six bricks

SALESFORCE.COM

For Modern Marketers

LEARNER WORKBOOK

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For Modern Marketers

Learner Activities

Exercise 1: Relational Databases

Scenario

Your organization, Blossom Buddies, has two separate delivery vehicles to deliver flowers. There is a sign-in and sign-out spreadsheet that drivers use to record when they take the vehicles... or at least they fill it out when they remember, which you'll see—isn't very often.

This is causing a large issue for the organization, as large chunks of mileage are missing and there is a concern that the company vehicle is being abused and driven for personal use. When the Blossom Buddies CEO asked the drivers why they are not signing the vehicle in and out, the answer was that the spreadsheet has too many fields that are too cumbersome to fill out each time.

Given the desire to make signing vehicles in and out take less time, the CEO has asked you to find a better solution to "the spreadsheet" problem.

Your Solution

Because this is a course on relational databases, it's probably not a surprise that your solution involves transitioning the spreadsheet into a very simple relational database.

By keeping much of the redundant information in separate tables, you'll only require drivers to enter a minimum amount of information each time they sign-out a car. We'll also provide Excel quick tips to help reduce the pain of date entry!

Step 1

Download and observe the original "problem" spreadsheet.

Driver First Name	Driver Surname	Driver #	Tel Num	Car Make	Car Model	Car Year	Date	Mileage on collection	Mileage on return
Julie	Vidal	419097	9296813	Ford	Fiesta	2014	11/21/15	25295	25488
Julie	Vidal	419097	9296813	Ford	Fiesta	2014	12/23/15	25997	26094
Julie	Vidal	419097	9296813	Ford	Fiesta	2014	12/22/15	26688	26802
Billy	Somers	556803	2297077	Ford	Fiesta	2014	1/2/16	27740	27897
Belinda	Gerald	294047	8281298	Ford	Fiesta	2014	2/3/15	28768	28813
Billy	Somers	556803	2297077	Ford	Fiesta	2014	3/1/16	30513	30617
Tony	Riddick	516280	3272673	Chevy	Impala	2015	11/18/15	4285	4396
Anthoney	Riddick	516280	3272673	Chevy	Impala	2015	12/4/15	5004	5063
Tony	Riddick	516280	3272673	Chevy	Impala	2015	12/25/15	5212	5295
Julie	Vidal	419097	9296813	Chevy	Impala	2015	1/2/16	5668	5733
Julie	Vidal	419097	9296813	Chevy	Impala	2015	1/4/16	5733	5916
Julie	Vidal	419097	9296813	Chevy	Impala	2015	1/5/15	5917	5997
Billy	Somers	556803	2297077	Chevy	Impala	2015	1/30/16	8635	8688
Mattie	Crow	637757	2262969	Chevy	Impala	2015	2/4/16	8802	8930
Billy	Somers	556803	2297077	Chevy	Impala	2015	2/9/16	9210	9390
Julie	Vidal	419097	9296813	Chevy	Impala	2015	2/23/16	9461	9624
Julie	Vidal	419097	9296813	Chevy	Impala	2015	3/1/16	9897	9969
Billy	Somers	556803	2297077	Chevy	Impala	2015	3/3/16	10001	10099

Exercise 1: Relational Databases (cont'd)

Step 2

Draw out the separate tables you would create below. If you don't want any hints, draw now and don't read below the orange line! You can print this out and draw by hand OR use a free tool like LucidChart..

Challenge yourself to use the lines we reviewed in our lessons.

If you're struggling with this, think about the following:

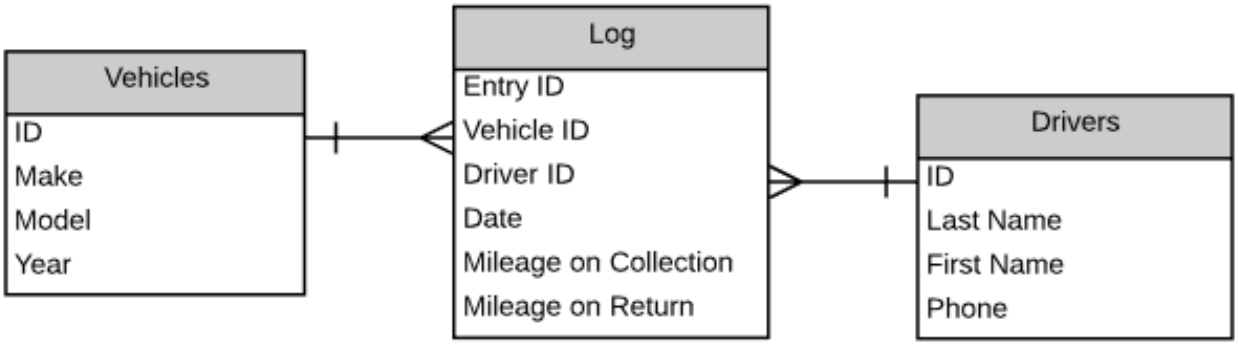
1. Is there repeated data that never changes?
    a. If yes, then that should likely be a table.
    b. If no, is there repeated data that COULD be normalized?
2. Is there a unique key to identify certain sets of records?
    a. If yes, then you're likely looking at a unique table.
    b. If no, could one be easily created?
3. Hint: There should be three tables.

STOP! On the next page is the correct database structure. Proceed only after you've taken at least a guess at what it should be! C'mon you got this!

Exercise 1: Relational Databases (cont'd)

Step 3

Review the below database structure for the car log.



The lines drawn from the "Vehicles" and "Drivers" tables to the "Log" table have three little prongs on the end to symbolize the 1-to-many relationship. Note how for each row in the "Log" table, there can only be one vehicle and one driver reference, but there will be MANY log references for each vehicle and driver.

If we wanted to allow a single driver to check out multiple vehicles, the vehicle to log connection would many-to-many.

Step 4

Adjust the "Car Log" spreadsheet to align to the above database structure, making each tab a table and each field a column.

Step 5

Populate all tabs with the appropriate data. For missing IDs, just start with 001 for the "Vehicles" tab and 00001 for the "Log" tab.

HINT: You will need to adjust the format of the fields to get the zeros

Step 6

Now that we have the historic data where we want it. We want to make the future of filling out this spreadsheet easier on our drivers. So, let's use some fancy Excel formulas to ensure the drivers only have to click one button.

Exercise 1: Relational Databases (cont'd)

Step 6 Continued

Create a formula for the "Date" field in the "Log" table to populate today's date automatically.

=IF(B20<>"",IF(D20="",NOW(),D20),"")

IMPORTANT NOTE: This is a circular reference formula. Excel does not like circular references because they are typically mistakes. What Excel doesn't realize is that we know what we're doing! Therefore, you may need to turn on "iterative calculations." This is deep in Excel settings, so, just search Excel help docs for how to turn them on for your version of Excel.

Next, create a formula for the "Mileage on Collection" field in the "Log" table to populate the previous mileage for the vehicle based on the last "Mileage on Return" value.

=MAX(IF(B20=$B$2:B19,$F$2:F19))

IMPORTANT NOTE: This is an Excel array formula. You may see array formulas referred to as "CSE formulas," because you press CTRL+SHIFT+ENTER to enter them into your workbooks. Once you do, you will see { } bracket show up in your formula bar. If this is Greek to you, watch the walk-through to see it in action!

Step 7 (Optional)

To make this REALLY easy on the drivers, you could create a form which would provide a quick and easy drop-down list for the drivers. They would just have to pick their name and the car and THAT'S IT!

But, that requires some REALLY fancy Excel tricks or Google forms, which is a bit beyond the scope of this exercise. However, if you want to play around with it, we do encourage you to "Google it"!

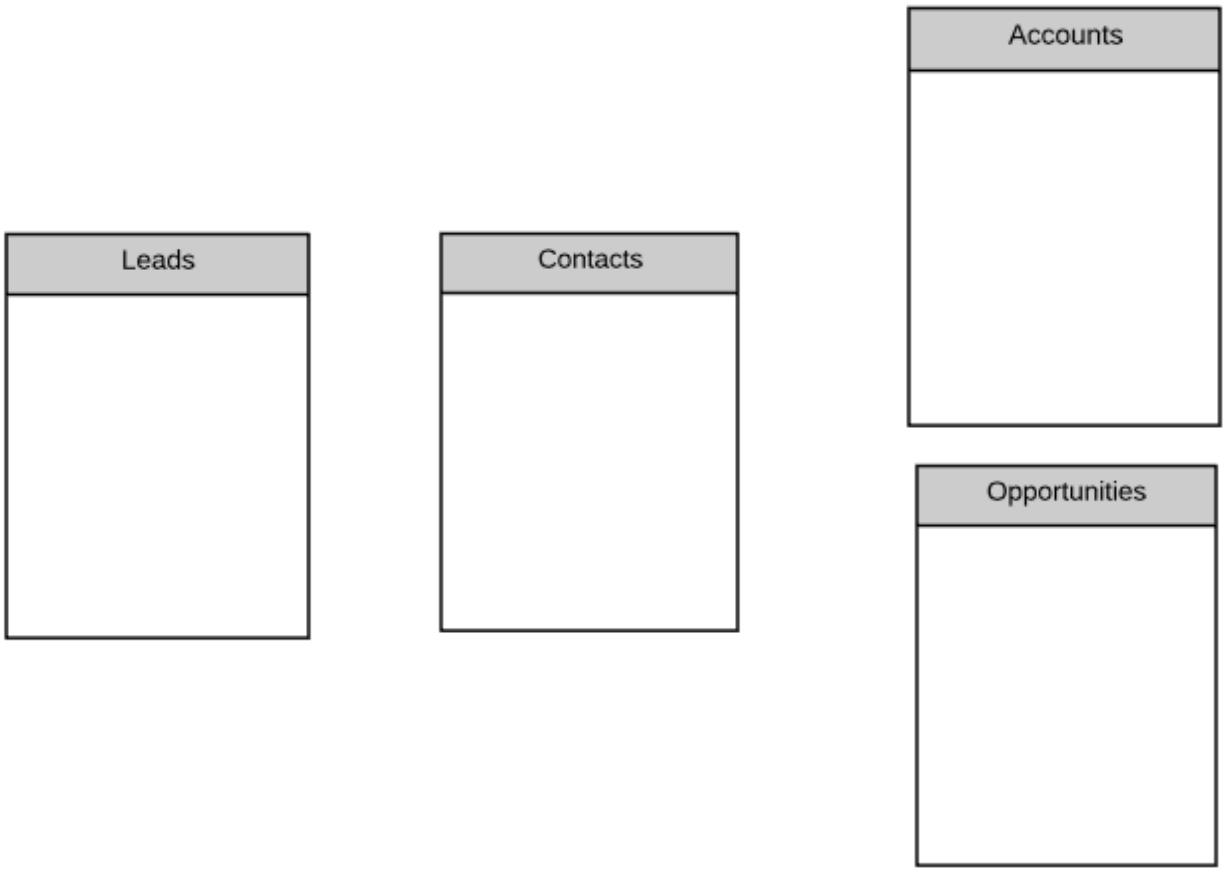
Watch the Walk-Through of This Exercise

If you go back to the Course, the final lesson is a recording of a walk-through of this entire exercise. If you got lost or confused, go check it out!

Exercise 2: SFDC Architecture

Step 1

Utilizing the learning from the last sections, draw the SFDC architecture for the four standard objects.



Step 2

Step 1 is a fairly complex ask, so don't feel bad if you're not super confident in what you did. However, before we show you the correct answer, a little reflection.

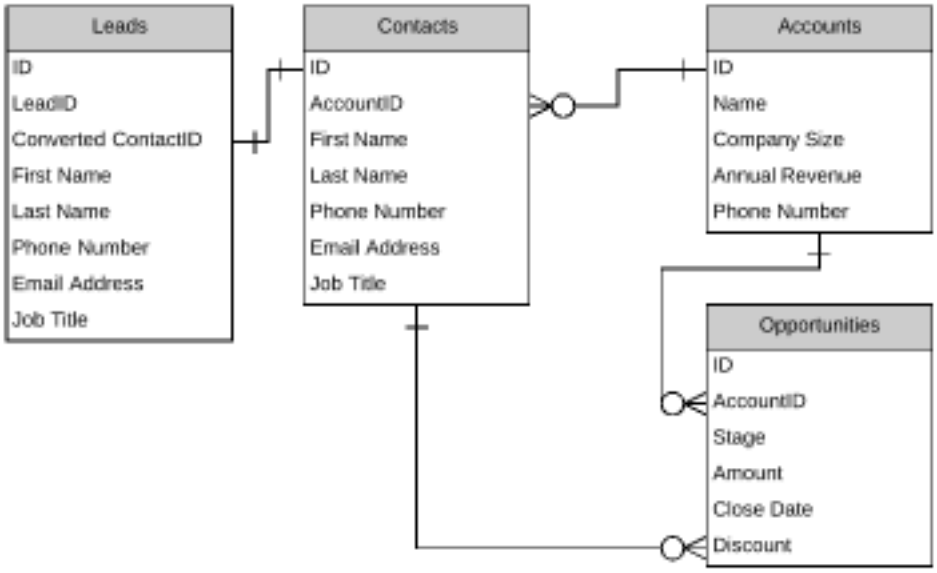
1. **I am most confident in my drawing of** _____
2. **I struggled most to draw** _____
3. **On a scale of 1 to 5, my confidence in a 100% correct drawing is:**

1 2 3 4 5

Exercise 2: SFDC Architecture (cont'd)

Step 3

Review the correct SFDC Architecture of standard objects.



Note the one-to-many relationships: Accounts and Contacts; Accounts and Opportunities; Contacts and Opportunities. One Account will have many Contacts and Opportunities. Also note the one-to-one relationship of Leads to Contacts. If you didn't list the field names, that's okay. We included them here for more context.

Step 4

Compare your answer to the correct answer.

1. **What did you get right?** _____

2. **What did you get wrong?** _____

Exercise 3: Campaigning with SFDC

Let's take a moment to dive in deeper to how SFDC campaigns are used by marketers. Reflect on this below.

What do you think the top three campaign types are? Example: Email

1. _____
2. _____
3. _____

What would some common campaign member statuses be?
Remember these are how the lead or contact INTERACT with the campaign.

Imagine you recently sent out an email with a special discount offer to around 1,000 prospects. You have an SFDC campaign set up to track the email activity. You want your sales reps to call on anyone who clicked the offer.

Write a script for your reps to use when calling on these prospects.

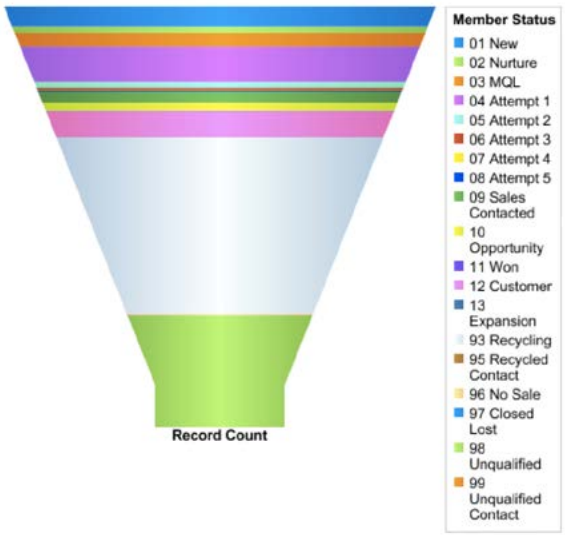
Exercise 4: SFDC Reporting

As mentioned in the video, this exercise will challenge you to consider all of the objects necessary to fulfill each one of these SFDC reports.

Options for answers are restricted to SFDC standard objects:
Leads, Contacts, Accounts, Opportunities, Campaigns

Answers can be found below each question.

Example 1: The Funnel



What object(s) do you think are needed to report on the overall status of PEOPLE (hint, hint!) in this report?

Click on the box below to see the correct answer

Answer: Leads, Contacts and Campaigns. Leads and Contacts are hopefully the easy part of this. The complex part is that this is actually a Campaign report. The one hint to that is the Key on the right that references the "Member Status." That is a Campaign term. This report is facilitated by creating a "Lifecycle" campaign in SFDC with statuses that match your funnel and moving people into those statuses. One could argue that due to the presence of Opportunity and Won statuses that Opportunities must be included as well. And although Opportunities drive the status people are in, they are not absolutely needed in order to generate this report.

Exercise 4: SFDC Reporting (cont'd)

Example 2: New Names by X

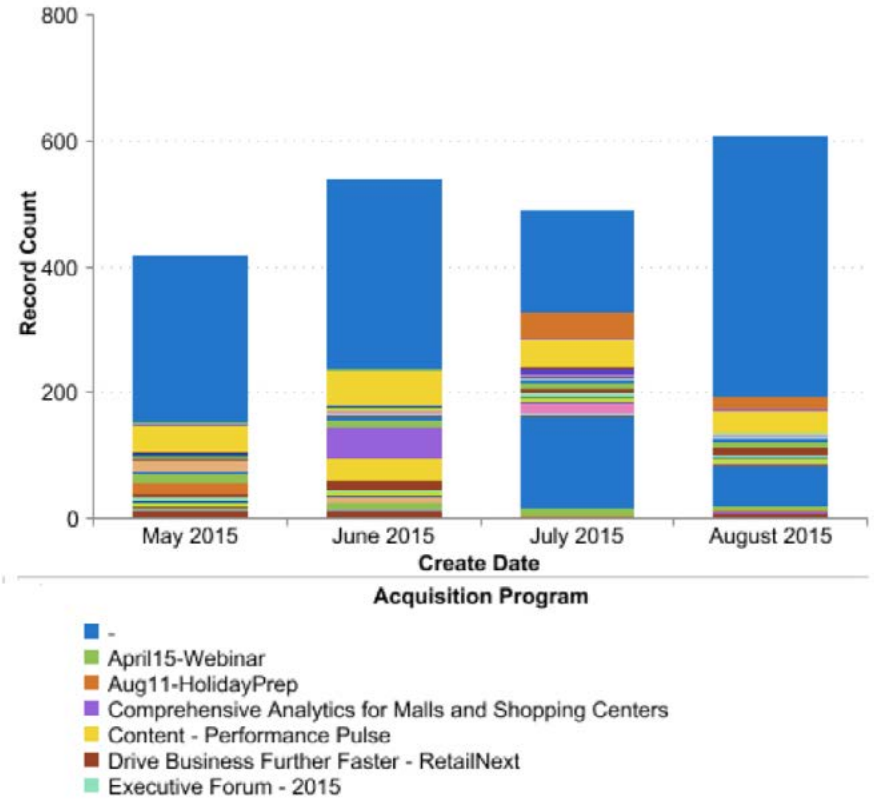
What object(s) do you think are needed to report on the number of new PEOPLE (hint, hint!) in this report?

Click on the box below to see the correct answer

Answer: Leads. In an out-of-the-box implementation of SFDC, all new records should be created as leads and therefore, you only need this one object to report. However, if an organization is using a non-standard SFDC business process, you may also need Contacts to report on "New Names."

Exercise 4: SFDC Reporting (cont'd)

Example 3: Acquisition Campaigns



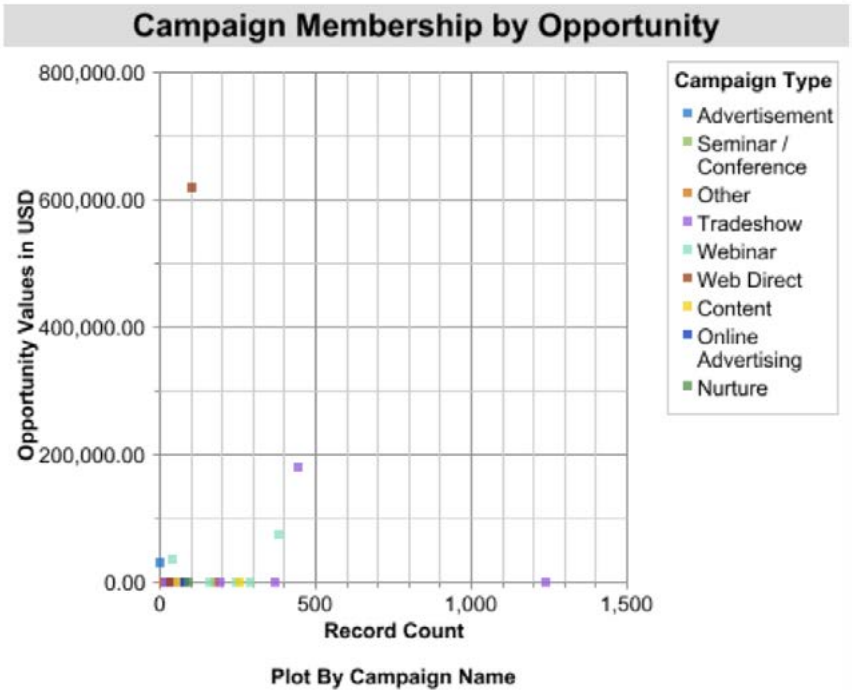
What object(s) do you think are needed to report on the number of members within these various campaigns by month?

Click on the box below to see the correct answer

Answer: Campaigns, Leads and Contacts. Nothing tricky here, you want to report on the people associated to various campaigns. Again, if the organization isn't using Leads, then it would only be Contacts and Campaigns.

Exercise 4: SFDC Reporting (cont'd)

Example 4: Campaign Membership by Opportunity Amount



What object(s) do you think are needed to report on the campaign types with the most money associated to them?

Click on the box below to see the correct answer

Answer: Campaigns, Opportunities and Contacts. Campaigns and Opportunities should've been easy here, especially since both words are in the report! The tricky element is that Contacts must be associated to Opportunities in order to tie this all together. Without a Contact, this report wouldn't exist!

Exercise 4: SFDC Reporting (cont'd)

Example 5: Campaign Influence by Campaign

Remember that this Campaign Influence reporting happens from rules created within SFDC's administrative "Campaign Influence" setup. Still, although the rules to populate may differ, the objects needed remain the same.

What object(s) do you think are needed to report on the campaign types with the most money associated to them?

Click on the box below to see the correct answer

Answer: Campaigns, Opportunities and Contacts. Like the last one, Campaigns and Opportunities should've been easy here, especially since both words are in the report! The tricky element, again, is that Contacts must be associated to Opportunities in order to tie this all together. Without a Contact, this report wouldn't exist!

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Appendix

Blossom Buddies One-Pager

Blossom Buddies

Company Profile

Company Name	Blossom Buddies
Address	11235 Flower Power Way, New York, NY
Year Established	2002
Business type	Small Business, Green Business, Veteran-Owned Business
Number of Employees	75

Company Description

Based in the heart of New York City, Blossom Buddies (BB) was founded by Carole Smith in 2002. With sales ranging from a single purchases through long-term, six-figure contracts with established hotels and restaurants, BB serves a wide variety of clients for all their flower needs. With seasonal inventory ranging from single stem flowers through bulk purchase and arrangements, BB serves the New York metro area with in-person delivery and services all of the United States with mail delivery.

Products and Services

Keywords	florist, flowers
NAICS Code	[453110] Florists

Target Audience

B2B

Ideal Customer	Buying Power	Pain	Examples
Lobby Managers	Mostly clerical resources who will need to get budget approved	Responsible for the office in terms of appeal to clients (cleanliness, friendliness, beauty)	Technology companies
Business Managers	Owners of their budgets	Responsible for the overall "feel" of the entry of their practice	Hotels
Event Coordinators	Owners of the client budget	Responsible for the beauty of an event through flowers	Wedding Planners

B2C

Ideal Customer	Demographic	Pain
High-Spend Beauty-Lovers	Women 40+	Fresh flowers fast that last
Special Event Buyers	All	Need to send flowers that arrive on the day requested (Mother's day, birthdays)

Excel Quick Tips Resources

VLOOKUP

We mention this quickly in the lesson where we're building our relational database, but if you don't know much about them:

Click Here to learn more about how to execute VLOOKUPs.

Top Excel Formulas

Excel formulas can seem daunting, but check out this blog post with tons of great info, including:

1. Top 10 Excel formulas, you just have to know. VLOOKUP is one of them, if you're still struggling with that one.
2. How to dissect an Excel formula, so if you inherit an Excel spreadsheet with some crazy formulas you can figure out what they're actually doing.
3. Additional resources to go from "good" to "great".