1. A person with an email address that doesn't exist in Account Engagement or Salesforce submits an Account Engagement form. A new prospect record is created.

2. The standalone prospect record is emailed from Account Engagement or an engagement program. The prospect continues to interact with other Account Engagement assets like forms and landing pages. Using the default scoring model and other automation features, the prospect's score and grade values adjust.
3. You set up an automation rule to find all unassigned prospects who meet a certain score and grade threshold. For example, find all prospects with a score of at least 100 and a grade of at least B-. These prospects are considered a Marketing Qualified Lead (MQL)
4. The automation rule assigns these prospects to a sales user in Sales Cloud or an industry cloud such as Consumer Goods Cloud. Assignment can be via lead assignment rules, queues, groups, or individual users.
5. The assignment automation triggers Sales Cloud or an industry cloud such as Consumer Goods Cloud to create a lead. The lead has a bidirectional syncing relationship with the corresponding prospect record.
6. A sales rep qualifies the lead.
7. A sales rep determines that there's a potential opportunity with this lead, making it a Sales Qualified Lead (SQL). The sales rep converts the lead to a contact, creates an account, and creates an opportunity.
8. The lead is converted to a contact. The contact is created with a specific record type: B2B Contact. Marketing Data Sharing rules in Account Engagement are configured to ensure that only those contacts with the B2B record type sync with Account Engagement. The prospect in Account Engagement has a bidirectional syncing relationship with the contact in Sales Cloud or an industry cloud such as Consumer Goods Cloud.
9. The existing customer, still syncing to Account Engagement, expresses interest in another product or service. The B2B marketing team continues marketing to this customer using features in Account Engagement like email nurturing, scoring, grading, and sales team alignment. Another opportunity can be created on the existing contact record.

B2C Persona

1. A buyer makes a purchase and becomes a customer. A salesperson isn't involved in this transaction.
2. As a new customer, a contact is created as a person account record in Sales Cloud or Consumer Goods Cloud.
3. The person account is available in Contact Builder using the contact ID via Marketing Cloud Connect using synchronized data extensions. In addition to the contact object, any custom object needed for segmentation, personalization, or journey routing can be synced from Sales Cloud, Service Cloud, or Consumer Goods Cloud to Contact Builder.
4. After the initial purchase, customer marketing begins in Journey Builder. Use Contact Builder and other segmentation tools to add the customer to multi-channel journeys, bulk email sends, or triggered messaging based on their consumer behaviors and interests.
5. (OPTIONAL) Journey Builder has more features to interact with Sales Cloud and Consumer Goods Cloud directly. Journey Builder entry sources listen for changes in Sales Cloud and Consumer Goods Cloud, such as a contact added to a campaign, and add them to a journey. Sales, Service, and Consumer Goods Cloud canvas activities in Journey Builder can be used to create or update object records for connected Marketing Cloud contacts. Although Journey Builder canvas activities provide a data connection to Sales Cloud and Consumer Goods Cloud, they're intended for specific campaign actions like creating a task or updating a person account. Don't use Journey Builder as a large-scale bulk data transformation tool to bulk update Sales Cloud objects.

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