Cloud for Good

IMPLEMENTATION BEST PRACTICES

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EXPLANATION OF BEST PRACTICES

Any time we hear phrases like "Best in Class," "Best of Breed," or "Best Practices," the first question we ask is: who decided what's best? What we have learned in our many years of CRM consulting is that best is relative and often dependent upon experience, trials, and most often failures. We believe that one has to go through a challenging, if not difficult, experience at least once in order to learn how to do it better the next time.

The purpose of this eBook is to share lessons learned and recommendations for best practices as you move forward with your implementation. These recommendations are not intended to be Salesforce specific, but are rather globally applicable recommendations for the implementation of any new technology tool.

OVERVIEW

At Cloud for Good, we are Salesforce experts who speak fluent nonprofit. Our consultants have led thousands of implementations across multiple industries, both for profit and nonprofit, as consultants and as customers. The main focus of this eBook is:

EXECUTIVE SPONSORSHIP

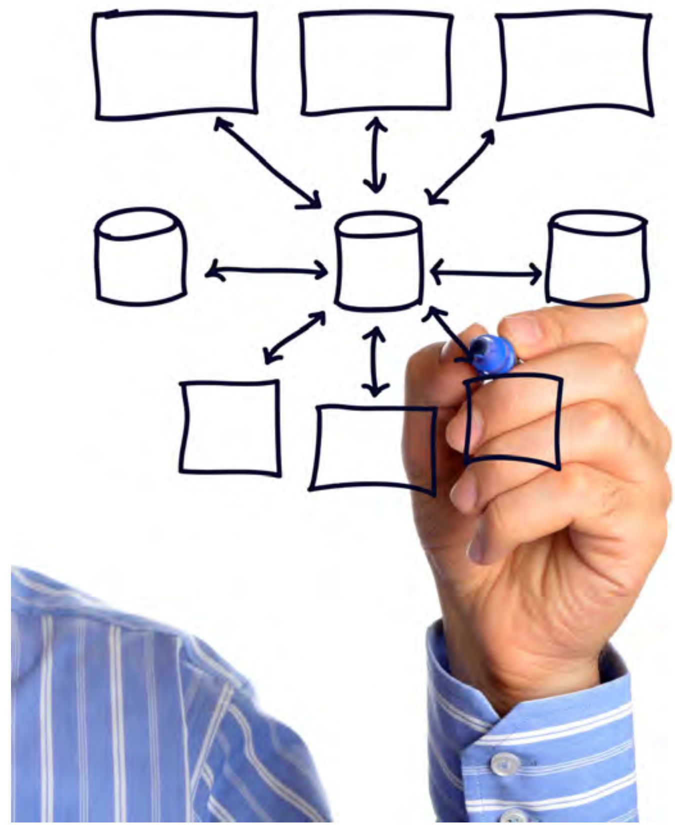
The most critical variable for the success of a new implementation is executive sponsorship. Whether the new implementation is a tool or a process, successful adoption is greatly influenced by whether or not the end users perceive importance, value, and visibility of the initiative by the executive team.

Every new implementation will have champions, or at the very least, acquiescent power users, but the greatest challenge to adoption is most often end-user resistance stemming from a variety of reasons. If it is immediately and consistently perceived by end users that the executive team believes in the importance of the new initiative, is regularly checking in and monitoring progress, and uses the new tool or process as a part of their own management, then end users will be less likely to resist.

In some organizations, executive sponsorship does come down to "do it because we say so," but far more often effective executive sponsorship includes:

- Visibility of the executive team at the project kickoff, major milestones and go-live.
- Explanation from the executive team of how the new initiative will enhance the business.
- Engagement of the executive team with non-executive stakeholders during implementation and go-live.
- Expectation setting by the executive team on metrics, inputs and outcomes.
- Modeling by the executive team within the new initiative; as an example, many of the successful Salesforce implementations we have seen include an executive team that displays Salesforce dashboards during team meetings, or who use Chatter for collaboration and announcements.

BUSINESS PROCESSES

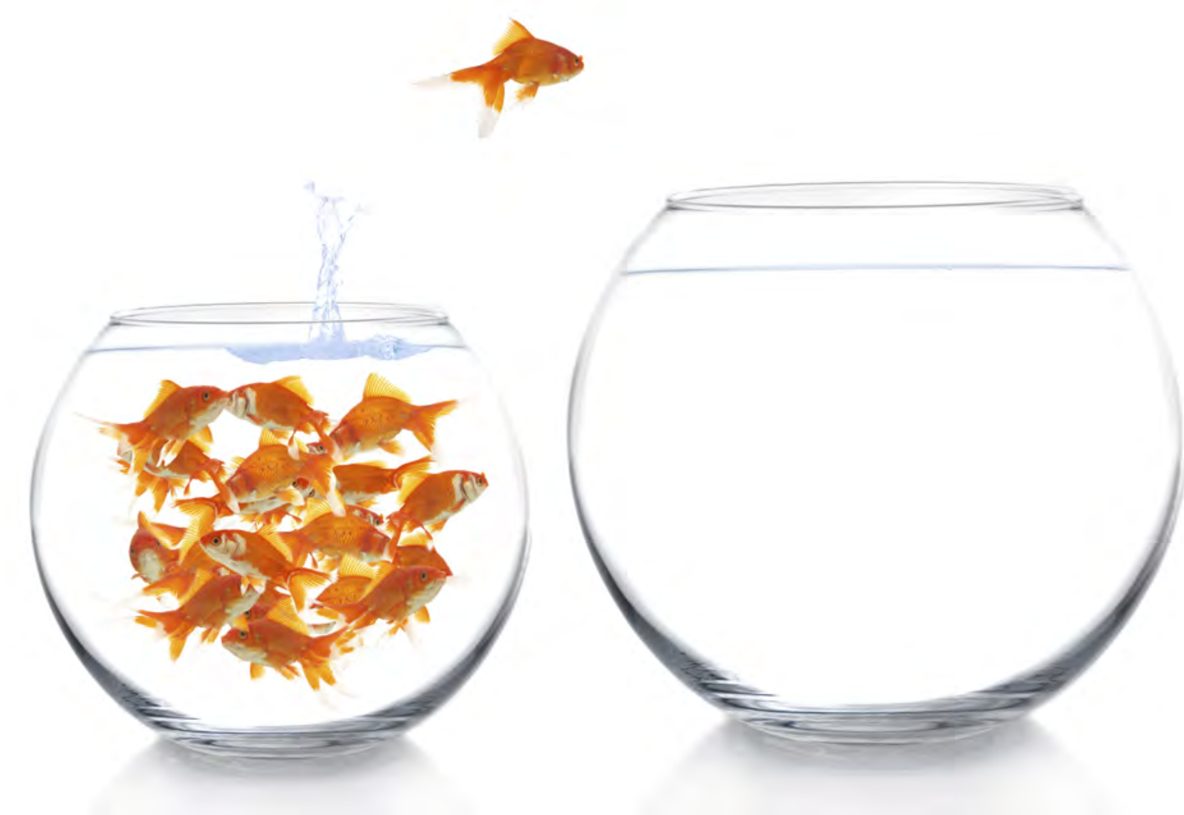


The next most critical aspect in your implementation is business processes. It is important to remember that a tool should never define or drive your business processes; rather, a tool should facilitate, support, and automate your business processes.

Make sure to visually map out your business processes so that critical points for notifications, hand-offs, alerts, interdependencies, and process parallels are easily seen. There are many visualization tools available.

Analyze your current business processes and determine if modifications are needed; we often have customers who include inefficient processes in their requirements but, further discussion often reveals that the the process was created due to limitations of their current tool(s). When analyzing your business processes, we recommend that the discussion of solutions be kept out of the conversation initially; the focus should be on what you need rather than how you are going to get to the goal.

Involve your stakeholders in the build out and review of your business process maps; oftentimes there are nuances to one or more business processes that only a minority of your end users are aware of or familiar with. Additionally, make certain that you include both champions and those who are perceived as resistant; in our experience, those who resist often uncover far more about your current process than even the champions.



DATA

Data is one of the most critical aspects of any implementation and must be considered not only for the final migration, but also for ongoing integrations and data entry.

Nothing sinks a new implementation faster than bad data. Users and implementation project leaders will quickly lose faith in the tool if effort if incomplete, incorrect, or irrelevant data is present.

DATA "DOs"

- Put a great deal of effort into data cleansing and task users with the cleanup process. Focus not only on de-duplication, but also data quality including completeness and adherence to data policies that you wish to implement and enforce in the new tool. For example, you might enforce complete contact names (Mary Unknown is not a valid contact) or a requirement that every Opportunity/Donation must have a Contact Role.

- Assess objects and fields for usage and appropriateness to current business processes and reporting. Changing tools is analogous to moving; ideally, you will not pack up every single item in your old home and move it to your new home. You want to review your data in the same way and start with only relevant data in the new tool.

- Create a data map that identifies each object relationship as well as each field's data type (text, picklist, date, number, etc.), precision or length and security requirements. Also, consider the interdependencies of data and process (which is the driver and which is the result, for example).

- Have a data management strategy to moderate and maintain clean data over time.

DATA “DONT’S”

- Don’t bring over unnecessary or irrelevant data. Far too often we have seen organizations put tremendous staff hours (and consultant hours) into the migration of severely aged data that is not required for compliance nor for regulatory purposes only to hear months or even years after go-live that the data has never been accessed.

- Don’t create data requirements and validations as substitutes for process, management or end-user training.

    - As an example, there was a customer whose administrator was hearing complaints from the fundraising team that they were not getting timely notification of new won donations in order to plan their acknowledgement process. The system administrator’s solution was to enforce an approval process before any donation could be closed as won. A better solution would be to create a workflow rule to notify the fundraising team when a donation record reaches a certain stage and then again when the donation is won.

    - We often see marketing teams struggling with incomplete prospects that they are unable to qualify because they have no means of contacting the prospect to follow up. We most often see that the system administrator will require both the email and phone fields on the lead page layout. What they later learned was that many leads were never entered because users had an email or a phone number, but not both. A better solution would be to create a validation rule that requires all new leads to have a phone number or an email.

AUTOMATION

The next important aspect of implementing a new tool is the automation of business processes. Automation can include a whole range of actions including:

- Approval Processes (for example, approval of a new volunteer job prior to posting to an external website).
- Workflows based on certain created or edited records that result in:
  - Email notifications to users or contacts.
  - Field updates (a change in one field causes an update to another field).
  - Task creation (a change on a record causes a task to be created for a user).
- Formula fields allow organizations to display data from one field, possibly on a related object, in a second field.
- Triggers are pieces of code that fire when a record is added or changed which result in either updates to other related records or possibly even the creation or deletion of related records.
- Validation rules allow organizations to enforce data rules such as "contact must always have either an email or a phone number."
- Publisher Actions which are relatively new and allow users to create or update other records from the Chatter feed of another record (for example, create a new major gift from the Chatter feed). Publisher Actions even allow certain fields to have default values.
- Assignment Rules for Cases and Leads.
- Escalation Rules for Cases.
- Auto-response Rules for Cases and Leads that come in through the web.

USABILITY/SCALABILITY

Whenever we implement a new tool or business process, we need to consider both the usability and the scalability.

Usability considerations include the flow of data on a single page, as well as the flow of data from one page to another, the ease of search, navigation, identification of critical data on a page, visual alerts and minimization of clicking and scrolling. A few examples:

- When configuring a page layout, consider your users' data entry experience. Will they typically click the edit button and tab from field to field? If so, make sure to place your fields and set your tab sequence in a way that flows so, if we think of a Contact page layout, we would enter First Name -> Tab -> Last Name -> Tab -> Title ->Tab -> Phone ->Tab -> Email. We would not put other fields in between the name/title fields and the phone/email fields.

- Use sections within the page layouts to group fields in logical clusters.

- Minimize the repeatable data that users have to enter; if you always want every donation name to include the current year and a special word or phrase, create a workflow rule that runs on every created Opportunity and appends the current year plus your special word or phrase to the beginning or end of the user-entered donation name.

Scalability is, in our opinion, even more critical. When you are making usability decisions, make certain to also think about scalability; is the solution you have developed to address a usability issue going to be sustainable as the number of users and the complexity in your organization grows and evolves?

ANALYTICS

The final important consideration during an implementation is analytics.

With all of the attention and care being put into executive sponsorship, business processes, data, automation and usability/scalability, we want to make certain that equal care is put into the development of analytics.

Just as with our data considerations noted above, we also want to ensure that the analytics we implement are accurate, clear, concise, relevant, and purposeful. As an example, if all event planning is by region and program, then it will likely not be beneficial to have a report of event invitees grouped by invitee gender or lead source.

ANALYTICS

Further you want to make certain that the analytics are easy to access, easy to interpret, and easy to collaborate on within the organization so that teams can work together to address found issues or celebrate successes.

Additionally, analytics are not meant to be static; they should grow and evolve as your users become more familiar with the tool, the data contained therein, and as your organization's business processes evolve.

Finally, we recommend that you have an analytics management strategy to compliment your data management strategy. Analytics can just as easily become unruly if they are not regularly reviewed for accuracy, relevance and use.

CONCLUSION

This eBook highlights best practice recommendations for implementation including considerations for executive sponsorship, business processes, data, automation, usability/scalability, and analytics based on our and our customers' success stories and lessons learned. Cloud for Good can help you navigate through all of the options when looking at implementing a CRM solution on the Salesforce platform.

At Cloud for Good, our goal is to make sure that these and all of your other Salesforce implementation needs are successful. We have helped more than 800 nonprofit and educational organizations create and implement strategic Salesforce solutions by following our proven methodology. By utilizing Salesforce experts who are passionate and fluent in the processes and objectives of the nonprofit community, we can help guide you through your options and best practices for implementing all kinds of solutions using Salesforce.

Contact Us for Help with Your Implementation

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