



DAY-8

Workflow in Sales Digital Work Place



Workflow in Digital Sales Workplace

Definition: The workflow is responsible to restrict sales advisor in the sales process execution, based on predefined process steps. It is also responsible to control the status of a sales process, the documents to be produced during this process and external functions to be called.

Key components

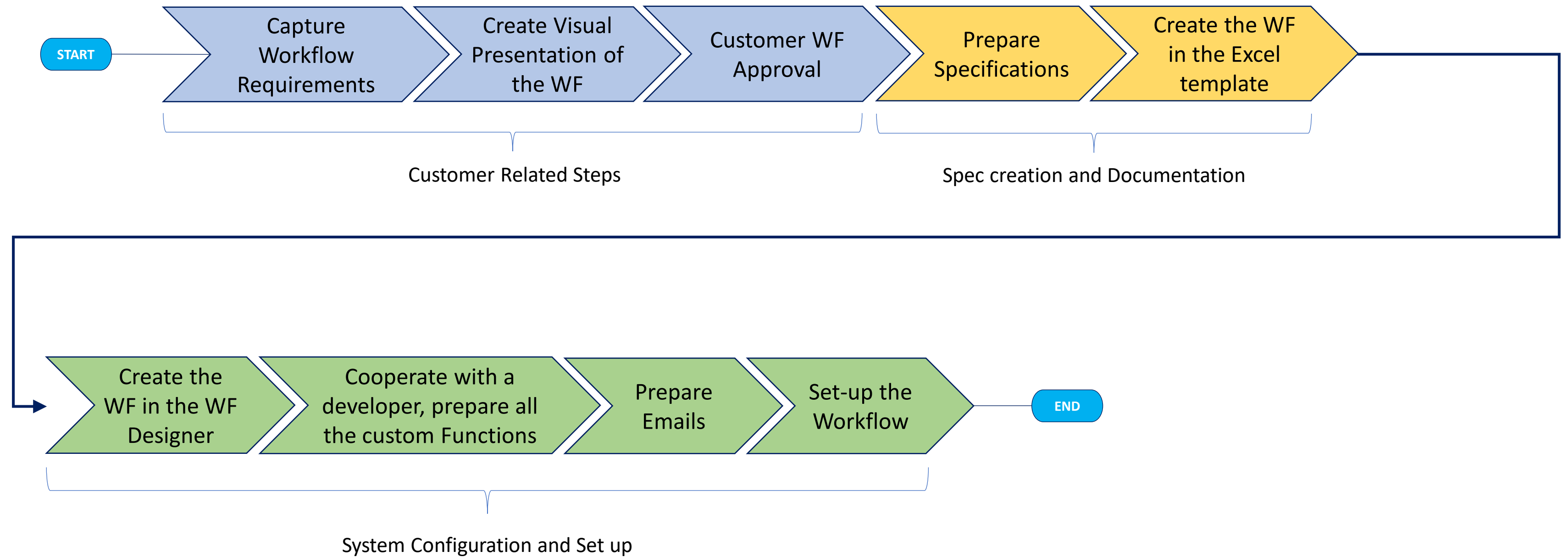
- Planned Activity: The current activity that the sales lead is at or has been left to.
- Activity Result: The possible activity results the current activity has.
- Next Activity (Transition): The next planned activity that the chosen activity result will lead to.
- External Function: Every functionality that should take place automatically after saving an activity result. (E-mails, Document creation, API calls, Status changes, Validations, Approvals)
- Transition Required View: Every functionality that the user should provide some extra information before saving the activity result. Usually the system makes a transition between different views/windows to collect this information from the user.
- Durations / Schedule times: A collection of fields where the duration and the predefined planning of each activity is determined.

Tools

- Power Point (optional)
- Excel
- OneDealer Workflow Designer
- Email designer (optional)

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Process in a project implementation





Thank you!

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