Mini mock scenario – Packt Visiting Angels

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 Visiting Angels (**PVA**) is a home clinical trial company that bridges the gap between **Clinical Research Organizations** (**CROs**) and clinical trial volunteers. PVA provides a different set of services, including home visits and site nurse services. They operate across five different European countries (UK, France, Germany, Italy, and the Netherlands).

Current situation

PVA has a sales operation team that deals with the CROs. They take over from the marketing team, which gathers and qualifies information about potential deals via multiple sources.

The sales operations team monitors qualified deals, particularly the high-value deals (with a total amount above EUR 5 million). The sales operations team handles various follow-up activities, such as creating quotes, contracts, notifications for other internal team members, and follow-up tasks, as well as scheduling wrap-up meetings.

Once the deal is closed, nurses are assigned to the project. They should follow an optimized schedule to visit as many sites as possible, considering their skills, location, and shortest possible route.

PVA's business is growing rapidly, and they are looking to introduce more automation to increase their internal teams' efficiency using Salesforce as their central CRM solution.

Requirements

PVA has shared the following requirements:

1. Leads are normally gathered via three channels: web forms, third-party providers, and manually created by the marketing team. PVA wants to ensure that the leads gathered are unique, where no more than one lead per company, drug, and country should be open at the same time.
2. Leads that are not created manually should automatically be assigned to a country's marketing team based on the geographic location (country). Leads can only have one associated country.
3. Once the lead is assigned, it proceeds to multiple stages. At each stage, a set of activities are expected to be completed by the lead owner.
4. Once the lead is qualified, it has to be converted into an opportunity and automatically handed over to the country's sales operations team. One of the team members (a sales operations agent) should pick up the opportunity to develop it further.
5. The sales operations agent will follow up with the deal. The agent should be able to create quotes and negotiate them with the client.
6. Once a quote is accepted, the agent updates the opportunity to the *contracting* stage. Once that is done, the system should automatically generate a contract record using the opportunity information.
7. The agent should ensure that the contract's data is accurate, select the right terms and conditions, and send the contract to the client for an online signature. The contract should be presented in the local language of the target country.
8. The client should receive a request to sign the document online. Once the document is signed, the contract should be made active, and the opportunity should be updated to closed-won.
9. The agent should update lost opportunities to the **closed-lost** stage manually and set a reason for the loss.

10. Once the opportunity is closed-won, a project that contains key information derived from the opportunity should be created automatically. Only the nurses in the target country and their managers should be able to view the project details.
11. The solution should provide the nurses with their daily optimized visit schedule. This schedule should aim at allowing the nurses to visit as many sites as possible during their working hours.
12. Once the opportunity is closed, lock all the opportunity fields for all users except the administrator and the opportunity owner.
13. Opportunity line items' fields should also get locked. No products can be added, edited, or deleted once the opportunity is closed.
14. The opportunity owner is allowed to change the value of the description field for up to 7 days after closing the opportunity. However, that is the only field they are allowed to change during that period.
15. After 7 days, all fields should be locked for all users except the administrators.
16. If a high-value deal is closed and lost, send an email to notify the sales agent's manager. This email should include the opportunity name and amount and create a follow-up task due in 10 days, assigned to the sales agent's manager to review the reasons for loss with the agent.
17. The system should support both Euro and Pound sterling currencies with dated exchange rates.

PVA is looking for a proposed solution that can increase their internal teams' efficiency and reduce manual errors using Salesforce.

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