

<b>Name</b>	Salesforce Korn Ferry Sell Installation
<b>Situation</b>	B&V would like to install the new Korn Ferry Sell app that formally walks user through the Miller Heimen Sales process.
<b>Complication</b>	The previous custom built MH package will need to be removed and a new very expansive Korn Ferry Package will need to be installed.
<b>Reason For this Document's Existence</b>	To describe and align all parties and stakeholders to single plan for Salesforce Korn Ferry Installation.

## Removal of the MH V1.0 App

The existing Miller Heimen app revolves around a single object called Miller Heimen KF Sheet. This object does not act as a foreign key in any other table. It does contain two foreign keys to the Account and Opportunity objects. This Miller Heimen KF Sheet object can be deleted with little concern for system interruption.

**HOWEVER -> Once this object is removed, all 72 existing Miller Heimen sheets will be removed as well. These existing sheets can not be migrated to the new Korn Ferry app as are they are very incompatible with the Korn Ferry Data Model.**

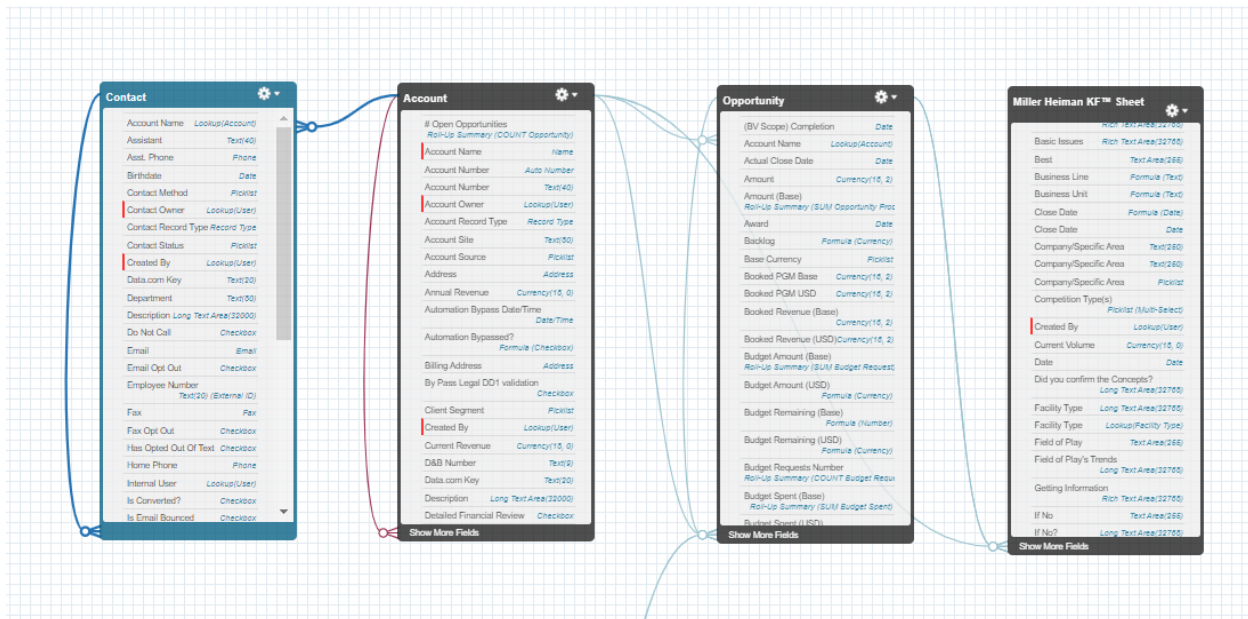


Figure 1 - Current Schema Design for Miller Heimen KF Sheet Object (from Schema Builder)

References to the Miller Heimen KF Sheet object should also be removed from the Page Layouts for the Opportunity Object and Account Object.

Once the legacy Miller Heimen KF Sheet object has been removed a new build of production should be done and deployed before installing the Korn Ferry sell app.

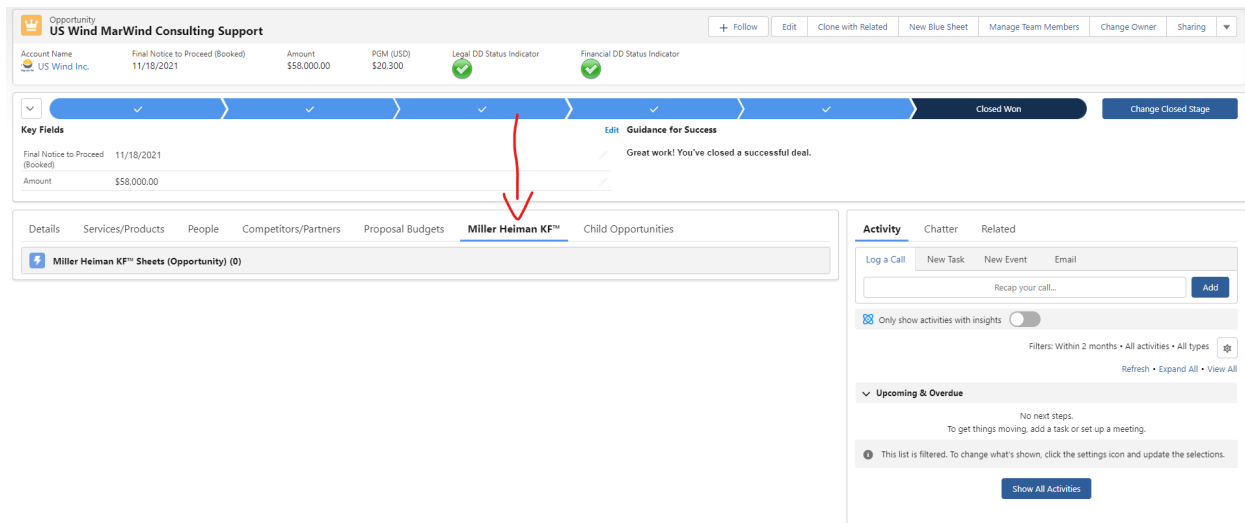


Figure 2 - Opportunity Page Layout with Reference to Miller Heimen KF Sheet Object

## Installation of Korn Ferry Sell App

The Korn Ferry Sell app is a massive application. It consists of over 75 custom objects and numerous lighting components, reports, apex classes and more. This single app will increase the overall footprint of our Salesforce instance by 20%. As big as the app is, Black and Veatch should not hit any limitations or threshold installing it.

## UAT Installation

The Korn Ferry Sell App greatly changes the flow of an opportunity object. For that reason and for purposes of preparing roll out materials (OCM) the Korn Ferry Sell App should be installed in the UAT (Full Data) sandbox first. There concern should be given to the page layouts and ensuring both Korn Ferry Users and Non-Korn Ferry Users have good access to the Opportunity and Account Object flow.

Permissions for the Korn Ferry app should be bundled into one single entitlement for the user.

Further, if Black & Veatch wants to include any Korn Ferry Sell data on reports then those reports will need to be recertified.

## Production Promotion

Once the UAT installation functions as desired the app should be promoted to the production instance in accordance to a full UAT rollout.

## Implementation Steps

OCM will be key in this roll out. The Korn Ferry app is massive. This list of steps DOES NOT include any OCM tasks as those should be determined by the OCM team and Product Ownership.

ID	Type	Description
1	SFDC-Support Task	Remove Miller Heimen KF Sheet object including history, chatter and other child objects of the Miller Heimen KF Sheet object
2	SFDC-Support Task	Remove all visual references to the Miller Heimen KF Sheet object on opportunity and account objects
3	SFDC-Support Task	Rebuild and publish a New production version with the Miller Heimen KF Sheet object removed.
4	SFDC-Support Task	Install Korn Ferry Sell in UAT Environment and configure Permission Set. Test new Korn Ferry Opportunity Page Layout and configure page layout as needed.
5	SFDC Product Ownership	Go/No on page layout in UAT environment
6	SFDC-Support Task	Install Korn Ferry Sell App from the App Exchange in the Production Environment
7	SFDC-Support Task	Apply Permission Set to first group of users and set Korn Ferry Sell as their
8	SFDC-Support Task	Certify Korn Ferry Reports that B&V users will be using and move to Certified Report Folders

## Solution Alternatives

None