

Business Systems Innovation Labs

Lab 3b Afterlab



Picture yourself at a job interview.
What would you say when asked about the course & the labs?

Overview: Lab 3B ("How to be a Better Borg")

This lab continued with the theme introduced in 3A—*How can you leverage technology to make overwhelming processes scalable/manageable?* Building on the process automation/CRM concepts introduced in 3A, you:

1. configured an integrated, highly automated, Web-based lead capture system AND
2. you improved efficiency on the un-automated, human side by using Social Business technology to access the collective wisdom of your colleagues within the organization.

What did you do?

- ✓ I researched a lead without leaving the data system environment, using integrated (built-in) social media tools.
- ✓ I collaborated efficiently with "co-workers" about a lead using integrated Social Business tools.
- ✓ I built an automated workflow, triggered when new leads are added, that creates & assigns follow-up tasks.
- ✓ I integrated Web-based lead capture, delivering an automated professional-level customer (user) experience.
- ✓ I templated customer communications, integrating data into emails to maximize perceived personalization.

What did you learn?

- ✓ I recognize the power of integrating systems, e.g. Web interfaces to data management systems.
- ✓ I grasp of the idea of Social Business—using social media tools to efficiently tap information from colleagues within an organization that would otherwise get buried in email threads, etc.
- ✓ I appreciate the value of automating processes as a way to scale them to handle greater volume/speed.
- ✓ I get how CRM systems can help businesses enhance how they deal customers, thereby increasing sales.

What skills did you add?

- ✓ I can use internal social media tools, like Salesforce's Chatter, to communicate efficiently within and across the organization (Social Business).
- ✓ I can configure tools like Salesforce Workflows to automatically create and assign customized tasks, like lead follow up, for example, based on business rules.
- ✓ I can implement business rules, using tools like Salesforce's Lead Auto-response capability, to automatically send instant personalized emails to leads when they submit contact information via Web forms.
- ✓ I can generate HTML code, using tools like Salesforce's Web-to-Lead function, to implement Web forms that convey lead information directly to the database, while triggering auto-response email rules and taking users to specified landing pages.