



**WORKFLOW TRAINING MANUAL**



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## 1. INTRODUCTION

### ***Why is Automation of Sales Marketing Process Important?***

Businesses cannot achieve ROI from CRM by renting a CRM system and feeding in data. Process automation is one method of reaping rewards from CRM.

The following benefits accrue from process automation:

- Consistent performance from the sales team
- Improved productivity
- Repeatable successes
- Improved responsiveness to customers to enhance customer satisfaction levels

Often the sales and marketing processes of a business are the least documented and structured areas of the business. Customers who focus on the processes will find areas that can be automated. This frees up sales staff to concentrate on the "Art" of selling that is not yet easy to automate, spending time developing deal propositions, discussing customer requirements and negotiating and closing sales.

### ***What types of processes can be automated in sales and marketing?***

- Automation of tedious manual processes e.g. feeding of web enquiries directly into your CRM database. Built into BluWave CRM is a free automated web service which allows all customers to push their web site enquiries directly into the BluWave CRM database.
- Business processes to assign resources based on an event e.g. automate the allocation of leads from a website based on a product or region selection. For example you can use the new workflow function to trigger an email and a task for the sales person to whom you have routed the lead.
- Triggering of client facing events e.g. personalised responses to a sales enquiries. For example, at BluWave Software we have applied the BluWave Workflow function for our customers who apply for the 30 day free trial. We have an automated trial user campaign that sends a weekly personalised email directly to the trial user "from the sales person" to indicate the remaining days on the trial but also to deliver a message about a function and the benefits thereof. The system has 4 automated messages triggered on a timed basis over the duration of the trial. "I find this is a very effective method to engage with new leads, they respond to my emails with queries and things they have queries about and this commences the sales engagement process" (Tania Cooke-Tonnesen)
- Automated prompts on customer anniversary dates e.g. contract renewals or customer equipment service prompts.
- Prompts to the sales team to monitor critical processes. For example, with the new workflow process in BluWave you can trigger an internal email to senior manager when a new high value opportunity is raised in the system.

## **Types of Actions That Can Be Triggered From BluWave CRM**

- Immediate emails
- Immediate tasks
- Future emails
- Future tasks

NB: Workflow emails can also have attachments.

## **2. BluWave CRM WORKFLOW TRIGGERS**

You will be able to trigger automated emails and tasks from the following main areas of the CRM:

### **2.1 Companies**

Company Workflows can be triggered in any of the following ways:

- Adding a new prospect/customer – The system can be setup to email the sales rep assigned to the company which could be useful if there is an internal sales person who captures clients on CRM. Automated tasks can also be created for the rep to follow up on new clients that have been allocated to them.

When a new client has been added, you can also create a series of marketing emails that trigger over a period of time to furnish the new client with information such as company profile, product and service range etc.

- Editing Company Information – Editing any of the company fields and user defined fields can also trigger emails and tasks from the system. For example changing a customer type from a B account to A Account can send an email to the sales manager alerting them of this change in client type. You can also have User Defined Fields in BluWave that are important to specific staff members and if this values change the system would then email or create specific tasks for those sales reps.

### **2.2 Leads**

Leads can be created manually or fed from our free web service which pushes enquiries directly from your website to the leads area in CRM.

Use lead workflows to trigger marketing literature fulfilment. E.g. If a lead requests a brochure or pricelist from the website, the system can automate the delivery of the required information.

**2.3 Activities** – Still to be released

**2.4 Opportunities** - Still to be released

**2.5 Contacts** - Still to be released

### 3. SETTING UP WORKFLOWS

#### ***Before Getting Started - Workflows and Consumer Protection Act Compliance***

Before initiating any workflows, it is important to understand how to stop the email campaigns should the customer request it. This is required by the Consumer Protection Act.

Workflow emails can be stopped in the following ways:

#### **3.1 Stop Workflow/ Deactivate on Setup**

This prevents any workflow from triggering. It is recommended that you flag the workflow as inactive while setting up/testing.

Deactivate Workflow by "Un checking" the Tick Box below.

Entity Type	Companies
Workflow Name	New companies added
Description	Send an email to sam
Created By	samuel
Active?	<input checked="" type="checkbox"/>

#### **3.2 Unsubscribing**

Once a workflow has been triggered, it can be suspended either by the recipient unsubscribing from the emails or the sales rep unsubscribing the user from future workflow emails. The server will always check the unsubscribe flag on contacts before sending out any emails.

Tel	011 462 6871
Fax	
Cell	
Email	samuel@thirdwave.co.za
Unsubscribe	<input type="checkbox"/>

## 4. CREATING WORKFLOWS EXAMPLES

To setup workflows, we will use the following Examples:

### 4.1 Company Workflow

**New Prospect Marketing Campaign** – When a new prospect is added on to CRM by the sales administrator, create a follow up task for the sales rep and also trigger marketing emails to be sent to the prospect over a week to include the Company Profile (Immediate email)and Product range offered (follow up email)

#### Before Starting: Create Email Templates

Email templates can be created from System Setup or from the workflow wizard.

**Step 1:** Click on the Work Flow tab under system setup and “New Workflow” to begin, this will open up the workflow wizard.

Select where workflow will be initiated from, give it a unique name to differentiate it from other workflows and also type in a short description of what the workflow is meant to achieve.

NB: Leave the workflow as inactive for setup. Activate it once all has been setup correctly especially for immediate emails and tasks.

**New Workflow**

Workflow Details \* Required Fields

**Step 1** Basic Information   **Step 2** Workflow Triggers   **Step 3** Workflow Criteria   **Step 4** Workflow Actions   **Next**

Entity Type:  Where in the system will this workflow be initiated from?

Workflow Name:

Description:


Created By:

Active?  This workflow will only be triggered when you flag it as active

**Step 2:** This step allows you to set the workflow triggers i.e. what condition has to be met to initiate the workflow tasks and emails.

In our example, the option will be “Create and Edit” – A New prospect added and allocated to a sales rep.

Workflow Details


 **Back**

**Step 1**  
Basic Information
 

**Step 2**  
Workflow Triggers
 

**Step 3**  
Workflow Criteria
 

**Step 4**  
Workflow Actions
 

**Next** 

Entity Type:

Workflow Name:

Choose an option based on when you want the workflow to be triggered


- Create a Record      When a company or prospect is added to the system
- Edit a Record        When you change details on a company
- Create and Edit        When a company or prospect is added or updated
- Delete a Record        When you delete a company

**Step 3: Add a rules for the workflow trigger.**

A rule is not required; only create a rule if you only want this work flow to trigger if and when a certain condition is met.

A rule is required in our example: The sales rep field has to be edited. Sales rep = any of the sales rep in the company

Workflow Details


 **Back**

**Step 1**  
Basic Information
 

**Step 2**  
Workflow Triggers
 

**Step 3**  
Workflow Criteria
 


**Step 4**  
Workflow Actions
 

**Next** 

Entity Type:

Workflow Name:

No Rule

Field:  Operator:  Condition:  Connector:  

Line No.	Field	Operator	Condition	Connector
<a href="#">Delete</a> 3	Sales Staff	=	Mike	AND
<a href="#">Delete</a> 4	Sales Staff	=	samuel	AND

**Step 4: Create the workflow actions.**

The screenshot shows the 'Step 4: Workflow Actions' configuration screen. At the top, there is a navigation bar with 'Back', 'Step 1: Basic Information', 'Step 2: Workflow Triggers', 'Step 3: Workflow Criteria', 'Step 4: Workflow Actions', and 'Finish'. Below the navigation bar, the 'Entity' is set to 'Companies' and the 'Workflow Name' is 'New Prospect Marketing Campaign'. Under 'Type of Action', there are four options: 'Create Immediate Task', 'Schedule Future Task', 'Create Immediate Email', and 'Schedule Future Email'. Each option has a green plus icon. An 'Edit/Add Email Templates' button is located next to the 'Create Immediate Email' option.

**A. Create a future follow up call for the sales rep to follow up on the prospect.**

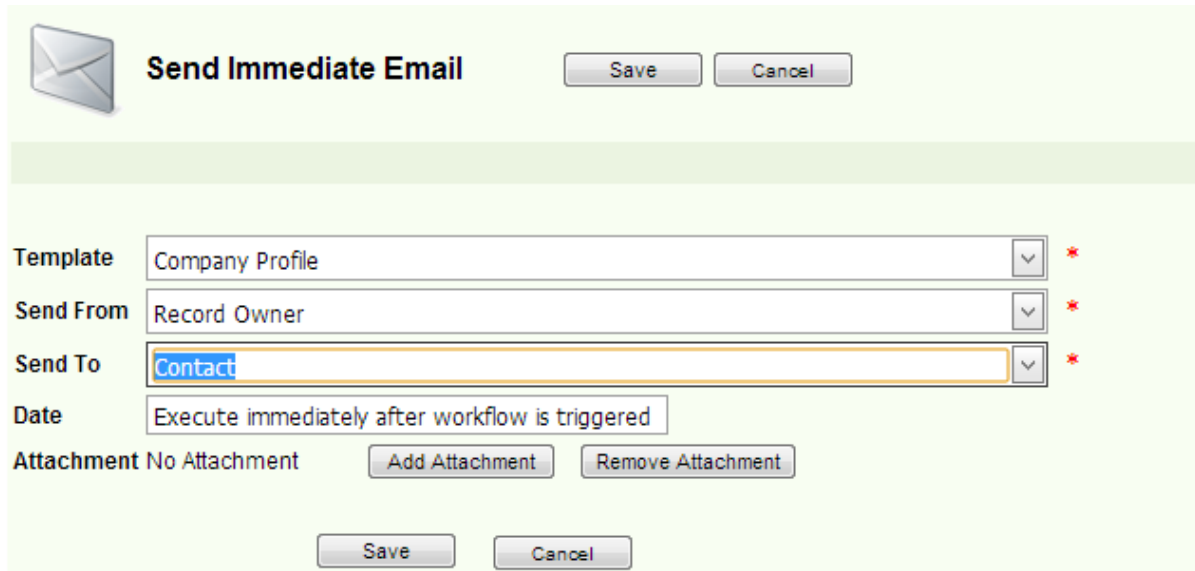
Click on "Schedule future task" to create a task for the sales rep and save.

The 'Schedule Future Task' dialog box is shown. It includes a calendar icon for the date '15'. The title is 'Schedule Future Task' with 'Save' and 'Cancel' buttons. The form fields are: 'Assign To' (Record Owner), 'Activity' (Follow Up Call), 'Create' (1 Days after workflow trigger), and 'Task?' (checked). A 'Note' field contains the text: 'Please call new prospect added to introduce yourself.' 'Save' and 'Cancel' buttons are at the bottom.



**B. Create Immediate email to be sent to the prospect once added on the CRM.**

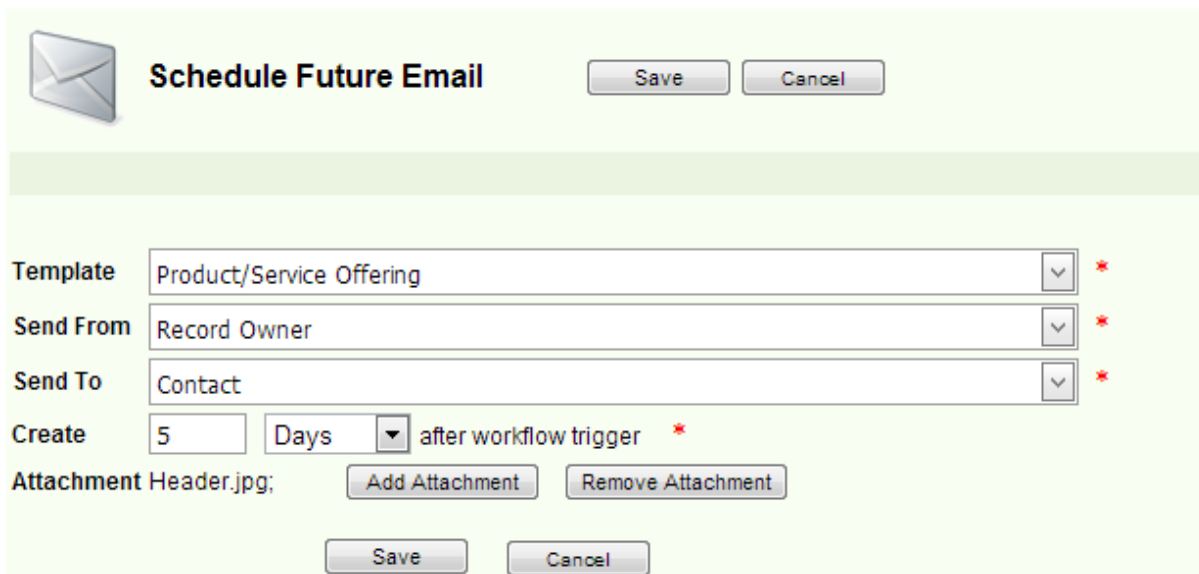
NB: If email template has not been created, create one on this step before proceeding.  
This email will be sent as though as it was coming from the sales rep to the contact added under the prospect.



The screenshot shows the 'Send Immediate Email' configuration form. It features a header with an envelope icon, the title 'Send Immediate Email', and 'Save' and 'Cancel' buttons. The form fields include: 'Template' (Company Profile), 'Send From' (Record Owner), 'Send To' (Contact), and 'Date' (Execute immediately after workflow is triggered). There are also 'Add Attachment' and 'Remove Attachment' buttons, and a final 'Save' and 'Cancel' button at the bottom.

**C. Create future email to be sent in a week to the prospect.**


This will have the product/ service brochure




The screenshot shows the 'Schedule Future Email' configuration form. It features a header with an envelope icon, the title 'Schedule Future Email', and 'Save' and 'Cancel' buttons. The form fields include: 'Template' (Product/Service Offering), 'Send From' (Record Owner), 'Send To' (Contact), and 'Create' (5 Days after workflow trigger). There are also 'Add Attachment' and 'Remove Attachment' buttons, and a final 'Save' and 'Cancel' button at the bottom.

All workflow actions can now be viewed under Step 4 panels as below:

Actions

**Workflow Tasks** 

	Assigned To	Activity	Period	Note
<a href="#">Edit</a> <a href="#">Delete</a>	Record Owner	Follow Up Call	1 Days	Please call new prospect added to introduce yourself.

**Workflow Emails** 

	From	Send To	Template	Period	Att.
<a href="#">Edit</a> <a href="#">Delete</a>	Record Owner	Contact	Product/Service Offering	5 Days	<input checked="" type="checkbox"/>
<a href="#">Edit</a> <a href="#">Delete</a>	Record Owner	Contact	Company Profile	Immediate	<input type="checkbox"/>

**Finish** – Click on “Finish” to save the workflow. To activate it, you can now click on edit and mark the workflow as “Active”

 **View Workflows** 

Search   Filter

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

	Workflow Name	Workflow Description	Active	Entity Type	Date Created	Owner
<a href="#">Edit</a> <a href="#">Delete</a>	<a href="#">New Prospect Marketing Campaign</a>	Create a follow up task for assigned rep and send 2 emails to the new prospect over a week( Company profile as an immediate email and products and services brochure in the next week)	No	Companies	23/09/2013	samuel

## 4.2 Lead Workflows

As mentioned previously, enquiries from the website can be posted to the BluWave CRM Leads area automatically via the free leads web service. Leads can also be added on the CRM manually.

You may want to automate responses to these enquiries by setting up a leads workflow.

Scenario: Training Company may wish to send course outline and price based on the course the lead enquired about. Use one of the user defined fields to store the “course interest” e.g. UDF 4

Setup workflow as follows:

**Step 1:** On the workflow page click on “Add New Workflow” and select “Leads Workflow”  
Enter workflow name and give it a short description.

**Workflow**

Workflow Details \* Required Fields

**Step 1** Basic Information   **Step 2** Workflow Triggers   **Step 3** Workflow Criteria   **Step 4** Workflow Actions   **Next**

Entity Type: Leads

Workflow Name: Price list Automation

Description: Send price list to lead based on course interest selected


Created By: samuel

Active?

**Step 2: Create workflow triggers.**

Choose an option based on when you want the workflow to be triggered.

Workflow Details


 **Back**

**Step 1**  
Basic Information
 

**Step 2**  
Workflow Triggers
 

**Step 3**  
Workflow Criteria
 

**Step 4**  
Workflow Actions
 

**Next** 

Entity Type

Workflow Name


Choose an option based on when you want the workflow to be triggered

- Create a Record    When a lead is added to the system
- Edit a Record    When you change details on a lead
- Create and Edit    When a lead is added or updated
- Delete a Record    When you delete a lead

**Step 3: Set workflow criteria.**

Indicate which conditions that must be met for the workflow to initiate.

Workflow Details


 **Back**

**Step 1**  
Basic Information
 

**Step 2**  
Workflow Triggers
 

**Step 3**  
Workflow Criteria
 


**Step 4**  
Workflow Actions
 

**Next** 

Entity Type

Workflow Name

No Rule

Field  Operator  Condition  Connector  

Line No.	Field	Operator	Condition	Connector
<a href="#">Delete</a> 1	Course Interest	=	Welding	AND



**Step 4: Set Workflow Actions**

Set actions that need to happen once the condition(s) set above have been met.  
NB: You can only create immediate emails/ future emails for leads. Tasks can only be created for companies.

Entity: Leads


Workflow Name: Price list Automation

Type of Action:

- Create Immediate Task
- Schedule Future Task
- Create Immediate Email  [Edit/Add Email Templates](#)
- Schedule Future Email 

Actions

Select email templates to use from predefined templates (this can also have an attachment) or create one in the step above.

 **Edit Immediate Email** [Update](#) [Cancel](#)

Send From: Record Owner

Send To: Contact


Template: Welding Course Brochure

Date: Execute immediately after workflow is triggered

Attachment: No Attachment [Add Attachment](#) [Remove Attachment](#)

[Update](#) [Cancel](#)

The workflow action will now be saved as shown below.

Workflow Emails 					
	From	Send To	Template	Period	Att.
<a href="#">Edit</a> <a href="#">Delete</a>	Record Owner	Contact	Welding Course Brochure	Immediate	<input type="checkbox"/>

**Finish:** Click finish to save the workflow. You can now activate this workflow.

## Workflow Maintenance

Workflows can be viewed, edited, activated and deleted from the View Workflows page as shown below.

Editing a workflow will allow you to access any of the steps above in the setting up process as well as allow for Activation/ Deactivation of the workflow.

Workflow Name	Workflow Description	Active	Entity Type	Date Created	Owner
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">New Prospect Marketing Campaign</a>	Create a follow up task for assigned rep and send 2 emails to the new prospect over a week( Company profile as an immediate email and products and services brochure in the next week)	No	Companies	23/09/2013	samuel
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Price list Automation</a>	Send price list to lead based on course interest selected	No	Leads	23/09/2013	samuel