Salesforce Org Strategy

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Why is Org Strategy important, what are the possible org patterns
and what are some of the benefits and challenges to consider?

#1 Org Strategy: why is it important?

As the adoption of Salesforce platform grows, customers experience an increase in
demand for more applications and more business units want to use Salesforce but
often times, different business stakeholders have conflicting priorities and
requirements. The requirements around governance, agility, autonomy, API limit and
data security arise and these requirements vary from team to team and sometimes

are very complex and/or conflicting. That's when most customers wish that they an optimal Org Strategy for their business before they started their journey with Salesforce. So whether you are just beginning to implement your first use case on Salesforce or have been a long time Salesforce customer it is never too late to determine an org strategy pattern that works for your business and will accommodate your future growth and business models.

This whitepaper will walk you through the various considerations in choosing between a single org and multi-org solution. It will help you to determine certain things about your business and how you plan to use Salesforce before you start.

Following are some of the benefits to executing a sound org strategy as you plan on building a new system or making major changes to your existing Salesforce system.

- This ensures that you've taken into account the business requirements to get maximum functionality and value from your org strategy.
- Planning a good org strategy will also allow you to take into account the technical requirements and limitations of your overall solution ensuring that you meet the needs of your corporate enterprise architecture strategy.
- Perhaps most importantly, it will also help you to accommodate future growth and foreseeable changes to your systems.

From what we have seen, the customers who don't spend enough time upfront evaluating an org strategy may subject to following risks of not having an org strategy.

- A lack of analysis will likely lead to potentially costly and more frequent changes to your org architecture as you struggle to make your existing architecture serve an ever-evolving set of business requirements.
- By not fully evaluating your needs with an org strategy, your architecture may hit technical limitations such as our governor limits or large data volume problems that affect either the performance or functionality of your system.
- Without a sound org strategy, you may end up with an architecture that makes it difficult to share and access the data you need to manage your business.

A good org strategy is part of your overall governance org and will result in a system that's optimized across all of your enterprise concerns like security, data sharing, scalability, agility, cost, and the maintainability of your system.

#2 Org Strategy Considerations

Unfortunately, establishing an optimum org strategy is not a trivial effort. Many times there are conflicting requirements that leave customers unclear about what is the best org strategy for their business. We recommend customers to consider the tradeoffs of a single v/s multiple org so they can make a fact-driven decision for their business. Customer must keep in mind that many times it will be almost impossible to satisfy their entire set of requirements and hence it is important that they list their general requirements in the order of importance. Some of the most common requirements are listed below.

a. Autonomy
b. Innovation
c. Collaboration

d.   Central governance

e.   Security and Visibility (internal and external)

f.   Speed to market

As illustrated in figure:1 there are multiple types of consideration, although business and technical considerations may play a key role but also consider requirements around operation support and organizational culture. A good Org strategy balances business, technical and other requirements.
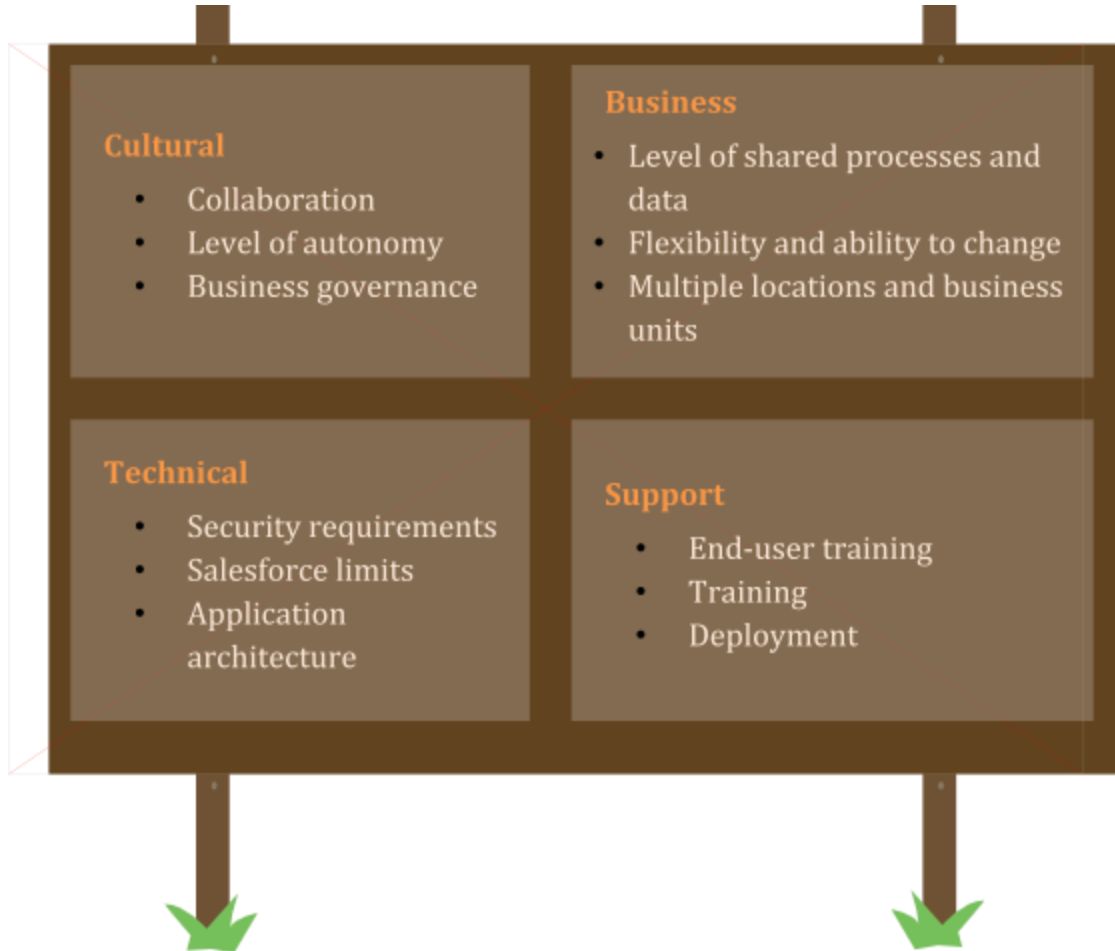

Cultural
- Collaboration
- Level of autonomy
- Business governance

Business
- Level of shared processes and data
- Flexibility and ability to change
- Multiple locations and business units

Technical
- Security requirements
- Salesforce limits
- Application architecture

Support
- End-user training
- Training
- Deployment

Figure: 1

#2.1   Org Strategy - Cultural considerations

One of the most important considerations as it relates to people and process.

#1 Level of autonomy - consider what level of anatomy do the different business units expect. Are they currently sharing other platforms and is that shared platform model working out for them? A strong autonomous operation requirement will lead to a multi-org existence model.

#2 Collaboration -do business users from different groups need to cross-collaborate to get the job done? Are there common users among different groups? A high number of common users licensed in the orgs makes a good case for single org to get advantage from the license optimization.

#3 Business governance - consider what kind of governance, compliance and controls

are expected? For any regulated use case that requires high-level of monitoring/auditing i.e validated apps for healthcare industry it is recommended to deploy the application in a separate org different from the rest of the applications.

#4 Flexibility/adaptability - how flexible the users are and how would it impact the way they do their job today. Also, same applies to the applications, determine if applications are flexible and can adapt to changes in the common data models.

#5 Merger & Acquisition – if multiples orgs exist as a result of merger and acquisitions and consolidating them into one may not provide any immediate value and sometimes business processes can be conflicting/ interfering so carefully assess the value of org consolidation of acquired orgs. It is important to think what is your end goal? Are you looking to let them operate as a separate entity or commingle with your current business processes? Depending on the response you could lean toward multi-org v/s single org respectively.

#2.2   Org Strategy - Business Considerations
Assess your business requirement with respect to following business drivers.

- Business strategy
- Multiple locations and business units
- Level of shared processes and data
- Speed to market
- Predictability of delivery
- Backend systems, master data
- Inflexibility of current processes

If you require a closed data/process sharing model and looking for speed to market and predictability of delivery working through relatively inflexible business processes then you may be more successful with a multi-org existence model.

Also, consider where your master data reside (in Salesforce or any other external system) and the number of integrations to be built/managed. With multi-org model your overall TCO/ operations overhead will be higher with respect to integrations.

#2.3   Org Strategy – Technology Considerations

- Data security
- Data sharing and volume
- Integration strategy and architecture
- Business reporting
- Complexity and scalability
- Common functionality
- Governor limits
- Amount of Customization (Apex code)

As you continue to drive adoption of your Salesforce platform you may soon realize some of the technical factors to consider when determining an optimum strategy for your org.

Do you deal with lots of sensitive data (PHI/PII and financial/ Intellectual property) that you need to share with a small set of users and hide from the vast majority of the users? Are too many data sharing rules are slowing down your process and impacting the performance of the overall org? If you answered yes to the above two questions then we recommend that you evaluate multi-org existence model for your business.

Consider your overall data volume and future growth. A centralized org provides the benefit of 360^0 reporting but he heavier the org is the longer it will take for jobs/reports to run in the org. Also, if you expect tons of coding/customization then keep in mind there are some limits enforced on the amount of customization and CPU/resource utilization (governor limit) customers are allowed to have in a single org. If you are currently at >70% governor limit usage range then we recommend you to explore multi-org existence as you long-term plan.

#2.4   Org Strategy – Support Considerations

Consider the structure of the support team who will be responsible to configure, build, deploy and administer applications on Salesforce platform. Is there a central support team or distributed? Customers with distributed support team model may experience challenges in running their operations in a Single org. Some customers have successfully overcome these challenges by setting up a Center of Excellence (CoE) and a governance board/committee to seek approvals from all the stakeholders before deploying changes that may impact other applications hosted in the same org.

Following are some of the factors to consider when evaluating your current support model
- Development model
- Training
- Deployment
- End user support
- User profiles
- Org level security and administration complexity

#3   Org Strategy: Possible Org Existence Models

After you have carefully assessed your requirements/model against the cultural, business, technical and support considerations you may have an inclination toward a single org or multi-org existence model as shown below (figure:2)
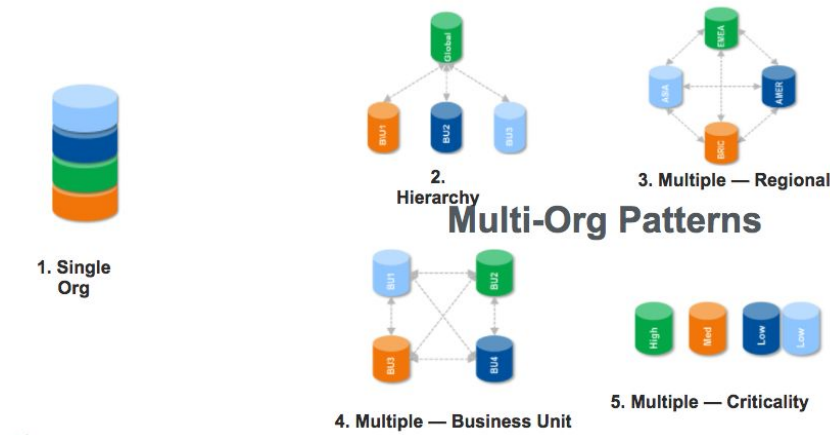
Figure: 2

In the next section, we will share some of benefits and challenges of Single v/s Multi-org model to help further in your decision making process.

#3.1 Single Org Model

#3.1.1 Single Org : Benefits and challenges

Following are some of the benefits of having a single unified org.
- Cross business unit collaboration
- Shared solutions for common business processes /Integrations
- Data sharing
- Unified reporting
- Single login
- Reduced TCO

Having a single org promotes reuse and cross collaboration. This is good for organizations with open data sharing usecases. Given all that data reside in one org it also facilitates unified reporting and single 360 view of the customer. Single org supports service reuse & license optimization and customers have experienced reduced overall TCO in the single org model v/s multi-org.

Following are some of the challenges customers experience in a single org model.
- Org complexity
- Concurrent enhancements
- Governor limits
- Security and sharing Org wide settings
- Data volumes

As the adoption of Salesforce platform grow and so as the amount of data/code and complexity and many times that slows down the speed and agility to deploy new applications and/or enhancements. If you have a multi release planned for different applications then please factor in some extra time and some of your concurrent/ parallel enhancements may need to be changed to sequential enhancements depending on the

scope and impact. Increased amount of data/code complexity also makes it more prone to hit Salesforce governor limits

#3.1.2 Single Org: Use Cases

A question that often gets asked; what are some of the top reasons that lead customers to go with Single Org Strategy?

Figure: 3

- 360˚ view & reporting
    - Single 360˚ view of all customer engagement and consolidated reporting across all data and business units.
- Sharing of global data
    - Enable global processes to access the common global data e.g. Single sales & support processes.
- Collaboration
    - Improve enterprise-wide collaboration.
- Standardize processes
    - Enable consistent processes across all the business units.
- Support and development
    - Realize efficiencies and economies of scale.

#3.2 Multi-Org Model

As you have read so far, single org existence model is great for many usecases but it comes with some challenges especially when your org adoption grows and there are many different business constituents with conflicting priorities and requirements. If you are at a point where you think a single org model can not meet all your business needs and/or governance and performance is going out of control due to complexity/large data volume then evaluate the multi-org existence model for those usecases. Following are some of the benefits of a multi-org model.

#3.2.1 Multi-org Model: Benefits and Challenges

Listed below are some benefits and challenges that you should consider when evaluating multi-org existence model.

Benefits

- Simpler security architecture
- Improved time to market
- Easier to manage object access /record sharing
- Reduced complexity
- Potential for lower data volumes
- Simpler to manage and enhance

Having No unified view of the data is one of the main limitations of the multi-org pattern. But there are some tools and best practices to address/minimize the impact of this limitation. Customers are highly encouraged to review Salesforce connect Cross-Org Adapter to enable spoke (consumer) org to access data from the hub (provider) org without having to build and manage redundant/expensive integrations. Also, consider Heroku- Salesforce connector that provides real time data sync capability and can make a copy of your Salesforce data available in Heroku in the form ready to get consumed by the other Salesforce orgs or systems. Similarly, many of the following challenges can be either addressed or the impact could be minimized with careful planning.

Challenges

- No unified view/definition of processes and data
- Minimal collaboration across business units on different orgs
- Data fragmentation and lack of 360 Reporting
- More efforts to build and support Integrations
- Duplicated administration functions
- Multiple User Ids
- Higher Licenses cost

#3.2.2 Multi-Org Model: Use Cases

Considering the benefits and challenges of the multi-org model it is good to understand what are the typical usecases that are best met with a multi-org strategy.

Top Reasons Why Customers Choose Multiple Orgs...

Legacy
>   M&A resulting in different processes and culture.

Business units
>   Multiple operating companies running their own P&L.

Functional
>   Business units operating totally different processes.

Legal
>   Legal and data privacy regulations..i.e. "Chinese wall" requirements, GDPR and
>   other data privacy laws..

Org limits
>   Current single org running into org limits and splitting the org will reduce the
>   likelihood of hitting those limits.

Geographic/Language
>   Different geo-political requirements across regions.

Data visibility
>   HR & Legal with their data to be stored in different Orgs.

#3.3 Org Strategy - Assessment Scoring Template

Now that you learned that there are many factors to consider and some requirement
favor Single org while some others are best met in a multi-org existence model. Here is a
draft template that you could refer and build on this to ensure that you have captured all
of your current and future requirements to come up with the best Org Strategy for your
business.

| Consideration	Requirement/Use Case	Single Org Preferred?	Multi-Org Preferred?
Cultural	Need autonomy		✔
	Require Cross Collaboration	✔	
	Require tight governance/control		✔
	Limited flexibility and adaptability of the users and applications		✔
	Standalone M&A Org		✔
	M&A org processes to be integrated with Core	✔	
Business	Large number of shared processes and data	✔	
	Speed to market		✔
	Predictability of delivery		✔
	Sensitive data and Controlled process (HR apps, validated apps etc)		✔
	Global operations but subject to data privacy laws and regulatory requirements		✔
	Need to support Customers segmentation/Level of service / 360 customer view	✔	
Technical	Hitting governor limits or close to threshold?		✔
	Open Data sharing	✔	
	Consolidated Business reporting	✔	
	Complex org and have scalability issues/concerns?		✔
	Large number of Integrations with backend systems/ master data	✔	
Support	Centralized Development model	✔	
	Distributed Deployment teams		✔
	Centrally managed Org level security, administration and end user support	✔	

#3.2.3 Multi-Orgs Model : Data/Process Distribution Patterns

We strongly recommend that customers should first evaluate the possibility of continued use of a unified single org. Also, they should assert if the benefits of going with a separate orgs overweigh the challenges. After the assessment if they come to a conclusion that single org is not going to be able to meet their requirements then here are some multi org patterns that are common in the industry and widely adopted by our customers.

All four multi-org patterns listed below may require some data interactions between the different orgs. Customers are highly encouraged to review Salesforce connect Cross-Org Adapter offering. Cross-org Adapter enables consumer org to access data from the provider org and avoids the need for building & managing redundant integrations.

#3.2.3.1 *Multiple Orgs –#1 - Hierarchical Pattern*

Hierarchical pattern consists of a Global org serving as a parent/provider org and connected with several children/consumer org. This is similar to a hub and spoke model.
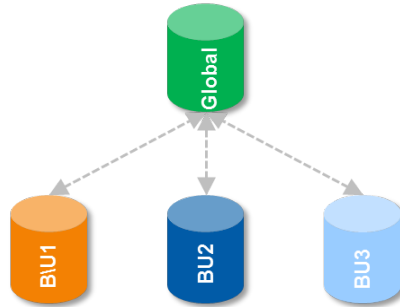

A benefit of the hierarchical pattern is that it addresses the business requirements without having to consolidate Orgs and/or change the business processes currently deployed within the children Orgs.

**Tools to address multi-org challenge**
Customers are highly encouraged to review Salesforce connect Cross-Org Adapter to enable spoke (consumer) org to access data from the hub (provider) org without having to build and manage redundant/expensive integrations. Also, consider Heroku-Salesforce connector that provides real time data sync capability and can make a copy of your Salesforce data available in Heroku in the form ready to get consumed by the other Salesforce orgs or systems.

#3.2.3.2 Multiple Orgs –#2 – Region based Pattern

The benefit of region based multi-org pattern is that it accommodates countries local regulation, processes and data encryption requirements. Also many countries especially in EU have data privacy regulations and restrictions on the geographic location of the data.
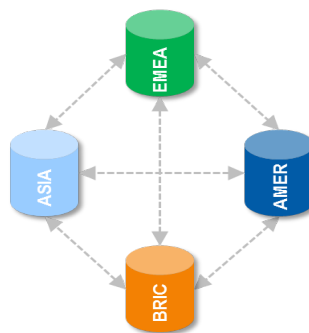
#3.2.3.3 Multiple Orgs –#3 – Business Units Based Pattern
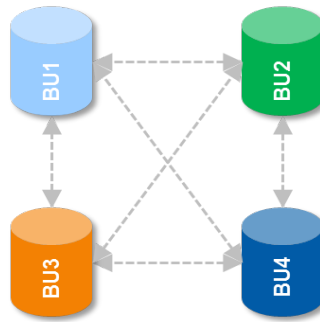
The Business Units Based pattern works well when business units need autonomous operations and standardization of the processed within each business unit. Ensuring a good COE model and enforcing global standards of technology/data security and developmental practices across all the orgs can help mitigate some issues that come with siloed operations in different units.

#3.2.3.4 Multiple Orgs –#4 – Criticality based Pattern

Criticality based pattern allows applications of similar criticality level to be co-hosted on the same org. Customers can have a different level of regression testing procedures for different orgs, from more strict to less strict as they go from high to low criticality org. Relaxing the governance on lower criticality orgs enables citizen developers and promotes agility and quick time to market. One consideration to keep in mind that in this patterns your users may need the license to more than one org hence consider the license overhead before you make a final decision.

Summary

We discussed why Org Strategy is important, what are the possible org patterns, and what are some of the benefits and challenges to consider. We also discussed what are the typical usecases for single v/s multi-org patterns and what are the widely used Salesforce adaptors to address some of the limitations of a multi-org pattern. Hope this content helps you in your efforts to identify an optimal org strategy to meet your business objectives.

The recommendation is to start with a single org model and have a comprehensive org strategy playbook and keep it up to date. You org strategy playbook should identify the uses cases that will require a separate org and an appropriate multi-org pattern. So when new business requirements come up and you realize that a single org model cannot meet all your business needs then you already have a well thought of org strategy to execute on.

If you need further assistance then reach out to your Salesforce Account Executive for an [Org Strategy Accelerator](#) offered by Salesforce Customer Success team.