Our focus this week is Platforms & Digital Business Models, including API's

We will discuss this reading during In-class activities

Digital Platforms?

"…facilitates commercial interactions between at least two different groups…"

- What are some core functions of a platform?
  - Audience Building
  - Matchmaking
  - Providing Core Tools & Services

Source: https://thumbor.forbes.com/thumbor/960x0/https%3A%2F%2Fblogs-images.forbes.com%2Fpeterbendorsamuel%2Ffiles%2F2018%2F03%2FDigital-Platform-Strategy-913629568.jpg

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How many of you have interacted with a platform today?
　　　　ex) I chatted with my friends on What's App.

Get the students thinking about platforms and the impact of Digital Platforms on Business.

"A platform business makes money from services delivered via apps and APIs on a scalable technical foundation that customers and suppliers can integrate into their operations, incorporate into their offerings, and extend through their contributions." (***relate this story back to the Max Labs and what she is producing***)

https://www.forbes.com/sites/joemckendrick/2019/01/23/once-they-were-companies-now-they-are-platform-businesses/#7602a7132773

Digital Platforms

What are the benefits?

- For Companies?
- For Consumers?
- For Industry?

Source: https://www.arup.com/-/media/arup/images/perspectives/themes/cities/how-can-cities-benefit-from-becoming-digital-platforms-2000x833.jpg

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what are some of the benefits of Digital Platforms?

1. Make it easier for companies to find customers (and vice versa)
2. Monetize underutilized assets
3. Reduce transaction costs
4. Reduce barriers to entry for many smaller companies to coexist with the "big fish" (increases choice = price reduction)
5. Reduce Search costs
   - We no longer have to visit multiple stores to find one item. For example, if you moved from Philly to LA in the mid 2000's and wanted to buy Herr's chips or a Tastycake, you were hard pressed to find them. Sure you could order them direct or find that one specialty store that sold Philly goodies but that was it! With digital platforms you can reach buyers and sellers globally…now I can buy Tastycakes anywhere!

Network Effects

What is the impact of Network Effects on the different types of platforms?

Source: https://www.snapsuites.com/wp-content/uploads/2017/05/o-SMARTPHONE-NIGHT-facebook.jpg

Source: https://g.foolcdn.com/image/?url=https%3A%2F%2Fg.foolcdn.com%2Feditorial%2Fimages%2F428448%2F2Fthe-network-effect-getty.jpg&w=700&op=resize

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Think about Tinder or Match, if I'm the only one on the network, there's really no value there for me (or the marketing team)…once we start adding users, we begin to add value.

Who can provide an example of a Network Effect from their own experience?

Source: http://blog.ionixxtech.com/wp-content/uploads/2017/09/Image_1-2.jpg

Review the Pros & Cons with the students ask them to elaborate on each
http://blog.ionixxtech.com/taking-a-look-at-the-pros-and-cons-of-cloud-computing/
**Cloud computing pitfalls to consider/discuss with the students:**

- **Downtime** – Network availability is an issue; outages do happen. So do incorrect access policies and other mistakes that can lead to the inability to access critical data. Contracts called Service Level Agreements between the provider and the customers that spell out guaranteed levels of service are meant to address these types of problems.
- **Device security** – Employees lose mobile devices and fail to use strong passwords; updated malware and antivirus definitions, timely patches and updates are critical.
- **Data integrity** – Potential problems that affect the integrity of a company's data include corruption, misplacement, accidental deletion, physical accidents, malicious acts, hardware failures and a lack of proper policies.
- **Privacy & confidentiality of data** – Data is vulnerable while being transmitted outside of the corporate firewall and once in the data center, it has to be kept separate from other companies' data. Reliable identity authentication is also extremely important. Whether you choose a public or private cloud influences how much you have to worry about security issues. In some cases, a hybrid cloud may be the answer to your concerns. It is up to you to make sure that your cloud service provider has adequate safeguards in place to protect critical applications and sensitive data in case of hardware failures, natural disasters, cyber crime or data breaches.
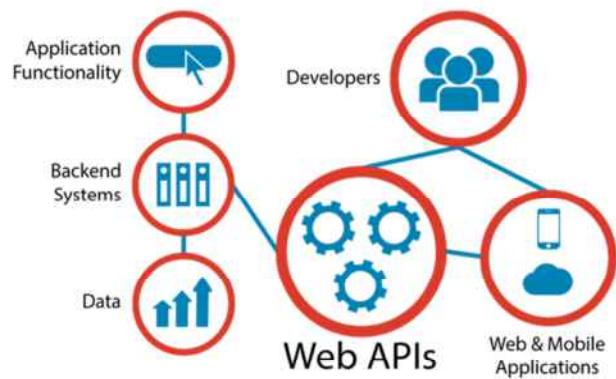
***Time permitting, here is a great video from PNC explaining API's…at a minimum we recommend that you watch this 4:31 minute video: https://youtu.be/EUI0SdHbcLk
Walk through each of the points listed on the slide. More information on this list is provided below (and was extracted from the following links: https://www.apiacademy.co/lessons/2015/04/api-strategy-lesson-101-what-is-an-api & https://news.codecademy.com/what-to-know-about-apis/)
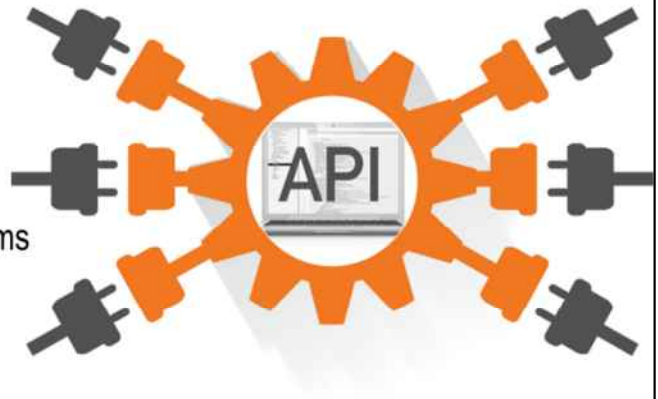
- APIs (application programming interfaces) provide a way to connect computer software components. Broadly speaking, APIs make it possible for organizations to open their backend data and functionality for reuse in new application services.
- An API achieves this by facilitating interactions between code modules, applications and backend IT systems. The API specifies the way in which these different software components can interact with each other and enables content and data to be shared between components.
- The API is not a new concept. But as the complexity of computer systems has increased, the need for APIs has increased, as evidenced by their prevalence in operating systems, programming languages and networks – including the Web.
- As more and more organizations have adopted the Web as the primary network for systems integration and have started seeking ways to connect their information technology assets to online portals and mobile apps, adoption of APIs has grown rapidly.
- When people talk about APIs today, they are more often than not referring to these "Web APIs". On a technical level, a Web API can be defined as any software interface exposed over the HTTP protocol in order to facilitate the development of Web, mobile and cloud applications.
- Web APIs are particularly important in social media – for example, a network might publish an API that allows developers to create client applications for posting status updates from mobile

devices. However, Web APIs are becoming increasingly vital to organizations across all sectors.

API's: "...a strategic business imperative"

API's Key Considerations
- Extract more value from existing assets
- Drive new innovations
- Easier access across multiple ecosystems
- API's are Products – "building blocks"
  - "live beyond any one project"
  - "reusable assets"

Source: https://miro.medium.com/max/700/1*6K4eQYf0R7cPCzukMCtu7Q.png

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Walk through each of the points listed on the slide. More information on this list is provided below (and was extracted from the following readings: https://deloitte.wsj.com/cio/2018/03/27/api-imperative-from-it-concern-to-business-mandate/ & https://www.cio.com/article/3218155/how-the-api-economy-is-igniting-a-cultural-shift-in-businesses.html)

- APIs (application programming interfaces) provide a way to connect computer software components. Broadly speaking, APIs make it possible for organizations to open their backend data and functionality for reuse in new application services.
- "A successful internal API economy requires IT to decentralize and democratize application development and data access to the business as a whole. In addition, central IT needs to invest in enabling a broader set of developers internally to discover, use and self-serve these assets, so the business can deliver more of their own projects. This changes the relationship between IT and the business."
- "To win in the digital era, companies need to play a larger role in the API economy. We're all used to the instant connectivity that puts the world at our fingertips. Today, it's difficult to imagine standing in a long line at the bank to cash a check, or waiting more than 10 minutes for our taxi to arrive. Whereas a mere five years ago that would have been a normal part of our daily lives."
- "The unsung hero of our connected world is the modern API. It's what makes possible all the interactivity that we've come to expect and rely upon. It helps drive the speed with which new technology products can be brought to market faster than the competition, establish new market presences quickly and change processes and workflows to fit evolving consumer tastes."

API's: Application Programming Interface

API Case Study: OpenTable

- What happens when you search for a restaurant?

- What types of data is being retrieved?
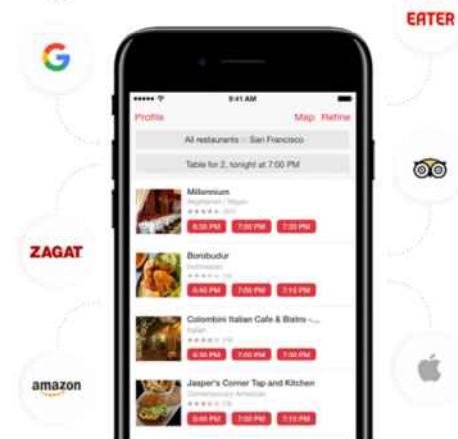
Source: https://restaurant.opentable.com/assets/fg/g/opentable-iphone-app-partner-logos.png

More information on this list is provided below (and was extracted from the following sites: https://restaurant.opentable.com/restaurant-groups , https://dev.opentable.com/ & https://platform.opentable.com/documentation/#authorization)

Linking to Individual Restaurants on OpenTable.com
- The process of linking to each restaurant's reservation page involves using the natural_profile_url value contained in the JSON response of the Directory API for each restaurant, along with your unique referral ID which is provided by OpenTable: https://www.opentable.com/boulevard-san-francisco?ref=zzzz

- The Directory API returns a complete directory of restaurants that accept online reservations via OpenTable so that will need to first be called. The restaurant directory will be returned by the API in JSON format. The links can then be built using the data returned by the Directory API. The restaurant data is refreshed nightly, so it is recommended to call the API at least once a day to get the most current restaurant directory data.

Cloud Computing

3 Basic Service types to Consider

1. Infrastructure as a Service (IaaS)
   - Provide an example?
2. Platform as a Service (PaaS)
   - Provide an example?
3. Software as a Service (SaaS)
   - Provide an example?

On-Premises	IaaS Infrastructure as a Service	PaaS Platform as a Service	SaaS Software as a Service
Applications	Applications	Applications	Applications
Data	Data	Data	Data
Runtime	Runtime	Runtime	Runtime
Middleware	Middleware	Middleware	Middleware
O/S	O/S	O/S	O/S
Virtualization	Virtualization	Virtualization	Virtualization
Servers	Servers	Servers	Servers
Storage	Storage	Storage	Storage
Networking	Networking	Networking	Networking

bmc

You Manage   Other Manages

Source: https://blogs.bmc.com/wp-content/uploads/2017/09/saas-vs-paas-vs-iaas-810x754.png

IaaS: Amazon Web Services – they host Capital One and Netflix

PaaS: Google App Engine – Google is the engine for the app Snapchat

SaaS: Salesforce – cloud based software – CRM

IaaS: "host" – you pay for the infrastructure but you are responsible for all application development and deployment and support activities.

PaaS: "build" – you pay for the infrastructure and for a developing platform that supports many areas of deployment so you can just focus on programming your application.

SaaS: "consume" – you pay for an entire solution that is fully built, deployed, and distributed over

the web for you to consume on demand. You have no infrastructure, development, deployment, or support responsibilities.

IaaS: Amazon Web Services – Capital One - case study – click on image to play video (4:26)

https://aws.amazon.com/solutions/case-studies/

Discuss the video with students...additional concepts to consider include:

- "Online services that abstract user from the detail of infrastructure like physical computing resources, location, data partitioning, scaling, security, backup, etc."
- The user is responsible for installing and maintaining the operating system and the application software.
- Resource Pooling
- Pay for resources allocated and consumed, much like a utility service

PaaS (Platform as a Service)

Case Study: Salesforce

1. Mobile Software Development
2. Rich Developer Environment
3. Fully managed cloud database
4. Point-and-click app building
5. Multi-language development
6. Cloud app marketplace

Source: https://www.salesforce.com/ap/learning-centre/tech/paas/

Source: https://c1.sfdcstatic.com/content/dam/web/en_us/www/images/app-cloud/products-mobile-open-source-applications.jpg

PaaS: Microsoft Azure, Google App Engine & Salesforce - case study – Azure video link: https://youtu.be/ZFEw7nSWi6Y (1:26 no commentary)
https://www.salesforce.com/ca/paas/
https://azure.microsoft.com/en-us/migration/migration-program/
https://www.salesforce.com/ap/learning-centre/tech/paas/
https://azure.microsoft.com/en-us/overview/what-is-paas/
https://cloud.google.com/appengine/

Walk through each of the 5 points listed on the slide. This is a great connection to Max as a Product Developer. More information on this list is provided below (and was extracted from the following link: https://www.salesforce.com/ap/learning-centre/tech/paas/)

- **Mobile Software Development Kit (SDK)** - more and more business is being done over mobiles. The number of different handset manufacturers and models makes it imperative to use all the opportunities available and make sure what you build works well on the range of devices in use. A good PaaS option will support you in this. For example, Salesforce mobile SDK is an open source suite of familiar technologies – like REST API and OAuth 2.0 – that makes it easy to build mobile apps. It supports 3 development approaches to building mobile apps: native, HTML 5, hybrid
- **Rich developer environment** - as well as allowing developers to build engaging, customer-facing apps, a high-quality PaaS solution gives developers everything they need to iterate quickly, helping with testing and debugging. With a rich developer environment, they can make changes and deploy them instantly, scale with ease, and get full control, infinite

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capacity, and independent scaling for each component of an app. It assists with short-cuts, helped by complete and open APIs plus libraries and code created internally or externally. You can also expect to find IDE, Sandbox and ALM tools for app management.

- **Fully managed cloud database** - a good PaaS solution should provide you with fully managed infrastructure that can scale beyond your current needs. Being fully managed also means that it will be secure and meet the trust requirements of organizations that need mandatory data privacy and regulatory compliance.
- **Point-and-click app building** - an advanced PaaS solution isn't just for developers. PaaS empowers business users without coding skills to deliver their own solutions. Support for business-level services includes drag-and-drop page layouts, point-and-click field creation plus reporting dashboards. It helps business users rapidly create apps that don't add to the IT backlog yet remain compliant with your other app development.
- **Multi-language development** - Multi-language support means developers can use and build on their existing skills, with apps written in the language that best suits their delivery and business goals. Platforms like Salesforce Heroku can handle languages like Python, Ruby on Rails, Node.js, Scala, Java and all JVM languages and more. Integration with existing workflow strategies including Git, Continuous Integration and DevOps mean there's no need to add more processes.
- **Cloud app marketplace** - an app marketplace is a single source for thousands of valuable shortcuts for businesses – here you can find the tools to help you customize and extend your PaaS services. Rather than build your own, you can rely on the thousands of reviews to find trusted apps to do what you need. And because they're on your PaaS provider's common platform, you know they will integrate easily giving you a unified user experience.

...additional concepts to consider include:
- Build and deploy applications to the web quickly and without the significant capital expenditures and complexity of investments in infrastructure and support layers
- Platform includes security layers, databases, operating systems, and developing/execution environments
- Rapid deployment
- Automatic Scaling
- Integration with developing tools
- Pay for what your application consumes

SaaS: G-Suite- case study – no video...other examples include Slack and Dropbox

https://empireflippers.com/9-saas-examples/
https://getnerdio.com/academy/10-popular-software-service-examples/

Walk through each of the 5 points listed on the slide. More information on this list is provided below (and was extracted from the following link: https://empireflippers.com/9-saas-examples/)

- SaaS is where a third party provides an application, which is hosted on its own servers and delivered via the internet, typically through your web browser.
- SaaS, on the other hand, is sold on a subscription basis, which is either monthly or yearly.
- The biggest benefit of a SaaS is that it is OS-agnostic, meaning it doesn't care what OS you are running. Usually delivered via the browser (referred to as a thin client), a SaaS service doesn't require any special software installation or hardware to run. If your computer can run an internet browser, you're good to go.

Platform Business Models

Proprietary vs. Shared

1. Examples?
2. Advantages?
3. Disadvantages?

[OR]

Open Source or Proprietary Software what is best for your Business?

Source: https://www.esds.co.in/blog/wp-content/uploads/2018/04/OPEN-SOURCE-OR-PROPRIETARY-SOFTWARE.png

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Proprietary vs. Shared
1.   Examples
- **Proprietary:** iOS, Microsoft, Adobe
- **Shared** *(think open-source)* **:** Ubuntu (Microsoft open-source alternative) Inkscape (Adobe Illustrator alternative)
2.   What are the advantages?
- **Proprietary:** Larger market share, simplified user experience, product stability
- **Shared:** Flexibility and Agility – allows freedom, speed and cost-effective
3.   What are the disadvantages?
- **Proprietary:** can't be tweaked by users…think google forms, limited capacity to change the template provided, iOS can only operate on iPhone (not android!), overall dependency of the user
- **Shared:** Reduced competitive advantage – impacts the revenue model, free tech-support is not always the fastest.

https://www.esds.co.in/blog/open-source-proprietary-software-best-business/#sthash.qJWrmvDB.dpbs
https://smallbusiness.chron.com/advantages-three-disadvantages-proprietary-system-vs-open-platform-38010.html

We will discuss this reading during In-class activities

Max Labs – 3a Discussion

Data Driven Humans = Cyborg?

- Technology Awareness
- Managing Data
  - Scalability
  - Automation
  - Templates

Source: https://thumbor.forbes.com/thumbor/960x0/https%3A%2F%2Fspecials-images.forbesimg.com%2Fdam%2Fimageserve%2F935226186%2F960x0.jpg%3Ffit%3Dscale

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Pages 1 - 9

Key Takeaways:
Other (Professional/Personal Development
(Page 1) Max talks up TED talks, hopefully prodding her followers to check them and and develop a habit of learning from successful role models, particularly absorbing good presentation skills.
Business & Digital Business Models
(Page 1) Introduces crowd-funding as an alternative funding model.
Process Support/Automation
(Page 2) Max relates how processing email isn't scaling with demand and the consequences, hinting at needing a technology solution.
Tech Competence/Confidence/Initiative
(Page 2) Max models being cognizant of her tech surroundings and being on the lookout for new ways to leverage the tech when problems arise.
Process Support/Automation
(Page 4) Max envisions the process support value of keeping lead investor data in a database where it is manageable and also the potential for automating parts of the process to solve the scalability challenge she's facing.
Data/Databases/Apps/Platforms
(Page 4) Max introduces her followers to the role of SysAdmin and invites them to create a user account for Riley, underscoring the enterprise perspective.
Process Support/Automation
(Page 5) Max perceives the value in automating the assignment part of the process to avoid errors

and ensure reliability.

Data/Databases/Apps/Platforms

(Page 6) Max leads students through the process of creating three different email templates that merge data from the lead record being processed, embedding it into the message body to make it easier/more efficient for the recipient to take action on it.
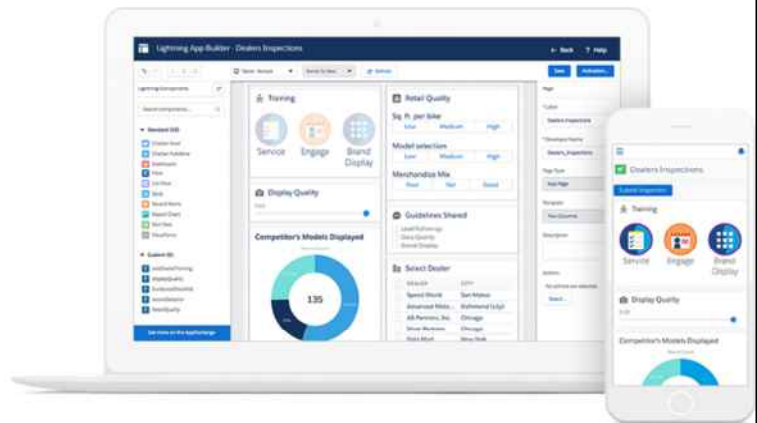

Additional Source:

https://www.forbes.com/sites/kalevleetaru/2019/06/25/as-the-world-becomes-more-data-driven-humans-are-overruling-our-algorithms/#de38b1ddca11

Max Labs – 3a Discussion

Platform Tools

- Programming
- Implementing Business Rules
- Automation

Source: https://www.salesforce.com/products/platform/lightning/

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Pages 9 - 13

Key Takeaways:

Process Support/Automation
(Page 9) Max shows student how to implement the business rules on lead assignment, utilizing Salesforce's logic processing flow definitions.

Data/Databases/Apps/Platforms
(Page 9) Reinforces for students that they are using the Salesforce platform to combine basic functional components in combinations that provide app-level services across the enterprise's users.

Process Support/Automation
(Page 11) Max invites her followers to confirm the successful automation by entering three different leads meant to trigger each of the three business rules and observe the effect.

Process Support/Automation
(Page 13) Max recognizes the automation to help manage their funding leads as a form of CRM.

Tech Competence/Confidence/Initiative
(Page 13) Max introduces the term "secret sauce" and is cognizant of the tech context (Salesforce) that she's working in and confident she can look for, find & implement whatever she needs.

Max Labs – 3a Discussion

Cyborg CRM?
- Business Processes
- Platform Features
  - Managing Communications
  - Process Automation

Source: https://designerd.info/features/neil-harbisson-the-art-of-being-a-cyborg/

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Pages 14 - 17

Key Takeaways:
Process Support/Automation
(Page 14) Max is learning more about the business processes and prospecting to discover more process support platform features she can apply.
Strategic Value/Business Impact
(Page 15) Max fleshes out the business value of the platform process support features she's invoking for managing communications with potential investors (leads).
Strategic Value/Business Impact
(Page 16) Max recognizes the business value to be leveraged from Salesforce tracking if/when a lead opened an email s/he was sent.
Process Support/Automation
(Page 16) Max summarizes how she combined selected process support capabilities and process automation features of the Salesforce platform, leveraging what computers do best (tedious, well-defined tasks) to let her focus on what humans do best (unstructured, unique, situational work) so her job is scalable and she's doing things better/faster/smarter.

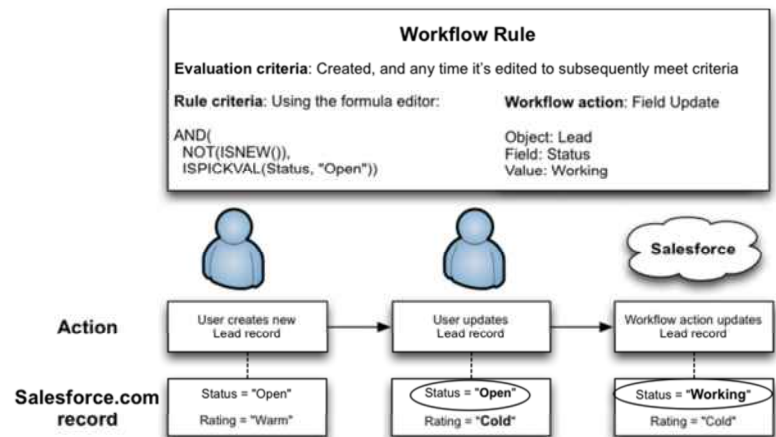We will discuss this reading during In-class activities

Max Labs – 3b Discussion

"Social Business"

- Internal vs. External
- Communication Tools
- Enterprise Environment
- Practice Professionalism

Source: https://joannemccall.com/wp-content/uploads/2017/02/social-network_110003543-012814-int.jpg

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Pages 1 - 6

Key Takeaways:
Tech Competence/Confidence/Initiative
(Page 1) Max is modeling confidence, founded on her last success, and a newfound passion to carry it farther, specifically in identifying new automation opportunities she can leverage with Salesforce platform services she anticipates finding.

Process Support/Automation
(Page 2) Max introduces the idea of "Social Business" for quick & easy communication with colleagues and she invites her followers to try it out using the Salesforce platform's Chatter tool with a humorous example.

Data/Databases/Apps/Platforms
(Page 3) Logging out and logging back in as Riley to respond as her reinforces the enterprise environment students are exposed as Salesforce admins (likely for the first time).

Process Support/Automation
(Page 6) Max points out that you can follow people or groups but also individual leads, etc. can be followed & have threads attached. And she summarizes Social Business as ad hoc process support thru the ability to quickly & easily get/give ideas across the organization.

Other (Personal/Professional Development)
(Page 6) Max is making the point that while Chatter is Facebook-like in functionality, it's for professional purposes only and violating that, even accidentally, can have career-damaging consequences

Pages 6 - 7

Key Takeaways:

Process Support/Automation
(Page 6) Max introduces the concept of workflows (task sequences) and imagines there must be something in the Salesforce platform for automating them.

Process Support/Automation
(Page 7) Max leads her followers thru creating a workflow rule, setting the rules to trigger it and then customizing the result--the creation of a new task for that lead, assigned to the right person by the rules.

Max Labs – 3b Discussion

Email Messaging

- Creating forms & templates
- Auto-response
- Configuration

Source: https://developer.salesforce.com/forums/servlet/rtalmage?eid=906F0000000D6Js&feoid=Body&refid=0EMF0000000TjgE

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Pages 8 - 11

Key Takeaways:
Process Support/Automation
(Page 8) Max previews making a database-connected web form for leads but first she walks followers thru configuring the auto-response that leads will receive--automating another busywork task off her plate.
Data/Databases/Apps/Platform
(Page 8) Further reinforcement on configuring templates to merge database fields into personalized messages.
Process Support/Automation
(Page 9) Configuring the platform's auto-response service so it will use the template for the assigned staff (Max or Riley) when a new lead comes in through the form.
Process Support/Automation
(Page 10) Max shows how to configure the Web-to-Lead form
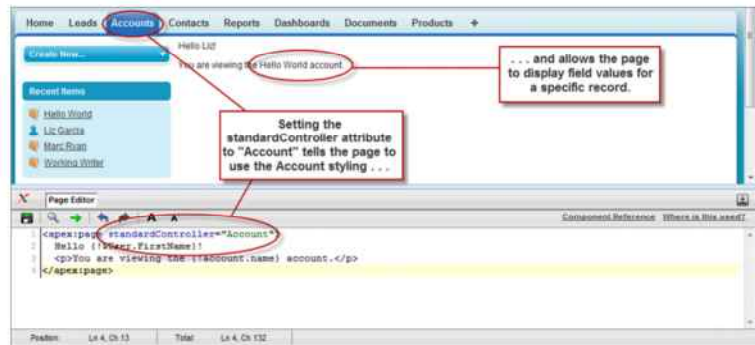**Process Support/Automation**
(Page 11) Max shows how to configure the platform's Web-to-Lead service to send the user (lead) to a thank-you page.

Max Labs – 3b Discussion

Pages 11 - 12

Key Takeaways:

Tech Competence/Confidence/Initiative

(Page 11) Max overcomes her initial reaction to code as incomprehensible and plunges into the underlying HTML form tags only to discover she can, with a little effort, figure out a lot more than she'd imagined.

Tech Foundations/Coding Intro/Primer

(Page 11) Max starts deciphering HTML by recognizing that the symbols (<!- ->) preceding the webmaster instructions (in plain English), must be telling the browser to ignore those lines.

Tech Foundations/Coding Intro/Primer

(Page 11) Tech Foundations/Coding Intro/Primer Max infers the "input" tags below must be used define the form slots, telling the browser the corresponding field names in the Salesforce database, the display label for the form, how long to make the slot, etc.

Tech Foundations/Coding Intro/Primer

(Page 12) Max susses out how the input tags with "hidden" qualifiers work (not appearing on the form, values set within the tag, etc.). She further notes the "oid" must be telling which organizational account the collected data is to be sent to upon Submit. Finally, seeing the embedded URL for the Thank-you page, she infers the function of "retURL"

Tech Foundations/Coding Intro/Primer

(Page 12) Max Google's the term "form action" and schools herself in the basics of APIs. She suggests an excellent tutorial she found helpful.

Tech Foundations/Coding Intro/Primer

(Page 12) Max encourages her followers to get up close & personal with APIs by issuing their own Post request manually from their browser's address bar to send data directly into their Salesforce database over the web via HTTP

Max Labs – 3b Discussion

"The Cloud"
- API's
- PAAS
- Automation
- Coding
  - HTML

Source: https://i1.wp.com/www.startupmgzn.com/english/wp-content/uploads/2018/06/shutterstock_710262001.jpg?resize=740%2C494&ssl=1

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Pages 13 - 16

Key Takeaways:
Data/Databases/Apps/Platforms
(Page 13) Building out "the cloud" concept as more than Web page servers to include others running different kinds of apps, such as Salesforce's "webtolead" servlet, that are interfaced via APIs.
Tech Competence/Confidence/Initiative
(Page 13) With another movie reference, Max congratulates her followers for having dared to pull back the curtain a bit on the technology infrastructure on which the platform services are built.
Tech Foundations/Coding Intro/Primer
(Page 13) Confirming the Post request succeeded--the data now appears in a lead record in the database of the student's Salesforce org account.
Process Support/Automation
(Page 14) Max encourages students to pause and take stock in what they've managed to build: a set of eight automated processes to be triggered by one click of the form Submit button!
Tech Foundations/Coding Intro/Primer
(Page 15) Max notes that the HTML generated this way is purely functional--integrating it into the organization's website aesthetically would require cosmetic editing by a true techie but that's ok--that's what they're there for.
Tech Foundations/Coding Intro/Primer
(Page 15) Confirming the HTML parameter RetURL worked, automatically sending the lead to the thank-you page after Submit.

Tech Foundations/Coding Intro/Primer

(Page 15) Confirming the auto-response email was automatically sent to the lead after Submit.

Process Support/Automation

(Page 15) Confirming the lead assignment alert message was automatically sent to Max (the student).

Tech Foundations/Coding Intro/Prime

(Page 15) Confirming a new lead record was created in the database after Submit.

Tech Foundations/Coding Intro/Primer

(Page 15) Confirming the lead info from the Web form appears in the new record details.

Process Support/Automation

(Page 16) Max notes an unexpected automation extra--the lead assignment has automatically posted to the Chatter feed.

Process Support/Automation

(Page 16) Confirming the auto-response AND the both automated workflow succeeded--the results appear on the lead's (Miles Dyson's) Activity list.

Page 17

Key Takeaways:

Process Support/Automation
(Page 17) Max concludes by reiterating that process automation relieves her of the busywork in her job, making it scalable and opening up time to focus on the aspects where she can can add value as a thinking human being. Implied is the larger point that this makes organizations better/faster/smarter, and it's enabled by leveraging technology strategically.

More to Come

Prepare with Readings & Videos before our next class!!!