

Center of Excellence



Center of Excellence

Accelerating business value to maximize ROI

- Improves communication and visibility across the enterprise
- Ensures strategic initiatives are prioritized, leveraged and executed upon
- Leverage resources = shortened change cycles, faster time to market
- Facilitates and drives user adoption
- Shares business and technology best practices across the organization
- Reduces deployment risk and raises quality of the release lifecycle
- Drives corporate and industry compliance



Executive Sponsorship

Best practice - drive execution at all levels

- Key stakeholder empowered to drive the success of Salesforce
- Sets vision, priorities, and drives the execution and broad adoption
- Establishes cross-functional team with regularly scheduled meetings to evolve the usage of Salesforce across the business enterprise
- Steers team decisions to influence business strategy
- Mitigates risk through issue analysis and resolution
- Drives yearly budget and staffing allocation decisions
- Stays abreast of Salesforce innovation and direction through participation at Dreamforce and other customer events



Center of Excellence

Best practice – establish a governing body

- Define accountability at sponsorship levels
 - Sponsors are actively engaged in the initiative
 - Establish roles and responsibilities at all levels
- Build collaboration across all programs
 - Monitors progress continually while driving excellence
 - Ensures strategic objectives are met
 - Facilitates common business and best practices
- Improving speed of execution
 - Leverage common platform & strategy
 - Ensures effective utilization of Salesforce technology across initiatives
 - Delivers a guiding framework while maintaining an overall enterprise vision



Center of Excellence

The impact of NOT having a COE

- Inefficient use of resources
 - Best Practices are not leveraged across organization
 - Inefficient configuration/setup
 - Administrators inadvertently impacting one another
- Duplication of tasks
 - “Re-inventing the wheel” over, over and over
- Poor communication and visibility
 - Lack of standardization
 - Lack of insight into all associated costs
- Inability to maximize ROI and adoption
- Lowers ability to achieve adoption and deployment success



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A governance framework

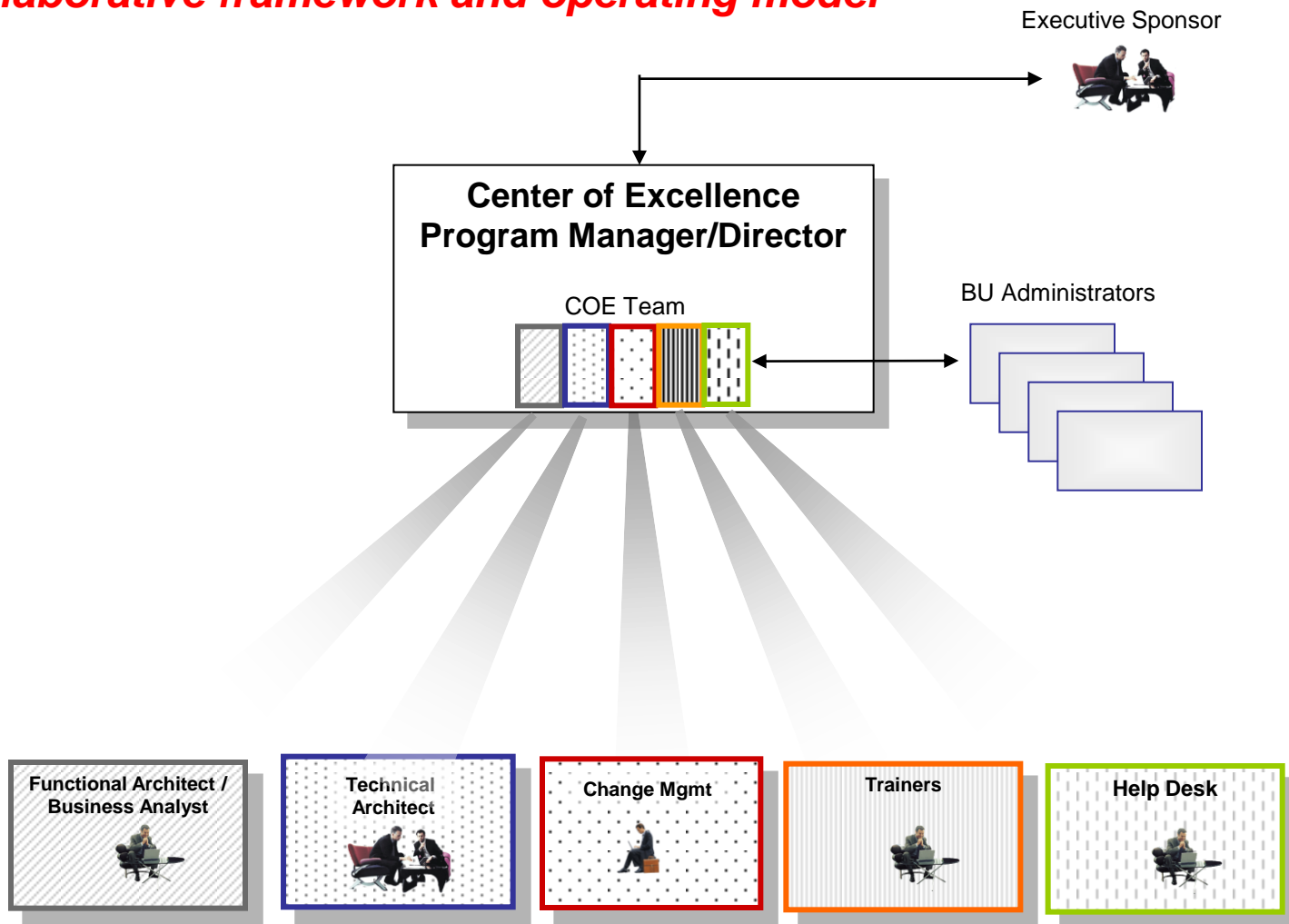


- COE goals
 - To drive global or large multi-division projects
 - To drive strategic **leadership** and **execution** focused on building, maintaining and sustaining customer success
 - To ensure **governance**, best practices, **adherence** to quality and technology standards, and processes for efficiently managing multiple regions and/or business units
- COE may encompass/include:
 - Change Management Board
 - Advisory Board
 - Executive Steering Committee



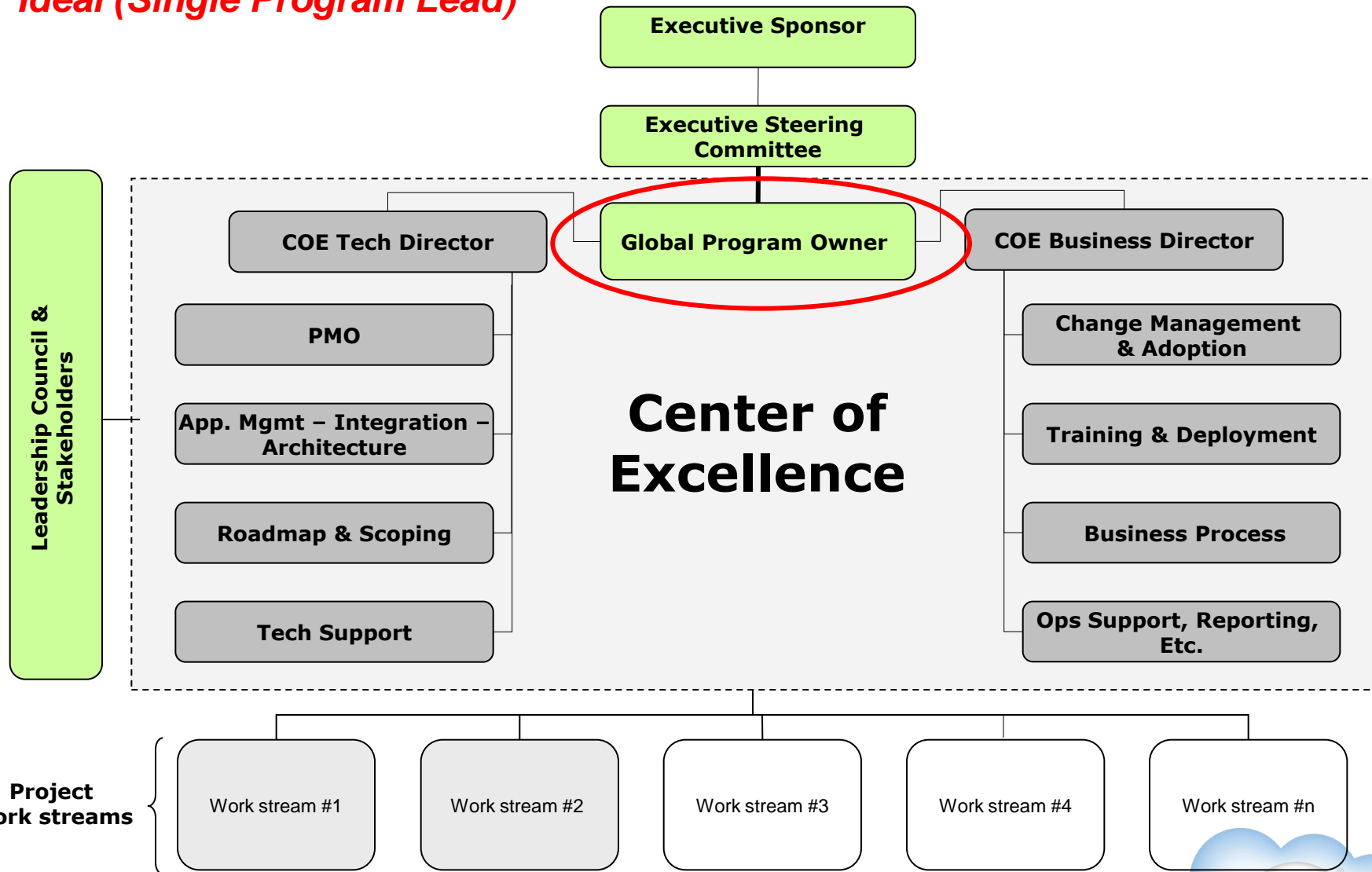
Center of Excellence

A collaborative framework and operating model



Global Governance Approach

Ideal (Single Program Lead)



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Best practice - roles and responsibilities

Role	Responsibilities
Program Director/ Manager	<ul style="list-style-type: none">▪ Responsible for the overall Program effort at organization▪ Manages escalations and risk mitigation▪ Coordinates efforts across multiple initiatives, including staffing▪ Define overall metrics to be tracked by Program▪ Ensure initiatives map to metrics strategy
Functional Architect	<ul style="list-style-type: none">▪ Provide functional architecture strategy and guidance▪ Reviews functional design for initiatives▪ Implements configuration standards
Technical Architect	<ul style="list-style-type: none">▪ Provide advanced architecture, solution, and/or platform-specific technical best practices▪ Reviews integration design for initiatives▪ Implements enterprise integration strategy
Data Architect	<ul style="list-style-type: none">▪ Provide data architecture and solution▪ Identifies best practices for implementation of Single Source of Truth▪ Reviews data design for initiatives



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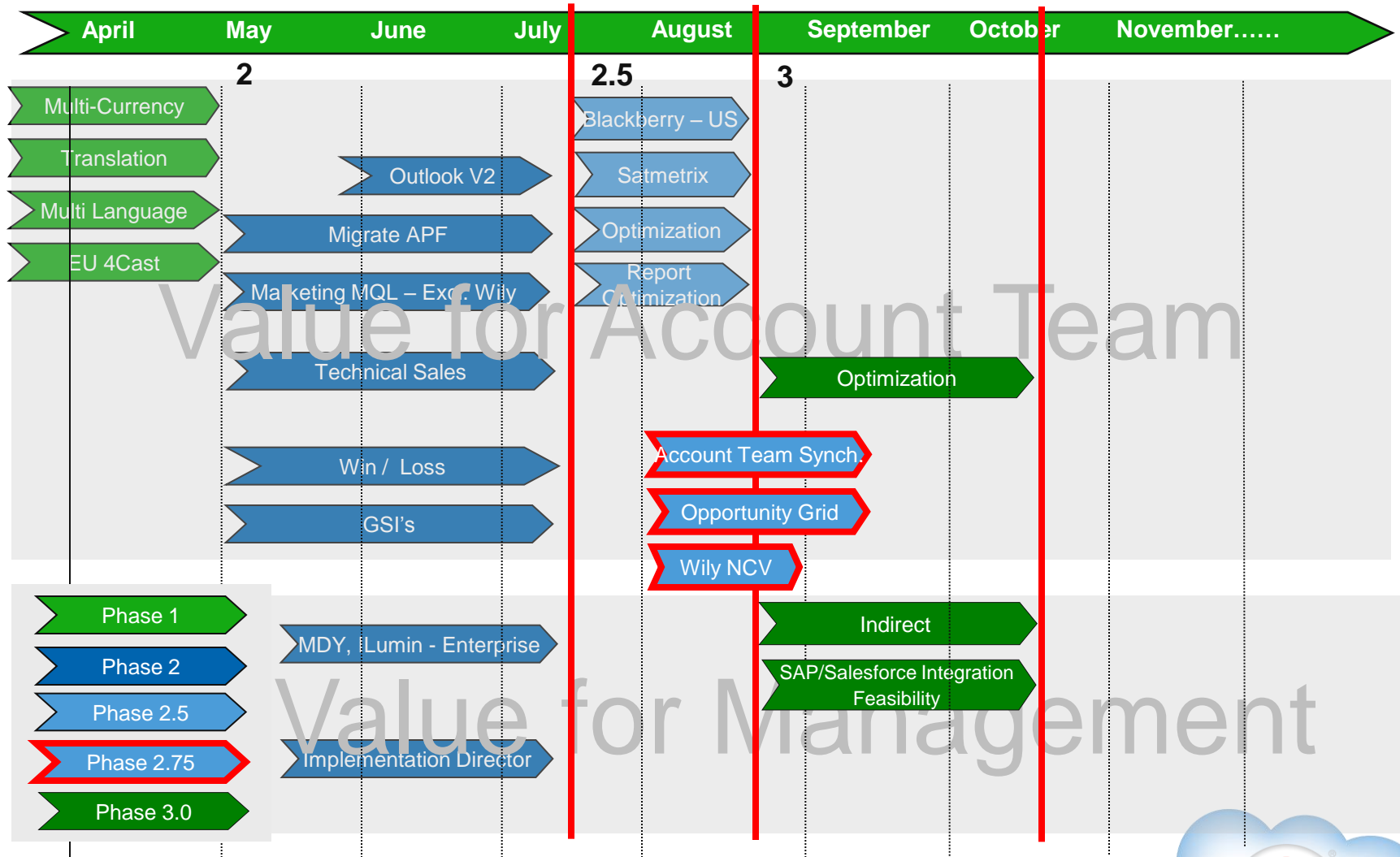
Best practice - roles and responsibilities cont.

Role	Responsibilities
Release Managers	<ul style="list-style-type: none">▪ Responsible for environment management and strategy▪ Responsible for the coordination of code release scheduling (including testing and production, release scheduling)
Deployment Lead	<ul style="list-style-type: none">▪ Responsible for overall end-user deployment strategy and planning▪ Works closely with Change Management and Training
Change Management Specialists	<ul style="list-style-type: none">• Conducts stakeholder assessments across the initiatives• Responsible for overall Change Management strategy, including communications plan and templates to support releases and end-user deployments
Trainers	<ul style="list-style-type: none">• Responsible for overall training strategy, plan and curriculum development to support releases and end-user deployments
Help Desk & Support	<ul style="list-style-type: none">• Provide first and second line support for end users



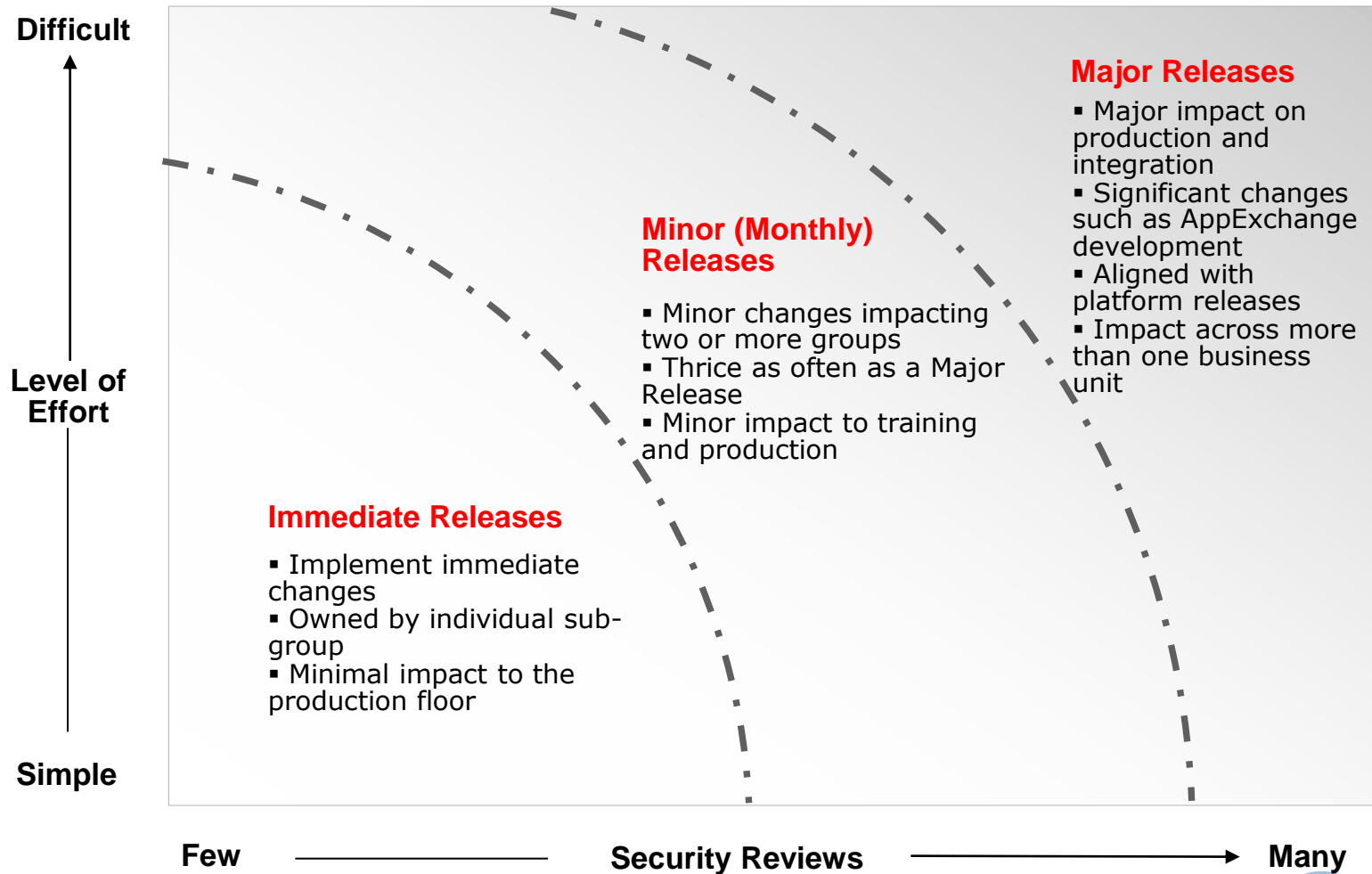
Release Management

Define a deployment roadmap



Release Management

Define a release strategy



Source: Faulkner 2006



Release Management

Establish release timeframes

Release Type	Activities	Examples	Level Of Effort
<i>Immediate Release</i>	<ul style="list-style-type: none">▪ Small changes that can be implemented in a short time span and directly in the production environment as needed▪ Changes can be configured, tested and deployed with minimal impact within a single business unit	<ul style="list-style-type: none">▪ New fields▪ Field label changes▪ Field positioning▪ New custom objects▪ New related lists▪ New roles	LOW <ul style="list-style-type: none">▪ No additional training required▪ None or minimal impact to integration
<i>Minor (Monthly) Release</i>	<ul style="list-style-type: none">▪ Medium level changes that can be implemented with minor impact to the production environment▪ Changes can be configured, tested and deployed with minor impact to one business unit	<ul style="list-style-type: none">▪ New dashboards and reports▪ New page layouts▪ New org or sub-org in role hierarchy	MEDIUM <ul style="list-style-type: none">▪ > 1 day of additional training required▪ > 1 week of integration development
<i>Major Release</i>	<ul style="list-style-type: none">▪ Large changes that have major impacts to the business or environment▪ Changes requiring a significant GUI update, data migration and/or integration impact▪ Major releases should be tracked by a standard naming convention for items such as: Role Hierarchy, Profiles, Page Layouts, Record Types, Sales and Support Processes, sControls▪ Items that do not need to follow naming convention: Fields, Custom Objects, Reports, Dashboards	<ul style="list-style-type: none">▪ New AppExchange app▪ Process-impacting configuration changes	HIGH <ul style="list-style-type: none">▪ 1 day of additional training required▪ < 1 week of integration development

Categorizing requests as immediate, minor or major allows you to set user expectations and provide visibility into release timeframe



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A collaborative effort driving best practices



Responsibilities of Administration Between Business and IT

Business Responsibilities



- *Reports*
- *Dashboards*
- *List View Management*
- *Documentation Management*
- *User Administration*
- *Solution Management*
- *Communication Templates*
- *Email Templates*

IT Responsibilities



- **Minor Release**: Simple configuration changes that do not impact day to day business or require training.
As Required (Target Monthly)
- **Major Release**: New Initiatives and other changes that require training or testing.
Dates determined by Steering Committee (Target Quarterly)



Elements of Governance

COE Responsibilities

- Standards & Best Practices

System Administration & Standards Guidelines

- Record Types
- Fields Names & Security
- Page Layouts & Views
- Opportunity Management
- Role Hierarchy & Sharing Rules

- SME Knowledge Training Materials

- Implementation Support
- Strategic and Tactical Support
- Administrators Meetings
- COE Meetings: User Groups

- New Functionality Testing & Deployment Approach

- Sandbox – Test Environment
- Complex Functionality
- Mobility



Elements of Governance

COE Responsibilities cont.

- Cross Unit Projects
 - Business unit integration
 - Future Enhancement
- Security & Data Sharing Model
 - Documented as part of System Administration and Standards Guidelines
- Subscription & Vendor Management
 - License administration & controls in place
 - Partnership established with SF Mgmt Team
- New Product Evaluation
 - Sandbox
 - Mobility
 - Territory Management, Forecasting, etc.
 - Salesforce.com partners
 - SF Unlimited Edition



Elements of Governance

COE Responsibilities cont.

- Data Integration
 - Data Migration approach and support during implementation
 - Legacy Systems Integration
- New Unit Implementation Guidance & Support
 - Additional business units
- Reporting
 - SME Support provided through Administrator meetings
 - Potential for cross unit Sales reports
 - Sales Opportunities
 - Prospecting Assessments
 - Service Assessments



Cross Business Unit Standards - Example

The following areas of functionality will be covered in this standards guide:

- Record Types and Page Layouts
- Fields and Field Level Security
- Roles and Profiles
- Views, Reporting, and Dashboards
- Visibility, Role Hierarchy and Sharing
- Custom Applications and Objects
- Workflow and Approval Rules, Workflow Alerts
- Email and Mail Merge templates
- Use of Apex, Visualforce, S-control code
- Use of any AppExchange partner tools

Example of Cross-BU standards:

➤ **Accounts, Contacts**

- The same Account and Contact Record Types are shared across ALL business units.
- The data records are shared and can only have one record type per record therefore any changes to pick lists for Accounts or Contacts will affect all groups and should not be done without full coordination with the CoC.
- The Account record types correspond to the business segment account pick list field. If new Account records are created by a System Administrator, the appropriate record type should be selected and the Business Segment Account field should be populated.
- New records should ideally be coordinated with the other business System Administrators to ensure no duplication and the other Businesses can go into the new record and fill in their business specific fields where appropriate

➤ **Other Entity Record Types (e.g., Opportunities, Tasks, Events, etc.)**

- All other entities can have specific record types for each business unit.
- The naming convention is that the name should include the acronym of the business and a description of the record type.
- During the record type creation process, each system administrator should ensure that the record type is only made available to their own business' profiles. Otherwise, these new record types will be available for other users when they go to create that type of record.
- The description should be filled in for each record type.



High-Priority Governance Functions

Salesforce.com "Center of Competency" Functions	Deliverables (Guidelines - Best practices, Processes & Templates, etc.)
Salesforce.com Roles and Profiles Standards & Best Practices (Salesforce permissions)	LOB specific: * Business Application Manager * Application/SFDC Admin * Support - Level I, II, III
Salesforce.com User On-boarding/Termination	LOB Specific: *Workflow/Approval process and template * User Entitlement form
Salesforce.com Support Model	LOB Specific: Level I, II, & III Support
Salesforce.com Environment Management	* Guidelines and best practices to leverage SFDC production and sandbox environments to support dev, test, uat, pilot, prod environments * Code promotion guidelines and tools (e.g. Snapshot)
Salesforce.com Product Roadmap	* Process/template to submit a new feature request * Product roadmap sessions



Salesforce Governance Functions

Salesforce.com "Center of Competency" Functions	Deliverables (Guidelines - Best practices, Processes & Templates, etc.)
Management of New CRM requests	<ul style="list-style-type: none">* Process/template to submit a new CRM request* Framework to evaluate new CRM request* Provide recommendations to CRM SC on CRM request for final approval
Salesforce.com Subscription & Vendor Management - SFDC Org Request/Creation and License/Subscription Management	<ul style="list-style-type: none">* Process/template to request a new SFDC Org* Process/template to submit licenses to existing or new SFDC Org
Salesforce.com Development Standards & Best Practices	<ul style="list-style-type: none">* Configuration* Custom Development* Data Management* Data Migration* Integration
Salesforce.com Release/Change Management	



Change Request Process



COE Investment Request Process

- A critical component to the COE is to be able to accept and prioritize requirements from end-users to schedule in as new initiatives
- The Investment Request Process (IRP) is a mechanism that allows the COE team to support this need
 - The IRP is closely integrated to the overall CRM Monthly and Quarterly release timeline



Change Advisory Board (CAB) Overview

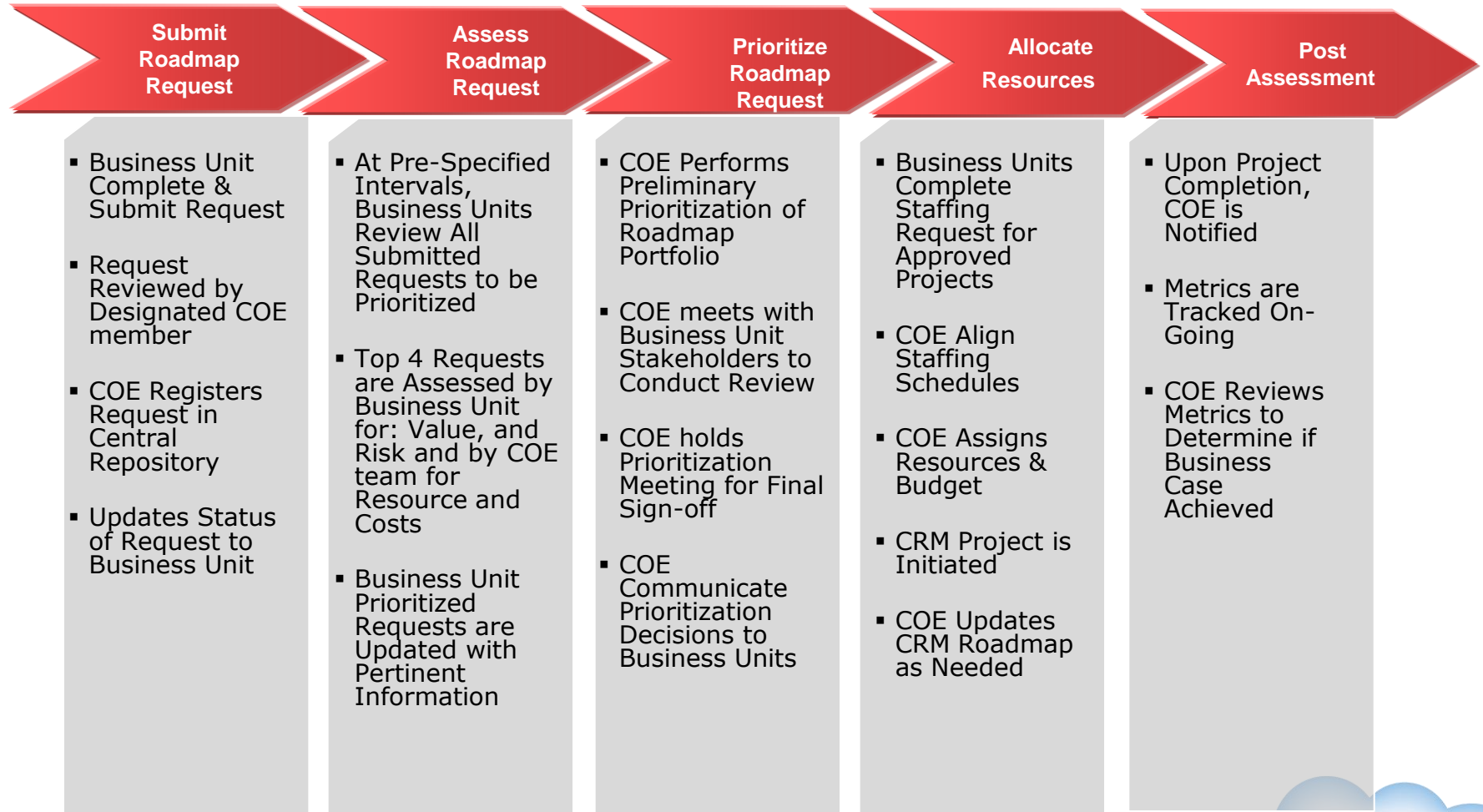
Responsibilities of CAB

- Represents the governance board for all change requests for CRM initiative
 - Only this group can review and approve CRM change requests
- Includes representation from:
 - Business Unit
 - Delegated User Administration
 - IT
 - Product and Project EM
- Owns the CRM configuration
- Represents business needs to vendors for vendor application roadmaps
- Manages user licenses for all environments
- Responsible for application specific roadmaps
- Defines and owns applications strategy



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Investment request process (IRP) overview

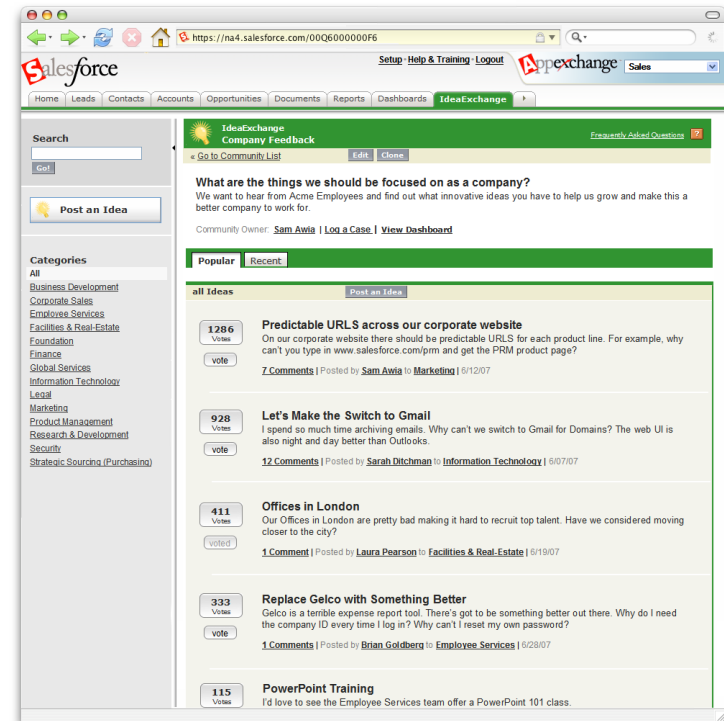


Release Management

Capturing enhancement requests



Create internal communities
for your employees to
capture feature requests



Release Management

Capturing enhancement requests

SFDC Change Request Case

- Requests can be received by the Business Unit or the COE depending on your model
- Change request types & priority determine the difficulty & necessary action to be taken
- Certain change requests can be executed immediately but others may help build your roadmap

Case Edit: New Case

Save **Save & Close** **Save & New** **Cancel**

Case Information: ■ = Required Information

Case Owner: James Parker	Status: New
Contact Name: Parker, James	Case Origin: Phone
Type: SFDC Change Request	Assigned To: SFDC Change Request
Region: EU South	Priority: Major / Medium
Location: Ivry sur Seine	Date Request Needed: 19/05/2004 (12/05/2004)
Change Request Type: Add a field	Functional Area: Contacts

Description Information:

Subject: Please add a reference field as a check box.

Description: In order to follow up references for public relations and RFP, please add a check box to identify these contacts.

Field : Can be contacted for?
Check box entries : Press Releases, Special Use Referee, RFP Reference

Internal Comments:

Add a field

- Add an entry in a drop down list
- Change a field type (ie: drop down to check box)
- Change personal set-up
- Feedback - No action Req'd
- Other (must specify in subject)
- Request a feature

From: James Parker [james.parker@genesys.com] <james.parker@genesys.com> **To:** SFDC_Change_Request

Subject: New Case # 00059418 - Major / Medium SFDC Change Request **Cc:**

A SFDC Change Request has been submitted at 12/05/2004 by James Parker from the EU South (Ivry sur Seine). This request is of Major / Medium Priority. This request is for James Parker of Genesys Conferencing - Internal and concerns Add a field - in Contacts.

Please click on the link below to view the case details.

<https://ssl.salesforce.com/00059418>





Center Of Excellence

Getting Started

Primary Components of a COE

Standards, Best Practices, Strategies, Approaches

Leadership

- Executive Sponsorship
- CRM Business Objectives & KPIs
- Program Charter
- Management and Risk Controls
- Roadmap Request Process Support

Business

- Process Maps
- Processes mapped to Business Requirements
- Metrics Strategy
- CRM Capabilities Roadmap / Solution Map

Technical & Data Architecture

- Release Management Strategy
- System Blueprint
- Security & Data Architecture
- Integration Blueprint
- Implementation Plan
- Reusable Test Approach

Change Management

- Stakeholder Analysis
- Adoption Strategy & Plan
- Deployment Strategy
- Training Approach
- Training Assessment



Phased Approach – Center of Excellence

■ Evolution of the Framework

Getting Started

- ✓ Identify Executive Sponsors
- ✓ Define Business Objectives
- ✓ Conduct Stakeholder Analysis
- ✓ Define Program Charter
- ✓ Define Roles & Responsibilities
- ✓ Identify Key Business Process Capabilities
- ✓ Standard Meetings

Emerging

- ✓ Define Process Maps
- ✓ Define System Blueprint
- ✓ Define Management & Risk Controls
- ✓ Define Investment Request Process
- ✓ Define Metrics Strategy
- ✓ Define Security & Data Architecture
- ✓ Define Data Quality Strategy
- ✓ Develop Adoption & Strategy Plan

Practicing

- ✓ Map Processes to Business Requirements
- ✓ Execute Investment Request Process
- ✓ Define Training Strategy
- ✓ Develop CRM Solutions Roadmap
- ✓ Define Integration Blueprint & Implementation Plan
- ✓ Define Release Strategy
- ✓ Develop Deployment Strategy
- ✓ Define On-going Support Plan

Leading

- ✓ User Group Meetings
- ✓ Vendor Management
- ✓ Newsletter

Center of Excellence Roadmap



Phased Approach - Getting Started

- Identify Executive Sponsor Steering Committee
 - The goal of membership is to provide executive vision and steering of the SFDC project and application as focused on the core requirements.
 - It is to provide funding, change management arbitration and scoping for new projects to grow the application and meet vision & business objectives. This team will meet via conference call quarterly.



Phased Approach - Getting Started

- Define Business Objectives

- Clear and measurable business objectives need to be defined which can be achieved within a given timeframe.
- Business Metrics (KPI) help to monitor the success of your CRM program.
- Example Business Objectives:
 - Improve customer satisfaction
 - Acquire new customers
 - Increase sales revenue for new and existing customers
 - Improve productivity amongst team to maximize sales results
 - Gain better understanding of buying trends in the industry
 - Improve ROI of marketing efforts through more targeted efforts
 - Enhance forecasting accuracy for better predictability
 - Enhance up-sell/cross-sell opportunities
 - Increase visibility into deals and initiation of services
 - Increase customer loyalty



Phased Approach - Getting Started

- Conduct Stakeholder Analysis
 - Identify not only the executives but the influencers who will impact the user community, inspire change and acceptance who will represent the ideals and objectives of the company.
 - Executives: provide sponsorship and mentorship, ensuring initiative is not ignored and connect to line (business) leaders
 - Line leaders: sanction initiative and lead through active participation - nothing can start without their commitment
 - Change agents: power and influence comes from the strength of their convictions and clarity of their ideas and leadership



Phased Approach - Getting Started

- Define Program Charter
 - Program Charter is simply a definition or list of the principal goals a committee will attain through group participation.
 - Example Program Charter
 - Create a scalable structure to deliver efficient support for salesforce.com use
 - Share SME expertise, and leverage functionality and applications
 - Prevent customization conflicts and barriers to sharing data
 - Develop standards and encourage data quality
 - Facilitate common business practices



Phased Approach - Getting Started

- Identify Key Business Process Capabilities
 - Business Processes are consistent methods and strategy prescribed for achieving company goals encompassing collaboration of various touch points throughout the organization
 - Map out current business processes and tie them back to business objectives and capabilities
 - Business Objective: Improve new customer acquisition
 - Capability: Target campaigns to new geography or segment
 - Business Process: lead management and conversion process



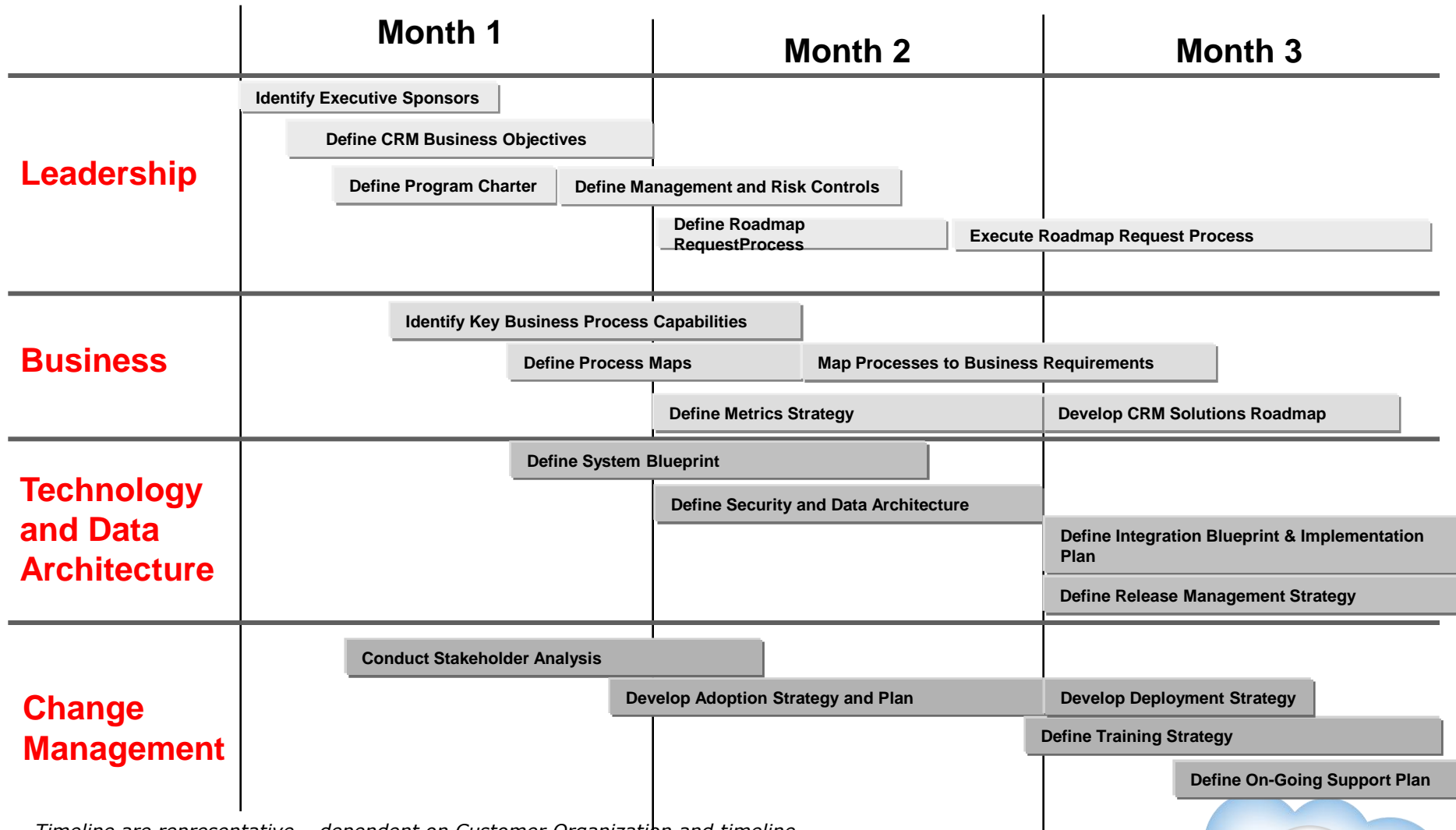
Phased Approach - Getting Started

- Next Steps
 - Schedule standard meetings, build out agendas and project plan timeline to achieve COE success.
- Resources Available
 - Salesforce.com CSE (Customer Services Executive)
 - Partner Community



Center of Excellence

Best practice – build a high-level plan



Timeline are representative – dependent on Customer Organization and timeline



Case Study



Customer Case Study

ADP Center of Excellence

- Outlined strategic objectives and multiple business units were committed for deployment
- Aligned a COE team member from each business unit with the Salesforce PMO office
- Aligned the COE with a salesforce.com Executive Sponsor
- Established weekly COE status meetings with representation from the cross functional teams :
 - Sales, Consulting, Support, Customer Success, Product Management
- COE drives quarterly user group sessions with business unit leads and BAM's ("Business Application Managers")
- COE manages all product feature requests and communication to the business units



Customer Case Study

ADP Center of Excellence drives collaboration

- Standards, processes, and communication
 - COE is the liaison between salesforce.com and the business units
 - COE drives the communication protocol between salesforce.com and business units
 - COE ensures adherence of corporate standards and processes
 - Standard Operating Procedures (“SOP’s”)
 - Contracts (e.g. SOW) and Billing Process
 - Process and Technology Infrastructure
 - Training and Support
 - Priorities and Roadmap



Customer Case Study

ADP Center of Excellence drives adoption

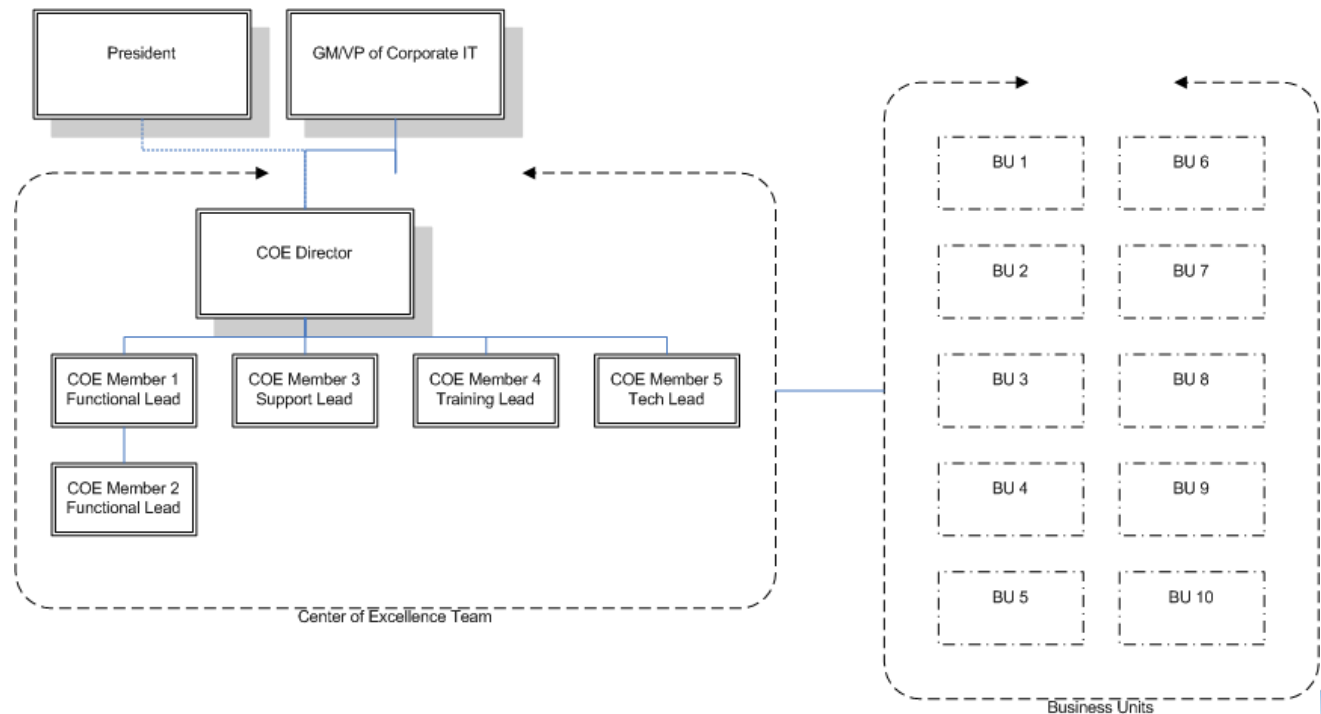
- Support & User Adoption
 - Provides first line of support to the business units
 - Monitors and regulates user adoption
 - Solicits feedback directly from the business units
 - Provides feedback to salesforce.com Customer Success Team



Customer Case Study

ADP Center of Excellence governance model

- COE Director reports to GM/VP of Corporate IT and dotted line to the President
- COE team members are aligned similar to Salesforce roles
- Each of the BU's have Executive Sales Sponsor and BU System Administrator



Extra Slides



Domains of Success

Each domain comprised of focused categories

Vision and Strategy	<ul style="list-style-type: none">• Vision• Business Strategy and Objectives	<ul style="list-style-type: none">• Business and Technology Issues• Customer Experience
Business Measures	<ul style="list-style-type: none">• Objectives• Key Performance Indicators	<ul style="list-style-type: none">• Operationalize• Validation
Adoption	<ul style="list-style-type: none">• Organizational Readiness• Stakeholder Involvement• Measurements and Rewards	<ul style="list-style-type: none">• Communication Plan• Training Strategy• Support• Continuous Improvement
Sponsorship and Governance	<ul style="list-style-type: none">• Executive Sponsorship• Center of Excellence (COE)	<ul style="list-style-type: none">• Release Management
Roadmap	<ul style="list-style-type: none">• Deployment Roadmap• Capabilities Value Map	<ul style="list-style-type: none">• Product Roadmap• Global Deployment
Processes	<ul style="list-style-type: none">• Process Definition• Process Ownership	<ul style="list-style-type: none">• Process Effectiveness• Process Review
Technology and Data	<ul style="list-style-type: none">• Implementation Framework• Data Management Strategy	<ul style="list-style-type: none">• Platform and Integration Strategy• Security Infrastructure



Center of Excellence

Sample COE meeting agenda

- **Introductions & Salesforce Usage with Demo**
 - Each BU provides a brief introduction and an overview of Salesforce usage
 - Discuss and review any Integrations
 - Discuss BU adoption and best practices & business measures for tracking
- **Release Feature Overviews**
 - Prioritize specific features each BU is interested in reviewing in greater depth
- **Discussion Topics**
 - Dive deeper into what each BU is doing with Salesforce, business processes and the best practices
 - Data quality
 - Approval workflows
 - Workflow rules
 - Expanding usage beyond sales force automation
 - Territory management
 - Forecasting
 - Provide updates on the new releases
- **Next Steps**
 - Begin to develop roadmap
 - Establish roles and responsibilities



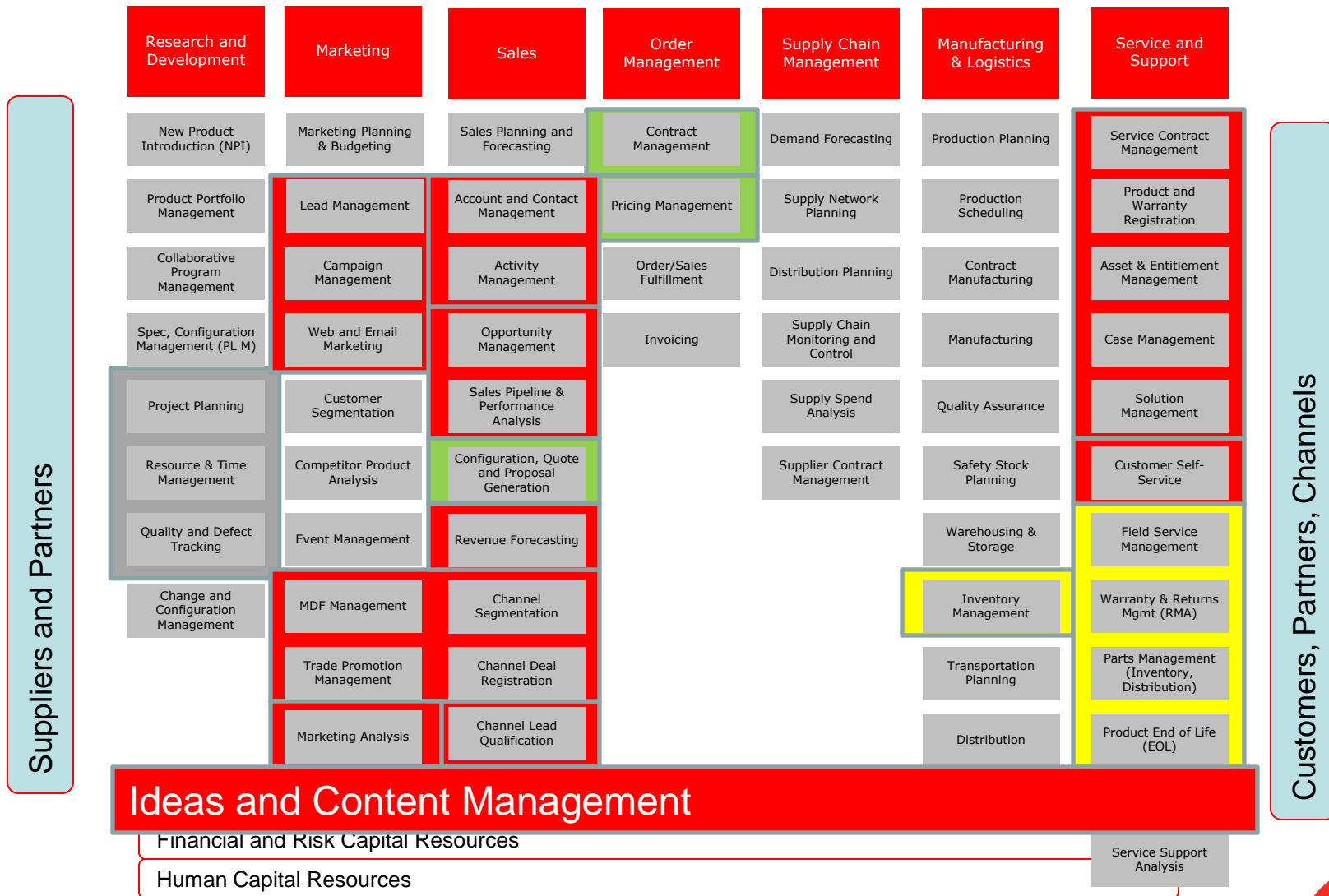
Sample Process/Capability Roadmap

Salesforce

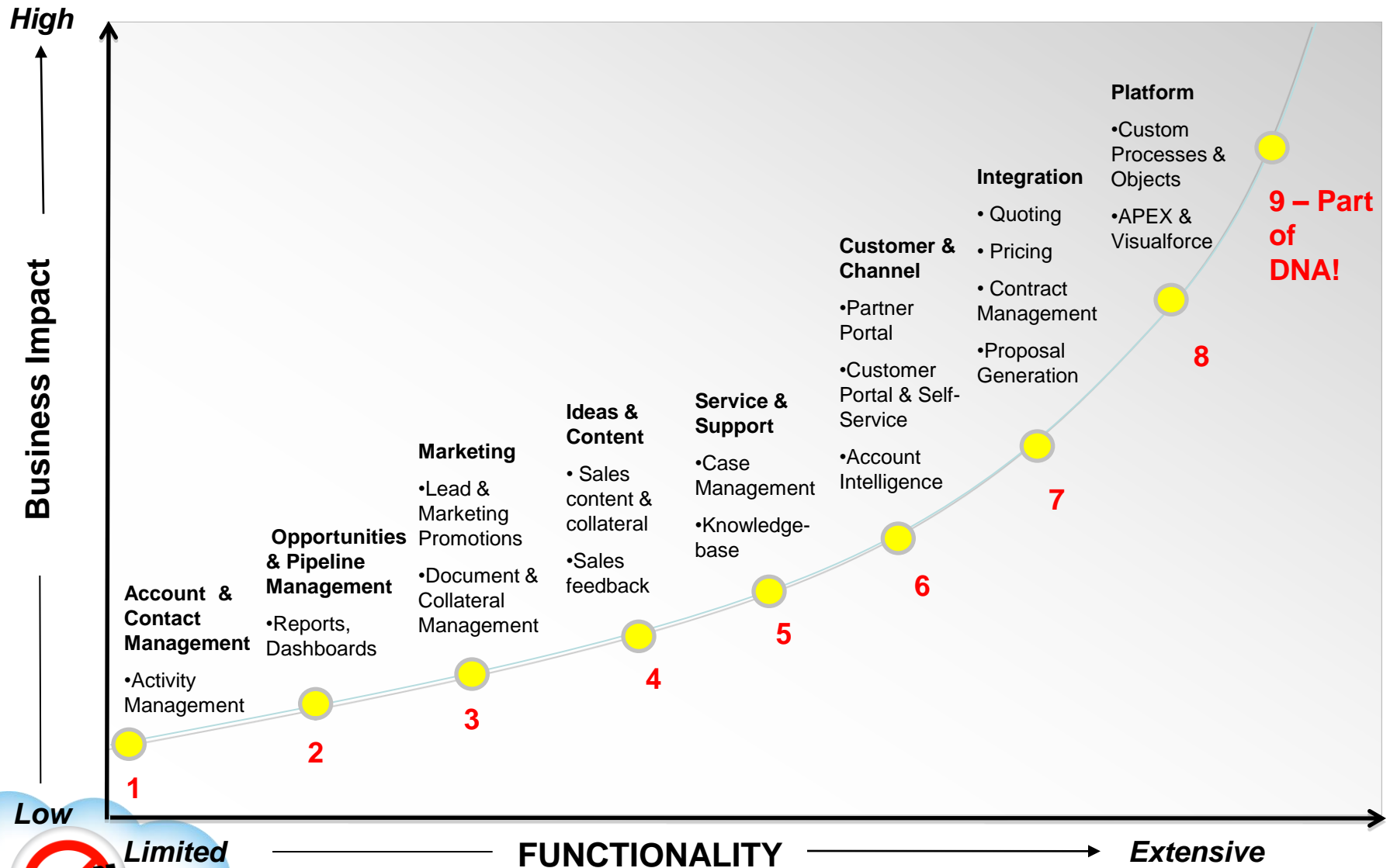
Integration

Partner/ISV

Platform



Driving Continuous Business



SOFTWARE