The purpose of *The 8 Steps to Leading Successful Salesforce.com Projects* is to document what I have found in my experience to be the most effective way of managing and implementing salesforce.com projects. This model can be used for other types of projects as well, but I use salesforce.com projects in these examples because my ultimate goal is to help new salesforce.com admins get a head start when they are thrown into the world of managing a system they have never used before. There are plenty of training programs that will get these people the technical skills they need to administer the application, but there is little help available on how to connect the dots when moving from a purely administrative assistant/support role into being responsible for running and owning projects to improve process for the organization.

The Project LifeCycle

This is a high-level representation of the project lifecycle that I have found to be the most effective in managing successful salesforce.com projects.

Step	Deliverable
1. Current state	Identify the business owners of the current state and schedule a kickoff meeting to have them walk you through every step in the process. Ask them why they do what they do, what does each step do for them exactly and you will naturally begin translating these things (“business requirements”) into salesforce.com solutions (“functional requirements”).
2. Identify PB&J's	(P) Personas: all users/teams impacted (the Team Charter); (B) Bombs: the major business problems and pain points (where are we losing data / reporting abilities, the things that are unknown but shouldn’t be); and (J) Jams: the bottlenecks/delays; often jams are the low hanging fruit that you can solve for easily just because salesforce.com is awesome. Get great at identifying jams and people will think you are magic! Jams come disguised like this: “lots of emails back and forth” (solved w/ validation rules on forms or approval flows!); “we don’t know what the stage is” (solved w/ a status field!); “we are never notified when it is complete” (solved w/ workflow email alerts).
3. Future state	Document the proposed ideal future state. Don't just take what the business tells you they want and recreate it exactly. Take what you have learned and apply salesforce.com to make everything better! They don’t know what they don’t know about salesforce.com, but you now know what you didn’t know about their process so use that to your advantage and design something even better than they could have asked you for. Make sure you create the current and future state in a flow diagram and visualize the PB&Js so they understand exactly how the new process will impact them (and how it will make their life easier!) -- this step is especially important if you are trying to get approval to move forward with a large initiative.
4. BR and FR Docs	Translate the future state into actual business requirements (BR) (i.e. what the business is asking you to solution in order to consider the project a success) and add your own salesforce.com functional requirements (FR) for each (i.e. what is the technical requirement you will build to “manage opportunity stages for pipeline visibility”). Send this document to all stakeholders for approval to ensure you did not misunderstand or miss any requirements.
5. The MVP	If you are designing a car the MVP might be a working bike but it absolutely can't be a state-of-the-art engine without a place for a person to sit (the point of a car is to get a person from one place to another after all!). Design your app in a sandbox and give your stakeholders a demo. Take their feedback and keep iterating until you are at a place to start testing.
6. QA Testing	Quality assurance testing should be done by the SME/Super users. Give them training documentation (and live training if possible) and watch as they test to make sure you didn’t miss anything critical. Be with them during testing as much as possible to ensure you capture their clicks and issues/pain points as they happen so you can quickly iterate.
7. Define Next Steps	Document the features to be included in the enhancement project and define a schedule. Sometimes on larger projects you want to go live with one team and then a second team later (Sales first and then marketing; or sales opportunities and then RFPs as phase II, etc.).
8. Deploy & Feedback	Document the release notes and end user training (SF knowledge articles work great for this!) and create a Chatter Group where users can give feedback, ask questions and collaborate with you and each other in real time! Provide live training whenever possible.

The Current State (#1)

Overview

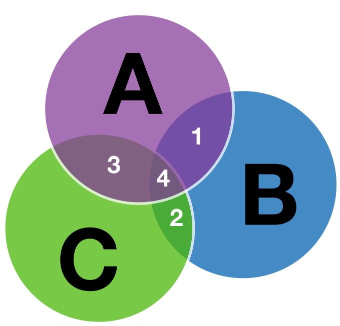
All business process improvement (BPI) initiatives require thorough analyses of the current state if you want the improvement to actually work. Odds are you don't know what you don't know about the current state, and given you must understand exactly what is happening today if you want to improve upon it you must go to the source. People are the process, and therefore, your success depends on getting all the right people completely involved and dedicated to the initiative.

If you are a salesforce.com administrator, your job centers on process improvement! Every question you get that starts with "Is it possible to…" is process improvement. Some initiatives are larger than others, but they all go through the same basic steps to solve. You identify the people who know the processes best (often called the "subject matter experts" or SME for short), this could be one person or 25+ depending on how big the initiative is (and you need an executive sponsor and business owner for the bigger change management initiatives so you have the support you need and the right people making the decisions), (together the "personas"). Then you get them to tell you the current process and how they use it, and document the flow along with clearly identifying the pain points ("bombs") and bottlenecks ("jams").

I have found when implementing a salesforce.com project I consistently pull from my knowledge in three areas to implement successful deliverables, (1) salesforce.com expertise, (2) process improvement, and (3) project management.

The three knowledge areas we pull from to implement successful deliverables:

Knowledge Area	Description
Salesforce.com (SFDC)	As a SFDC Admin you are the technical expert on this subject and will guide the team
Business Process Improvement (BPI)	BPI is about using a systematic approach to solving business problems with an end goal of creating efficiencies
Project Management (PM) and the project life cycle	At its core, PM is about using planning and executing methodologies while leveraging effective communication and interpersonal skills to successfully manage project teams and deliver successful products/deliverables



All three knowledge areas intersect with each other at different times of the project life cycle when implementing successful salesforce.com deliverables.

Know your PB&Js (#2)

Personas

First order of business is to identify the SMEs and interview them together, all of them in one room if at all possible (with white boards and sticky notes!). To ensure you have identified all the right people, be sure to send an email in advance with a persona diagram asking everyone to confirm that the diagram covers all departments/units/teams that own and or work within the current process.

Here is an example diagram for a contract management change initiative:

Persona (team/unit)	Team Member(s)
Accounting	Jane and Jerry
Legal	Tina and Alex
Sales	Mike and John
Business Owner	Howard (General Counsel)
Executive Sponsor	Lisa (CFO)

Bombs

Now that you have everyone in the same room and they are walking you through the current state process, make it clear that you need to know where the pain points are. The best way to improve a process is to ease the major pain points for the people in the room (not to mention how excited they get when you listen to their pain and tell them you are going to do your best to make these pain points disappear!). This process enables the team trust you (you are on their side after all!) and makes them feel a sense of ownership in the project at the same time. Gaining trust and support from this core team will be essential to the success of your project!

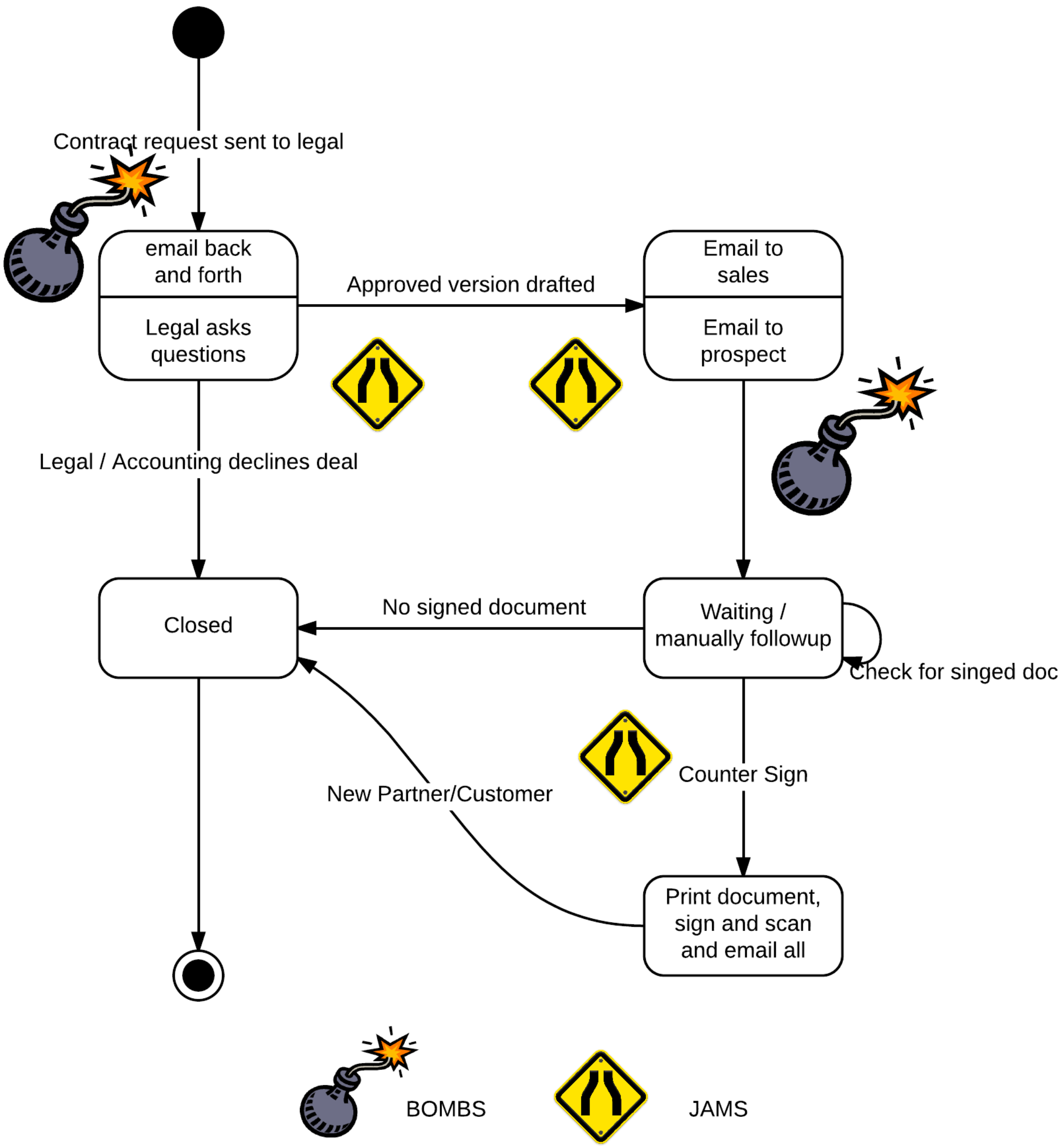
Jams

Jams simply identify areas of the process where there are delays due to manual intervention, system trouble, and or chronic email churn. Sometimes a bomb is also a jam, but the way I typically differentiate between the two is by keeping jams under the umbrella of something I can easily fix with out of the box salesforce.com functionality (such as approval flows, or a field update with workflow rules, auto email alerts, etc.). Generally I find many of the manual processes being completed by people can be fixed easily with salesforce.com so I don't consider them a true bomb unless the team stresses that a specific jam is the absolute nightmare in their process and want to see it as a bomb!

On the next page you will find an example flow with the bombs and jams clearly identified!

Example Workflow with Bombs and Jams

In this example the team has clearly stated that their pain points are in the front end of the process, where legal has to manually create every contract and send to the sales team in order for them to send to the prospect. The jams indicate there are a few opportunities for automation and approval flows in the new process!



Project Planning

What is a project exactly?

For our purposes, a project is an endeavor undertaken to deliver a new process in salesforce.com according to a defined use case (the “Project”). All projects have a defined start and end date, ideally once you have delivered the product the project is closed and another business unit takes on the daily operations of the app/process (typically your stakeholder or subject matter expert). If, given your circumstances, you are responsible for the operations of managing the process as well, you should structure your time in such as way so you can define how many hours you spend on project work and how much time you spend on managing operational duties. This is a good practice and will help you when you find opportunities to push for change in your organization, as you are prepared to define the value of offloading the hours you spend on operational duties in order to spend that time on bringing more value through more project work!

If you are an admin and have handled the end-to-end process of implementing a solution before, you already know there are a lot of steps in the project lifecycle that you are trying to plan for. If you are a new admin without much project experience, or if your boss just purchased salesforce.com and now you need to help with the deployment, you have come to the right place for some guidance to get you started!

Approaching the part of your job that builds and deploys solutions as a project manager instead of an operational / administrative role will instantly change your approach. Shifting from an operations mindset (maintaining the system, analyses, data management, etc.) to a project management mindset can look something like this:

- Understand the business case, ask why and ask why again! Identify the team and bring them together for a kickoff meeting and current / future state analyses.
- Document the current state, including all PB&Js (personas, bombs and jams)
- Use your sandbox to design a quick MVP (minimal viable product) to show the team
- Ask for feedback, the more the end users get involved the more they will embrace the solution!
- Plan for deployment and implementation, communicate constantly and clearly (less info more often)
- Document, document, document. Create high quality training documentation and you will be an instant hero.
- Plan for quick enhancements and take feedback with a positive attitude (don’t get defensive!)
- USE A CHATTER GROUP for feedback, not email (less stress for you, and the whole team can benefit from your answers to each post without having to remember to copy the world on emails)
- Document your lessons learned, think about what went wrong/right and how you can duplicate the successes and address the failures as lessons learned. Remember, we learn from our mistakes so don’t beat yourself up!

This is a high level summary and we will go into more details on each of these topics in this document, but for now let’s get started reviewing an example project plan. Based on your high level conversations with the team/owner document the phases you plan to deliver for this project, it will look something like the below project plan template.

The Project Plan Template

The section is a complete salesforce.com project plan template that you can use to plug in the specifics of your next project! Depending on the scope of your project, some sections will not be needed. Pick and choose what works for you, as each project is unique!

Overview

The overarching theme of this Project is to implement a brand new user-friendly CRM tool that each member of the team can use to effectively manage account portfolio, pipeline activity and reporting. The ultimate deliverable of this project is a stable salesforce.com environment, designed to accommodate the agreed upon unique core business needs, with full data migration and end user training:

The Project will occur in two core phases and two future phases [include date estimates if possible]:

Phase I: Build the Salesforce.com foundation for sales team (structure defined and designed, including mobile functionality; data migration; pipeline management and reporting)

Phase II: Training and user adoption (client and activity management; page layouts and data movement; usability testing and enhancement design and rollout)

Phase III: Marketing migration (tracking for marketing events and contact/campaigns)

Phase IV and V: System integration with accounts payable and other backend systems

Gaining a solid understanding of the requirements for a CRM initiative reduces the risk of a failed implementation. By not providing the context, support and understanding for all users --we risk there being limited use of the technology and a frustrating deployment experience, resulting in the lack of adoption of both processes and technology. In the following pages we will track specific CORE requirements as well as functionality and tasks that will be assessed and executed during future phases of the full Project.

A successful implementation of the Project should entail:

a. Understanding our business pains.
b. Leveraging technology to automate those business pains.
c. Analyzing the business and helping people to be successful in the business.

A universal acceptance that users are crucial to creating and capturing customer information while running business processes within the CRM technology; that if users do not use the technology during daily activities then there is no accurate CRM data (which means no reports, no improvement in efficiency and no foreseeable enhancement to business processes).

Requirement Assessment: Kickoff Meeting Agenda

a. Review Team Charter and role assignments
b. Review project charter information (dependencies, risks, assumptions, etc.)
c. Review Current State, analyze existing processes and identify business pains (PB&J's)
d. Business and Functional Requirements review and brainstorming
e. Agree on Action Items for next steps

This Business and Functional Requirements document for the Project is a documented representation of the project scope and objectives. It includes specific needs that will be incorporated into the new salesforce.com environment and/or the business functions that must be modified or created to satisfy the business need (and identifies if each will be included in CORE initiative or a future phase).

Why is CRM technology important?

- Enhanced process and data tracking capabilities through consistency.
- We realize data within the CRM system is as reliable as we make it.
- Real time reports and data analysis will empower us.
- Consistency, Reliability, and Empowering (ourselves and each other) = true CRM effectiveness

Dependencies

- Testing will be executed by the Administrator and the Super Users as defined in the Team Charter.
- The migration of current data will be imported into salesforce.com by the System Administrator.
- New release of [master database or 3rd party database as applicable] data for migration ready by
- Regularly scheduled data migration or integration planned [date]

Risks

- Change management and user adoption: The current CRM system has had a 0% end user adoption rate. It is currently used simply as an extension of Excel –as a tool to help the administrator/super user capture high level data as it is provided (through word of mouth, email, digging through individual calendars for meeting information, etc.), which in turn is used to create bi-weekly meeting reports. Gaining adoption by all end users will be a challenge and require an effort to 1) provide enough value in the system, 2) enforce mandatory use, and 3) implement an adequate change management program.
- Active executive level involvement and support is necessary
- Continual end user involvement and feedback is crucial to success
- Lack of support of the new system by not enlisting key personnel to provide feedback and become lead advocates in training and usage.
- Full mobility functionality properly implemented and adopted
- Inability to extract data from current system

Constraints

- Resource constraints – dedicating the right personnel to this project while maintaining a consistently high service level on existing responsibilities
- Need to develop an implementation schedule that allows for appropriate performance testing and user acceptance while recognizing when resources are extremely tied up with year-end responsibilities.

Assumptions

The scope for the Project, including architecture / design, pipeline management, data migration, and mobility functionality will be refined, prioritized, and finalized as part of the Functional Requirements and design work stream of the project. The final scope for the Project will be based on priority, business need, time and resources allocated. Executive Sponsorship will lead the effort in enforcing user adoption and integration into daily work activities for all end users.

Team Charter (personas defined)

Document every stakeholder on your project, including a representative set of end users that will use your system, give them all an assigned role and ensure they have an opportunity to be actively involved in the project – the more involvement they have the more they will support you and the new system. Give them ownership and responsibilities throughout the project lifecycle (quality assurance testing is a big one for super users, etc.).

You can group by team or in any other way that makes sense. Just be sure you have the support of an executive sponsor and business owner and then identify your SMEs and or super users on each team. You can group these however you want, sometimes the SME and super users are the same for example.

[Enter your name]

> Project Manager: Responsible for development of requirements, management of project scope, schedule and budget; and securing project resources, both internally and externally, to complete project. Reports progress and escalates issues as necessary to Business Owner and Project Sponsor(s).
>
> Salesforce.com Administrator: Responsible for system design, quality assurance testing, conducting initial training sessions for all users and continual support and administration of the technology.

[Enter Executive Name]

> Executive Sponsor: Articulate the vision of the project and provide support for resource requirements. Aid the team in driving the process modifications required for adoption of the resulting changes.

[Enter Business Owner Name]

> Business Owner: Provide project oversight. Aid the team in driving the process modification required for adoption of the resulting changes. Secure the resources and funding needed for the development, implementation integration and rollout. Remove organizational roadblocks.

[Enter Name]

> Super User: participate in all project activities, work with team to define and document business and functional requirements and continual enhancements. Participate in systems and training documentation development and rollout as needed.

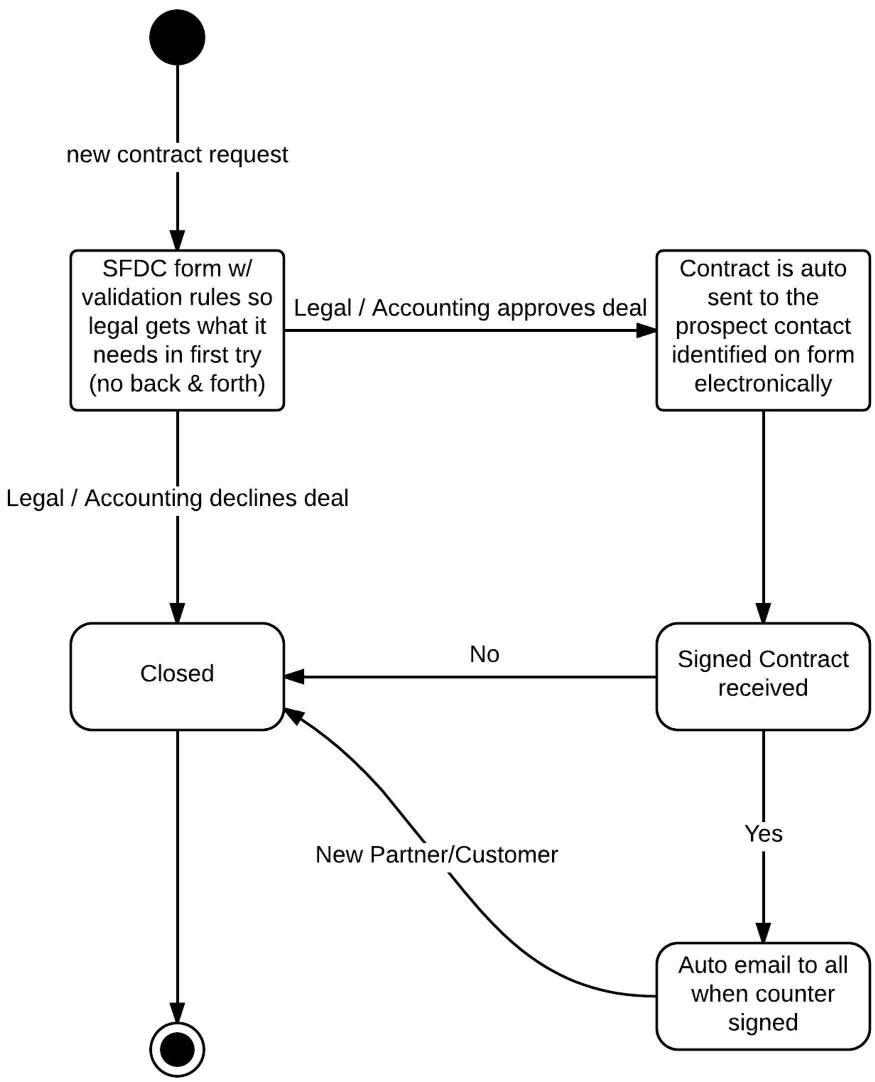
[Enter Name]

> Subject Matter Expert: provide subject matter expertise regarding business needs.

Future State (#3)

Example Future State Workflow

Document the proposed future state. Don't just take what the business tells you they want and recreate it exactly. Take what you have learned and apply salesforce.com to make everything better! They don't know what they don't know about salesforce.com, but you now know what you didn't know about their process so use that to your advantage and design something even better than they could have asked you for. Make sure you create the current and future state in a flow diagram and visualize the PB&Js so they understand exactly how the new process will impact them -- this step is especially important if you are trying to get approval to move forward with a large initiative.



Business Requirements (#4)

When you start to translate the future state into business requirements, you are basically identifying all the requirements that the business wants to see completed in order to consider the project successful. They might look something like the below at a high level, your job is make sure you get them as detailed as possible:

Account and Contact Management

- Track changes to contact and account information
- Knowing when the last time we met with contact/account
- Holiday card list

BD / Sales Meetings (scheduling and tracking)

- Track individual meetings and the outcome of these meetings
- Call reports – tasks to follow up and tracking portfolio, investor owned, and client meetings individually (and by region)

Pipeline Management

- leads and opportunities (stage, history, etc)
- Searching for status and other updates
- Report generation and reliability

Portfolio Management

- Database management: trending reports /asset management – operating margin reports/credit history)
- Account Name vs. the individual properties located there (if property management/REIT)
- Call Reports
- Track when a call is made to a contact, saving this history to use in the future (individual basis)
- Setting up reminders to follow up / task management in Outlook / notebook

NPS /Client/Partner Survey

- Manage the NPS survey and score tracking process

RFP response

- Document preparation and task execution / management (IDA, underwriting, intake meetings, etc)

Project management

- Track project goals and status for ongoing projects
- Project close-out – client management (change from prospect to client)
- List of complete projects (in “profile” format) listing details of each project completed

Marketing Campaign tracking and ROI

Manage Speaking Engagements / Events

Example Business Requirements with Functional Requirements

Translate the business requirements (BR) into detailed deliverables and add your own salesforce.com functional requirements (FR) for each. To do this think about what the technical requirement is that you will build to meet the business requirement. Send this document to all stakeholders for approval to ensure you did not misunderstand or miss any requirements. Below is an example to get you started!

NEW CRM PROJECT- Business and Functional Requirements

BR ID#	FR ID#	Priority	Phase	Requirement
1	**BR**	**High**	**CORE1**	**Track and organize contact within CRM**
FR	F1a	High	CORE1	Auto update contact addresses when the account address is updated (if they matched)
FR	F1a1	High	CORE1	Research title auto fill options (consistency, etc) and add check box to show if address is different from account (otherwise address field is hidden). Also add “preferred name (informal)” field.
FR	F1a2	High	CORE1	Add “holiday gift” field (yes/no) if yes then choose “small/med/lg”
FR	F1b	High	CORE1	Sync contact updates from Outlook to SFDC
FR	F1c	High	CORE1	Track former roles vs. current roles (i.e. have a process for having no duplicate contacts, but still capturing data from when contact was at former position)
FR	F1c1	High	CORE1	As a team we decided the “inactive” function would be best for tracking history, etc.
FR	F1d	High	3rd	Data control and monitoring. Salesforce.com Administrator to ensure duplicate contact and account records are detected and roles are correctly captured.
2	**BR**	**High**	**CORE1**	**Track and organize clients and prospects (and referrals/businesses) with efficiency**
B2a	BR	High	CORE1	[Database] Guide data updates (if you have a 3rd party database you purchase or unique IDs for your accounts, etc.)
FR	F2a	High	CORE1	Unique [Database] Guide identifier (field named "Guide") --which allows for easy update imports
B2b	BR	High	CORE1	[Database] data updates
FR	F2b	High	CORE1	Unique identified (field name "Member ID" -- which allows for easy updates with [Database/3rd party company] website functionality)
B2c	BR	High	CORE1	Clients vs. Prospects (providers/partners)
FR	F2c	High	CORE1	"Relationship" field on Account page (Client; Prospect; Business/Referral) – add as a window view to the account page (not a new field) – remove “network relationship” field and form the hierarchy as following: hospital has the network in the “system” field and the “network” account has the system name in the “system” field (make each of the parents account name viewable from the child form)
B2d	BR	High	CORE1	Referrals (and other businesses)
FR	F2d	High	CORE1	"Relationship" field on Account page (Client; Prospect; Business/Referral) – add “broker” to the “type” drop down menu on the account form
B2e	BR	High	CORE1	Track project progress for each product line to ensure client status is reached
FR	F2e	High	CORE1	Create auto workflow process in SFDC to change "Relationship" field from "Prospect" to "Client" when Stage is changed to "Closed/Won"
3	**BR**	**High**	**CORE1**	**Have clear understanding of internal activities… how we interact with prospects and clients to help each other be more efficient when we are going about our daily activities.**
B3a	BR	High	CORE1	BD phone calls
FR	F3a	High	CORE1	Out of the box SFDC call log functionality -- allows users to log calls as they are made to ensure history is captured for that account/contact
B3b	BR	High	CORE1	BD meetings

FR	**F3b**	high	CORE1	Out of the box SFDC event functionality -- minor changes to the Event Form as the business requests
4	**BR**	**High**	**CORE3**	**Pipeline Management**
FR	**F4a1**	high	CORE3	Design the Opportunity Form for [Company] needs (attach an example)
B4a	**BR**	High	CORE3	Enhanced pipeline visibility
FR	**F4a**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS
B4b	**BR**	High	CORE3	Relevant pipeline reports for top management
FR	**F4b**	high	CORE3	Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to)
B4c	**BR**	High	CORE3	Report Meeting metrics
FR	**F4c**	high	CORE3	Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to)
B4d	**BR**	High	CORE3	Report Hit Ratio (win/loss)
FR	**F4d**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to)
B4e	**BR**	High	CORE3	Report Proposals (issued vs. outstanding)
FR	**F4e**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to)
B4f	**BR**	High	CORE3	Easily understand relationship management status (meetings, etc)
FR	**F4f**	high	CORE3	Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to)
B4g	**BR**	High	CORE3	Increase close rates through management of daily activities and higher efficiency (access to data)
FR	**F4g**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS, EVENTS, TASKS, CALL LOGS, REPORTS
B4h	**BR**	High	CORE3	Dashboard to display top deals and win rates
FR	**F4h**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS
B4i	**BR**	High	CORE3	[3rd party partner] pipeline items (track and report)
FR	**F4i**	high	CORE3	Out of the box SFDC functionality -- REPORTS (Modified to include VHA fields)
B4j	**BR**	High	CORE3	Track forecasted revenue from all profit centers
FR	**F4j**	high	CORE3	Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to)
5	**BR**	**High**	**CORE1**	**Portfolio tracking and relationship management**
B5a	**BR**	High	CORE1	[Company] properties/assets (owned vs. managed)
FR	**F5a**	high	CORE1	Design Account Form to include necessary fields to run the portfolio reports
B5b	**BR**	High	CORE1	[Parent company] legacy properties
FR	**F5b**	high	CORE1	Design Account Form to include necessary fields to run the portfolio reports
B5c	**BR**	High	CORE1	[Acquired] legacy properties
FR	**F5c**	high	CORE1	Design Account Form to include necessary fields to run the portfolio reports
6	**BR**	**Med**	**3rd**	**Project based tracking**
B6a	**BR**	Med	3rd	Development projects
FR	**F6a**	high	3rd	Out of the box SFDC task functionality -- allows users to create tasks and assign to others to ensure task management and project status FROM THE WON OPPORTUNITY FORM
B6b	**BR**	Med	3rd	Advisory projects
FR	**F3c**	high	3rd	Out of the box SFDC task functionality -- allows users to create tasks and assign to others to ensure task management and project status FROM THE WON OPPORTUNITY FORM
7	**BR**	**High**	**CORE5**	**Track and organize tasks, meetings and calls**
B7a	**BR**	High	CORE5	Enhanced team reports showing action items, meetings and calls
FR	**F7a**	high	CORE5	Design custom REPORT
B7b	**BR**	High	CORE5	Auto process work flows for to do and follow up items regarding deals and meetings
FR	**F7b**	high	CORE5	Design customer process work flows within SFDC -- need to define
B7c	**BR**	High	CORE5	Outlook integration (first for administrator then for all end users during 2nd phase)

FR	**F7c**	high	CORE5	Install Outlook integration package and work with IT team to ensure release is smooth
B7d	**BR**	High	CORE5	User Profiles defined -- system administrator vs. Assistant vs. management/sales team (lock certain fields for existing accounts/contacts --changes to these to be routed through system administrator)
FR	**F7d**	high	CORE5	Lock all "NAME" fields -- can't modify any name field even if you are the owner, must notify (use “task” or a “form”) administrator --other field related rules to be defined as well
B7e	**BR**	High	CORE5	Various page views based on User Profiles
FR	**F7e**	high	CORE5	marketing and analyst view to be designed based on fields they need to see (sales team will not see these fields)
8	**BR**	**High**	**CORE1**	**Quantify why deals are lost to key competitors**
B8a	**BR**	High	CORE1	As opportunities are lost, track competitor wins
FR	**F8a**	high	CORE1	Custom field to appear when "Reason Lost" = lost to competitor --select competitor account to relate to the loss
9	**BR**	**High**	**CORE2**	**Data Migration**
B9a	**BR**	High	CORE2	[3rd party purchased data if applicable] (accounts and contacts)
FR	**F9a**	high	CORE2	Ensure all fields are represented and captured
B9b	**BR**	High	CORE2	Existing pipeline data from CRM or Excel or Word, etc.
FR	**F9b**	high	CORE2	Migrate active pipeline data from outside systems/Excel (ensure all fields are represented) -- migrate all contacts associated to each active account too
B9c	**BR**	High	CORE2	Marketing’s updated marketing contact list (used in last marketing campaign)
FR	**F9c**	high	CORE2	Migrate the "Scrubbed" contact list from marketing -- marking each scrubbed contact with unique field
B9d	**BR**	High	CORE2	Capture client data
FR	**F9d**	high	CORE2	Custom fields used to define Clients and portfolio data
B9e	**BR**	High	CORE2	Existing meeting data from outside systems
FR	**F9e**	high	CORE2	Plan to migrate the existing meeting data from Excel
B9f	**BR**	High	CORE2	Existing businesses (referrals) from outside systems
FR	**F9f**	high	CORE2	Migrate active businesses (referrals) from outside systems -- define
B9g	**BR**	High	CORE2	All other existing contacts in Outlook for clients
10	**BR**	**High**	**CORE4**	**Mobility Functionality**
B10a	**BR**	High	CORE4	Ensure mobility features are set up and functioning in time for training
FR	**F10a**	high	CORE4	Design mobile features and test to ensure working properly on MOBILE
11	**BR**	**High**	**3rd**	**Marketing campaigns and tracking**
B11a	**BR**	Med	3rd	Capture leads from the Web site
B11b	**BR**	High	3rd	Campaign management
B11c	**BR**	High	3rd	Lead Generation (territory assignments, etc)
12	**BR**	**High**	**CORE1**	**Collaboration and communication**
B12a	**BR**	High	CORE1	Chatter
FR	**F12a**	high	CORE1	Enable chatter and train on functionality (install Chatter Desktop)
13	**BR**	**High**	**CORE5**	**Training (user adoption)**
B13a	**BR**	High	CORE5	Ensure users are engaged with multiple training sessions and quick tips.
B13b	**BR**	High	CORE5	Enable chatter "town hall" group so that users can post questions as they work --responses are then captured for the future and other users can benefit from reading the posts
B13c	**BR**	High	CORE5	Usability Testing (w/immediate enhancements as necessary)
15	**BR**	**High**	**5th**	Project close out
B15a		High	5th	Document lessons learned
B15b		High	5th	Write close out doc explaining how continual enhancement projects will be planned

The MVP Assessment (#5)

Overview

All business process improvement (BPI) initiatives require thorough analyses of the current state if you want the improvement to actually work. You did all of that work in Part One (steps 1-4 which covered current state, PB&Js, future state and requirements). Now you must decide if you will produce a minimum viable product (MVP) knowing you will enhance on it or if you are going for the big design in the first roll out. The way to do this is by weighing time restraints (deadline requirements and available resources) to figure out what your approach will be. This analyses ensures you decide which direction you need to go in and provides you a consistent message you can deliver in all communications and meetings.

BENEFITS: You seem less distracted and more in control when you decide a direction and stick to it (unless deadline and or resource restraints change then you can reassess).

The Three Knowledge Areas

Remember the three knowledge areas we pull from to implement successful deliverables are (1) salesforce.com expertise, (2) business process improvement (BPI) and (3) project management. When deciding the scope and plan for your implementation you must use skills from all three areas.

Knowledge Area	Description
Salesforce.com (SFDC)	As a SFDC Admin you are the technical expert on this subject and will guide the team
Business Process Improvement (BPI)	BPI is about using a systematic approach to solving business problems with an end goal of creating efficiencies
Project Management (PM) and the project life cycle	At its core, PM is about using planning and executing methodologies while leveraging effective communication and interpersonal skills to successfully manage project teams and deliver successful products/deliverables

For example, you tapped into your knowledge of process improvement when designing the future state, and I am sure when you proposed it you had other options in your head about how you might go about it if you had less time or more resources. Also, based on your force.com knowledge you know what is technically possible and how much effort each option you take you in hours/resources (and if you don't know exactly you can figure it out by chatting with the success community at success.salesforce.com any time, etc.). Literally take the time to figure out the time/effort it will take to complete the future state as you have designed it.

Once you have an idea of the time/effort it will take for the ideal future state, compare that to the deadlines/time frame you have been given by your stakeholders. This is when you are using project management skills!

If the scope of work can be completed by the deadline then great, you should be able to complete the future state. But, if the scope of work can not be completed by the deadline then you will have to do the following:

1. Identify the alternate options for the future state (MVP options). List the features that will not be included in the first release given the resource/time limitations. These will be your list of quick enhancements after launch if the stakeholders decide they can't extend the deadline for initial release.

2. Meet with your stakeholders or send a communication if a meeting is not possible, and explain that given the resource/time limitations here are the options if we have to meet the deadlines and let them decide if it is better to extend the deadline (and/or hire more resources to help you) to get the full product or to release with limited features and then quickly enhance the product after launch.

At this point, depending on how big the project is and how much benefit a demo will bring to the conversation you can also decide to quickly create a demo to solidify and form the picture/story you want to tell. For example, if you think the MVP is a good way to go given the time restrictions then design a rough draft in a sandbox (even if all the bells and whistles are not there yet it can help make a point) to visualize your ideas. This might be as simple as creating the object and fields from your design and mass loading some dummy data in order to visualize a report of what they would be able to see once the project is complete!

Or it might be creating one piece of the workflow automation and then providing the demo to show how easy the automation makes the process.

Depending on the project, there is always a selling point you can highlight to get people excited and it is always going to be around what problem you are solving exactly. If you are solving a data or visibility/KPI problem then reports will be the selling the point, if you are solving an automation problem or bottleneck issue than workflows will be the selling point. Focus in on what the need is that you are solving for and highlight how you solve these problems (showing how much value you bring to the table with force.com)!!

QA Testing (#6)

What is quality assurance testing?

Quality assurance (QA) testing is leveraging the subject matter experts and super users you have been working with this entire time (you identified them in step 1 and have been working with them closely ever since.... don't forget to do this, your success depends on building these relationships and having their support!) and making sure it actually works for them. You have them get into the sandbox and test your design before releasing!

1. Create training material (I like to use Knowledge Articles personally) and provide them with a training session to go over the steps in person (or a webinar) as a demo so they can see how it should work.

2. Explain to them how to log into the sandbox and how to tell the difference between prod and sandbox.

3. Give them a deadline of when you need their feedback on how testing goes.

4. Setup a private Chatter Group for them and let them know all feedback must be posted there so that everyone can benefit from it (but be clear that no one but the testers will ever see the posts so that they are more likely to post openly). Explain to them that you can't do this without them. Remind them this process is FOR them, they are the ones that have to use it everyday, not you! Let them know without their expertise, given through their feedback, the product will suffer. If you did your job right, you have built up trust with them over the requirement building sessions and proved to them that you are on their side and care about making their life easier so they will be willing to help you in the QA testing phase.

5. Implement ideas they come back to you with. If they are easy, do the fix right there in front of them, don't wait. Make any adjustments they want, this is their process (of course don't do something that makes the process worse --if it is absolutely not the right decision then explain to them why you can't do that and give them alternative ideas to see if any of them will suffice).

6. Do not get defensive. Do not take their feedback personal. You are proving your perspective of the process based on what has been told to you, if it does not work for them that is OK just make it works for them as best as you can while keeping the stakeholders happy (and not breaking the process). You are a problem solver, not some kind of super human that knows what is best for the entire world!

7. Communicate. Communicate. Communicate. When you think are communicating too much, communicate more. This is a huge value driver.

Next Steps (#7)

All about communication

During the MVP assessment you defined what features were to be included in the go-live phase vs. enhancements that will be added quickly after product release.

At this point, the QA Testing is done and you must reassess where the project is at to ensure everyone is on the same page and that nothing has been overlooked. Often, during testing there are opportunities for you to get some feature completed that you didn't think you would have time to do. Or there is not enough time to get that one thing done that you had originally said would get done, it is ok that these things happen as long as you are communicating to the team clearly!

As soon as testing is done (or just before it is done, whatever makes sense) send out an updated summary of features to be included in the initial release (and include a go-live date and a flag that indicates which are new features from the last communication if any) and features that have been identified as quick enhancements (with estimated go-live dates for these enhancements).

This is also where you want to include the high level project plan (see part one of this guide) for any projects that will be started after this one is completed. Reminding the audience that there are constant projects going on and that your time on this project will snowball into a new projects will keep them interested in your plans! Don't be surprised (or scared) if you get a lot of questions or new ideas coming out of these communications! Gather all this information and keep a running log (hint: this becomes your roadmap!!)

Deploy and Feedback (#8)

Deploy in Production

Deploy in production (communicate downtime if any, and make sure everyone knows when the expected launch date is and how that affects their timelines/work)! When should they should start using it exactly, etc. be specific.

The reason many deployments fail is because of lack of communication and feedback loops. The key here is you build relationships with the Troops and they trust you. Now deliver on that trust. Don't leave them out to hang... keep on reaching out and following up to make sure everything is well. Answer their questions quickly.

I recommend setting up a Chatter Feedback group (much like what you did during QA Testing) to get feedback. This makes all questions visible to anyone else interested and gives you reference material to easily answer the same questions over again with a link to your previous answer!! Make Knowledge Articles to address anything that comes up that has no documentation and Chatter those links out constantly. If one or two people have the same questions, other have the same question they are just not reaching out.

It's all about communication

During the MVP assessment you defined what features were to be included in the go-live phase vs. enhancements that will be added quickly after product release.

Now that you have proven that you can keep a project organized by clearly defining what you can do (and can't do), provide reasonable solutions given resource restrictions, always have a plan for anything that comes up, and showing that you are a high level communicator, you are on your way to implementing one successful salesforce.com project after another! Your roadmap will start to build and setup regularly scheduled stakeholder review meetings to set priorities!