:iTechArt

Salesforce implementation

Company snapshot

As a software development company, iTechArt helps VC-backed startups and fast-growing tech companies build successful, scalable products that users love.

We are global

- Headquarters in New York, offices in San Francisco and Atlanta
- Extensive presence in the UK and Austria
- Software development centers in Belarus and Poland

Industries and verticals covered

30+ Diversity serves as a core component of our tech culture

A pool of **go-getter engineers**

1800+

Service areas

- Staff augmentation
- Custom software and app engineering
- QA and testing
- DevOps

Our team knows how to **marry tech and money**

$500k The average amount clients save with us, per year

$8B Our clients collectively raised

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Why iTechArt

Talent

- Hand-picked engineers
- Mature, well-developed education system
- Low attrition rate of 5.6%

Commitment to dialogue

- Streamlined communication
- Latest collaboration approaches and tools
- Proven processes and best practices

Efficiency

- High coding standards
- Deep domain expertise
- Seamless integration with clients' workflow

Dynamic engagement model

- Rapid kick-off and easy scale up
- Flexible ramp down
- No operating costs

Salesforce expertise at a glance

- Certified Salesforce Administrators, Developers, Consultants and Architects

- Deep expertise in Salesforce customization leveraging Apex, Lightning and Visualforce

- Data migration and 3rd party services integration experience

- Sound experience in business processes automation on top of Force.com

- AppExchange application development with further publishing support

- Custom Salesforce solutions design and implementation

salesforce	Visualforce	AppExchange	Apex	Lightning
Salesforce	Visualforce	AppExchange	Apex	Lightning

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Technology expertise

Salesforce configuration:

Standard and custom Object Fields
Workflows and approvals automation
Reports and dashboards
Security management

Salesforce customization:

APEX, Visualforce development
Lightning Components
Development
Custom reports and dashboards
Data cleansing
Analytics

Salesforce integration:

SSO or OAuth
Mobile
Rest/SOAP/Bulk
Social
ETL tools

Salesforce Clouds and products:

Service Cloud
Sales Cloud
Health Cloud
Marketing Cloud
Analytics Cloud
Community Cloud
IoT Cloud
Pardot
Nonprofit Cloud
Tableau

AppExchange services:
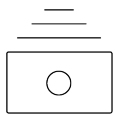
App development
Application testing and code coverage
Custom UI
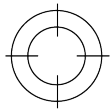Security review

Applications:

FinancialForce
DocuSign
Drawloop
TargetRecruit
SkyVisualEditor
Skuid
PandaDoc
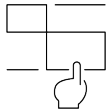Jobscience
Conga Composer and many more
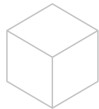
Implementation roles

Client

Stakeholders
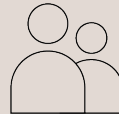
Super users

End users

Salesforce product owner (optional)

iTechArt

Technical consultant

Technical team

Project manager (optional)

* Note that there is always a Salesforce Account Executive who syncs up with both parties on a regular basis to ensure smooth Salesforce onboarding

Success ally: Technical consultant

Technical consultant

is a Salesforce certified expert with, on average, 6+ years of experience and a deep understanding of Salesforce platform and product set. Consultant is business-oriented and works to maximize Salesforce implementation ROI and make the platform a perfect fit for the existing business processes
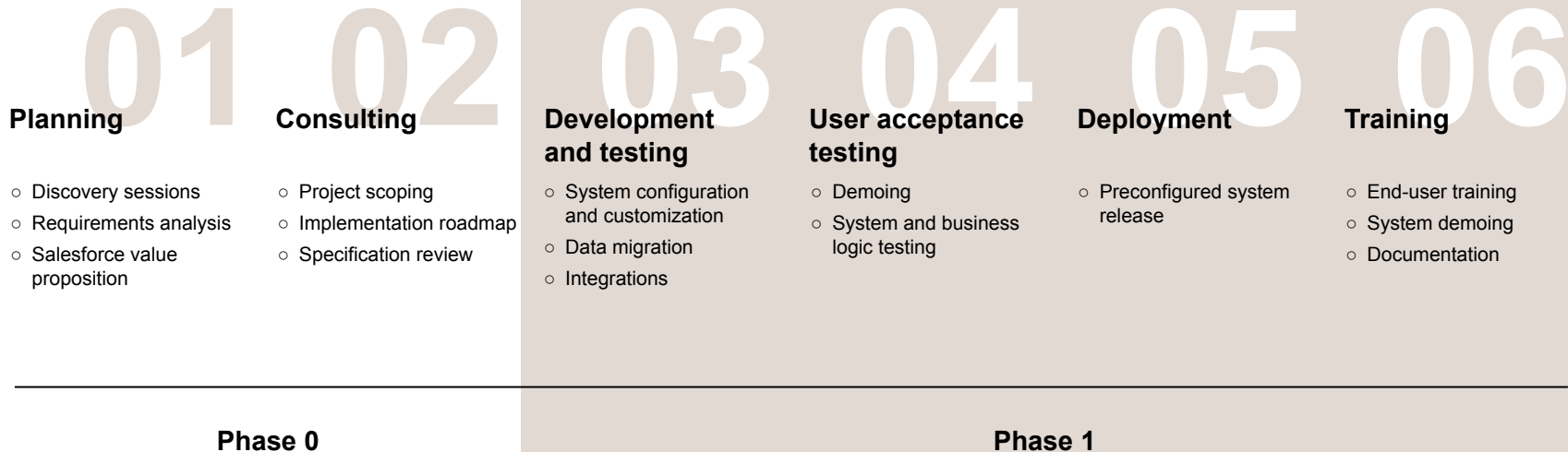
Technical consultant is responsible for:

- Technical design of the platform
- Estimates and resources allocation
- Advises across business and architecture/ technical functions
- User training

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Salesforce implementation roadmap

Our best practice is to split the implementation into several phases
Here is the roadmap for Phase 1

01

Planning

- Discovery sessions
- Requirements analysis
- Salesforce value proposition

02

Consulting

- Project scoping
- Implementation roadmap
- Specification review

03

Development and testing

- System configuration and customization
- Data migration
- Integrations

04

User acceptance testing

- Demoing
- System and business logic testing

05

Deployment

- Preconfigured system release

06

Training

- End-user training
- System demoing
- Documentation

Phase 0

Phase 1

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Planning

Goal:

To identify if Salesforce is the right fit for the existing business processes and is able to cover all business needs and to prepare the business strategy

Who:

Stakeholders on the client's side, iTechArt technical consultant, Salesforce account executive

What:

Technical consultant steps up to identify business pain points, what products/CRMs are used, Salesforce products/clouds that should be implemented, data that should be migrated to the Salesforce, integrations that should be made

How:

Discovery calls and Salesforce demonstration

Deliverables:

Identified: Salesforce products and editions, number of licenses

Consulting
Phase 0

Goal:

To come up with a detailed proposal on the Salesforce implementation strategy and roadmap

Who:

iTechArt technical consultant and stakeholders

What:

Technical consultant comes up with a detailed Salesforce implementation roadmap that includes timelines, demo sessions schedule, system features, role permissions, integrations, etc.

How:

Remotely or on-site

Deliverables:

The complete Salesforce solution design document, implementation estimate and timelines, demo session schedule

Development and testing
Phase 1

Goal:

To customise the system in accordance with the specifications and requirements

Who:

Technical team (SF engineers and QA)

What:

The iTechArt team is working on the system configuration (Fields, Page layouts, Reports), data migration, set up access levels and user role permissions, integration with 3rd party systems, POC demoing, automation processes setup, system testing

How:

Weekly status calls and demos

Deliverables:

Salesforce system is ready for acceptance testing

User acceptance testing
Phase 1

Goal:

To ensure that the system fully corresponds to the needs of end users and is easy in daily use

Who:

Super users

What:

This phase is designed for the final system configuration based on users' feedback. Once the system is tested by the end users, we make the final adjustments and configuration

How:

We give clients 5-10 business days to test the system capabilities

Deliverables:

Salesforce system is fully tested by both teams and ready to be deployed in Production

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Release
Phase 1

Goal:

To deploy the system based on the results of user acceptance testing

Who:

Salesforce engineers and QA

What:

The technical team is working on production instance release and user access mapping

How:

- ○ Metadata deployment into the production instance
- ○ Running manual and/or automated tests

Deliverables:

Successfully deployed system ready for use by end users

Training
Phase 1

Goal:

To drive Salesforce adoption up to 100%

Who:

Technical consultant

What:

To ensure smooth system onboarding and ease of use, the technical consultant organises a training session or set of sessions for the end users. We can also provide detailed documentation on the system capabilities and configurations/integrations that have been made
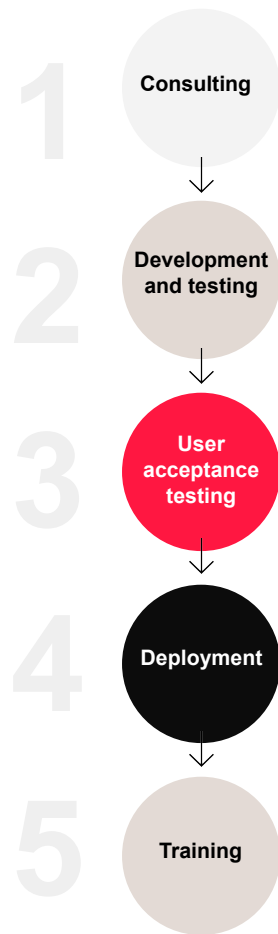
How:

Webinar or on-site sessions

Deliverables:

Salesforce system is ready for use, end users known how to utilise the system for their daily activities

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Salesforce implementation roadmap: Phase 2

After Phase 1 (initial system deployment) comes Phase 2, where we work on further system enhancements. Here is a roadmap for Phase 2

1 Consulting

2 Development and testing

3 User acceptance testing

4 Deployment

5 Training

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—We've implemented Salesforce for:

HAUD
STAY IN CONTROL

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YGGDRASIL

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Let's work on creative things together

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