Mini mock scenario – Packt Innovative Retailers

This scenario is part of the book *Becoming a Salesforce Certified Technical Architect*. The scenario, its proposed solution, artifacts, and several elements of the presentation pitch can be found in the book. You can get your copy from Amazon at `https://www.amazon.com/Becoming-Salesforce-Certified-Technical-Architect/dp/1800568754/ref=sr_1_1?crid=D5L23IKSKZ6M&dchild=1&keywords=becoming+a+salesforce+certified+technical+architect&qid=1624804105&sprefix=becoming+a+salesforce%2Caps%2C217&sr=8-1`.

Timing

The following list contains the suggested timing for this scenario:

- **Preparation**: 75 minutes
- **Presentation**: 20 minutes
- **QA**: 20 minutes

You can increase or reduce the suggested timing to place yourself under looser or stricter exam conditions as required.

The scenario

Packt Innovative Retailers (**PIR**) is a global digital retailer. They sell computers, computer accessories, and services through multiple channels to both B2B and B2C customers. They also sell via a network of partners/distributors.

Current situation

The organization is structured as two main departments – sales and service. Each report to an **Executive Vice President** (**EVP**) who, in turn, reports to the CEO. PIR is mainly operating in three regions: AMER, EMEA, and APAC. They share a single Salesforce org and currently have a set of processed and configured global sales and services that utilize the account, contact, opportunity, opportunity line item, product, service contract, asset, case, and entitlement objects. The sales department team is currently organized according to the following structure:

- An EVP for global sales who requires visibility across all sales deals.

- A **senior VP** (**SVP**) covering each of the three major regions: AMER, EMEA, and APAC. SVPs report to the EVP.
- A VP for each country within a region (for example, France and Germany) reporting to the regional SVP. In total, PIR operates in 100 countries.
- A state/district director of each main territory/state in a country. There can be up to 60 territories per country. The average is 10. State directors report to their country's VP.
- Sales representatives who typically operate in a particular region or city. They report to the state director. Sales reps normally own the sales opportunity and direct customer relationships.
- In addition, there are 5,000 channel representatives (who sell the company products via the partner/distributor channel). They report directly to the global sales EVP, and they own the direct relationship with the partners.
- In total, there are around 20,000 employees in the sales department.

The service department is organized by two main product lines—hardware and software, in addition to the call center agents who operate across both product lines. They are organized according to the following structure:

- An EVP for global service that requires visibility across all reported customer issues, service agreements, and service deals.
- An SVP for each product line that requires visibility across reported customer issues, service agreements, and service deals related to their product lines.
- Each product line has multiple teams of service specialists (which could be up to 25 different teams) who provide support to resolve the raised client tickets and reported issues. They are organized by the different product categories they support, such as software servers, software-cloud, and hardware-desktop. Specialists can work in more than one team. Teams usually contain around 30 specialists.
- 500 call center agents who answer calls from customers and raise support tickets. They need visibility of all customer records, service agreements, and cases across all product lines.
- In total, there are around 1,000 employees in the service department.

PIR had a concern with their current setup. Several users reported that they could view and edit records that they shouldn't even be able to see. PIR also wants to offer their customers the ability to self-serve as they see this as a crucial part of their future customer-centric services.

Requirements

PIR shared the following requirements:

- Users in the sales department should only have access to the accounts owned by them or their subordinates. This includes both direct and channel sales.
- Reports for direct sales should roll up from the entire sales org up to the global EVP of sales.
- Reports for channel sales should roll up to the global EVP of sales.
- The service department reports roll up by product line. Eventually, they should roll up to the EVP of service.
- Call center agents can create cases on behalf of customers. These cases may relate to specific complaints, inquiries, or requests to service a PIR product they have purchased. Cases are organized by type and subtype, where the type value is aligned with the product line (hardware or software), and the subtype is aligned with the product line category such as software servers, software-cloud, and hardware-desktop.
- Specialist teams can work on one or more case subtypes.
- Only the team of specialists working on a case and anyone above them in the hierarchy should be able to view it.
- Once a case is created, it gets assigned to a member of a specialist team, based on the case type and subtype.
- PIR wants to provide its customers with the ability to self-serve themselves by raising different types of cases. They currently have 500K B2B customers with up to 10 contacts each and 1 million individual B2C customers.
- Customers should only have access to cases related to their accounts.
- PIR wants to allow B2C customers to self-register or log in via Facebook. B2B customers must provide their corporate ID and their corporate email address during registration. B2B customers are also expected to provide a second-factor authentication when logging in for additional security.
- PIR partners should be onboarded by their channel rep. PIR has 20K partners, with an average of 10 users each. Partners should be able to have access to designated customer accounts only, determined by their channel rep. They should also be able to view and collaborate on the different sales and service opportunities for a given customer. They shouldn't be able to access the customer's cases.

- PIR employees in APAC have their credentials and user details defined in APAC's Active Directory. Other regions are using a different LDAP provider. PIR wants all its employees to access Salesforce using a unified login mechanism, which also requires the employee to use a mobile application to provide a second-factor authentication.
- Once a new employee joins PIR, a user should be created for that user in Salesforce. Once the employee leaves, their corresponding Salesforce user must be deactivated immediately.
- The call service agents would like to use modern technology to look up the customer account based on the caller number. PIR doesn't want to utilize its existing call center infrastructure and would like suggestions for a more scalable and easy-to-maintain solution.

This concludes the hypothetical scenario. Ensure that you have gone through all the pages and requirements of your actual hypothetical scenario before proceeding further.