

twist⁺ellar ✦ blog

IMPLEMENTATION
OF SALESFORCE:

GETTING YOUR
COMPANY READY
FOR DIGITAL
TRANSFORMATION

In the previous articles we've shared [important arguments on selection of a CRM system](#). We'd like to continue the series of Salesforce Implementation materials with the key considerations for the next big stage of a digital transformation project: getting your company ready.

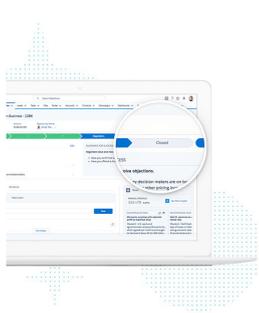
Regardless of the approach to a digital project implementation - whether the project will be carried out by an invited consultant, or internally, the overall success will be highly dependent on a few factors that are sole customer's responsibility:

- [Internal alignment on the goals and timeline of the project](#)
- [Allocation of accountable team to support the planning and implementation stages](#)
- [Definition and formalization of the business flows that need to be changed/automated to achieve them](#)
- [Sustainable plan of working out new habits](#)

Let's discuss these points one by one and define the actionable items.

Internal alignment on the goals and timeline of a Salesforce project

Whether it's some basic implementation of Sales Cloud to put sales processes in order, or a sophisticated Salesforce Platform application that connects a few IT systems together for specific data exchange and transformation, it's absolutely essential that the particular business goals are defined and agreed between the stakeholders, along with the timeline of the project.



Salesforce
Sales Cloud

For instance, for [Sales Cloud](#) domain the typical achievable goals are*:

- +26% Win Rate
- +32% Lead Conversion
- +38% Forecast Accuracy
- +38% Sales Productivity
- +28% Increase in revenue

For [Marketing Cloud](#) projects it can be*:

- +27% Lead Volume
- +38% Campaign Deployment
- +30% Lead Conversion
- +25% Increase in Marketing ROI



Salesforce
Marketing Cloud

*source: Salesforce Customer Relationship Survey

Besides formalizing the desired output from the perspective of *"What we'll get if we do that"*, it's useful to approach it from the perspective of *"What will happen if the project will NOT be implemented"*. In the modern world a company with vision can't afford to pause in development, as competitors will definitely outrun.

For the sake of successful project planning and scope definition it's really important that the stakeholders of the customer company are aligned in their expectations of the outcome. An internal consultant or a professional consulting company with relevant business experience will

be much more effective, if the high level goals are formalized, and their economical impact defined, as **it will be much easier to make the appropriate solution design and proposal of the scope to match the price/value targets.**

And the timeline of the project set by the stakeholders focuses the implementation team on the expected velocity, at the same time limiting the spendings, and simplifies the adoption, when all people involved remember the goals well, and are motivated to achieve them. **Ideally, the timeline should be separated into phases, when each phase of implementation already brings value and can be deployed separately to make users' adoption more iterative and smooth.**

Based on our rich experience, you can expect the initial implementations of Salesforce Sales Cloud or Service Cloud to last for 4-6 months. If you'd like to leverage Salesforce Community Cloud - that may take another 1-2 months for styling and customization.

On the contrary, we've sometimes witnessed the situations when stakeholders would like to implement an IT project, and seem to have some expectations, but they're not well defined or even not agreed completely between them. And instead of planning the project from top to bottom, some low level tasks are created for the automation of separated flows, with hope that they will effectively connect to each other in the end somehow. **Usually that doesn't do much good and results in data model discrepancies, gaps in automations and disappointment.**

On the stage of goal placement, the responsibility of a consultant is to help the stakeholders (at least by asking proper questions) to define and formalize the business expectations. And technical proficiency helps to spend less effort on that stage, as consultants with **sufficient business AND technical expertise will be able to decrease the number of rounds of such discussions**, not having to refer to technical architects on each step.

Allocation of an accountable team able to work on the planning and implementation stage

A Salesforce implementation project will require a lot of efforts from the customer's organization. These efforts will be spent for the planning and implementation of the Salesforce project. Effectively, any digital transformation is related to changing the existing ways of doing business, and thus it's very important that appropriate representatives participate in the definition of actual changes and automations.

A Salesforce implementation project usually contains of the following stages:

1. Discovery stage, high level scope definition
2. Solution design, draft estimation of the scope
3. Business analysis, technical specification and project plan
4. Change management planning
5. Technical implementation
6. QA and UAT stage
7. Training
8. Actionable monitoring and adoption
9. Fine tuning

The importance of the right people involved from the customer's side already on the first stages is obvious. Despite the high level definition of the project goals, the actual execution will be driven on the middle level of the organization. **That's why it's really crucial that the true followers of the required organizational changes exist on the middle management level, and are involved in the implementation team.**

Stages that require the most efforts from the organization representatives are Business Analysis, UAT, Training and Monitoring. A Salesforce Consulting company can't achieve any business goals for an organization, it can only help and drive the changes, contributing to the

solution design, sharing the industrial experience and recommending the proven approaches.

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So, in order to make sure that the organization has enough resources for the project, it's necessary to consider not only the cost of services of a Salesforce consultant but also the time expenses of the organization itself. And probably, the more business experience a Salesforce consultant has, the more self-sufficient they will be in suggesting business solutions.

Recommended compositions of an implementation team from the customer's side, depending on the scale of a company, are:

For smaller businesses:



CEO / SHAREHOLDER

the sponsor of the project, defining the project goals



HEAD OF DEPARTMENT

responsible for the automated corporate function

contributor on the execution level planning and UAT



LINEAR EMPLOYEE

for instance, a Sales Representative

for Sales Cloud implementation

consulted for certain employee-facing parts of the project to simplify adoption

For larger companies and enterprises the following roles may be added:



BUSINESS-ANALYST

helping to define the scope of the project and internal communications inside the customer company



PROJECT MANAGER

helping to arrange the necessary interactions between the implementation team and project participants and stakeholders



TECHNICAL ARCHITECTS

ensuring that the solution will [fit into the existing corporate IT infrastructure](#)



TRAINER

responsible for creating corporate playbooks and teaching the personnel how to use the system

What is important - **to ensure that the implementation team from the customer's side is composed of people with certain authority, able to make decisions and promote the project goals inside the company.** And having time necessary to support the project on all the stages.

The contribution of this team is especially meaningful during implementation of such Salesforce domains as Sales Cloud - where the **actual outcomes of the project are heavily dependent on the comfort of working with the system and the discipline** of inputting all the relevant commercial information. On the monitoring stages the team will be responsible for helping employees to get comfortable with the solution.

Definition and formalization of business flows

Now let's assume we know the expected outcomes of the project from the perspective of goals and timeline. And we have the implementation team composed of the consultants and the authorised representatives of the company. **Next step would be to outline the business flows that need to be changed/automated during implementation.**

It's important to understand that **automation itself should be applied only to the processes that are well defined and arranged.** To automate "chaos" won't do any good. So a properly planned project will anyway require some business analysis and formalization as an initial stage. You would be surprised how distanced can be the understanding of the expected results of a Salesforce implementation, if they're not discussed and detailed to the sufficient level, both from business, UX and backend perspectives.

The definition of a business process usually includes the following sections:

BUSINESS OBJECTS

The list of entities that will exist in the system, description of their characteristics (attributes, types etc) and their relationships - such data objects will be presented in the data model as tables with columns.

Examples of data objects with their possible attributes typical for Sales Cloud, Service Cloud, Marketing Cloud and other "bread and butter" domain implementations of Salesforce:

- **Account** - Name, Address, Type
- **Contact** - Name, Phone, Email, Birthday
- **Lead** - Name, Address, Rank, State
- **Opportunity** - Amount, Close Date, Name, Creation Date
- **Activity** - Type, Channel, Due Date, Status
- **Order** - Amount, Start Date, Type

- **Asset** - Type, Location, Cost
- **Contract** - Start Date, End Date, Amount

Examples of connections/attributes:

- **Account** can have one or many **Contacts**
- **one Contact** can be related to **one or several Accounts**
- an **Order** is related as a child object at the same time to an **Account**, an **Opportunity** and a **Contract**

Effectively, all the business entities that your company is working with in a business flow, should be named.

BUSINESS ROLES

The list of profiles of people who will be participating in the business processes as the executors, approvers, managers, etc. With the descriptions of their permissions: what they will be able to do with the business entities.

Examples of roles in a typical sales system empowered with Sales Cloud:

- **Sales Representative**
- **Head of Sales Department**
- **CEO**

Definition of the business roles will help to properly arrange the corporate structure, accesses to business entities, layouts of screens, etc.

BUSINESS FLOWS

The list of processes (sequences of operations) with all the business entities, naming the business roles participating in the process and the actions they conduct.

Usually it's convenient to present a business flow for a particular process as a diagram with certain input, internal operations and an output that's further used in some internal process, or exposed to an

external customer/partner.

And on this stage it usually becomes obvious, which steps of the business flows can be automated, and how exactly.

During the definition of these components of the business processes an implementation team can often reveal valuable insights on how the actual processes should be optimized to achieve better business results, and only then use these decisions to define the way of their automation.

Based on this information provided, a Salesforce consultant can present the real life entities and flows by Salesforce data model, flows and processes (combining standard out of the box functionality and custom code if needed), roles and profiles in the future system.

It's very important that an implementation team assigned on the customer's side is knowledgeable enough and possessing time to describe how exactly these processes work now, and make decisions on what should be done to raise their efficiency and productivity. The company should be able to create this vision of the project outcomes, not as siloed descriptions of disconnected procedures, but as a high-level picture decomposed to the interconnected flows.

Of course, a professional Salesforce consultant will be able to effectively contribute to such discussions, help to define gaps, share experience of industrial best practices and conduct the business analysis work required to achieve the needed level of alignment on the expected outcomes of the automations - this operational level where the employees of the company will be involved every day.

Sustainable plan of working out new habits

Any company that's getting ready to start an IT project needs to remember that successful completion of a technical solution is not the finish line, it's the beginning. We're always telling potential customers that the importance of the technological factor in the overall Salesforce implementation success is 30%, while 70% stand for human factors.

Here's what the plan of getting your people engaged and adapted to the new technology includes:

- Involvement in project planning
- Participation in UAT
- Training
- Launch
- Collection of feedback
- Control of users' discipline
- Making adjustments

For all the stages certain managerial activities need to be scheduled. A Salesforce consulting company can participate and contribute on all the stages, but the real responsibility for the successful implementation is definitely shared by the customer company's stakeholders.

The main idea is that **the majority of people always treat new tools and technologies with suspicion, and the more their trusted representatives take part in the whole process - the better.** However, when the project will be ready to go live, it will be absolutely crucial that middle management, responsible for the functions that are being automated, are promoting the tool within the company, use it themselves and support their colleagues.

Sometimes you can create a technological masterpiece, but still to make it a useful tool within a company, you'll work with your colleagues' habits.

To help track adoption the following specific metrics can be measured:

- MAU (monthly active users)
- Average frequency of logins of a user
- Number of uses per function
- Number of requests to IT support
- Satisfaction rate

Especially such actions are important for those business processes, where there's a lack of "natural" control points. For instance, usually it's hard to avoid using a warehouse management system, so when we're building ERP-like systems on Salesforce, we're telling companies that they will be easier implemented from the people management perspective.

Similar approach is feasible for certain customer-facing automations, for instance Service Cloud can automatically track customer inquiries via different channels, and it will be possible to control how they're processed and resolved.

While if we're talking about Sales Cloud (which is quite a natural first step for any company's digital transformation journey with Salesforce), **the company will be vastly reliable on the accurate and timely input of crucial information on leads, opportunities, forecasts, activities, etc** - all the commercial information that will help prioritize and boost sales. And the leaders of sales departments will have to spend sufficient time coaching, explaining why that's needed, "selling" the advantages of metrics-driven approach to sales management, etc.

Conclusion

So, stepping on a digital transformation journey will take efforts and preparations, but the effect of a successful Salesforce (or any other platform) implementation project can really overcome your expectations.

In order for it to be successful, don't forget to:

- Get your stakeholders aligned on the expectations and the quantitative metrics of the project
- Collect a motivated and knowledgeable team that will be able to participate in the project planning and execution
- Spend time to structure and formalize your business processes: objects, roles and flows
- Be prepared to laborious post-launch work dedicated to changing the habits of your colleagues

And don't hesitate to get advice from a [Salesforce consulting company](#).

Professional Salesforce consulting services are not only about technology - a professional contractor will become your reliable business partner in this exciting endeavor.

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