Salesforce Governance Best Practices

Scaling your Innovation

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This isn’t just a turning crank of tech
There are reasons why today looks like this

Mainframe
High Capital Barrier to Entry

Client/Server
Not conceived for collaboration
3-10 year cycles of innovation

Enterprise Could Computing
No Capital Barrier to Entry
Subscription-Model Pricing
Non-Disruptive Upgrades
Mobile, Connected, Collaborative
On-Time; On-Budget; On-Spec
Unprecedented Pace of Innovation
Hey, look how easy it was to add a custom field to this page layout! It took me 2 minutes and now all 20 of my users can access it!

We love how responsive Bob is to our requests!
As the platform matured, it became more complex...

- Add a custom button to the page layouts used by our European division
- Add an Apex trigger to implement our pricing algorithm
- Create a new custom app to manage events
- Install an AppExchange app to track expenses
- Design an approval process for each country where we do business
- Add a validation rule to enforce our role-based discount matrix

I hope I don’t mess up.
Governance became critical…

Change requests must be approved by the Change Control Board.

We expect to use professional dev and version control tools.

All changes must be archived for SOX compliance.

All changes must pass system test before being deployed to production.

Nobody messes up on my watch.

We expect to use professional dev and version control tools.
“Most people never even bother to program their programmable thermostats. As a result, their houses actually use more energy than homes without them. Two years ago, the federal government eliminated the entire programmable thermostat category from its Energy Star program.” – David Pogue, nytimes.com

“I’m not used to GPS at all,” Ms. Latshaw says. A former BMW owner, she confesses she “worked on daylight-saving time all year last year” because she couldn’t figure out how to reset the German car’s clock.

Customers like Ms. Latshaw are why Sewell [Lexus] has Alex Oger, the dealership’s first “technology specialist.”
People Won’t Tolerate Complexity

Make it easier to use

- For example, the Nest thermostat learns your pattern of temperatures versus time of day after a week of manual adjustments. It doesn’t feel like you’re “programming” the device.

Make it more likely to be used

- It sounds like mere cosmetics, but the Nest device detects the color of the wall and adjusts to blend in. You’re more likely to put it in a visible place.

Make it both data-driven and goal-oriented

- The Nest thermostat displays a symbol of a leaf when the user makes a change that lowers energy consumption.
Do you have Innovation in your Governance?

- Does everybody understand the state of the projects?
- Are Projects delivered on time and meet the requirements of the business?
- Is the agility of the Business met?
- Are costs are kept under control?
- Are you driving competitive advantage?
Governance built for Innovation and Transformation

Alignment

Agility

Expertize

Innovation

Value

Business

IT
The Value of a Center of Excellence

Business Strategy

Plan

Architect

Deliver

Adopt

Realize Value

Portfolio of Business Solutions

Business Outcomes
Plan for Speed

Business Strategy

Plan
Architect
Deliver
Adopt
Realize Value

Business Outcomes

Portfolio of Business Solutions
Project Intake

**SFDC User**
- Submits change request
- User notified

**Change Control Board**
- Reviews request
- Approved?
- Determines release timeframe
- Communicates changes to end-users

**SFDC Admin**
- Analyzes request and timeframe
- IT required?
- Sandbox required?
- Configure feature/functionality
- Notifies CMM request completed

**IT**
- Configure feature/functionality
- Conducts testing (end-user & IT)
- Moves changes to production environment
- User notified

- Sandbox Environment
- Production Environment
Project Intake -  T-Mobile®

Telecommunications – 5,500 Users

The “Intake Exchange”

- End-user innovation captured via Case Management
- Workflow notifications for end-users
- Automated Sizing, scoping and sequencing of business backlog
- Incorporated Reporting and Analytics for project tracking and budget approval
Build Agility into your Architecture

Portfolio of Business Solutions
COE Model

- 25,000 Users, 8 week release cycle
- Delegated administrators (1 for every 300 users)
- Local champions (1 for 20 users, 20% of time)
- Single global process for changes
- “Go fast, good enough” strategy

Consolidated

- 330 independent subsidiaries, 40+ Salesforce Orgs
- Corporate IT only provides/supports hardware
- Autonomy given to each subsidiary/BU
- Informal command and control, architecture not shared
- Monthly best practice sharing meeting

Confederated
Environment Strategy

Legend:
- Production
- Full Copy
- Partial Copy
- Developer Pro
- Developer

Short Projects
- Dev
  - Developer
  - Developer Pro

Long Projects
- Dev
  - Developer
  - Developer Pro
- QA
  - Developer Pro

Integrated
- Dev
  - Developer Pro
- QA/System Test
  - Full Copy

Staging
- Full Copy
- Performance Testing
  - Full Copy
- UAT/Training
  - Full Copy
- Production Support
  - Full Copy
- Production
Deliver Consistently for Predictability

Plan
Architect
Deliver
Adopt
Realize Value

Portfolio of Business Solutions
Deployment Size and Cadence

- **Immediate Releases**
  - Implement immediate changes
  - Owned by individual sub-group
  - Minimal impact to the production floor

- **Minor (Monthly) Releases**
  - Minor changes impacting two+ groups
  - Thrice as often as a Major Release
  - Minor impact to training and production

- **Major Releases**
  - Major impact on production/integration
  - Significant changes such as AppExchange development
  - Aligned with platform releases
  - Impact more than one business unit
Deployment Size and Cadence

Real-Estate/Self Storage - 1,400 Users

22 Enterprise applications in 9 departments

Monthly Release Cadence
- Approvals for each Release
- Emergency Release process
- Release on Wednesday night, 24 hour open window
- Only release team has System Admin access
- Code freeze 1 week prior

Results

Predictability of IT

70% New Project Development, 30% Application Support

1,100 Salesforce projects released in first 2 years
Make Adoption Simple

Business Strategy

Plan
Architect
Deliver
Adopt
Realize Value

Portfolio of Business Solutions

Business Outcomes
# Training and Communication

**Genealogy – 1,500 Users**

1,200 Volunteers, 13 Languages, 129 Countries

Average age of volunteer: 72

**#1 Training Tip: Keep the app simple!**

- Training team part of build team
- Address uncertainty of When and Why
- Combination of Train-the-trainer and Webex
- FAQs, Videos, Reference Guides
- Weekly “Salesforce Labs” Sessions
# Ongoing Support Model

<table>
<thead>
<tr>
<th>Level</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>Internal networkers (Change Agents)</td>
</tr>
<tr>
<td>Tier 2</td>
<td>Internal Help Desk</td>
</tr>
<tr>
<td>Tier 3</td>
<td>SFDC administrator</td>
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<tr>
<td>Tier 4</td>
<td>Salesforce.com Premier Support</td>
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Ongoing Support Model

Physician Placement - 1,600 Users
Many Custom Apps

Proactive monitoring of usage
Help Desk is trained on Salesforce
Fully Certified Admin/Dev Teams
Premier Support for generic questions
  Reporting, Dashboards
  Mobile
  Email
Measure Value and Repeat

Business Strategy

Plan
Architect
Deliver
Adopt
Realize Value

Portfolio of Business Solutions

Business Outcomes
Value Realization

Home Security, iHome - 9,000 Users
Sales, Service, Marketing, Billing, Custom Apps

Implemented Service Cloud Console in <1 week
First 7 days = 30 Sec reduction in AHT
First 30 days = 1 min reduction in AHT

Out of the Box Features
60%

Out of the Box Features
20%
## What do I do next?

<table>
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<th>Do It Yourself Next Steps</th>
<th>Assisted Next Steps</th>
<th>Engage Next Steps</th>
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<tbody>
<tr>
<td>Premier Online Training</td>
<td>Premier Success Accelerators:</td>
<td>New Product launch:</td>
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<tr>
<td>• Introduction to Governance</td>
<td>Available Now…</td>
<td>• Innovation and Transformation Center by Salesforce</td>
</tr>
<tr>
<td>• Introduction to Center of Excellence</td>
<td>• Design a Center of Excellence</td>
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<tr>
<td>• Implementing Change Management within Salesforce</td>
<td>• Salesforce Sandbox Design</td>
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<tr>
<td>Trailhead Trainings</td>
<td>• Introduction to Governance</td>
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<tr>
<td>• Application Lifecycle Management</td>
<td>• Org Strategy</td>
<td></td>
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<tr>
<td>• Change Management</td>
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</table>
| You can work with your Account Executive to help you define that path that is best for you and your organization.
Introducing the Innovation and Transformation Center by Salesforce

Jim Ehrhart
Product Manager
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Plan
Architect
Deliver
Adopt
Realize Value

Portfolio of Business Solutions
Traditional COE Focus is on Delivery

Portfolio of Business Solutions
Innovation and Transformation Center Focus is on Value

Portfolio of Business Solutions

Plan Architect Deliver Adopt Realize Value

Business Strategy Business Outcomes
Go Faster with Focus, Methodology and Tools

**Alignment**
- Biz/IT Senior Exec Alignment on Salesforce Initiatives
- Salesforce Solution & Project Portfolio Roadmap
- Regular stakeholder management & communications

**Agility**
- Manage key IT & cross-business processes (i.e. release management, solution deployment)
- Salesforce reference architecture & data model
- Integration to Enterprise Architecture
- Optimized Instance Strategy

**Expertise**
- Capability assessment & skill upgrade plan
- Solution adoption best practices
- Change Management guidance
- Knowledge Transfer
- Health Assessments

**Innovation**
- Access to design & process expertise
- Application design & review guidelines
- Ideation
- Rapid Prototyping Framework
- Proof-of concepts

**Business Value**
- Monitors business value metrics, ROI & KPIs
- Find opportunities to improve results, like identifying and eliminating low value processes or under utilized applications
- Monitors and optimizes license consumption

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Biz/IT Senior Exec Alignment on Salesforce Initiatives
Salesforce Solution & Project Portfolio Roadmap
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Knowledge Transfer
Health Assessments

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Innovation and Transformation Center Structure

a collaborative and agile partnership between the business, IT & Salesforce

SALESFORCE EXEC SPONSOR
- ITC Lead
- Architect (CTA)
- Program Manager
- (Rotational Expertise)

BUSINESS EXEC SPONSOR
- Business ITC Co-Lead
- Business Strategy & Ops
- Communications

IT EXEC SPONSOR
- IT ITC Co-Lead
- Enterprise Architect Lead
- Development and/or outsourcer Leader

• Salesforce Executive level sponsor
• 3 dedicates Salesforce governance experts
• Access to other subject matter experts as required
• Business & IT executive sponsorship
• Other key Business & IT contributors
Innovation and Transformation Center

engages across the solution portfolio

Business Solution 1
- Business Leader
- IT Leader
- Dev Team
- PA (1+ per solution)
- Additional Project Resources (optional)

Business Solution 2

Business Solution 3

Business Solution n
Innovation and Transformation Center Value

- A central point of contact for all Salesforce related matters and expertise
- Vehicle for building global solutions – fast, iterative & cost effective
- A source of best practices (architecture, cloud, mobile, social, data science)
- Facilitates improvement of IT service levels & business outcomes
- A catalyst for a more capable and self sufficient cloud based enterprise

Champions for
- Collaboration
- Innovation
- Standardization and reuse
- Improved adoption & productivity
- Continuous improvement
- Reduced costs
Why engage Salesforce?

- Proven governance model
- Deep Salesforce skills and experience
- Customer success and completion focus
- Salesforce-enabled tools and collaboration
- Agile mindset and culture of innovation
Innovation and Transformation Center
Build and run your Salesforce Governance Practice

IT + Business + Salesforce
- Deliver at Speed
- Maximize ROI
- Minimize Risk

Center Of Excellence Redefined
Governance process models and proprietary cloud governance applications
Team of specialized on-demand experts
Orchestrated by a dedicated team of 3 governance experts, onsite
CoE in a Box:

A Toolkit to Optimize your Salesforce Implementation

<table>
<thead>
<tr>
<th>TIME &amp; LOCATION</th>
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<tbody>
<tr>
<td>☀️ Thursday, September 17, 8:30 - 9:10</td>
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<tr>
<td>📍 InterContinental San Francisco Hotel, InterContinental Ballroom A-B</td>
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</tbody>
</table>
Certified experts and innovative offers that complement our market-leading cloud solutions and accelerate the business value you are able to realize.
Success Services Portfolio
Helping you architect, adopt, and optimize your Salesforce solutions

- Accelerators
- Advisory Services
- Innovation and Transformation Center
- Mission Critical Support
- Strategic Projects

Add-Ons

Premier Success Plans
Standard Success Plans

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2. Tap the bell to take a survey
3. Earn a GoPro prize entry for each completed survey
Thank you