Mobile Sales ToolKit

Audience (Barrett)

This document is intended to provide information on selling, scoping, and implementing custom mobile projects on the force.com platform. This toolkit should be helpful to SDM, SEM, CSM, AE, and SE. Basically any client facing resource tasked with selling and scoping custom mobile applications.

Scoping requires an understanding of the underlying technologies used. If you don't feel this is your strength, reach out to the Mobile Services Chatter Group at http://bit.ly/mobserv for assistance.

What is a Custom Mobile Services Project (Barrett)

Custom Mobile Services Projects are projects in which the intended users will use phones, tablets, or offline laptops to execute business process. This includes projects like the Digital Sales Aid, call reporting, and field service. The key features are:

- Custom - These projects are typically customized to the customers' requirements to reduce clicks or present company branding.
- Mobile - Applications will run on tablets, phones, and offline laptops.
- Offline - While not required, the vast majority of custom mobile projects require some sort of data to be accessible when offline or when connectivity is poor.

This does not include implementing the standard Salesforce.com applications (Salesforce.com Mobile CRM, Mobile Lite, Chatter Mobile, or Touch).

Technologies (Mihir)

For a client, we have the ability to work on any OS and we have some degree of experience across all of them. We can design and develop apps on any mobile form factor (Smartphone, Tablet, Tablet PCs)

1. Mobile OS's
- a. Apple iOS - Very Proficient
- b. Android - Very Proficient
- c. Windows 8 - Working Knowledge
- d. Blackberry 10 - Basic Knowledge

2. Development Languages
- a. Objective C - iOS

b. Java - Android
c. HTML5/ Javascript - Hybrid Apps
d. Mobile Web - HTML5 Mobile Apps with Responsive Web Design
e. C# - Win 8
f. Flex / AIR - Older Cross Platform Technology

Selling Mobile Services (Mihir)

Strengths (Differentiators)	Weaknesses
- Core Philosophy of constantly innovating on the Salesforce Platform. - Worked on the Most Complex Mobile Applications in the Salesforce Eco-System - Offline Native and Hybrid Frameworks - In House Design Centre - FX Studio - Close relationship with the Product Teams to help define what is best on the platform vs. Custom work. - Methodology for Mobile Projects and how to build the ROI on it.	- Salesforce Mobile SDK not supported for all Platforms - Lack of experience in Win 8 - Expensive – We are not adept at doing smaller Mobile Projects
Opportunities	**Threats**
- Lead in Win8 SDK + Offline Framework - Hybrid Application Platform to allow Enterprises to install / create their own apps easily - Android Offline Platform - Expert Services for Key Customers where they want to develop their inhouse apps.	- Cheaper Mobile Dev Options available in the Market - Companies IT organizations building own Mobile groups - Companies looking for more productized solutions vs. Full Custom

Scoping (Barrett)

Costs of mobile applications run anywhere from $100K to over $1M depending on the customer's requirements.   There is no typical custom mobile application. It will be your responsibility to determine the use cases and customer requirements. The following sections will help you build an accurate estimate.

Application Definition - An app is a solution to a problem, not just a list of features. Define the application in one sentence, and follow this format: [the differentiator] [the solution] for [the audience].

Business Processes - What business process is the customer trying to execute? Can you define the application in one sentence? Is this a B2C or B2B application? B2C typically require more UI/UX and QA time. The key to defining this is to draw. Whiteboard with the customer to get an idea of the process flow, # of pages, and extent of work. This will be key information needed in the SOW and to set expectations properly.

Platform and Technology - Is this application going to run on iPads, Android phones, or something else? Do they want to use a native language or are they looking for a cross platform solution? Be careful how you ask if the client wants cross platform. Everyone wants cross platform if they don't understand the costs and tradeoffs. The functionality and performance of HTML5 is still below that of native applications, and the development times are often longer. If clients ask for cross platform applications, make sure they understand the tradeoffs.

Existing Salesforce.com Implementation - Do they already have salesforce.com? What license type? Custom mobile applications require access to the salesforce.com API. If they do not have an org in place, make sure to scope the work needed to create the foundation for the mobile application. This includes roles and profiles, object configuration, workflows, reports, and integrations.

Overhead - Will we have both IT and the Business involved? What sorts of security requirements and security reviews will be required throughout the course of the project? Are there any extremely large data volumes the app will have to deal with? Will the app need to support Single Sign-On (SSO)? Has the customer ever deployed a mobile application before? Do they have an Apple Enterprise Certificate? Will they be using the Apple App Store? Are they using a Mobile Device Management (MDM) solution? See a full list of questions to ask on the Wiki, here:

https://wiki.modelmetricssoftware.com/wiki/index.php/Mobile_Non-Functional_Requirements

Workbook - Need to understand the joint sfdc services scoping methodology

Project Team - Projects require:

- Project Manager - Handle the basic blocking and tackling for the project.
- Sr. Business Analyst - Define and document user stories. Typically they have a heavier upfront staffing and are able to reduce time in later iterations.
- Solution Architect - Key for all custom mobile projects. The SA is responsible for the overall architecture and quality of the application.
- Sr. Developer/Developer - The developers that will be writing code. This could be Apex, Visualforce, HTML, Objective-C, Java, C#, and Javascript. If a project has both Apex/Visualforce and Objective-C requirements, you should plan to staff separate developers for each. Consequently, mobile projects usually require multiple developers.
- User Experience (UX) and User Interface (UI) - The UX resource will be responsible for taking the user stories and creating wireframes. Wireframes represent the skeletal framework of an application. The UI resource will be responsible for making it look great. They will create comprehensive layouts, full color designs of the application.
- Quality Assurance (QA) - QA is key for mobile applications. No project or code should be released without QA.

Support - In the Salesforce.com world, clients are used to products just working without the need for IT support. Additionally, they get 3 great updates every year. This is not the case with custom mobile applications. You need to ensure that the customer understands that they will ultimately be responsible for the support and ongoing maintenance of the application. We recommend a support contract to ensure that changes and fixes can be made to the application post go-live.

Implementing (Gersic)

DSA projects should start with the DSA Checklist: http://bit.ly/dsachecklist

Mobile Projects follow the Delivery Methodology 3.0.

[WAITING ON IMAGE]

Some key aspects of this methodology for mobile projects include our:

- Rally Setup for Project Management
- Environment Setup - iOS
- Develop Architecture
- Architecture Reviews
- Source Control
- Code Standards - General

- [Code Standards - iOS](#)
- [Code Reviews](#)

Ongoing Support (Gersic)

For the most part, we don't offer long term support. Projects should include time for go-live planning and knowledge transfer. Once a project has been completed, any additional support should be considered a new engagement.

Other (Mihir)

Mobile Device Management (MDM)

MDM vendors provide functionality for managing corporate or personal "BYOD" devices within the enterprise. They do things like force users to use a PIN code, use encryption, and disable screenshots. They also often offer Enterprise App Stores for internal apps. Our apps typically can be deployed using MDM App Stores. Many of our clients use Mobile Iron, Airwatch, or Good Techology.

There are two basic models for Enterprise MDM in the marketplace today: "wrapper" based and full device security through core manufacturer-provided APIs. The best known example of the former model is that of Good Technology. The core MDM functions are controlled by device manufacturers (Apple, Google, Samsung, HTC, etc.), so MDM vendors aren't able to do much that sets them apart with core device security features. Where they have distinguished themselves is with add-ons like Mobile App Development Platforms (MADP), application management (enterprise app stores), cloud services, analytics, automation of compliance measures, file/content sharing, and PC management combined with mobile management.

Push Notifications

Push notifications are the notifications you can receive while an app isn't running. They do require a 3rd party server to handle the communications with the Apple and Google push notification servers. We have implemented these before for both iOS and Android apps using Urban Airship, the market leading service provider.

Initial setup is fairly easy, but complexities arise when the UI of the app has to respond differently to different types of notifications. For instance, how the app should respond to notifications while:

- the app is in not running

- the app is running but is in the background
- the app is running in the foreground, but on the wrong tab
- the app is running in the foreground, and on the correct tab

Hybrid applications complicate things further because they typically include a multi-stage application launch (native app launches, then the hybrid container, then the UI framework, etc.) The easiest possible implementation of Push Notifications is to have one standard notification display for all notifications.

Testing and QA

QA is very important to mobile apps. Any time a developer is working on a project, QA should be engaged. This means that QA cannot roll off at the end of a project as development wraps up. Typically, testing in mobile apps is a function of 2 main areas:

- Developer Responsibility: Automated Unit Tests
- QA Responsibility: Manual or Automated QA Test Scripts

Digital Sales Aid (Mihir)

Digital Sales Aid is an iOS based content platform that enables clients to present content in a visually appealing way. The Goal of the Digital Sales Aid is to act as a way to get into a client quickly and then work to do more custom projects with the client either built on top of the DSA platform OR custom projects.

They Key thing to remember is - Its is NOT a product. It's typical for project teams to get feature requests during the course of the project. These may initially be framed as questions about whether "R&D can add something to the DSA roadmap". These sorts of feature requests are a great opportunity scope out and implement custom feature functionality as a part of a paid services engagement. DSA does not have a public roadmap, and our clients shouldn't be expecting to get free updates with new functionality.

Resources

- DSA projects should start with the DSA Checklist: http://bit.ly/dsachecklist
- DSA Internal Implemenation Guide: http://bit.ly/dsaguide
- DSA Customer Implementation Guide: http://bit.ly/dsacustguide
- DSA Architecture: http://bit.ly/dsaarchitecture
- DSA Wiki: https://wiki.modelmetricssoftware.com/wiki/index.php/DSA
- DSA Image Assets Specification: http://bit.ly/dsaimages
- Chatter Group: http://bit.ly/dsachat

Model FX (Barrett)

Workshop

The purpose of the FX Workshop (as either a stand-alone workshop or as part of the BPR) is to allow the UX architect, SBA, change management lead (if needed) and others to gather insight about end-users and their current and ideal processes. The sole focus should be on user needs, not business or technology requirements. Prior to the Workshop (or BPR), the UX architect should plan the necessary activities or discussion topics and work with the SBA and PM to include this type of discussion in the BPR or work with the PM to schedule the necessary discussions with SMEs, user surrogates, or users themselves. If possible, prior to the actual workshop or BPR, the UX architect and SBA/BA can participate in user research to start to develop empathy or and an understanding of key users.

Additional Questions (Someone Else)