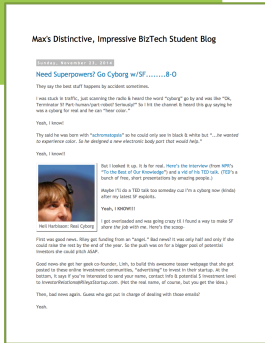


Business Systems Innovation Labs

Lab 3a Pre-flight Checklist



“NeedSuperpowers? Go Cyborg w/SF.....8-O”

In this episode, Max’s job is getting out of control and she can’t keep up. Fortunately, she figures out how to build business rules into SF to make it help do the work. That’s *process automation*—how you make the computer do the busywork so your job is *scalable*. She also uses Customer Relationship Management (CRM) to better deal with customers (VCs & Angels, in her case), even when there’s tons!

Prep: What do you need to start?

- ✓ **Do NOT Yahoo or AOL email with this assignment.** If you normally use one of those, consider creating a free Gmail account to use for this assignment. **If you already set up your account with Yahoo or AOL, see Step 6** to learn how you can change the email address for an account, even though the login name for that account still *looks* like the old email address. It’s easy!

Learning Objectives: What to “get”

- ✓ See for yourself how data can be totally unmanageable when it’s not in a system where it can be well... managed (eg. like when it’s buried in emails).
- ✓ Realize how you can make business processes manageable, and scalable, through automation (when your data’s managed in a system).
- ✓ Discover the power of Customer Relationship Management (CRM) systems to track & ensure effective communication so customers are happier (& buy more).

Deliverables: Get your points

This time there are four (4) points marked for you to stop and take a screen capture to submit as deliverables. Match the numbers below with the annotations in the blog:

- 1 After Step 130, Max tells you to leave Salesforce, open your own email inbox and find three messages sent by Salesforce. First, open the message with subject “New Distant Investment Lead.” Do a screen capture and submit for credit.
- 2 Next, open the message with subject “New (minor) Investment Lead for YOU (me) – Go!” Do a screen capture and submit for credit.
- 3 Then, open the message with subject “New Bay Area Investment Lead”. Do a screen capture and submit for credit.
- 4 After Step 166, you’ll be on the lead details page for Kyle Reese, viewing the Activity History section. Do a screen capture and submit for credit.

Tips: Get more

Take the time, as you work, to think about what you’re actually doing, in terms of the job!

Resources: Get some help

Online help community (using your Google+ account): <http://tiny.cc/MaxLabs911>