How will the SalesConnect sunset impact your CSA experience?

By: Haley Kitts January 28, 2020 Featured, General

This year begins with significant and exciting changes in CRM. Many of you have either boarded Atlas or are beginning that process. And, SalesConnect sunsets as of February 29. Currently, multiple CSA capabilities integrate with SalesConnect, so continuing to support these capabilities depends on integration with Atlas. This article describes how CSA is adapting to our changing CRM environment.

- CRM blackout
- CSA capabilities that will integrate with Atlas
- CSA capabilities that will not be integrated with Atlas

CRM blackout

February 28 @ 6pm ET – March 1 @ 10pm ET*: Starting on Friday, February 28, there will be a CRM blackout period that impacts all CRM systems. During this time, CRM systems will be unavailable. No opportunities can be created in any application.

** Subject to change.*

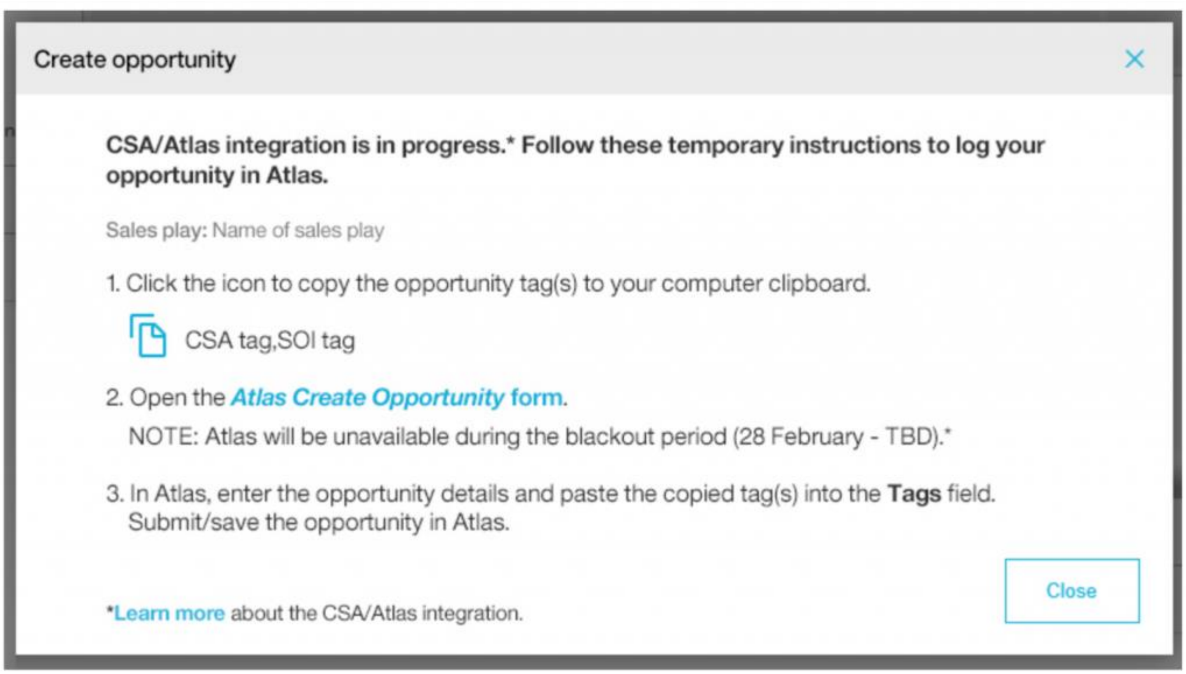
CSA capabilities that will integrate with Atlas

The following capabilities will integrate with Atlas. In most cases, their transition from SalesConnect to Atlas data sources will be seamless for you.

- Create an opportunity
- View opportunities in the manager & seller dashboards
- View opportunities associated with a client
- Create and view SMART tasks (TSS sellers only)
- Contact visibility
- Metrics reporting

Temporary user experience when creating an opportunity in CSA

End of blackout – March 13: When the blackout ends, CSA/Atlas integration will still be in progress. During this transition period, the CSA *Create opportunity* form will display instructions that link to the Atlas opportunity form. In Atlas, you will fill out six required fields and, in one click, copy/paste CSA tags into that form.



After March 13: Once CSA/Atlas integration is achieved, the CSA *Create opportunity* form will work the same way it does today, enabling you to quickly log an opportunity in our CRM systems.

Contact visibility

While your territory assignment or supported Market determine which *clients* you see in CSA, contact visibility refers to which *contacts* CSA displays. CSA currently applies users' SalesConnect contact visibility settings. While CSA/Atlas contact visibility integration is in progress, CSA will continue to leverage the most recent SalesConnect settings.

- If you have a SalesConnect profile today, you will continue to have the same contact visibility in CSA.
- If you do not currently have a SalesConnect profile, or if you board CSA after February 29, you will see contacts in your *Market* of employment. Because Atlas defaults to your *Geo* of employment, you will see fewer contacts in CSA than Atlas.

SMART tasks (TSS sellers only)

While CSA/Atlas integration continues into the first half of March, the ability to create and edit SMART tasks will be temporarily disabled.

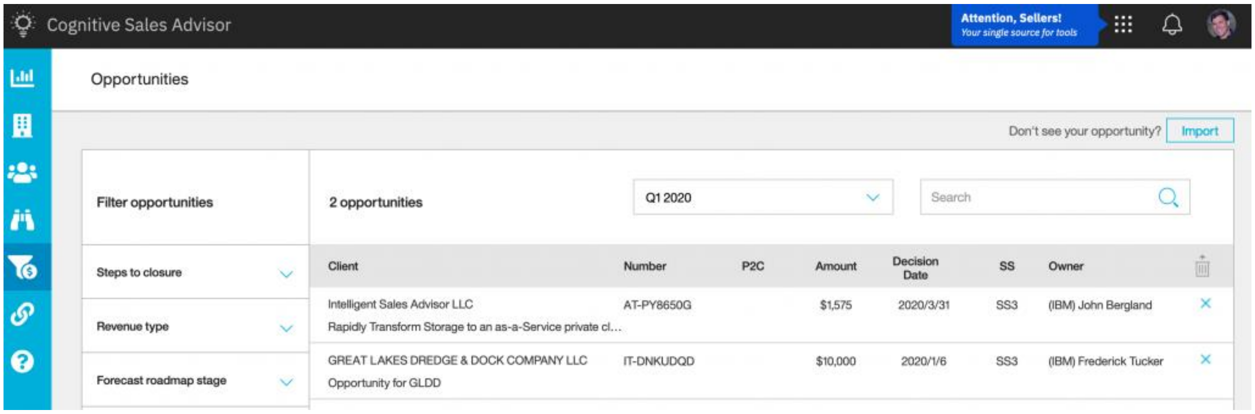
CSA features that will not be integrated with Atlas

Earlier chapters of CSA focused on providing a more user-friendly interface for managing opportunities, so CSA includes several features that support this goal. SalesConnect's sunset impacts all of these features. As we reimagine CSA and develop Athena, the goal is to complement CRM opportunity features rather than duplicate all of them. With that in mind, plus the need to prioritize integration that supports key sales initiatives, some of CSA's opportunity related features will not be integrated with Atlas. As of the February 28th CSA release, the following features will sunset in CSA:

- Opportunities module, including the BANT form and warm transfer
- Opportunity related alerts
- SMART tasks tile in the seller and manager dashboards
- Sales play tile in the seller and manager dashboards
- List of opportunities associated with a contact
- SalesConnect interactions for a contact
- Last call or email for a client
- Actions to create and update tasks, calls, and notes for a contact

Opportunities module

The *Opportunities* module shows your opportunities across four quarters, as well as details and recommended activities for those opportunities. Additionally, for DDRs, this module supports warm transfers. Once SalesConnect sunsets, you will use Atlas for managing your opportunities and documenting warm transfers. (For warm transfers, you'll find a BANT form and task form in Atlas.)



Note: In CSA, your dashboard will display a list of opportunities you created and, within CSA Client360, you'll still see a list of opportunities associated with a client.

Opportunity related alerts

Today, CSA delivers alerts to notify you when your territory or opportunities need attention. The opportunity related alerts leverage data from SalesConnect and, when SalesConnect sunsets, CSA will no longer deliver these alerts.

Opportunity alerts for all sellers
IBM Opened opportunity (in territory)
Business Partner opened opportunity (in territory)
Opportunity roadmap status change
Opportunity decision date change from quarter to quarter
Missing line item steps to closure
Open opportunity with prior decision date
Opportunity stage change
Close out needed for won opportunity
Roadmap status update required
Missing or invalid email address for primary contact
Upcoming SalesConnect task (5 days)
Upcoming SalesConnect call (1 day)
Stuck opportunity

Opportunity alerts based on role	Audience
Potential duplication of lost opportunity	DDR
Opportunity transferred to new owner 14 days ago – OO	DDR
Opportunity transferred to new owner 5 days ago – OO	DDR
Warm transfer needed	DDR
Removed from sales team	IS
New < $500,000 USD opportunity in your territory – not LIO or OO	IS
New opportunity in territory - not on sales team	Software Rep
New opportunity in your territory – not LIO or OO	TSS
Open opportunity with revenue in prior month	TSS
Won opportunity with future decision date	TSS
Won opportunity with revenue in prior month	TSS

While CSA will no longer provide these alerts, we recognize that they are valuable to sellers. We are in the process of discovering Atlas's alert capabilities, and exploring how opportunity related alerts may be available in the future. Meanwhile, CSA will continue to deliver other client relationship and prospecting alerts, such as the *XaaS subscription started* and *Marketing interaction logged* alerts.

SMART and sales play tiles in the seller and manager dashboards

Currently, the CSA seller and manager dashboards present three tiles: Opportunities, sales plays, and SMART tasks (TSS sellers/sales managers only). As of February 28, your dashboard will focus on a detailed view of the opportunities you created, as well as their total value. Due to low usage, and lower priority compared to the opportunities data, the seller/manager dashboards will no longer include the sales play tile and SMART task tile. However, CSA deployment focal points can continue to track SMART tasks, as well as the effectiveness of sales plays, in DSMH metrics reports.

Opportunities, CRM interactions, and CRM actions in Contact360

As of February 28, the CSA Contact360 view will no longer show:

- Opportunities associated with a contact
- SalesConnect interactions for a contact
- Actions to create and update tasks, calls, and notes for a contact

However, these features will be available in Athena (date TBD).

NOTE: Marketing interactions are not impacted by the SalesConnect sunset.

From SalesConnect to Atlas, CSA to Athena, these changes are steps toward a better CRM experience and greater simplification in the sales tool ecosystem. We are striving to minimize disruption to you along the way and we appreciate your ongoing engagement.