

ACME INC.

Salesforce Health Check

Jan 01, 2017



**ARTISAN
CONSULTING**



EXAMPLE

CONTENT

- Health Check Overview
- Business Context
- Technology Context
- Salesforce Overview
- Salesforce Usage and Adoption
- Salesforce Security & Visibility
- Salesforce Custom Configuration
- Salesforce Custom Code
- Salesforce Data
- Salesforce Integration
- Salesforce Release Management
- Salesforce Roadmap
- Salesforce Resourcing





HEALTH CHECK OVERVIEW

Objective

- Aligning Salesforce Evolution to Strategic Business Outcomes

Process

1. Consult stakeholders and review Salesforce implementation
2. Identify variances to best practice and obstacles to achieving value
3. Document discovery assessment with recommendations for action
4. Define a roadmap with towards business defined end goal

Next Steps

- Validate Discovery Observations
- Rank Roadmap Projects/Phases and Health Check Recommendations
- Re-Establish an Effective Delivery Team
- Deliver Business Value



BUSINESS CONTEXT

- Multiple brands delivering Business Retreat/Travel services
- 100 000+ travellers to more than 200 countries on all seven continents
- Indirect sales channels 90% of sales
- Indirect sales model limits direct traveller interaction due to data ownership constraints
- Call centres in Melbourne, Sydney, Brisbane and Perth



BUSINESS CONTEXT CONT'D

- Customer Strategy FY16
 - Accelerate growth through acquiring new and retaining existing customers
 - Put customers first and focus on Business Retreat objectives
 - Competitive differentiation by delivering ‘the best Business retreat service in the industry’
- ACME Customer Strategy
 - DATA ACCURACY – Cleansing, capturing and Maintaining clean customer data
 - CUSTOMER ACQUISITION – Acquiring new customers
 - CUSTOMER UNDERSTANDING – Understanding the needs and wants of the customers as well as their history via a single source of truth
 - CUSTOMER RETENTION – Applying analysis to customer data to proactively interact with customers and drive engagement



TECHNOLOGY CONTEXT

- Melbourne based IT supporting smaller teams for local IT in each office
- Strong development skill and understanding of agile, architecture and release management
- Desire to improve governance over Salesforce change release management
- Intermediate internal Salesforce expertise
- Salesforce Labs apps installed
- Certain business processes are supported with spreadsheets e.g. case management
- Email used for staff communication
- Jira used for project management



SALESFORCE OVERVIEW

- First licensed 10/2012 with 10 Professional Edition licenses
- Upgraded to 130 Enterprise Edition licenses in 07/2013
- More licenses added 2/2016
- Upgraded to 217 Performance Edition licenses in 11/2015 (78 not allocated)
- No current feature licenses
- Contracted to 29/09/2018
- Initial customisation done 11-2012 by ACME Consulting Co.
- Data cleansing and customer view projects underway

SALESFORCE OVERVIEW CONT'D

User Licenses

User Licenses Help ?

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	2	0	
Salesforce Platform	Active	3	0	3	
Customer Community Login	Active	5	0	5	
XOrg Proxy User	Active	2	0	2	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	5	0	5	
Identity	Active	10	0	10	
Customer Community Plus	Active	5	0	5	
Silver Partner	Active	2	0	2	
Gold Partner	Active	3	0	3	

[Show 10 more »](#) | [Go to list \(23\) »](#)

Feature Licenses

Feature Licenses Help ?

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	2	1	1
Apex Mobile User	Active	2	1	1
Offline User	Active	2	1	1
Knowledge User	Active	2	0	2
Force.com Flow User	Active	3	0	3
Service Cloud User	Active	2	1	1
Data.com User	Active	2	0	2
Live Agent User	Active	2	0	2
Site.com Contributor User	Active	1	0	1
Site.com Publisher User	Active	2	0	2
Chatter Answers User	Active	30	0	30
Work.com User	Active	5	0	5
Salesforce CRM Content User	Active	5	2	3

SALESFORCE OVERVIEW CONT'D

- Partial copy sandboxes are populated with production data based on a template defining which objects are in scope but will sample any object with over 10,000 records. This can leave data relationally out of sync.

Sandbox License			
Developer	Developer Pro	Partial Copy	Full
Refresh Interval: 1 Day	Refresh Interval: 1 Day	Refresh Interval: 5 Days	Refresh Interval: 29 Days
Capacity: 200 MB	Capacity: 1 GB	Capacity: 5 GB	Capacity: Same as Source
Includes: <ul style="list-style-type: none">• Configuration• Apex & Metadata• All Users	Includes: <ul style="list-style-type: none">• Configuration• Apex & Metadata• All Users	Includes: <ul style="list-style-type: none">• Configuration• Apex & Metadata• All Users• Records (sample of selected objects)• Sandbox Template Support	Includes: <ul style="list-style-type: none">• Configuration• Apex & Metadata• All Users• Records (all or selected objects)• Sandbox Template Support• History & Chatter Data (optional)

SALESFORCE OVERVIEW CONT'D

Business Value Rating 0/1/2/3 = none, low, medium, high

Complexity Rating 1/2/3 = low (configuration), medium (coding), high (coding and integration)

Recommendations:

- OVR01 – Purchase low volumes of employee, partner and customer community licenses for prototyping.
 - Value=2, Complexity=1
- OVR02 – Define strategy around cleansing and migration of data from excel
 - Value=0, Complexity=1
- OVR03 – Define Projects and Phases for each project
 - Value=2, Complexity=1
- OVR04 - Clarify business outcomes expected to be delivered at each phase of each project.
 - Value=3, Complexity=1

USAGE AND ADOPTION

- 280 users allocated licenses
 - 120 active in the last month
 - 126 active in the last 3 months
 - 129 active in the last 6 months
- Active users have no country or manager specified
- Salesforce Adoption Manager is not enabled so users are not prompted on how to better use Salesforce.
- Chatter is deployed but not actively used or promoted

****Chatter matrix report place holder****



USAGE AND ADOPTION CONT'D

Recommendations:

1. USE01 – Configure the Salesforce User record to...
 - Value=1, Complexity=1
2. USE02 – Review Roles and Profiles to...
 - Value=1, Complexity=1






SECURITY AND VISIBILITY

- Health score for security control is only 54%
- Private security model over some objects hence role hierarchy is important and this currently reflects existing users
- Single sign on is not enabled (no integration with Active Directory)

SECURITY AND VISIBILITY CONT'D

✓ High-Risk Security Settings (3)

Your values in these settings are considered high-risk security vulnerabilities.

STATUS	SETTING	GROUP	YOUR VALUE	STANDARD VALUE	ACTIONS
High Risk	Maximum invalid login attempts	Password Policies	10	3	Edit 
High Risk	Enable clickjack protection for customer Visualforce pages with standard headers	Session Settings	Disabled	Enabled	Edit 
High Risk	Enable clickjack protection for customer Visualforce pages with headers disabled	Session Settings	Disabled	Enabled	Edit 

SECURITY AND VISIBILITY CONT'D

✓ Medium-Risk Security Settings (8)

Your values in these settings are considered moderate-risk security weaknesses.

STATUS	SETTING	GROUP	YOUR VALUE	STANDARD VALUE	ACTIONS
Medium Risk	Password complexity requirement	Password Policies	Must mix alpha and numeric characters	Must mix alpha, numeric, and special characters	Edit ↗
Medium Risk	Obscure secret answer for password resets	Password Policies	Disabled	Enabled	Edit ↗
Medium Risk	Require a minimum 1 day password lifetime	Password Policies	Disabled	Enabled	Edit ↗
Medium Risk	Disable session timeout warning popup	Session Settings	Disabled	Enabled	Edit ↗
Medium Risk	Lock sessions to the IP address from which they originated	Session Settings	Disabled	Enabled	Edit ↗
Medium Risk	Enforce login IP ranges on every request	Session Settings	Disabled	Enabled	Edit ↗
Medium Risk	Enable caching and autocomplete on login page	Session Settings	Enabled	Disabled	Edit ↗
Medium Risk	Trusted IP Ranges	Network Access	An IP range isn't set.	At least one IP range is set.	Edit ↗

SECURITY AND VISIBILITY CONT'D

Recommendations:

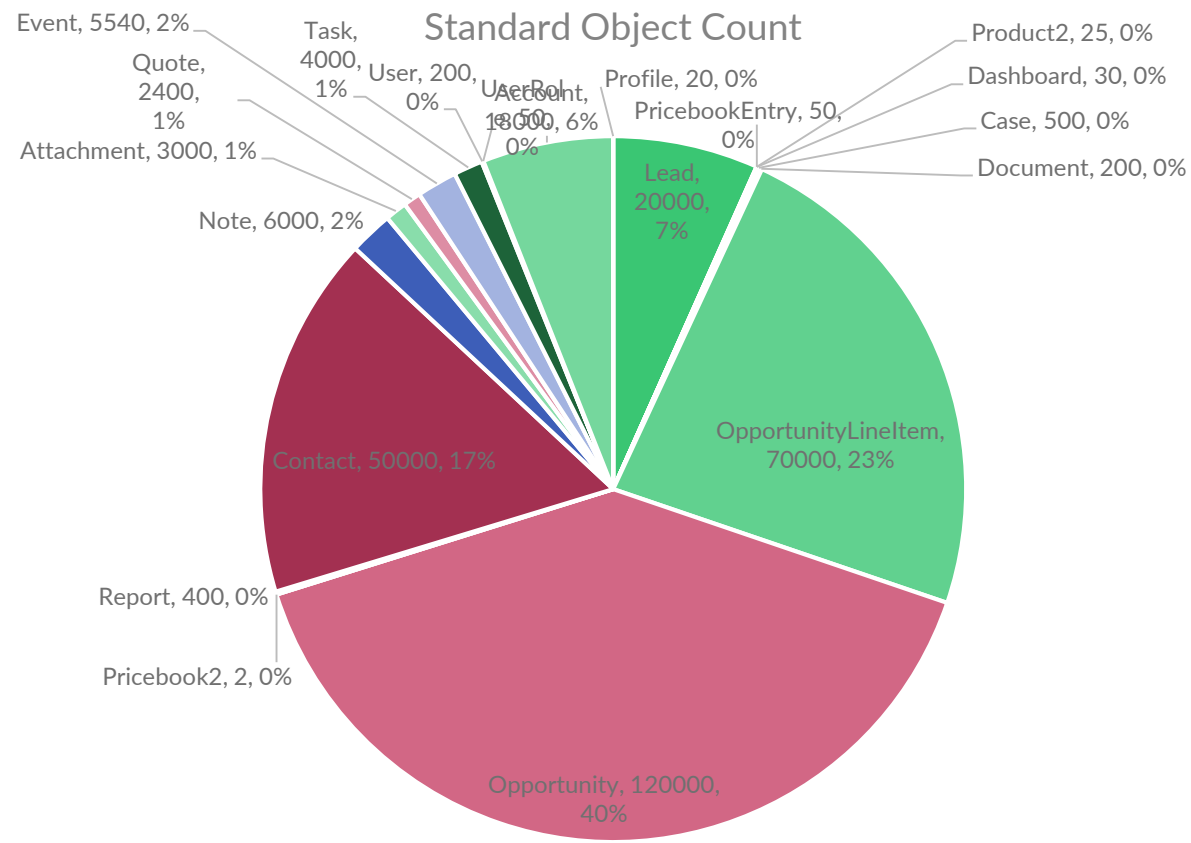
1. SEC01 – Review role hierarchy, object org wide defaults....
 - Value=3, Complexity=1
2. SEC02 – Review high and medium risk issues...
 - Value=2, Complexity=1
3. SEC03 – Consider....
 - Value=2, Complexity=3



CUSTOM CONFIGURATION

- The current custom configuration in the org is as follows...

CUSTOM CONFIGURATION CONT'D



- Lead
- Case
- Pricebook2
- Attachment
- User
- PricebookEntry
- Document
- Report
- Quote
- UserRole
- Product2
- Event
- Account
- Dashboard
- OpportunityLineItem
- Opportunity
- Note
- Task
- Profile



CUSTOM CONFIGURATION

Recommendations:

1. CFG01 – Remove...
 - Value=3, Complexity=1
2. CFG02 – Plan to move to Lightning Experience...
 - Value=2, Complexity=1
3. CFG03 – Enable Salesforce Territory management to...
 - Value=3, Complexity=1
4. CFG04 – Create custom class to...
 - Value=2, Complexity=1



CUSTOM CODE

- 5000 lines of code (2.75% of the total allowance)
 - 1 critical security risk
 - 1 serious risk
 - 5 warnings
- 12 scheduled Apex jobs...
- Code Coverage and where to improve...
- Log management improved by...

CUSTOM CODE CONT'D

Recommendations:

1. COD01 – Adopt method of...
 - Value=2, Complexity=1
2. COD02 – Run scheduled jobs...
 - Value=3, Complexity=1
3. COD03 – Fix all failing test classes...
 - Value=3, Complexity=2
4. COD04 – Resolve the critical and high risk issues...
 - Value=3, Complexity=1

CUSTOM CODE CONT'D

Recommendations:

5. COD05 – Remove custom code where...
 - Value=3, Complexity=2
6. COD06 – Resolve the issues stemming from...
 - Value=3, Complexity=1
7. COD07 – Resolve performance and scalability of the code by...
 - Value=3, Complexity=1

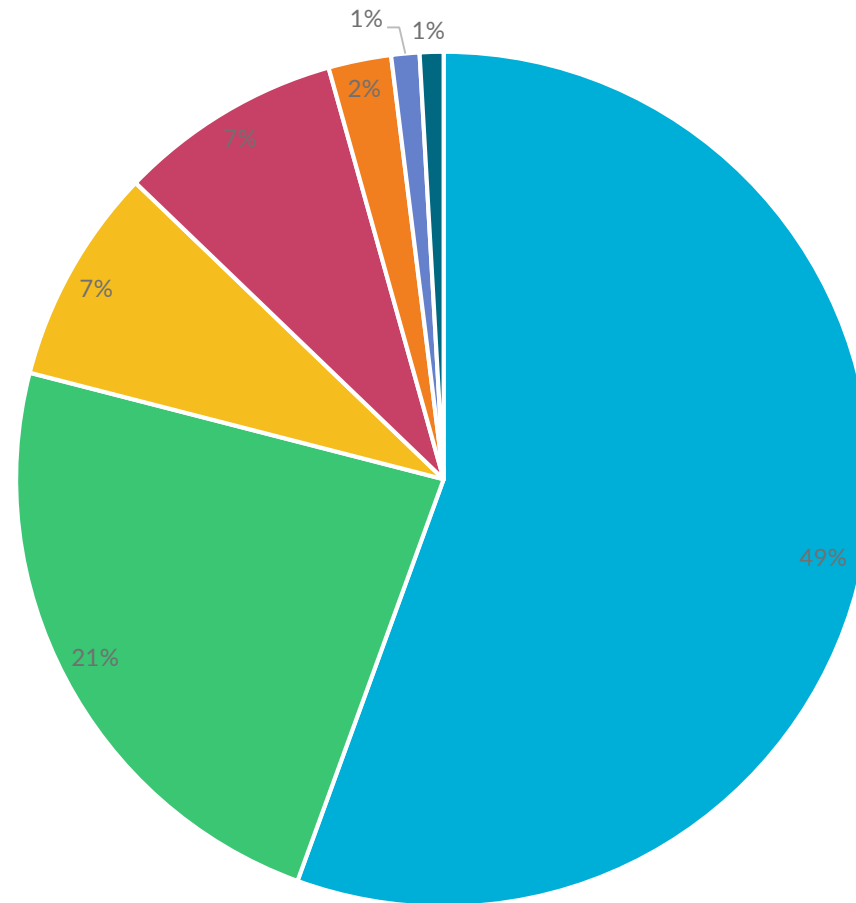


DATA

- Data cleanse and storage issues are as follows...

DATA CONT'D

Data Storage by Object Type



■ Opportunities ■ Contacts ■ Accounts ■ Events ■ Tasks ■ Quotes ■ Live Chat Transcript Events

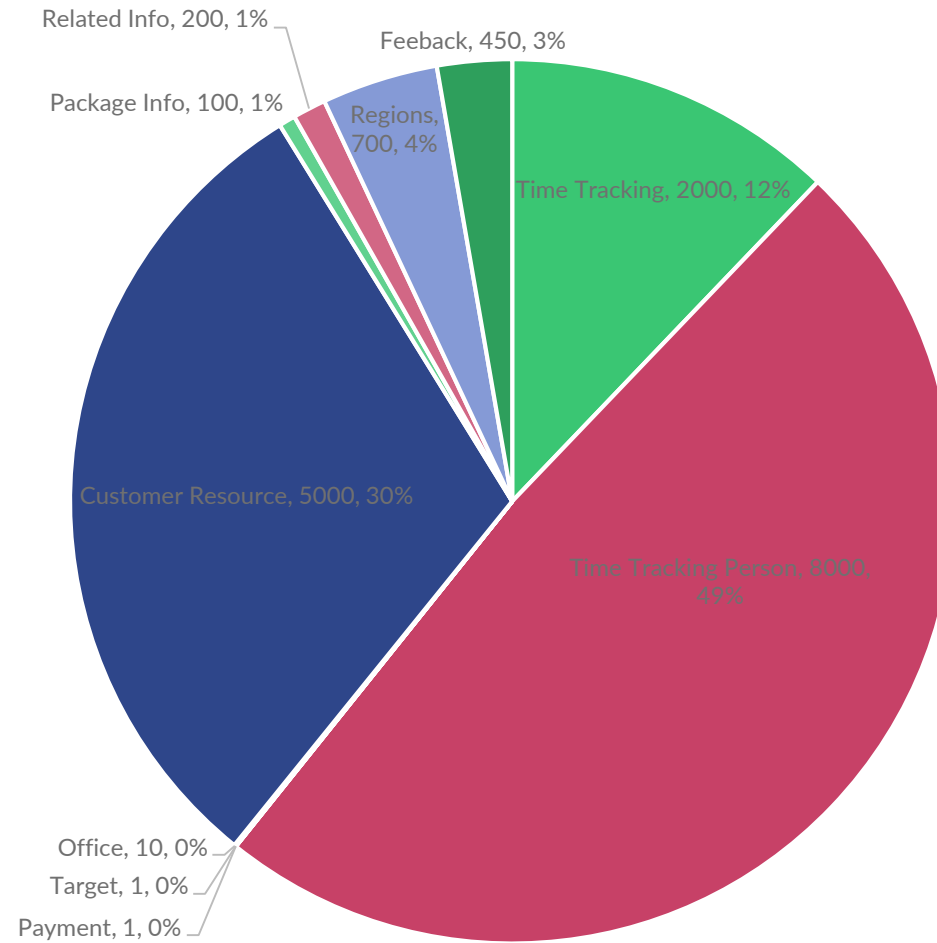
DATA CONT'D

Standard Object Count by Activity in Last 3 Months



DATA CONT'D

Custom Object Count



DATA CONT'D

Custom Object Count by Activity in Last 3 Months





DATA CONT'D

Recommendations:

1. DAT01 – clarify rules...
 - Value=2, Complexity=1
2. DAT02 – Change structure to...
 - Value=2, Complexity=3
3. DAT03 – Change the integration pattern so...
 - Value=2, Complexity=1
4. DAT04 – Install the application...
 - Value=2, Complexity=1



INTEGRATION

- The integration for the org is as follows:...



INTEGRATION CONT'D

Recommendations:

1. INT01 – Re-implement the following...
 - Value=3, Complexity=1
2. INT02 – Remove the following...
 - Value=2, Complexity=1
3. INT03 – Remove following AppExchange Applications if it is no longer being used...
 - Value=2, Complexity=1

RELEASE MANAGEMENT

- 1 full sandbox is being used for UAT and
- 1 partial copy sandbox is in use for Unit Testing
- 5 developer copy sandboxes with 1 in use
- 89 developer sandboxes with 11 in use

Available Sandbox Licenses			
Developer 89 Available (11 in use)	Developer Pro 1 Available (4 in use)	Partial Copy 0 Available (1 in use)	Full 0 Available (1 in use)

RELEASE MANAGEMENT CONT'D

Recommendations:

1. ENV01 – Use the full copy sandbox for...
 - Value=3, Complexity=1
2. ENV02 – Adopt source code control...
 - Value=3, Complexity=3
3. ENV03 – Define processes to...
 - Value=2, Complexity=1
4. ENV04 – Define a...
 - Value=2, Complexity=1



ROADMAP PROJECTS

Business Value Rating 0/1/2/3 = none, low, medium, high

Complexity Rating 1/2/3 = low (configuration), medium (coding), high (coding and integration)

PRJ01 (Project One)

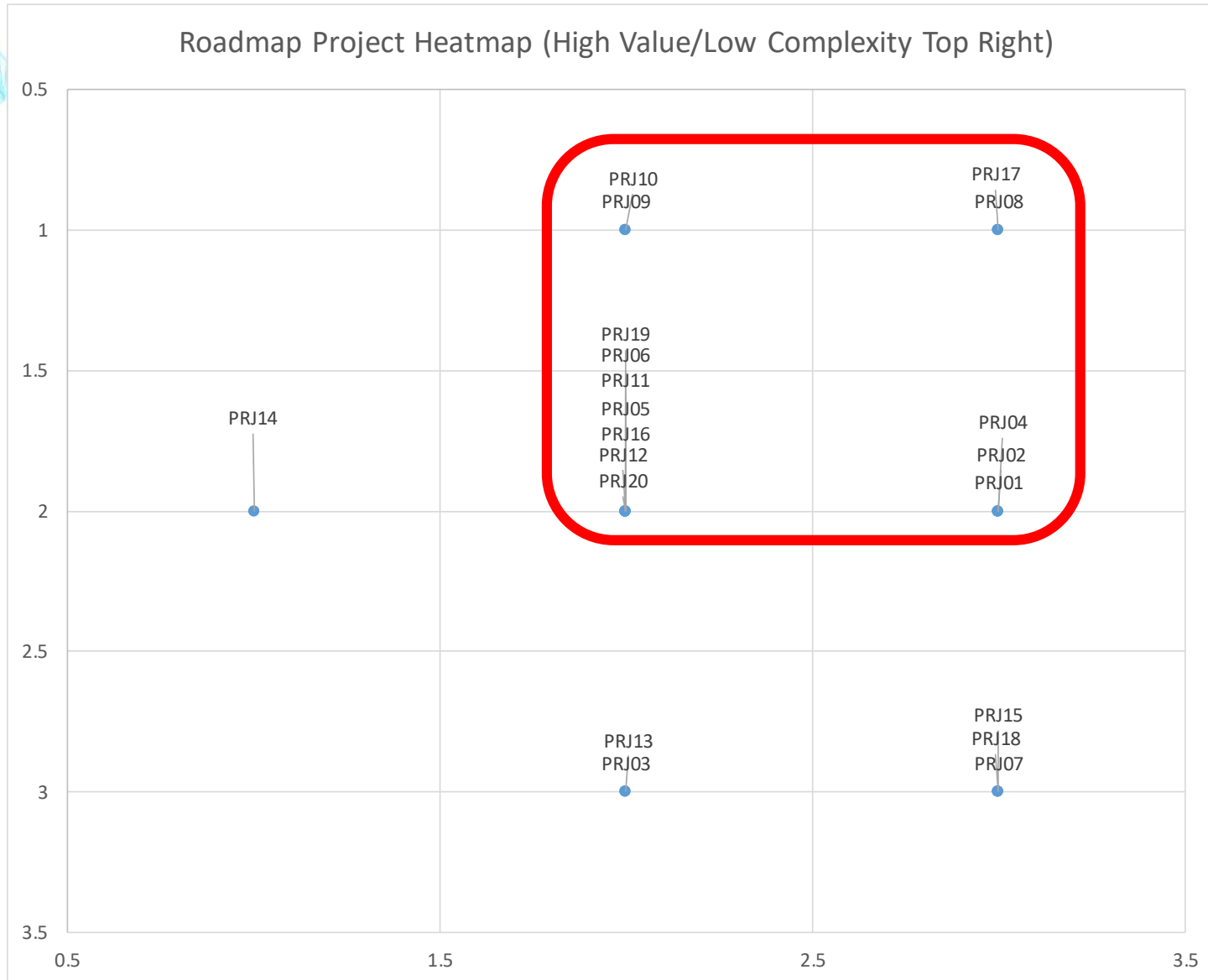
- Value=3, Complexity=2, Dependency=none
- Step to complete
- Step to complete
- Step to complete

PRJ02 (Project Two)

- Value=3, Complexity=2, Dependency=none
- Step to complete
- Step to complete
- Step to complete

...

ROADMAP PROJECTS HEATMAP





ROADMAP PROJECTS SEQUENCING

Project length is not indicative of duration, diagram just shows dependencies and ignores resourcing

The project dependencies and recommended project sequencing are as follows:



RESOURCING

- Skills Matrix
 - Successful delivery of an integrated Salesforce solution requires a matrix of skills
 - Agile delivery requires a clear roadmap with disciplined execution at sprint level
 - Program/project management
 - Business analysis to capture and formally approve requirements
 - Architecture across data, solution and integration
 - ...
- Artisan Resourcing
 - Some roadmap project can run in parallel
 - ...



RESOURCING CONT'D

Recommendations:

1. RES01 – Identify...
 - Value=3, Complexity=1
2. RES02 – Invest in training to...
 - Value=3, Complexity=1



THANK YOU

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