Getting Started with Chorum

Version

Version	Description	Modified By	Date
0.1	Overview	Head of Technology	12/09/2022
0.2	Revision 2	Head of Technology	14/10/2022
0.3	Revision 3	Head of Technology	29/05/2023
0.4	Revision 4	Head of Technology	02/08/2023

Chorum

Chorum is a Customer Success Platform built as a managed package on Salesforce.

Chorum brings together key business data residing in your CRM and Service Cloud products to give visibility into customer health. We built this product with a vision to provide Customer Success Managers with a reliable data set to further their voice and that of their customers in a more meaningful way. Chorum will assist CSM's in;

- Providing visibility of problems and scenarios impacting your customers, even if they don't require escalation.
- Providing an objective and insightful perspective on the most effective areas for product and engineering teams to address, fostering customer satisfaction and increasing renewal probability.
- The ability to filter and prioritise a list of work by customer ACV, time to renewal and impact to all customers, along with other filter metrics.
- Keep account information in Salesforce, Chorum will ensure there is no need for double entry on customer interaction, and support and work history.

This documentation covers various aspects of installing and using the Chorum platform. It includes detailed instructions for installation, managing users, custom settings, triggers, projects, issues, sprints, boards, and various metrics for churn probability calculation.

This documentation also explains how to create and manage Chorum products and modules, along with a detailed guide on setting up the Churn Probability Score (CPS) calculation metrics and mapping exercises.

Should you have any questions, need assistance or general feedback please feel free to contact us at support@chorum.com. We are happy to invest time in ensuring your success with Chorum.

Install Chorum

Chorum is available on AppExchange as a managed package.
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000GV6odUAD

Instructions for installing AppExchange managed packages can be found in the Application Installation Guide.

Assign User Permission Sets

Chorum comes with 4 defaults permission sets that you can assign to users: Chorum Admin, Chorum Executive, Chorum Scrum Master, and Chorum Users

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Click the user's name.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. Under Available Permission Sets, select a permission set and click **Add**.
5. Click **Save**.

SEE ALSO:

Salesforce Help: Permission Sets

Manage Chorum Custom Settings

Chorum Settings

The Chorum Settings custom setting allows you to tweak additional configurations for the application. Some settings are configured during the installation by default, but you can change them by following these steps:

1. Click the **gear** icon at the top right hand corner of the screen.
2. Select **setup**.
3. In the Quick Find input field enter **Custom Settings**.
4. Click on **Custom Settings** under the custom code menu.
5. Click on **Manage**, next to the Chorum Settings label.
6. Now click on **Edit**.
7. The fields you can tweak are:
    a. Account Contract Values
        - The field on Account object the app will use to calculate the Account Contract Value on the Issue record
        - Please specify the field API name
    b. Days In Week
        - Define the number of working days within a week
        - The app will use this value to calculate the sprint capacity
        - Default value is 7
    c. Default Project Id
        - The default project that will be pre-filled when converting the CRM case to Chorum Issue
    d. Opportunity Probability
        - Define the percentage of the opportunity stages that the business consider a pipeline
        - The app will then use this config to calculate the Pipeline Value of the issue associated with the defined product pulling the information from the opportunity matching the criteria
    e. Story Points To Day - The equivalent of a day of work represented by story points.
        - The app has the flexibility to define the conversion between story point and to a day where it will be used for the capacity calculation
8. Click **Save**.

Chorum Triggers

The Chorum Triggers custom setting allows you to enable and disable trigger automations for the Chorum application. All triggers are enabled during the installation by default, but you can disable them by following these steps:

1. Click the **gear** icon at the top right hand corner of the screen.
2. Select **setup**.
3. In the Quick Find input field enter **Custom Settings**.
4. Click on **Custom Settings** under the custom code menu.
5. Click on **Manage**, next to the Chorum Triggers label.
6. Now click on **Edit**.
7. Find the trigger you want to enable/disable and click on the checkbox in front of it. Please note: A checked value means the trigger is **enabled**, whilst an unchecked value means the trigger is **disabled**.
8. Click **Save**.

Create and Manage Chorum Users

To create new Chorum User or edit an existing

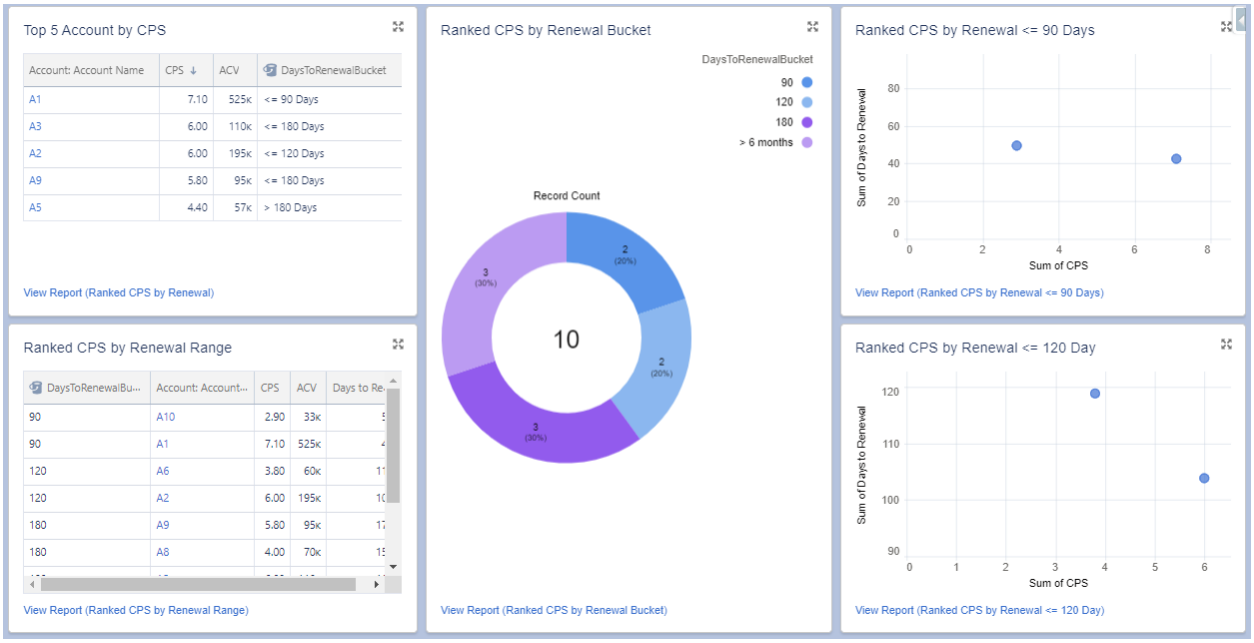
1. Navigate to the **Chorum Users** tab or search from the application list. From here you can either create or edit existing users.
2. Click **New**.
3. Lookup to the Salesforce users
4. Enter the user's name. ** If the name does not match, the after insert trigger will update the name to match with the Salesforce user's name
5. Click **Save**.

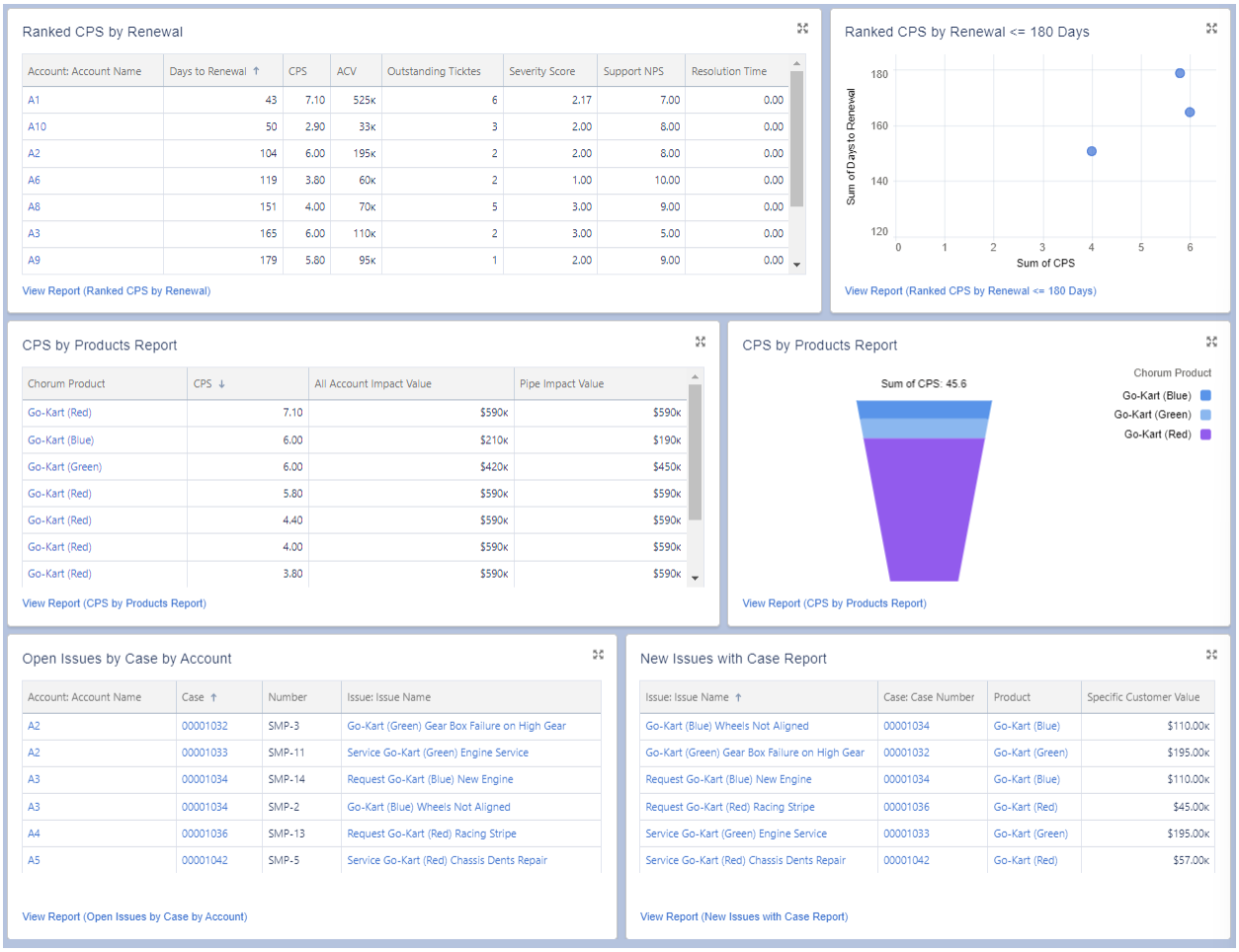
Churn Probability Score

Introduction

The Churn Probability Score (CPS) provides an overview of customer health, considering multiple data inputs and calculations as described in the metrics below. This information can then be used to determine the best action on behalf of a customer, from both a mitigation and proactivity point of view.
The CPS displays an averaged, weighted view of various metrics in order to provide a single output representing customer health.

Sample Dashboard





Metrics

With the current version, there are a total of 8 predefined metrics we can incorporate into the Churn Probability Score calculation, which includes the following

ACV

Description: Current contracted amount for current subscription term
Object: Account

Outstanding Tickets

Description: Number of open customer interactions with "open" status
Object: Case

Recency of Tickets

Description: The most recent customer interaction raised date

Object: Case

Resolution Time

Description: The time between a customer interaction being created and when that interaction is marked as "resolved."
Object: Case

Severity Score

Description: The expected harm or adverse effect that may occur due to exposure to the Risk
Object: Case

Support NPS

Description: Most recent NPS survey result
Object: Account

Time to Renewal

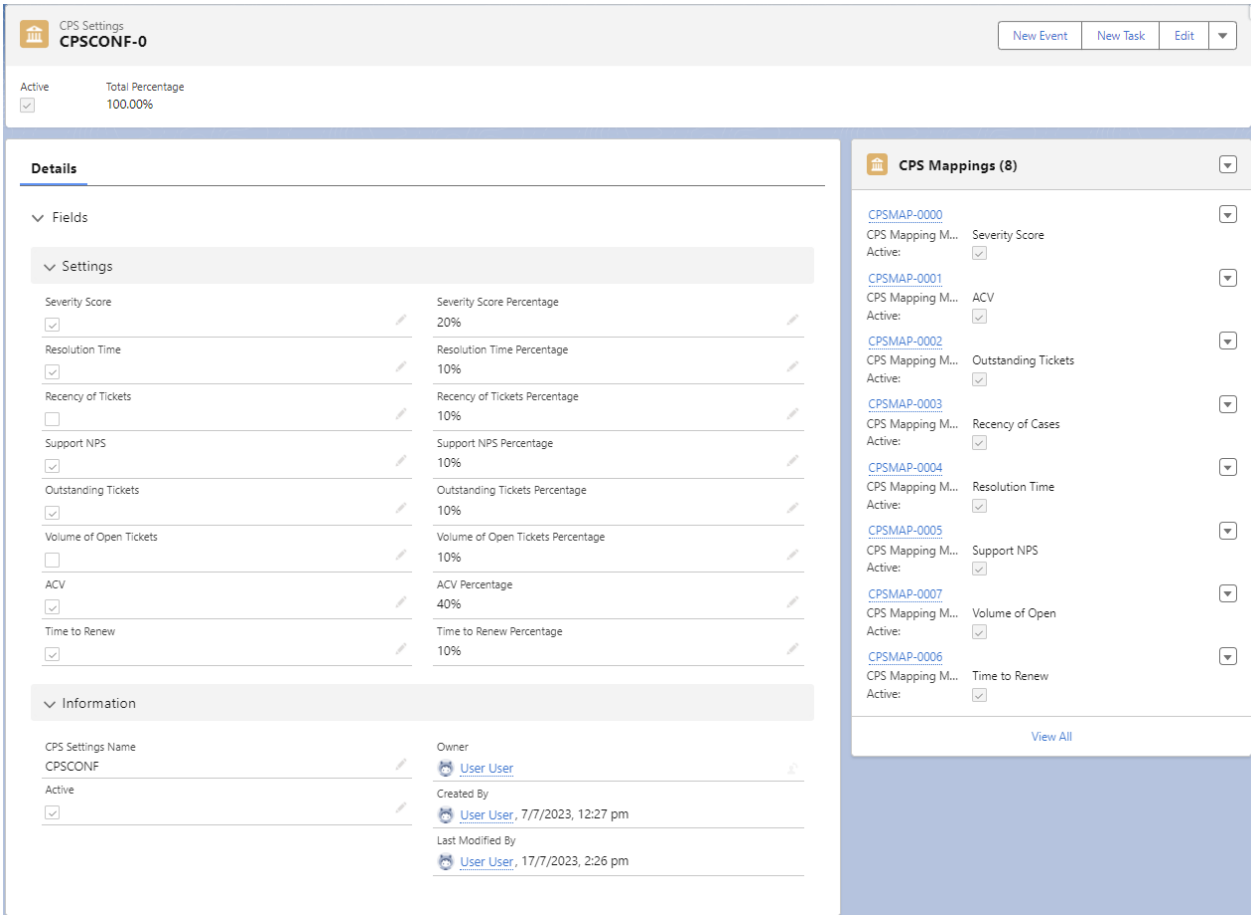
Description: Days until next renewal date
Object: Account

Volume of Open

Description: Number of open customer interactions with "open" status within the past 12 months (or subscription period)
Object: Case

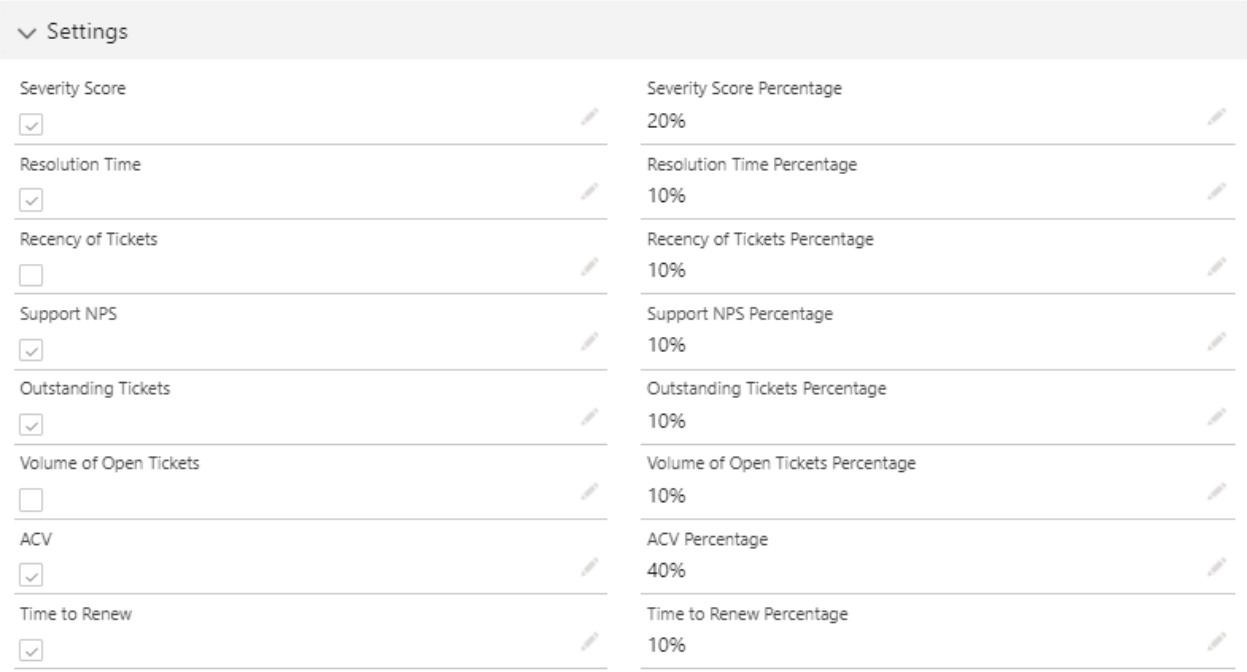
CPS Settings

The Chorum - CPS settings allows you to tweak the CPS Calculation metrics being used, its weighting percentage, and mapping exercise.



Some settings are configured during the installation by default, but you can change them by following these steps:

Main settings

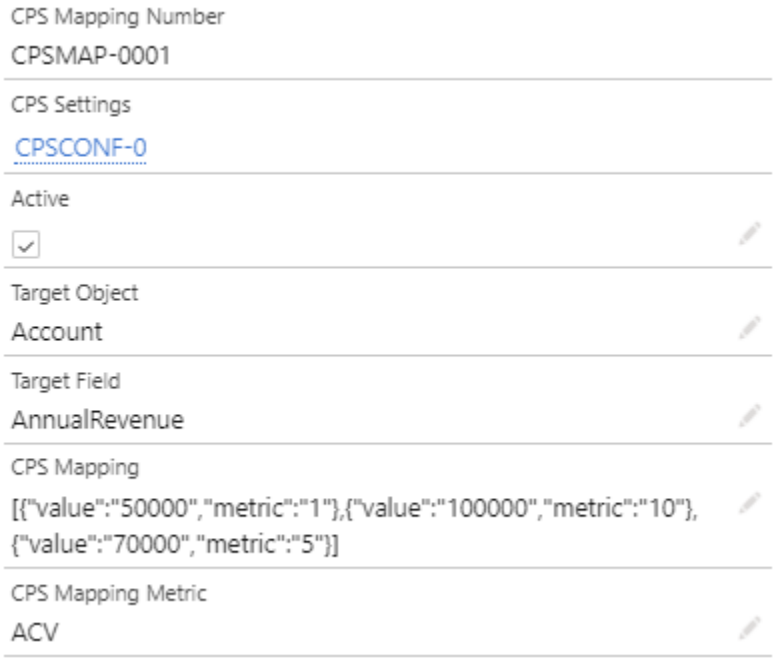


1. Navigate to the **Chorum Settings** tab or search from the application launcher. From here you can either create or edit existing config.
2. Click **New** to create new Setting or **Edit** to modify the existing one
3. Select all applicable metrics, as mentioned above, you want to use and its weighting percentage for each metric being calculated
4. Check the **Active** checkbox to mark the setting as active and being picked up by the calculation batch job

Note:

- Only 1 setting should be activated at one time
- The combination of all weighting percentages should be a 100%

Mapping exercise



For each metric being used, the mapping exercise is mandatory for the accurate calculation

1. On the CPS Setting record, there is a **CPS Mapping** related list
2. Click **NEW** to create new mapping or **EDIT** to edit the existing one
3. Select the appropriate **CPS Mapping Metric** from the picklist for each metric
4. Add the mapping in the CPS Mapping field in JSON format, which include a key pair value, as show below
    a. **value:** raw score data for each metric
    b. **metric:** metric mapping score

```
[
	{
		"value": "5",
		"metric": "1"
	},
	{
		"value": "10",
		"metric": "5"
	},
	{
		"value": "20",
		"metric": "10"
	}
]
```

5. For **Severity Score** metric only, 1 more mapping is required.The mapping between the case priority and the raw score data. Add the mapping in the CPS Mapping Rules field in JSON format, which include a key pair value, as show below
    a. **value:** raw case priority value
    b. **metric:** raw score mapping score

```
[
	{
		"value": "High",
		"metric": "10"
	},
	{
		"value": "Medium",
		"metric": "5"
	},
	{
		"value": "Low",
		"metric": "1"
	}
]
```

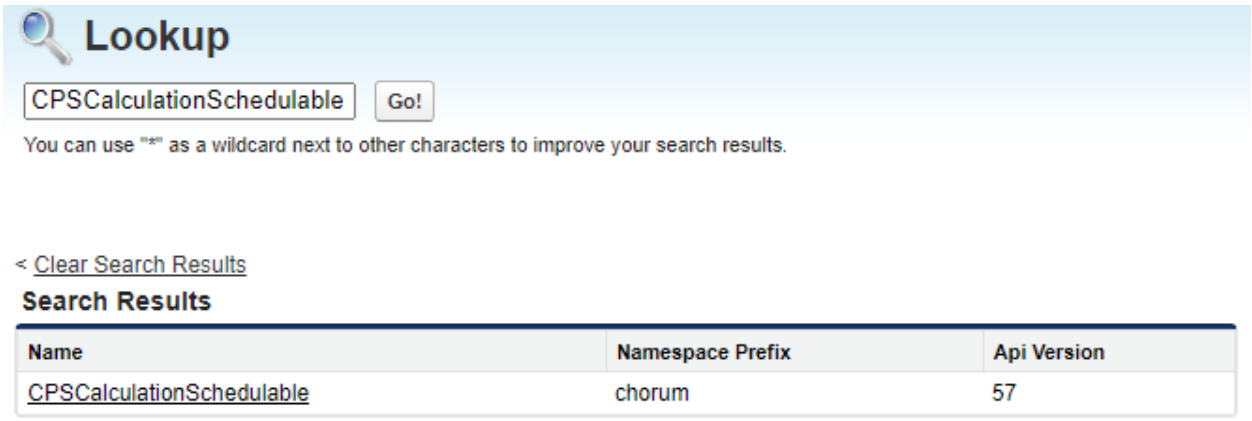
6. Once the mapping is completed, check the **Active** checkbox to mark the mapping as active and being picked up by the calculation batch job

Note*:* The user needs ***Chorum Admin*** permission set OR write access to the “CPS Settings” object for a custom permission set

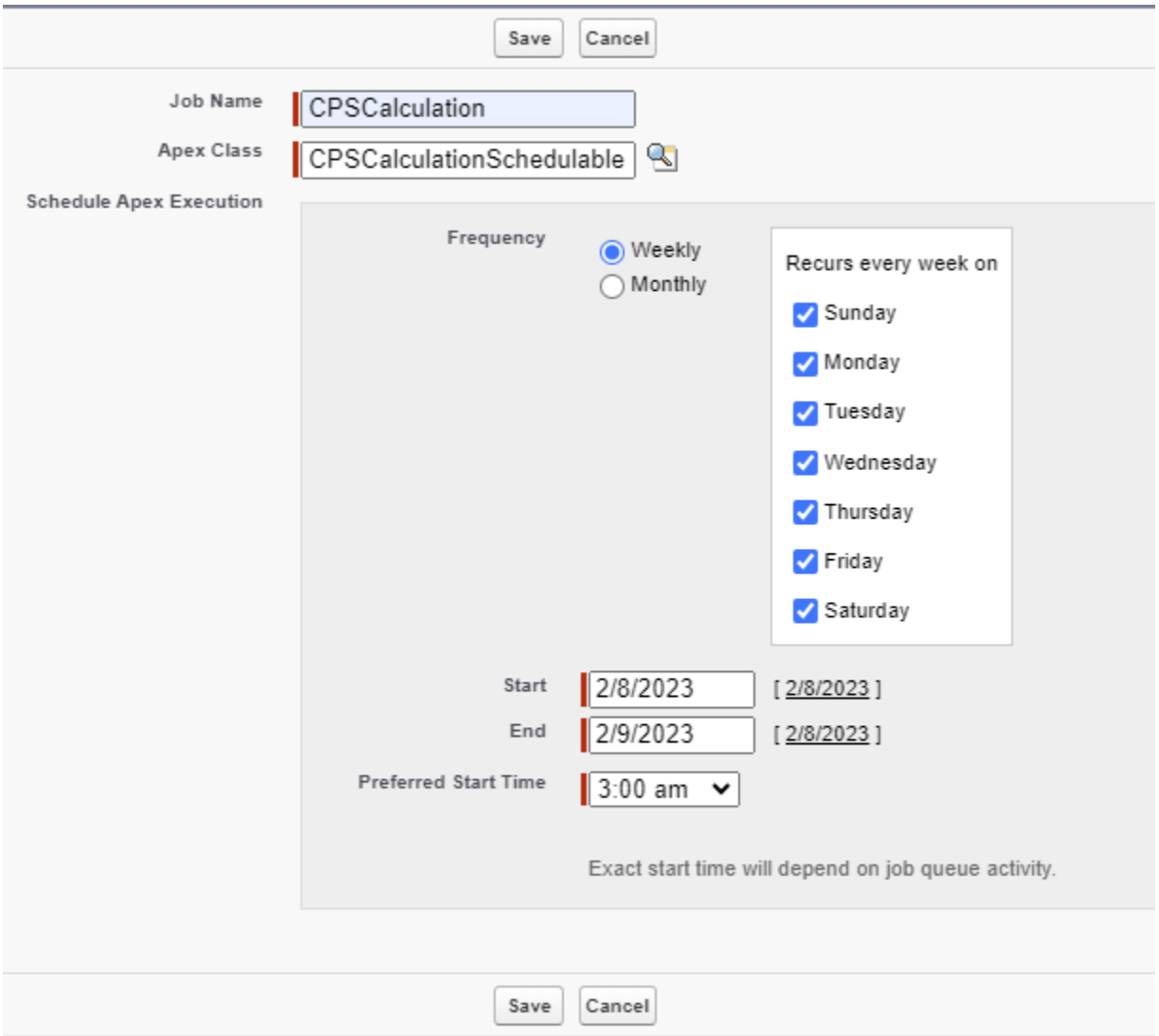
CPS Calculation Schedule

Once all the configuration is completed, we can schedule the batch job to run at any specific time.

1. Click the **gear** icon at the top right hand corner of the screen.
2. Select **setup**.
3. In the Quick Find input field enter **Apex Classes**.
4. Click on **Schedule Apex**.
5. Defined the **Job Name** as needed.
6. For **Apex Class,** select **CPSCalculationSchedulable.**



7. Select preferred **Schedule Apex Execution Frequency**



Project

Manage Workspace

To create new workspace or edit an existing

1. Navigate to the **Workspaces** tab or search from the application list. From here you can either create or edit existing workspaces.
2. Click **New** to create a new workspace, or click **Edit** to edit an existing one.
3. Enter the workspace name.
4. Click **Save**.

Manage Group

To create new group or edit an existing

1. Navigate to the **Groups** tab or search from the application list. From here you can either create or edit existing groups.
2. Click **New** to create a new group, or click **Edit** to edit an existing one.
3. Enter the workspace name and its description.
4. Select an existing workspace or create a new one.
5. Click **Save**.

Manage Project

To create new project

1. Navigate to the **Projects** tab. From here you can either create or edit existing projects.
2. Click **New**.
3. Enter the project name and its unique key (5 chars max), which will be used for a project issue number prefix.
4. Select the group for the project or create a new group.
5. Click **Save**.

Manage Project Members

To create a new project member or edit an existing one:

1. Navigate to the **Project Members** tab or search from the application list. From here you can either create or edit existing project members.
2. Click **New** to create a new project member, or click **Edit** to edit an existing one.
3. Lookup to the Chorum user that will be associated with the project member record.
4. Enter the project member's name. ** If the name does not match with the Chorum user's name, the after insert trigger will update the name to match with the Chorum user's name.
5. In the Project field, use the lookup to select a project that will be associated with the project member.
6. Click **Save**.

Manage Project Boards

Boards

Once the new project is created, the default Kanban board (Kanban Main Board) and default Active Sprint board (Scrum Main Board) will be created automatically. The default board will come with pre-set columns and statuses where the user can modify as follows.

To create a new board or edit an existing one:

1. Navigate to the **Projects** tab or search from the application list. From here you can either create or edit existing boards.
2. From the project list, click on the **Project Name** to navigate to the project's record page.
3. Click on the **Related** tab.
4. Under the Boards related list, click **New**.
5. In the Board Name field, enter a name for the board. The project is already selected for you.
6. You may or may not choose to make this board the default board for the project. In the Default Board Type field select **Kanban Default Board** to make it the default kanban board. Alternatively, select **Scrum Default Board** to make it the default scrum board. If none are selected, the board will not be converted to the default board.
7. Click **Save**.

Board Columns

To create new board or edit existing

1. From within the **Board**, navigate to the **Related** tab.
2. Click **New** to create a new board column or click on the existing one to edit.
3. In the Column field, select an existing column or click **New Column** to create a new one. For this example we will be creating a new column. If you already have a column, you can skip to **step 11**.
4. In the Column Name field enter a name for the column.
5. In the Order field, enter a number that will represent the order in which the column will be displayed in the board. (e.g., a column with order 1, will be the first column to be displayed in the board, whilst a column with order 2 will be displayed after column 1).
6. In the Parent Column field you can select another column that will behave as the parent column for the column you are creating. Nesting columns can be utilised to create sub-workflows.
7. From the Category picklist, select a category for the column.
8. In the Status field, enter a status for the column.
9. By checking the Requires Approval checkbox, the users will not be able to freely move cards to and from this column. When a column has the Requires Approval field selected, only users with the Chorum Admin, Chorum Scrum Master, and the column owner will be able to move the issue to a different column.
10. Click **Save** to create the column.
11. Click **Save** to create the board column.

Manage Sprints

To create new sprint or edit an existing one

1. Navigate to the **Projects** tab, then click on the **Related** tab.
2. Locate the **Sprints** section. From here you can either create or edit existing sprints.
3. Click **New**.
4. In the Sprint Name field, enter a name for the sprint.
5. Select a project in the Project lookup field.
6. You may use the Description field to enter a description about the sprint.
7. In the Start Date field, enter the starting date for the sprint.
8. In the End Date field, enter the ending date for the sprint.
9. Enter the amount of hours in a work day.
10. You may use the Sprint Goal field and the Sprint Retrospective field to provide additional information about the sprint.
11. Click **Save**.

Note: The Active and the Completed checkboxes are used to indicate if the sprint is the current active sprint of the project and/or if it has been completed. These fields are automatically updated when a sprint is made active (or is completed) through the Planning/Delivery panel.

Manage Sprint Members

To add or remove sprint members

1. Within the **Sprint** record, navigate to the **Related** tab.
2. Under the Sprint Members related list, click **New**.
    a. Alternatively, you can delete a sprint member by clicking the dropdown menu next to the record and selecting **delete**.
3. In the Project Member field, select a project member record.
4. Enter the sprint member's name. ** If the name does not match with the project Member's name, the after insert trigger will update the name to match with the project Member's name.
5. Click **Save**.

Note: When a new sprint is created, the after insert trigger will automatically create a sprint member record for each project member associated with the project.

Manage Chorum Product and Modules

Chorum Product

To create new chorum product or edit an existing one

1. Navigate to the **Chorum Products** tab or search from the application list. From here you can either create or edit existing products.
2. Click **New**.
3. Enter a product name in the Product Name field.
4. Click **Save**.

Module

To create new Module or edit an existing one

5. Navigate to the **Modules** tab or search from the application list. From here you can either create or edit existing modules.
6. Click **New**.
7. In the Module Name field enter a name for the module.
8. Click **Save**.

CRM Product setup

As a part of the installation, the 2 custom fields are created on the Product2 object

- Chrorum Product (chorum__Chorum_Product__c)
- Module (chorum__Module__c)

After the Chorum Product and Module has been set up per above. Link the product records that need to be included in the calculation to the new custom fields respectively.

Issues

Create and Manage Issues

To create a new Issue or edit an existing one:

1. Navigate to the **Issues** tab or search from the application list. From here you can either create or edit existing issues.
2. Click **New**.
3. In the Issue Name field enter a name for the issue.
4. Use the Project lookup field to link the issue to an existing project.
5. Select an issue type from the Type picklist.
6. Select a priority level from the Priority picklist.
7. Click **Save**.

Please Note: The fields in the issue form are reactive, which means they will vary according to the value selected in the Type field.
The table below is a complete report of the fields available for the Issue object based on the selected Type.

Field Name	Available for Issue Type	Description
Description	All	A description of the issue
Case	All	Lookup field that associates the issue with a Case
Assignee	All	Lookup field to associate the issue with a project member
Is Escalated by Executive	All	A special flag to indicate if the issue was escalated by an executive
Is Escalated	All	A special flag to indicate if the issue was escalated by a non-executive member
Sprint	All	Lookup field to associate the issue with a sprint
Parent Issue	All	Lookup field to associate the issue with a parent issue
Time Spent	All	The amount of time spent working on this issue
Source	Bug, Story	The source of an issue
Source Type	Bug, Story	The type of the issue source
Product	Bug, Story	Lookup field to associate the issue with a Chorum

		Project
Module	Bug, Story	Lookup field to associate the issue with a Module
Step to Reproduce	Bug, Story	The steps necessary to reproduce the issue
Epic	Story	Lookup field to associate the issue with an Epic issue
Status	All	The status of the issue. Only available after the issue is created. All issues are initially created with the status of *New*
Estimate Points	Bug, Story, Task, Sub-Task	The amount of story points estimated for the issue
Start Date	Epic	The expected starting date for the epic
End Date	Epic	The expected ending date for the epic

Calculate Values

Escalate

- Navigate to the **Issues** tab or search from the application list. From here you can search for or select the issue to perform the Escalation
- Select the **Escalate** button in the top right of the screen
- Is escalated will appear in the modal pop up, with a tick box
- Select **Save**

Note this function requires the following permission sets in order to perform:

- Chorum Admin
- Chorum Executive

Executive Escalation

- Navigate to the **Issues** tab or search from the application list. From here you can search for or select the issue to perform the Executive Escalation.
- Select the **Executive Escalation** button in the top right corner of the screen
- Is escalated by executive will appear in the modal pop up, with a tick box
- Select **Save**
- The Issue will appear at the top of the Kanban Board column, with a red border.

Note this function requires the following permission sets in order to perform:

- Chorum Admin
- Chorum Executive
- Chorum Scrum Master

Issue- Assign Customers

To create a new Issue Customer or edit an existing one:

1. Navigate to the **Issues** tab or search from the application list.
2. From the issue list, click on the **Issue Name** to navigate to the issue record page.
3. Click on the **Related** tab.
4. Under the issue customers related list click **New**.
5. Enter the account name in the Account lookup field.
6. Click **Save**.

Issue Risks

You can create and/or edit an issue risk record from two different places. Firstly, let's create it from the risk related tab:

1. Navigate to the **Risks** tab or search from the application list.
2. From the risk list, click on the **Risk Number** to navigate to the risk record page.
3. Click on the **Related** tab.
4. Under the issue risks related list click **New**.
5. In the Issue Lookup field, enter the issue you want to associate with the risk record.
6. Click **Save**.

Alternatively, you can also create/edit an issue risk record from the issue related tab:

1. Navigate to the **Issues** tab or search from the application list.
2. From the issue list, click on the **Issue Name** to navigate to the issue record page.
3. Click on the **Related** tab.
4. Under the issue risks related list click **New**.
5. In the Risk Lookup field, enter the risk you want to associate with the issue record.
6. Click **Save**.

Issue Requirements

To create a new Issue Requirement or edit an existing one:

1. Navigate to the **Issues** tab or search from the application list.
2. From the issue list, click on the **Issue Name** to navigate to the issue record page.
3. Click on the **Related** tab.
4. Under the issue requirements related list click **New**.
5. Enter a name in the Issue Requirement Name field.
6. Use the Requirement lookup field to associate the record with a requirement.
7. Click **Save**.

Sub-Tasks

To create a new Sub-Task or edit an existing one:

1. Navigate to the **Issues** tab or search from the application list.
2. From the issue list, click on the **Issue Name** to navigate to the issue record page.
3. Click on the **Related** tab.
4. Under the sub-tasks related list click **New**.
   Please note: A sub-task is essentially an issue with a parent issue associated with it. Please visit the Create and Manage Issues section for more information about all available fields.
5. In the Issue Name field enter a name for the issue.
6. Use the Project lookup field to link the issue to an existing project.
7. Select an issue type from the Type picklist.
8. Select a priority level from the Priority picklist.
9. Click **Save**.

Risks

To create a new Risk or edit an existing one

1. Navigate to the **Risks** tab or search from the application list. From here you can either create or edit existing risks.
2. Click **New**.
3. Enter a name for the risk in the Risk Name field.
4. Select one or more categories from the Category field list.
5. In the Impact field select an impact level for the risk record.
6. Select a Likelihood level from the likelihood picklist.
7. You may use the Chorum Product lookup field to associate the risk with a product.
8. You may use the Module lookup field to associate the risk with a module.
9. In the Status field you can change it to Open or Closed.
10. In the Business Owner lookup field you can link the risk to any Chorum User.
11. Click **Save**.

Please Note: Every risk record created will automatically receive an auto-generated Risk Number.

Planning/Delivery

Navigation

Navigation short desc

Kanban & Scrum Boards

The Planning/Delivery tab allows you to navigate through all boards for a given project. You can alternate between boards by selecting one from the Select Board dropdown menu.
You can utilise the boards to move issue cards between columns and to get an overall view of the project.

Metrics

desc

Available Filters

There are a few different filtering options that can be applied and combined together to filter issues from any Kanban or Scrum board. The filters available are as follows:

- My Issues: It displays only the issues where the Assignee field is linked to the project member record of the user that is currently logged in.
- Recent Updated: It displays only the issues that have been updated within the last 1 day.
- Priority: It displays only the issues that have a priority level matching the one from the filter picklist.
- Added Date: It displays only the issues that are newer than the value selected in the filter picklist.
- Risk Impact: It displays only the issues that have a risk associated with them, and the risk level of the associated risk record matches with the value selected in the filter picklist.
- Clear Filters: Clear all the filters that are currently applied to the board.

Sprint Planning

You can access the sprint planning panel by selecting any sprint from the Select Sprint dropdown menu.

Metrics

Capacity

Table + calculation

Backlog

- Escalated by Executive
  Issues that are in the backlog and have the Escalated by Executive flag checked will be highlighted by a red frame and grouped together at the top of the Backlog column for easy visualisation.

- Escalated
  Issues that are in the backlog and have the Escalated flag checked will be highlighted by a beige frame and grouped together at the top of the Backlog column for easy visualisation. Issues that are Escalated by Executive will take priority and will appear first.

- Normal tickets

Estimation Engine

- Vote
  Every sprint member has the ability to suggest the estimated points for any issues in the backlog. The steps to cast a vote are as follows:
  1. From the sprint planning board click on the **issue card** you want to cast an estimate vote for to select it. The issue will appear in the Issue Details column.
  2. Click on **Suggest Estimate Points**.
  3. Enter any value from 1 to 99.
  4. Click on **Confirm**.
     You will receive a confirmation toast message that your vote has been successfully received.

- Vote result + reveal
  Users that are assigned to the Chorum Admin and/or the Scrum Master permission have the ability to see the results for the estimated points voting. If no votes have been casted yet, the user will see a message informing that there are no votes for that particular card. The user may also press the **Refresh** button to update the panel.
  Once at least one vote has been casted, the panel will be updated with a table displaying the name of the person that voted, a status that reads *has voted* and the average score of all votes.

To reveal the voting results, click on **Reveal Results**, and to hide the results again click on **Hide Results.**