

Engagement Plan Template

SFDO Community Sprint – February 2021



Meet your project leadership team



TJ Warfield
Data Geeks Lab

Icebreaker!

Would you rather be an astronaut or
a SCUBA diver?



The problem

Lots hear about and want to use Engagement Plans, but then are unable to for a myriad of reasons.

The solution

This new community generated project will work to identify and define different donor personas and document templates that can be used when creating NPSP Engagement Plan Templates.

- Identify the challenges with NPSP Engagement Plans
- Define frequent personas of those in need of Engagement Plans
- Map out possible Engagement Plan Templates

Personas – organize user stories into categories

Pat: Developer

Spends most of their time working on custom automations in a combination of APEX, flows, and other tools. Understands the various automation options and wants reliable and reproducible ways to test their work and resolve bugs.

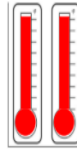
Main Activities Include:

- Creating and testing automations in orgs.
- Testing updates and changes performed by colleagues.
- Deploy finished solutions into production.

Skills

- Experience with command line tools.
- Understanding of standard code management practices.
- Experience with multiple program languages including APEX.

Comfort/Experience



Sandbox Data Import



Pain Points:

- Keeping up with changes to tooling
- Generating the many needed configuration files (gitignore, package.xml, Snowflake/ymml, etc.)
- Have time to fully test solutions.

1

Valerie: Senior Admin

Works in their organization's Salesforce and spends most of their time supporting the growth of Salesforce. Understands the schema of the organization and knows which objects they are using and how they relate to one another.

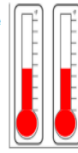
Main Activities:

- Building New Features
- Testing new features - making sure process run correctly
- User Training
- Business Requirement Gathering

Skill Set:

- Understands object relationships in the schema and what objects are in use
- Creates test data in Excel and imports into their sandbox for testing and training purposes.
- Understands and creates Sandboxes regularly, but tends to use too many (loses track of what's where) or too few (too many changes in one place for testing).

Comfort/Experience



Sandbox Data Import



Pain Points:

- Finding reliable partners who understand, instead of proposing rebuilding, existing system configuration.
- Getting a large enough test data set for full validation.
- Lack of automated tests they can run

LaVonna: Consultant

Spends most of their time working in another organization's Salesforce including build outs and testing. Understands the schema of the organization

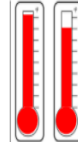
Main Activities Include:

- Testing large datasets for edge cases
- Testing new features - making sure process run correctly
- Translating business requirements

Skill Set:

- Understands object relationships in the schema
- Understands how to import large amounts of data but finds it annoying to create that dataset
- Basic Click-Hot Code understanding
- Creates and refreshes sandboxes on a regular basis.

Comfort/Experience



Sandbox Data Import



Pain Points:

- Maintaining sample data sets.
- Tracking multiple concurrent projects.
- Getting clients engaged in effective testing.

2

Oliver: Junior Admin

Works in their organization's Salesforce and spends most of their time supporting the growth of Salesforce, however is still learning the organization and Salesforce full potential.

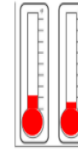
Main Activities:

- Manage User Settings
- Create new records (but not fully understand how they are related to each other just that they are lookup fields)

Skill Set:

- Understands how to use Salesforce but still learning its potential
- Needs to use trailheads to learn about features not already in use
- Has read about sandboxes, but has only used sandboxes created by other people.

Comfort/Experience



Sandbox Data Import



Pain Points

- Learning best-practices for Salesforce

Join us in the Power of Us Hub and turn group notifications “on”



[Manage Notifications](#)

PUBLIC

Sprint Project: Engagement Plan Template

✓ Member



Every Post



✓ Every Post

Daily Digest

Weekly Digest

Limited



Sharing docs

Use THIS FOLDER to store docs in a central repository. We will later migrate them to our Github Repo.

Email tj@DataGeeksLab.com to request access.

Working document is in Quip –

<https://quip.com/nJeeANatXEfz/NPSP-Engagement-Plan-Community-Sprint-Notes>