INNOVATE 2018

Customer Conversations Made SMARTer

Building Smarter Customer Service Outcomes through SmartCOMM™ for Salesforce

Marc Francis, Principal Sales Enablement Manager for BT

CONFIDENTIAL

SMART COMMUNICATIONS™

INNOVATE 2018
Customer Conversations Made SMARTer

Pre SmartCOMM™ for Salesforce Implementation at EE/BT

Driving Efficiency – Success and Shortfall

Our aim back in 2014 was to utilise Salesforce and its integration partners to go beyond Order to Cash:

"To deliver seamless functionality, efficiency and a great CX."

Our strategy over the last 4 years has been to develop a complete view of the customer from order to cash.

Ensure every business process, word document, spreadsheet, and over used SharePoint site is *fully* integrated into Salesforce.com.

Streamline Order to Contract and Beyond

Lead — Opp — CPQ — Contract — Engage

Lead-to-Pricing Efficiency ✔

EE was the first Telecommunications provider to get from Lead-to-Quote preparation all within the Salesforce CRM platform.

Quote-to-Contract Implementation ✗

We were still struggling from an overly manual process to get from financial sign-off through to signed contract and then implementation, support and future growth.

Order-to-Price – Our Success
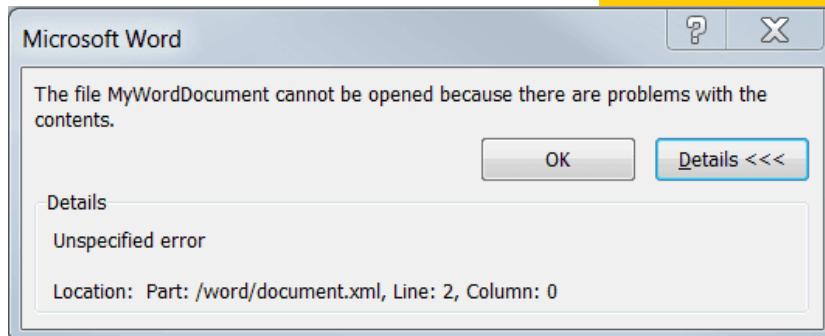
EE / BT Successes:

- All business users fully engaged and using SFDC

- Integrated CPQ platform – to build and financially model all deals

- An agreed standard contract document for all contracts

- Introducing the concept of digital signature to our customers

- Opportunity – contract time reduce from an average of 3 weeks to 3 days.

- Approximate **63** step process for sales to get from Order–to-Contract signature.

CONFIDENTIAL

EE / BT – Our Shortfalls
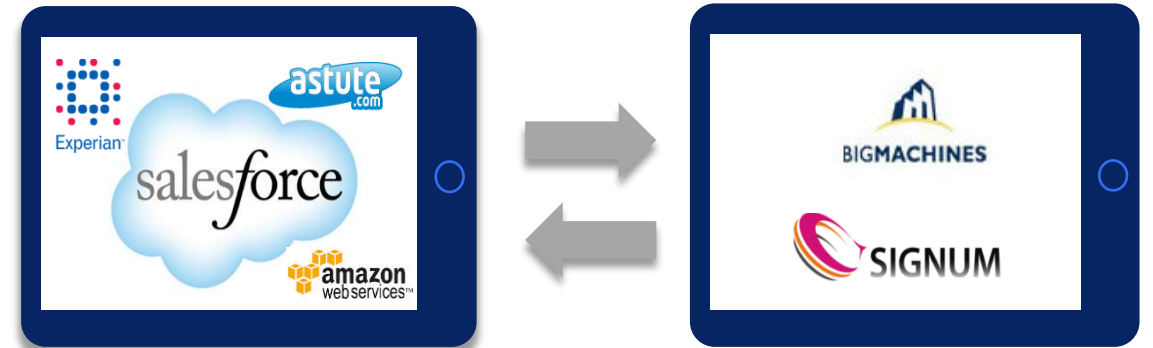
- One code heavy inflexible Business Agreement Template from a Word-based contract author

- Internal documents managed by Word and Email

- Reduced SFDC development roadmap due to document generation restrictions

- Not all customer-facing collateral on brand and consistent

- Slow to make core contract changes – therefore slower to market with new products and propositions

- E-mail heavy work stacks

Microsoft Word

The file MyWordDocument cannot be opened because there are problems with the contents.

OK   Details <<<

Details

Unspecified error

Location: Part: /word/document.xml, Line: 2, Column: 0

INNOVATE 2018

Customer Conversations Made SMARTer

Post SmartCOMM™ for Salesforce Implementation

CONFIDENTIAL

Seamless Functionality, Efficiency and a Great CX

- On-brand, personalised and governed documents with ease and efficiency for both users and administrators

- Data Models in SmartCOMM™ for Salesforce map Salesforce.com data avoiding re-key or copy/paste risks

- Integrated with EchoSign for one-step document approval and signature

- Templates designed to control both static pre-determined and dynamic content; general T&Cs plus terms for deal-level products etc.

- Document Settings control who can generate and edit a document; can vary between Sales and Support

- Reduction in Email traffic

Shortfalls to Efficient Growth

A Salesforce.com instance incorporating 90% of core business processes with dynamic document generation, email templates and all integrated with our CPQ and Signature journeys.

- Full on brand dynamic documentation generation, delivery and storage across 40+ different documents in both our Corporate and SME business units.

- Corporate Order-to-Contract process reduced from 63 to a **36** step process.

- Quickest Order-to-Contract timeline reduced from 3 days to 18 mins on a recent low connection deal.

- 15 + customer facing documents with allowed editable content and dynamic Shared Content.

- Quick and easy integration with new CPQ software.

- Legal teams becoming a fully engaged stakeholder and manage their own shared legal T&Cs across customer-facing documents – free up developers time to focus on process development.

- Seamless Digital Signature Integration.

Smart COMM™ for Salesforce Implementation

What Has SmartCOMM™ for Salesforce Enabled for BT/EE?

We have continued to achieve our aim: "To Deliver seamless functionality, efficiency and a great CX"

Trials	Credit Checks	Proposal	Contract	Change Mgmt	CPM/ADP
Introduced a new Device Trial process with Trial Agreements, stock sheet reporting and Bespoke Customer collateral with every device.	The delivery of dynamic, on brand personalised credit checking documentation, NDAs for signature and information cover sheets.	We now deliver fully dynamic, editable customer-facing proposal documents—fully tailored to the specific customer's needs.	Fully automated on Brand Dynamic EE Business Agreement Contracts with integrated Digital Signature and formalized all Public Sector Contracts.	Major contract changes, in-life amendments and novations can now all be managed in Salesforce, we can provide fully automated legally compliant Contract Change Notes.	Customers now get in-life support and reporting all held in Salesforce.com and formal customer-facing documentation delivered in the from of Project Relationship Documents and Account Development Plans.

Real Efficient Growth – Trials Case Study

- Opportunity win rate increased from 26% to 32% when a customer received a trial.

- 2016 figures show an average of 251 trials per month

- £240k annual budget for trials (cost of devices, call/data charges, warehouse and couriers) BUT there was an additional £90k of devices provided by Samsung as they saw the benefit of getting their devices into the hands of customers to trial.

- The average time taken from a sales user raising a trial request to that trial being dispatched from the warehouse pre automation was 2 working days.

- Dropped to **4 working hours** upon SmartCOMM™ for Salesforce Implementation.

  - There have been many occasions where sales have raised a trial request during a customer meeting and the trial has been approved, signed by the customer and dispatched from the warehouse in less than 15 minutes.

  - **7 minutes** was once quoted back to us from a customer who was really impressed with the speed and efficiency of our trials system (whether he loved the network/device as much is a different matter).

- Pre-automation there was an average of 8 trials per day. Within 6 months post automation this figure had risen to 13 per day.

INNOVATE 2018
Customer Conversations Made SMARTer

CONFIDENTIAL