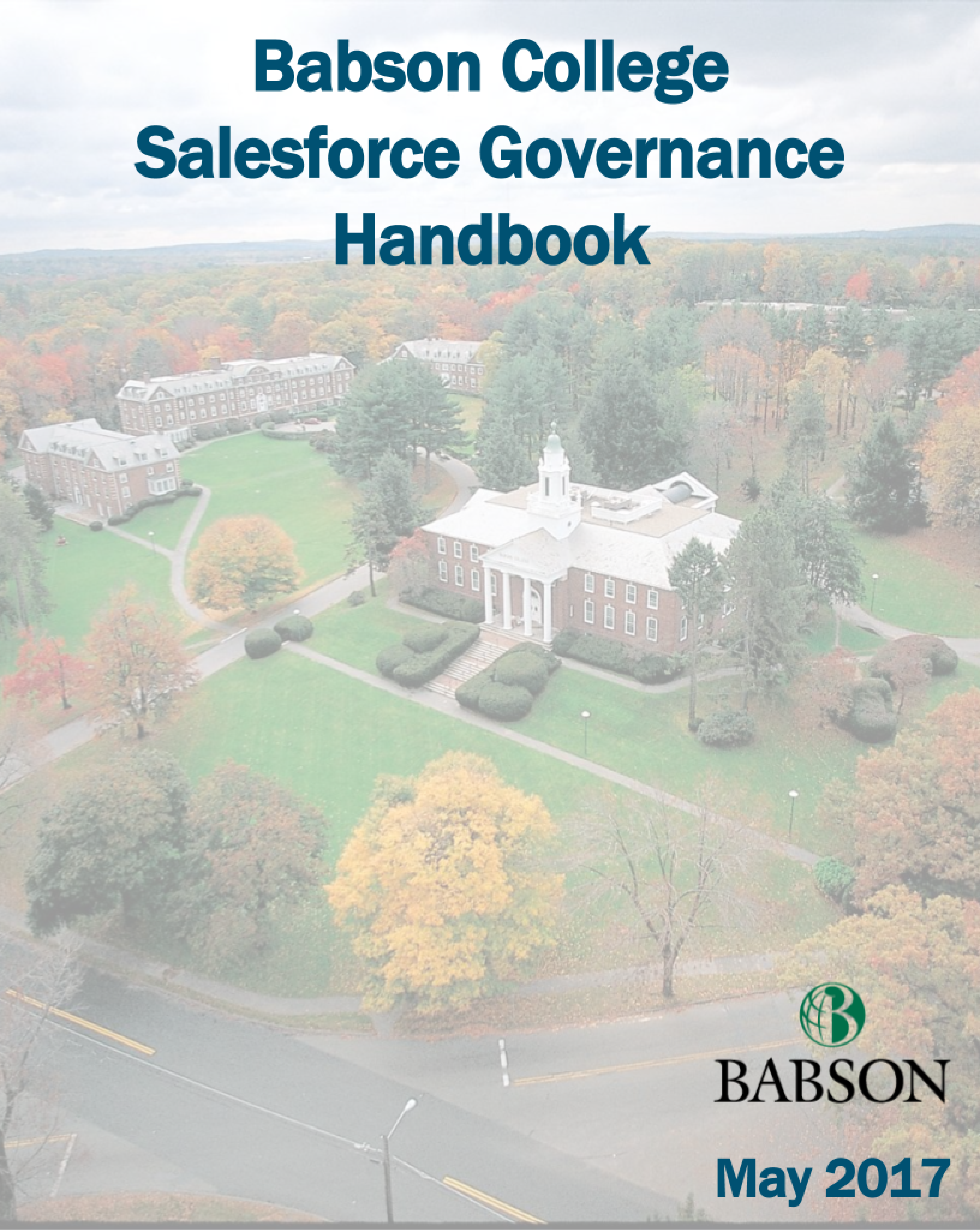
Babson College Salesforce Governance Handbook



BABSON

May 2017

TABLE OF CONTENTS

WELCOME

Welcome to Salesforce! On behalf of the Sales Force Governance committee, we are pleased to present the Governance Handbook. The intent of governance is to establish a fair set of “rules” that govern behaviors. These rules of the road have been established for the first phase of Sales Force utilization collectively created by committee members from IT, the Graduate Center of Career Development, Graduate Experiential Learning, Graduate Strategic Partnerships and Babson Executive Enterprise Education.

These “rules” can be applied and adapted long term as other Sales Force Babson users across campus join the system. Any future revisions for governance must be approved through the ongoing cross-college governance committee.

Sincerely,

The Governance Committee

Michael Budd - Technology Specialist, *Babson Executive & Enterprise Education*
Barbara Burnim Day - Associate Dean, Finance & Admin, *Babson Executive & Enterprise Education*
Nancy Doherty - Director, *Graduate Experiential Learning*
Barry Holt - Senior Business Analyst, *Information Technology*
Andrew Lymburner - Enterprise Architect & Information Security Officer, *Information Technology*
Cheri Paulson, Committee Chairperson - Senior Director, *Graduate Strategic Partnerships & Graduate Center for Career Development*
Dan Tonelli - Director, IT Support Services, *Information Technology*

1. ROLES & RIGHTS

1.1 SALESFORCE VISION

The vision for the future is for Salesforce to become a rich repository of shared information that supports and enhances Babson's interactions with clients across diverse departments such as Babson's Executive Education, Graduate CCD, Graduate Admissions, Graduate Programs, and Graduate Strategic Partnerships/Enrollment.

1.2 SHARING MODEL

Salesforce engages in a data sharing model known as **CRED** (create, read, edit and delete). Within this model, profiles are created with an ability to create, read, edit and delete values (CRED).

Additionally, a profile determines CRED permissions. A person's role is a way of of expanding or narrowing read/edit abilities based on where one is on the hierarchy. As expected, one higher on the role hierarchy will have the same (or expanded access) as those below him. Profile trumps Role; Role cannot give greater read/edit access than the Profile allows.

Note that defaults are overridden in the following exceptions:

- **System Administrators** can view and edit all data regardless of the sharing model.
- Users can manually share object records where the object has been set to Private.

1.3 SHARING RULES

Sharing rules can be used to extend record visibility and access to users, outside of being record owners or above record owners in the role hierarchy. Sharing rules can be set up to share information with a selected public group or role(s) based on the following:

- Records owned by other users in a public group or role(s)
- Specific data attributes of the record

If Babson has organization-wide sharing defaults of Public Read Only or Private, Babson can set sharing rules to allow users to share data automatically. Sharing rules grant read or read-write access at the object level, specific object field information is restricted by profile. **ACF is not anticipating that sharing rules will be required for Babson's implementation.**

1.4 ROLE HIERARCHY

Roles control the level of visibility that users have into Babson's data. Users at any given role level are always able to view, edit, and report on all data owned by or shared with users below them in the hierarchy, regardless of the organization's sharing model.

The role hierarchy setup also governs the "My Teams" options in reports and list views, allowing managers to easily see a set of data that is owned by their subordinates or where one of their subordinates is on a Company or Support Team.

Please note the following regarding role hierarchy and visibility:

- Every user must be assigned to a role, or their data will not display in opportunity reports, forecast roll-ups, and other displays based on roles.
- All users that require visibility to the entire organization should belong to the highest level in the hierarchy.
- It is not necessary to create individual roles for each title at your company; rather you want to define a hierarchy of roles to control access of information entered by users in lower level roles.
- When you change a user's role, any relevant sharing rules are evaluated to add or remove access as necessary.
- When an account owner is not assigned a role, the sharing access for related contacts is Read/Write, provided the organization-wide default for contacts is not Controlled by Parent.
- Users that gain access to data due to their position in hierarchies do so based on a setting in your organization-wide defaults.

Regardless of the organization's sharing settings, users can gain access to records they do not own through other means such as user permissions like "View All Data," sharing rules, or manual sharing of individual records.

1.5 PROFILES

A profile defines a user's Permission to perform different functions within Salesforce. Profiles also control the following:

- Which page and console layouts the user sees
- The field-level security access that the user has to view and edit specific fields
- Which tabs the user can view
- Which record types are available to the user
- Which standard and custom apps the user can view, depending on user license
- Which permissions a user is granted to customize and administer Salesforce
- Which permissions a user is granted to create, read, edit, and delete records for each object

Note: A user can be assigned to only ONE profile.

1.6 SYSTEM PERMISSIONS BY BABSON OBJECT

Below you will find a listing of the current Salesforce Objects set up in the Salesforce platform. Each object has an assigned permissions setting that aligns with the **CRED** philosophy -

Create, Read, Edit and Delete.

Note: All System Administrators also have the ability to View All and Modify All objects related to Salesforce.

SALESFORCE OBJECT	PERMISSION SETTING
Action Plans	All users = CRED Salesforce System Admin - CRED, Modify All, Delete All
Accounts	All users= CRE Salesforce System Admin - CRED, Modify All, Delete All
Accolades	Private; BEEE Marketing Profile = CRE Salesforce System Admin - CRED, Modify All, Delete All
Activities	All users = CRED Salesforce System Admin - CRED, Modify All, Delete All
Affiliations	All users= CRED Salesforce System Admin - CRED, Modify All, Delete All
Assets	N/A Salesforce System Admin = CRED, Modify All, Delete All
Campaigns	All Users = read only; BEE/CCD specific campaigns would be CRED to those campaign owners. Salesforce System Admin - CRED, Modify All, Delete All
Campaign Member	Controlled by Parent: Campaigns
Cases	N/A Salesforce System Admin - CRED, Modify All, Delete All
CC Community User Permissions	N/A
Chatter	N/A Salesforce System Admin = CRED, Modify All, Delete All
Conga Composer	All Users = N/A Salesforce System Admin - CRED, Modify All, Delete All
Contacts	All users= CRE Salesforce System Admin - CRED, Modify All, Delete All
Contracts	SP - CRE Salesforce System Admin - CRED, Modify All, Delete All
Courses	All Users = R; EL - CRE (EL Only Usage Case) Salesforce System Admin - CRED, Modify All, Delete All
Course Connection	All Users = R: EL - CRE (EL Only Usage Case) Salesforce System Admin - CRED, Modify All, Delete All
Course Enrollment	All Users = R; EL = CRE (EL Only Usage Case) Salesforce System Admin - CRED, Modify All, Delete All

CWB (Config Workbook)	Private, Salesforce Admin Only
Dashboards	Admin DB = CRED for Admin All Users = CRED Salesforce System Admin - CRED, Modify All, Delete All
Data.com	All Users; Prospector - Select Identified Users Salesforce System Admin - CRED, Modify All, Delete All
Documents	All Users: CRE Salesforce System Admin = CRED, Modify All, Delete All
Engagements	All Users = R Grad CCD/EL/SP/San Fran: CRE BEEE: CRE Salesforce System Admin - CRED, Modify All, Delete All
Evaluations	Private, BEEE Users = CRE (BEEE Only Usage Case) Salesforce System Admin - CRED, Modify All, Delete All
Evaluation Question Bank	Controlled by Parent - Evaluations
Evaluation Template	Controlled by Parent - Evaluations
Files	All Users (system users can select “private” under share setting) Salesforce System Admin - CRED, Modify All, Delete All
Find Volunteers	All Users Salesforce System Admin - CRED, Modify All, Delete All
Forecasts	Private; CRE permissions to select BEEE Users (BEE Usage Only) Salesforce System Admin = CRED, Modify All, Delete All
Form Assembly	Assigned FA System Admin (currently 3 admins) Salesforce System Admin = CRED, Modify All, Delete All
Geopointe	All Users Salesforce System Admin = CRED, Modify All, Delete All
Groups	All Users - CRE; CRED for Group Owner Salesforce System Admin - CRED, Modify All, Delete All
GL Account	Private, BEEE Users = CRE (BEEE Only Usage Case) Salesforce System Admin = CRED, Modify All, Delete All
HEDA Settings	Private, Salesforce Admin Only
Home	All Users - CRED Salesforce System Admin - CRED, Modify All, Delete All
Interests	All Users - CRE Salesforce System Admin = CRED, Modify All, Delete All
Interest Topics	Controlled by Parent - Interests
Invoices	Private, BEEE Users = CRE (BEEE Only Usage Case) Salesforce System Admin - CRED, Modify All, Delete All
Invoice Details	Controlled by Parent - Invoices
Leads	Not Applicable

Macros	N/A
Management	N/A
Map	N/A
Marketing Lists	Private, BEEE Marketing - CRE Salesforce System Admin = CRED, Modify All, Delete All
OEL Student Applications	EL Users = CRE Salesforce System Admin = CRED, Modify All, Delete All
Opportunities	Sales Opps = R only to CCD w $ fields = private; R only to BEEE Users; CRE to owner Faculty Agreements & Additional payroll = private, CRE to BEEE Users only Salesforce System Admin = CRED Modify All, Delete All
Opportunity Contact Role	Controlled by Parent - Opportunities
Orders	N/A
Payroll	Private, BEEE Finance = CRE (BEEE Only Usage Case) Salesforce System Admin = CRED Modify All, Delete All
People	N/A
Price Books	Private, BEEE = read only w select BEEE staff = CRE Salesforce System Admin = CRED Modify All, Delete All
Products	Private, BEEE = read only, w select BEEE staff = CRE Salesforce System Admin = CRED Modify All, Delete All
Profile	Profile User= CRE Salesforce System Admin = CRED Modify All, Delete All
Profile Overview	N/A
Program Enrollment	Assumption not in use; need to confirm Salesforce System Admin = CRED Modify All, Delete All
Projects	All Users = R; EL = CRE (EL Only Usage Case) Salesforce System Admin = CRED, Modify All, Delete All
Relationships	All users= CRE Salesforce System Admin = CRED, Modify All, Delete All
Reports	All Users= CRED Salesforce System Admin = CRED, Modify All, Delete All
Sessions	Private; BEEE = CRE (BEEE Only Usage Case) Salesforce System Admin = CRED, Modify All, Delete All
Shift Calendar	N/A
Social Personas	N/A
Social Posts	N/A
Solutions	N/A
Streaming Channels	N/A

Surveys	Private; EL Users = CRE (using FormAssembly) (BEEE is using Evaluation Object) Salesforce System Admin = CRED, Modify All, Delete All
Term	All Users = R; EL - CRE (EL Only Usage Case) Salesforce System Admin = CRED, Modify All, Delete All
Visualize	N/A
Volunteers Help	N/A
Volunteers Wizard	All Users = CRE (EL Only Usage Case) Salesforce System Admin = CRED, Modify All, Delete All

1.7 SALESFORCE USER ROLES AND RESPONSIBILITIES

ALL SYSTEM USERS

As an institutional best practice, each system user should have a full understanding of their role, and how that role engages with system best practices and use. A true collaborative effort will require the "pay to play" user adoption. Full understanding of this expectation will increase the effectiveness of the team, our platform, and ultimately assist in achieving Babson's organizational goals.

All system users will be expected to utilize the applicable components developed within the Core portion of the Salesforce CRM.

Core CRM Components:

- Contacts
- Campaigns
- Opportunities
- Accounts
- Salesforce for Outlook
- List Management and Email Marketing
- Surveys
- Chatter
- Document Management

In addition to the Core CRM components, specific additional custom components may require user attention and completion.

All system users will be required to work with the system in a proactive and in a timely manner. Within 48 hours of an account/contact interaction, the user will record activity with the account/contact record, including all pertinent details and next steps/action items, if applicable. This standard benchmark will assist each user with the following:

FACILITATING COMMUNICATION & COLLABORATION:

Be clear, concise and timely: This will ensure entry accuracy, save time as well as promote a better understanding of current activity by all users.

Keep records: All system Users will be expected to keep accurate record details.

Define the relationship: Provide an overview of your specific relationship with the account/contact. The ability to view potential multiple relationships at the institution could potentially help solidify future activity and engagements.

The ability to effectively communicate with internal collaborators and constituents.

Share files: Upload (and share) files/documents pertinent to the account/contact that would provide support or additional information that may be too voluminous or tedious to enter. Share settings shall be at the discretion of the user, consistent with the privacy policy of the user's department.

1. All Offline communications between system users will be recorded within the "notes" section of either an account or contact record. Responsibility for capturing this offline conversation will be the responsibility of the system user that initiated the offline communication.
2. If not affiliated with an account/contact but wish to be, identify yourself as a collaborator by selecting "Follow".

Principles for Multi-Faceted Communication:

- Implementing a CRM system should not completely replace a user's instinct to collaborate with other users/followers.
- Recognize the importance to engage in personal dialogue and discussions regarding a particular account and/or client.
- The CRM is not a means to replace human interaction. Significant developments within an account and/or contact record should be recorded and additional follow up with key collaborators (followers) strongly suggested. For example, Babson is moving away from a relationship or a new Trustee from a new organization is coming on board.
- Communication, in various forms, is vital to a full implementation success of Babson's CRM and will lead to a greater trust, not only amongst team members but with the system as well.
- Timely communication of any issues to the System Administrator, or to Support/IT in the event the System Administrator is not available or unable to assist.

All system users will be required to complete a minimum of one Face to Face training session with an identified Salesforce Administrator Trainer and/or System Power User.

- Additional training can be supplemented with online tools, peer to peer mentoring, Salesforce Community Hubs and other applicable tools available.
- All users shall receive additional training within their own departments to learn of privacy policies in regard to uploading and sharing of files/documents.
- System users will be held accountable relative to training content understanding and usage.

Mutual Cooperation, Understanding and Respect will be expected of all system users. Babson Governance recognizes the need for reciprocal cooperation and understanding when using this type of system and an all-inclusive approach should be the overarching theme and goal that will impact both system and institution success.

1.8 ADDITIONAL RESPONSIBILITIES BY SPECIFIC ROLE

SYSTEM ADMINISTRATOR:

- Participate in the College wide and Departmental development of processes related to data integrity, maintenance and storage.
- Determine metrics and create reports necessary to identify issues related to data integrity. Conduct timely reviews of data and if issues surface, engage in active measures to prevent further deterioration of data, including, but not limited to, conducting further training of system users.
- Together, with key users, create comprehensive training and onboarding plans. Responsible for ongoing review and updating of these plans.
- Conduct training for new users, or oversee the training provided by an appointed, qualified user.
- Work with managers/directors to spot check and follow up and put into practice the setting of team goals related to SF
- Ongoing management of user accounts. Engage in the determination, documentation and general administration of permissions levels.
- Serves as key resource and ‘help desk’ support for all users. Educate and communicate “system best practices” to all users, with a lead by example mentality.

DIRECTOR/MANAGER of ALL SYSTEM USERS:

- Lead by example, serving as system power user and serve as department support personnel. Assist with system usage, best practices, modeling governance and open lines of communication. As system “use cases” come to the forefront, share finding with other team members, and any applicable system user that may benefit from key findings/learning.
- Ensure team members have a strong understanding of Babson’s Governance, Phase 1 policies and procedures.
- Take part in the creation of a department-wide privacy policy in regard to uploading and sharing of documents, adhering to best practices of maximum disclosure without compromising sensitive information. Ensure team members are informed and have a strong understanding of this policy, as they will have final discretion.
- Ensure team members have a good understanding of the systems capabilities and limitations, clearly communicating available resources and tools to assist with user understanding.
- Ongoing review of team member’s system activity – to include, but not limited to, spot checking account/contact records to ensure data accuracy. During phase 1, initial check ins with system users to assist with questions, guide proper usage and model personalized support for individual success.
- Include Salesforce goals into each team member’s ePerformance annual goals and objectives.
- Communicate with team members, internal users and appropriate Salesforce Admins regarding potential conflicts, issues, and system idiosyncrasies. Proactively manage conflict resolution, if necessary.
- When necessary, lead system workshops, discovery sessions and demonstration to aid in user acceptance and best practice implementation.
- Assist in identifying system learning opportunities to maximize full potential usage of system offerings. Communicate key findings to system admins regularly and on-going basis.

ACCOUNT/CONTACT OWNER:

Ownership in Salesforce is two-fold. Any and all ACCOUNT records created in the system will be "owned" by Babson College. Related CONTACT records associated with an organization will be "owned" (assigned) to the respective Babson User.

Current Babson Users include (but are not limited to):

- Babson Executive Education and Enterprise - Business Dev Directors/Manager
- Graduate Career Center for Development - Senior Director, Operations and Relationship Managers
- Graduate Experiential Learning - Director, Relationship Manager and Program Coordinator
- Strategic Partnerships - Director
- San Francisco Campus - Director and Senior Assistant Director

Respective Contact Owners will be responsible for:

- Ongoing management of account/contact record to ensure data accuracy. Including, but not limited to, timely review of account/contact history, updates and scheduled upcoming tasks/events and status (i.e. active account/contact).
- Communicate with internal collaborators on potential conflicts, issues, and/or account/contact sensitivities. Proactively manage conflict resolution, if necessary.
- Assist in identifying new opportunities within an existing account. Provide key findings and share reporting with internal collaborators identified within the record.
- File Attachment Management - Any file documentation attached that has associated with, for payment association, any financial exchange or a contract that requires legal documentation may be attached (not required) with a private security setting. Identify the event/campaign/opportunity on the record and at the discretion of the contact owner what supporting documentation is attached to the record.
- Work with collaborators to determine if a change in Ownership should occur, focusing on the best interests of Babson College. Only the owner or system administrator has permissions to change the owner.

POWER USER/CHAMPION:

- Support comprehensive training and onboarding of new employees.
- Facilitate departmental productivity by serving as a key resource and "help desk" support for all users.
- Together with the system administrator, ensures departmental policies and procedures are updated and all QRG/Reference materials are current.

SUPPORT/IT:

- Deliver service and support to Salesforce system users via various communication methods – phone, email, in person.
- Interact with system users to provide and process information in response to inquiries, concerns, and requests about the Salesforce system, capabilities and general use.
- Gather system user's information and determine the issue by evaluating and analyzing their stated issue(s).
- Diagnose and try to resolve any basic knowledge relative to system user's issue, basic system functionality and potentially try to resolve technical hardware and software issues involving

internet connectivity, email clients, and more.
- Research additional information to assist with system user issue using available resources.
- Follow standard processes and procedures;
- Identify and escalate priority issues per IT department specifications;
- Redirect problems to appropriate resource;
- Offer alternative solutions where appropriate
- Follow up and make scheduled call backs to system user, where necessary
- Stay current with system information, changes and updates

2. ACCOUNTS & CONTACT MANAGEMENT

2.1 OBJECTIVE

Establish a fair set of "rules" that govern behaviors around Accounts and Contact Management within SalesForce. These Rules of the Road have been established for the short term launch with BEEE and Grad CCD and can be applied and adapted long term when other Sales Force users across campus join the system. Future revisions for governance must be approved through an ongoing cross-college governance committee.

2.2 GENERAL DEFINITIONS

Account (Company Record): Represents the company itself (e.g. Biogen); all contacts are tied at the account level and the account owner defaults to Babson College

Primary Account Contact: In relation to an ***external*** entity; there may be more than one account for each contact; 'primary' equals the company record that the contact most identifies with

Affiliated Account Contact: In relation to ***external*** entity; a secondary role a contact has with an account ie board member of a company

Primary Babson Contact Owner: Individual within Babson who is main liaison with external "contact" and serves as point internally within Babson; governing rules described above

Secondary Babson Contact Owner(s): Once the prospect is converted to an campaign/event/engagement, a secondary contact owner may be established by collaborating with the primary account contact and moving forward, may connect with the Account contact without permission/communication.

Flagging: Flagging blocks other Babson users from connecting with the Account Contact. This is an option for the Primary Contact Owner but needs to be justified with criteria below and is not permanent. This only can occur at the contact level and not at the *account* level. There may be times that this would be escalated to the small governance mediation committee should there not be resolution.
Criteria may include:
- Significant event activity or pending contract/ deal that is time sensitive

- High potential in development office
- Trustee or board member
- Major Babson vendor
- President's office preference
- Company had violations against IP, non payment, or other strategic decision not to work with the organization

2.3 RULES OF ENGAGEMENT

To encourage a successful Salesforce experience, engagement is based on all Babson users being respectful and courteous of the *primary* contact owners. Internal open communication with a coordinated effort is critical before approaching a contact directly. The *external* contact or account should view Babson as having an organized and seamless approach to the relationship, reflecting the "1-Voice" theme we are striving to project. Trust among internal users will enhance the success of this new way of operating across campus and is in the best interest of the contact/account.

ACCOUNT LEVEL (Company Record)

- All accounts are automatically "owned' by Babson College
- ACCOUNTS will not be "flagged" with DO NOT CONTACT ***unless determined by the college to do so*** (exceedingly rare occasions)

CONTACT LEVEL

- Goal is that primary *internal* Babson owner will be treated respectfully by any new Babson user. Upon launch of Sales Force, the primary contact owner is based on who originally entered the contact information. Existing primary owner is obligated to help identify the best way for the new Babson user to engage with this relationship. Outreach options might include:
  - Virtual introduction from primary Babson owner introducing new Babson user
  - Recommendation for new Babson user to reach out directly without introduction from primary Babson owner
  - Primary Babson owner suggests an alternative contact for new Babson user
  - Primary Babson owner can't just say "no" and block new Babson user from moving forward unless the contact has been flagged per the flagged governance rules below
- *Primary* Babson owner obligations and duties:
  - Serve as the main point of contact across the college
  - Initiate and facilitate introductions between new Babson users and contacts, as per outreach options outlined above
  - Should outreach activity be "dormant" (more than 9 months) with no activity occurring between the Babson primary owner and the contact, a discussion will ensue to justify keeping the existing Babson contact as 'primary' or moving that label to someone else

        - No new Babson user can change the current name of the primary contact owner due to systems limitations; primary contact owner has systems permission to make edits.
    - “Flagged” contacts mean that the primary contact owner does not allow any other Babson user to reach out directly to this contact:
        - 

    - Flagged contacts must be approved by divisional management and sample criteria includes:
        - High potential as determined by the development office
        - Trustee or board member
        - Major Babson vendor
        - President’s Office preference
        - Company had violations against IP, non payment, or other strategic decision not to work with the organization
        - Significant engagement activity/event/contract etc is pending

    - Secondary Contact Ownership
        - A new Babson user must have a communication with the current primary contact owner during the prospecting phase (exploring for a new event/engagement). Once the prospect is converted to an event/engagement, a secondary contact owner may be established in consultation with the primary contact owner and moving forward, may connect with the external contact without clearance from the primary contact owner.
        - There may be multiple secondary contact owners depending on need.

ARBITRATION/PUNITIVE MEASURES

A “pay to play” mentality is critical for the success of Sales Force across Babson

- If Babson employees can not resolve a governance issue, managers at the divisional level must resolve
- Those individuals not playing by the rules of engagement (e.g. not entering info into the system/ blocking others) will be subject to discipline at the divisional management level
- Managers should include the importance of Sales Force governance in performance objectives
- Managers could choose to negatively impact the employees in monetary ways, promotions, and in reviews
- If issues continue to go unresolved, the mediation governance committee may be involved

SCENARIO/CASE

Employee from Exec Ed (“Sue”) wants to establish a relationship with EMD Serono, so she goes into SalesForce and sees that (“Bill”) from Grad CCD is the *primary* contact owner. Sue calls Bill to explain her interest in talking with this contact at EMD about her offerings and asks if he would be willing to make an introduction.

Some possible responses from Bill:

1. “Yes, I’d be happy to but let me reach out to my contact first and see what she might recommend”

2. “Sure, no problem. I’ll email her and copy you for an introduction”
3. “If it’s okay with you, I’d like to hold off for a short period as I am in the middle of waiting to hear back from them about coming on campus to interview many students. Can we reconnect in 2-3 weeks? So that there is no confusion, I will temporarily flag this and chatter with you when this is released.”
4. Bill may choose to stay as the primary contact owner depending on volume of activity and can work that out with Sue moving forward. Decisions need to be made based on volume of recent activity if there will be a switching of primary contacts. Sue could also become a secondary contact owner should prospecting end and engagement has occurred.

3. DATA VALIDATION & QUALITY

3.1 DATA ENTRY STANDARDS

PROCESS GOVERNANCE | POLICIES

A data policy should be created and implemented to ensure users fill out all fields in an accurate manner. In addition, users should be consistent. Accuracy combined with consistency creates data integrity and reliability.

As part of our data quality process, we recommend the following steps to maintain data quality:

1. Prior to importing any data into Salesforce:
    a. List the data sources and the names of the fields in which data is stored.
    b. Analyse and cleanse the data.
    c. Map the fields correctly with Salesforce CRM.
    d. Set up the proper validation rules to ensure data integrity.
    e. Ensure there is no duplicate information between objects and fields.
    f. Use automated routines or tools such as Data.com and DemandTools to clean data.
2. Enforce Minimum Requirements for data entry, such as:
    a. Company
        i. Name
        ii. Address
    b. Contact
        i. First Name
        ii. Last Name
        iii. Email address
        iv. Company
3. Enforce data standards in Salesforce by validating the data as it is typed into CRM.
4. Create pick-lists and take away as many variables as possible.
5. Achieving high-quality data will require ongoing vigilance.
    a. Use Workflow, Validation Rules and Force.com code to enforce critical business processes.
    b. Create reports and dashboards to monitor data quality. Leverage free data-quality dashboards available on the AppExchange.

6. Train users so they understand how to do their part. Assign responsibility for data to a super user, business lead or other business owner.

3.2 ACHIEVING QUALITY DATA

DATA GOVERNANCE

- We recommend forming a Data Governance sub-committee to:
  - Determine which fields Data.com is allowed to update automatically and which fields need to be user approved in order for an update to be applied.
  - Establish a standard update schedule for Data.com (e.g., Weekly, Monthly, etc.).
  - Develop a standard to update, archive or delete records that are not updated by Data.com
  - Establish a routine data cleanup project consisting of conforming data to the established standards and ensuring the accuracy of data not accounted for by data.com. The project should employ students and/or fellows and be centrally managed (ITSD?).

ARCHITECTURE/DESIGN

- We recommend adopting standard values from Data.com for fields that require conforming values. For example, if the standard country for the US in Data.com is "United States," then we should adopt "United States" as the standard value for Contact and Account country fields.
- We recommend enabling validation for all validation capable fields.
- "Strength of Contact" - as the need to enter and interact with a record in the system is subjective, we recommend against requiring a "strength of record" requirement for adding contacts.
- Account Hierarchy - For Accounts that are ***not*** in Data.com, all users should manually create the hierarchy.
- Contact Employer History - It should be a standard process to create a new Primary Business Organization/Employee affiliation record, and modify the previous primary record to note "former employee" when a contact changes employment.
- Data Verification - We recommend a policy stating that any user who notes an inaccuracy in the data will be responsible to update the record or notify the record owner.
- "Safeguarded" Contacts. Since the sensitivity of a contact can be determined at any level, we recommend the implementation of a third party app that allows for alerts to be created on Contact and Account records.
- User Accountability - Individual accountability should be one of our prime security objectives. A user who can be held individually accountable for actions is less likely to make mistakes or take other actions that might disrupt or compromise operations.We recommend:
  - that an acceptable use policy be developed for Salesforce similar to the "Computer Code of Ethics/Acceptable Use of Campus Network and Computing Systems" and "Information Security Policy" documents relating to the users rights and responsibilities related to entering information into Salesforce.
  - Salesforce related responsibilities be added to the Job Descriptions of key Babson Positions (Business Development Manager, etc.)

        - User adoption reports and/or dashboards be created as needed for specific departments.
    - Data Migration Data Integrity - Conflicts between BEE and CCD/EL data will be identified and resolved by representatives from each department (Mike Budd, Nancy Doherty, Ryan Boyer) before being imported to Salesforce.

4. COMMUNICATION

4.1 AUDIENCES

	INTERNAL (within Babson	EXTERNAL (outside Babson)
USING SALESFORCE	Babson Executive & Enterprise Education, Graduate Career Services staff	
NOT USING SALESFORCE	All other Babson Departments (President's Office, Alumni Network, etc.)	Clients, Prospects, Alumni, Babson Vendors

INTERNAL USERS (Using Salesforce)

INTERNAL (within Babson)	
1a. Any account or contact info	○ If you would like to stay updated on an account or contact, subscribe to follow updates on Chatter (When you subscribe you can choose to get email updates or look at the Chatter feed.)
1b. Change to account info (ie. address, company name)	○ If you know of the change, make the update unless account owner has requested to be notified (via pop-up alert). ○ Anyone can stay informed of changes by subscribing to follow updates via Chatter.
1c. Change to contact info (ie. moved to a new company, name change)	○ If you know of the change, make the update unless contact owner has requested to be notified (via pop-up alert). ○ Anyone can stay informed of changes by subscribing to follow updates via Chatter.
1d. Status updates/meeting notes with a contact (ie. have a meeting with this person, sent a proposal)	○ These are kept in the notes field on the contact record. Notes field shows who added the note. ○ For status updates that should be seen by others (key meetings, contract signed, etc.), place the note in the public section. The private notes section is only seen by you.

	○ Some notes are added automatically - meetings that are synched with Outlook, phone calls when the unified phone system launches
1e. Marketing campaigns with a contact (ie. this person attended a marketing webinar, this person received a mass email)	○ These are noted in the campaign field per contact ‣ Constant Contact emails are updated automatically through the CC connector ‣ Webinar registration and attendance is updated manually by importing a list from Webex or automatically if people register through Form Assembly
1f. Negative issue with an account (ie. they are getting bad press in the news)	○ Add the issue to the public notes field on the account and post to Chatter ○ Scan through recent notes or Chatter to see if anyone else on campus is interacting with them to alert them of the issue
1g. Negative issue with a contact (ie. the person in getting bad press in the news, the person isn't paying us)	○ Add the issue to the public notes field on the contact record and post to Chatter ○ Scan through recent notes or Chatter to see if anyone else on campus is interacting with them to alert them of the issue ○ If it is a specific issue (like the person isn't paying us), contact finance

EXTERNAL USERS (Babson Employees Not Using Salesforce)

TYPE OF COMMUNICATION	SOLUTION
2a. Any account or contact info	○ If a department is not using Salesforce, they can be kept up to date on an account or contact through reports that are sent at a predetermined frequency
2b. Change to account info (ie. address, company name)	○ If a department is not using Salesforce, they can be kept up to date on an account info change through reports that are sent at a predetermined frequency ‣ Non-Salesforce User Requests - standard report template to be created with basic information. Follow up to Non SF user to include templated language about the report being delivered and next steps. ○ Non-Salesforce User Requests - will call in and IT will support who owns the contact(s) and then provide the information for follow up with Contact(s) Owner. ○ Account owner adds a note to the record that a department wants to be notified
2c. Change to contact info (ie. moved to a new company,	○ If a department is not using Salesforce, they can be kept up to date on a contact info change through reports that

name change)	are sent at a predetermined frequency ○ Non-Salesforce User Requests - will call in and IT will support who owns the contact(s) and then provide the information for follow up with Contact(s) Owner. ○ Contact owner adds a note to the record that a department wants to be notified
2e. Marketing campaigns with a contact (ie. this person attended a marketing webinar, this person received a mass email)	○ If a department is not using Salesforce, they can be kept up to date on marketing campaigns through reports that are sent at a predetermined frequency ‣ Non-Salesforce User Requests - standard report template to be created with basic information. Follow up to Non SF user to include templated language about the report being delivered and next steps.

MASS MARKETING

TYPE OF COMMUNICATION	SOLUTION
3a. Mass Marketing Emails in General	○ All mass marketing emails need to be sent from a vendor that follows CAN-SPAM opt-out regulations ○ Each department needs to create segmented opt-out options, for example: ‣ Unsubscribe from BEE Babson Insight emails ‣ Unsubscribe from BEE open enrollment emails ‣ Unsubscribe from BEE newsletter emails ○ If an individual wants to unsubscribe, they will select which emails they no longer want to receive ○ They will be automatically unsubscribed from the selected list through Constant Contact and noted in Salesforce through the CC connector so they no longer receive emails from this list
3b. Mass Marketing Emails to Babson Alumni	○ If a Babson Alum is in Salesforce, they will receive emails and follow the same unsubscribe process as outlined in section 3a ○ If the Alumni Office wants to be kept up-to-date on an alum, they will follow the process as outlined in section 2a
3c. Mass Marketing Emails to Babson Vendors (ie. IT phone service, photographer College Marketing works with)	○ If a Babson Vendor is in Salesforce, they will receive emails and follow the same unsubscribe process as outlined in section 3a ○ If someone wants to be kept up-to-date on a vendor and they are using Salesforce, they can subscribe to follow the account or contact on Chatter ○ If a department wants to be kept up-to-date on a vendor and they are not using Salesforce, they will follow the process as outlined in section 2a

GLOSSARY

SALESFORCE OBJECT DEFINITIONS

ACTION PLANS: Action Plans encapsulates best practices into reusable task templates. An Action Plan can be created for an Account, Opportunity, Contact or Lead. Template tasks can be pre-assigned to a specific individual or assigned to the running user.

ACCOUNTS: An account is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

ACCOLADES: Testimonials provided by Babson Executive & Enterprise Education clients and participants.

ACTIVITIES: An event, a task, a call you've logged, or an email you've sent. You can relate an activity to other records, such as an account, a lead, an opportunity, or a case. In an org with Shared Activities enabled, you can relate an activity to multiple contacts. Tasks can also be generated by workflow rules and approval processes configured by a Salesforce administrator.

AFFILIATIONS: Tracks connections between contacts (any person, such as a student or faculty member) and accounts (an organization, such as a College or department).

ASSETS: Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased and installed.

CAMPAIGNS: A marketing initiative, such as an advertisement, direct mail, or conference, that you conduct in order to generate prospects and build brand awareness.

CAMPAIGN MEMBER: Any lead or contact associated with a campaign.

CASES: Detailed description of a customer's feedback, problem, or question. Used to track and solve your customer's' issues.

CHATTER: A set of collaboration tools that are woven throughout Salesforce, allowing individuals to work together and share information on deals they are working. Users can join different groups, comment on different objects and data, and share details through chatter.

CONFIGURATION WORKBOOK (CWB): A software tool that quickly extracts Salesforce metadata in Excel files, ex. Field Level Security, Profile permissions across objects, fields etc, Page Layouts , Permission set assignments, Apex, Visualforce. It also offers tools like Org Comparator, and Impact Analysis. Used by Salesforce System Administrators.

CONGA COMPOSER: Customize, streamline and scale your document generation and reporting, removing administrative roadblocks. Create & deliver documents, presentations & reports in Word, PowerPoint, Excel, HTML email & PDF from any standard/custom object.

CONGA COMPOSER COMMUNITY USER SETTINGS: Permission settings for Conga Composer system users. CC User Profiles determined by Department Salesforce Administrator.

CONTACTS: A standard object in Salesforce that represents an individual person. The contact record contains details like a name, address, email, and phone number. A contact can be attached to an account and opportunity record.

CONTRACTS: A contract is an agreement defining the terms of business between parties.

COURSES: A course is simply a class offered at a university. For example, British Literature. A course is typically a child of an account with the academic department record type, because you can share courses across multiple programs but it's aligned with only one academic department.

COURSE CONNECTION: A course connection shows a contact's course offering through a course connection. A course connection could also be created for a contact who is added as a faculty member for the course. You can see a contact's course connections on the contact record.

COURSE ENROLLMENT: You can connect a contact to a course from the Course Connections related list on the contact, or from the contact's program enrollment.

DASHBOARDS: A dashboard in Salesforce is a graphical representation of what you might find in a report. Dashboards might include charts, gauges, or other graphics that represent the metrics that underlie them. They make it easy for a team to track progress toward a goal or metric.

DATA.COM: Data.com Clean helps you automatically update and enrich the account, contact and lead data that drives your most important sales and marketing processes, all right inside Salesforce.

DOCUMENTS: Represents a file that a user has uploaded. Unlike Attachment records, documents are not attached to a parent object.

ENGAGEMENTS: Represents an account and contact engagement activity, including engagement interest, type of engagement and status of the engagement.

EVALUATION: The object that holds post program evaluation questions and responses. Evaluations can currently be associated with Campaigns (RT: BEE Program Offering) and Sessions.

EVALUATION QUESTION BANK: Pre-populated list of questions to be used by Evaluation Template records.

EVALUATION TEMPLATE: An assemblage of Evaluation Questions that make up the questions of an evaluation.

FILES: Represents a file that a user has uploaded. Unlike Attachment records, documents are not attached to a parent object.

FIND VOLUNTEERS: Object created; ability to learn more about functionality and configuration if use needed.

FORECASTS: In the context of Salesforce, a forecast is a type of report that shows a tally of data from opportunities expected to close in a specified time period.

FORM ASSEMBLY: Software application that is installed with Salesforce. A Salesforce ISV Gold Partner, ability to create records, update existing records, prefill forms, send attachments, create chatter posts, avoid duplicate records, etc.

GEOPOINTE: Geopointe provides proximity searching, optimized routing, territory management, boundary layers, demographics, check in & more.

GROUPS: Only administrators and delegated administrators can create and edit public groups, but anyone can create and edit their own personal groups.

GENERAL LEDGER ACCOUNT: Enter GL Account information related to a specific Business Organization.

HEDA SETTINGS: The HEDA data schema serves as the foundation of your Higher Education system. It also provides robust business logic that maintains data integrity. HEDA includes the following additional, rich functionality: Affiliations, Relationships, Program Enrollments, Course Offerings

HOME: As it stated - a “home page” for your profile. Home tabs can be customized with components such as sidebar links, a company logo, a dashboard snapshot, or custom components that you create.

INTERESTS: Track clients’ personal and financial interests so it’s easy to personalize communications and match clients with events of interest.

INTEREST TOPICS: Track Interest Topics related to programs,offerings,events, opportunities that can be linked to a contact’s record as an Interest.

INVOICE: A list of services provided, with a statement of the sum due (total of invoice details).

INVOICE DETAILS: The line items of an Invoice record.

LEADS: A standard object in Salesforce that represents an individual identity at an early stage in the sales process. A lead record isn’t natively connected to other data in Salesforce, but is “converted” when it represents a valid opportunity (a process which creates a contact in its place, and associates it with account and opportunity records).

MACRO: A macro is a set of instructions, which tell the system how to complete a task. When an agent runs a macro, the system performs each instruction. Macros save time and add consistency to support agents’ work.

MAP: Mapped data points that have been derived from Geopointe.

MARKETING LISTS: Marketing Lists can be used to migrate, integrate and sync your Contacts, Leads and Campaign Members to Act-On Software, Constant Contact, Delivra, ExactTarget, MailChimp & VerticalResponse using SyncApps.

OEL STUDENT APPLICATIONS: Custom Object that captures Student Applications for Student Consulting Project offerings.

OPPORTUNITIES: A standard object in Salesforce that represents a potential sales deal. An opportunity record typically contains details about the potential deal, like expected deal size (a dollar amount that cascades up to Salesforce forecasts), expected close date, probability, and opportunity stage.

OPPORTUNITY CONTACT ROLE: The Contact Roles related list of an Account, Case, Contract, or Opportunity displays the roles that each Contact or Person Account plays in that record. On Person Account detail pages, the Opportunity Contact Roles related list displays the Opportunities on which the Person Account is listed in the Account Name field of the Opportunity.

ORDERS: Represents an order associated with a contract or an account.

PAYROLL: A record of the amount due to be paid to a faculty member for teaching in Executive Education programs.

PEOPLE: The People tab and the People list on the Chatter tab display a list of the users in your organization.

PRICE BOOKS: A price book is a list of products that your organization sells

PRODUCTS: A standard salesforce table that contains the products that one would typically associate with an opportunity. An example would be a list of services provided (Program Delivery, Program Development, Expenses, Travel, etc.).

PROFILE: Represents a profile, which defines a set of permissions to perform different operations, such as querying, adding, updating, or deleting information.

PROFILE OVERVIEW: Customize your personal Chatter profile with a photo and information about yourself so others can learn more about you.

PROGRAM ENROLLMENT: Tracks a contact's enrollment in a program.

PROJECTS: The project object is a listing of all applicants that have submitted a project proposal to the Office of Experiential Learning. Each project has an associated stage and status

RELATIONSHIPS: A connection between two objects, used to create related lists in page layouts and detail levels in reports. Matching values in a specified field in both objects are used to link related data; for example, if one object stores data about companies and another object stores data about people, a relationship allows you to find out which people work at the company.

REPORTS: A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. See Tabular Report, Summary Report, and Matrix Report.

SESSIONS: The session cache is active as long as the user's Salesforce session is valid (the user is logged in, and the session is not expired).

SOCIAL PERSONA: A social persona is a Salesforce object that represents a contact's profile on a social network such as Facebook, or Twitter.

SOCIAL POST: A social post is a Salesforce object that represents a post on a social network such as Facebook or Twitter.

SOLUTIONS: A solution is a detailed description of the resolution to a customer issue.

STREAMING CHANNELS: Channels shared with public read-only or read-write access send events only to clients subscribed to the channel.

SURVEYS: To query (someone) in order to collect data for the analysis of some aspect of a group or area. Surveys will be managed differently using different system tools (Form Assembly and Evaluations).

TERM: A term is a period of time when a course is offered. When you create a term, such as Fall 2017, and associate it with the course, you create a course offering.

VISUALIZE: The Process Visualizer uses specific notation to graphically represent each approval process. The shapes are based on the Business Process Modeling Notation (BPMN) standard.

VOLUNTEERS HELP: Object created; ability to learn more about functionality and configuration if use needed.

VOLUNTEERS WIZARD: The Volunteers Wizard creates a new Volunteer Campaign, and allows you to either copy all the Volunteer Jobs, Shifts, and Hours from an existing campaign, or to create sample Jobs and Shifts.

RESOURCES

SALESFORCE ONLINE RESOURCE LINKS

Trailhead – The Fun Way to Learn Salesforce

Blaze your Trail - trails are guided learning paths that chart your course through Salesforce skills.

Salesforce Help and Training

Salesforce's online resource for all things Salesforce: Getting Started, Community, Documentation, Technical Support, etc.

Getting Started with Salesforce

Salesforce's Customers for Life is here to help you be successful and get you up and running quickly. This group is designed for new customers to engage by asking questions, giving feedback, and sharing experiences.

The Power of Us Hub

A one-stop resource center where customers of Salesforce.org can find resources and training specific to nonprofit and higher education users, engage with one-another, and connect with employees, MVP's in our community, and rel partners.

- Ask Questions
- Answer a Question
- Collaborate
- Share resources