

2022

Hunley Associate Salesforce Consultant

Academy



A synthesis of insights and recommendations to develop Hunley's Consultant Academy, based on workshops conducted by Montage Learning.

Press Record



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Academy Mission Statement

What is our goal?

Hunley needs consultants with experience **AND** skills capable of collaborating on projects, **BUT** it is difficult to source/recruit/train those who have the right background, **THEREFORE** Hunley's Academy is an opportunity for those that exhibit the right attributes to join Hunley, gain experience, and contribute to the client experience as an Associate Salesforce Consultant.

Montage uses the And, But, Therefore (ABT) model (developed by Randy Olson) to frame a goal, problem or obstacle in a story format.

01



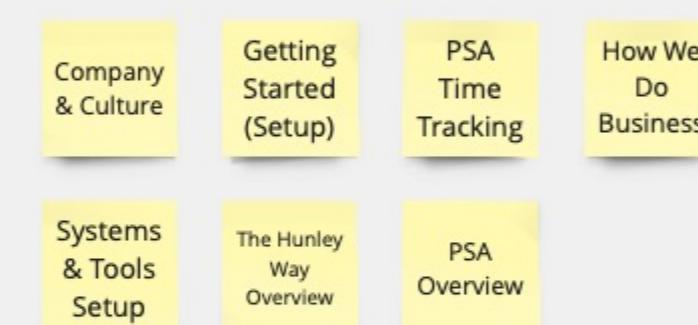
Knowledge Buckets

Support Areas

Role Best Practices



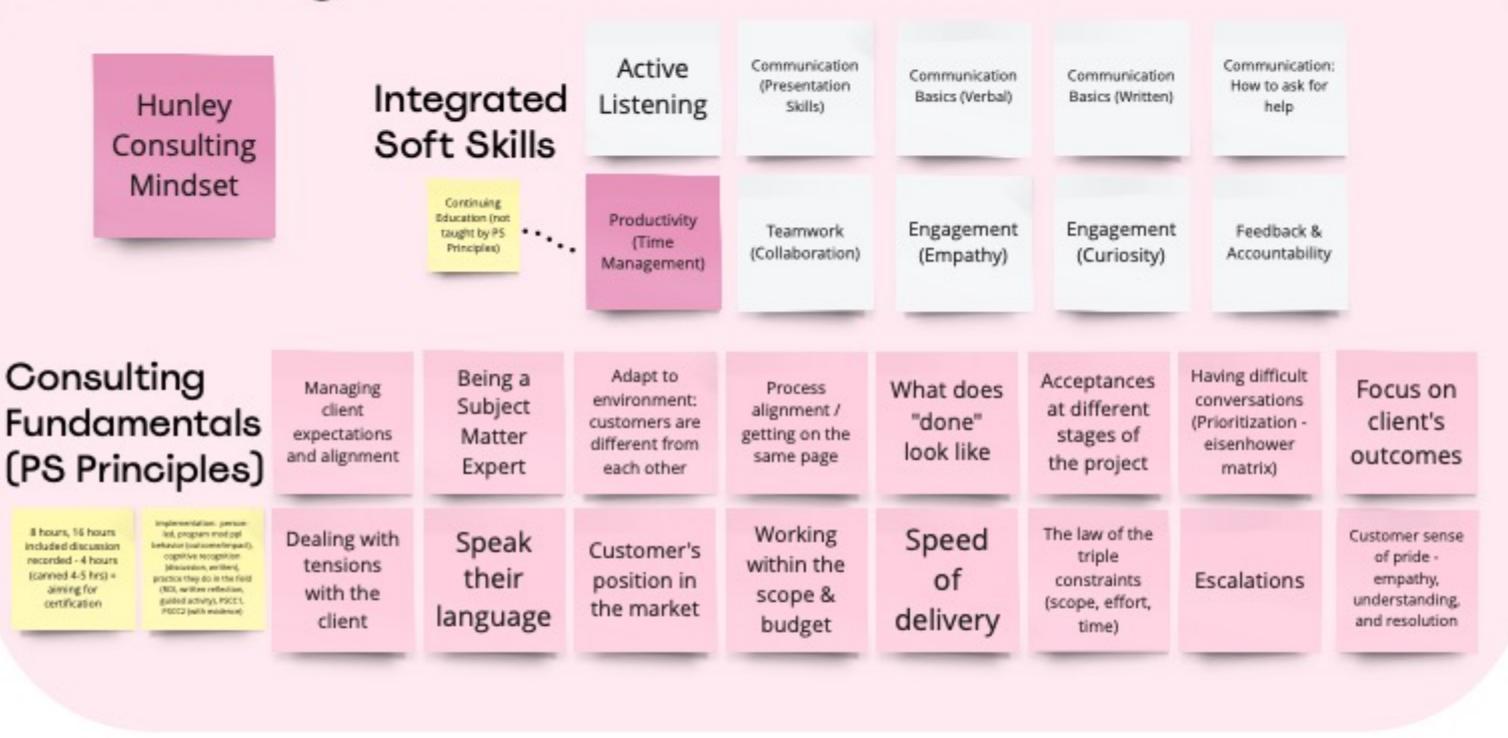
Onboarding



02

4 Areas of Focus

Consulting (Soft Skills + What it is)



Technical (Salesforce)



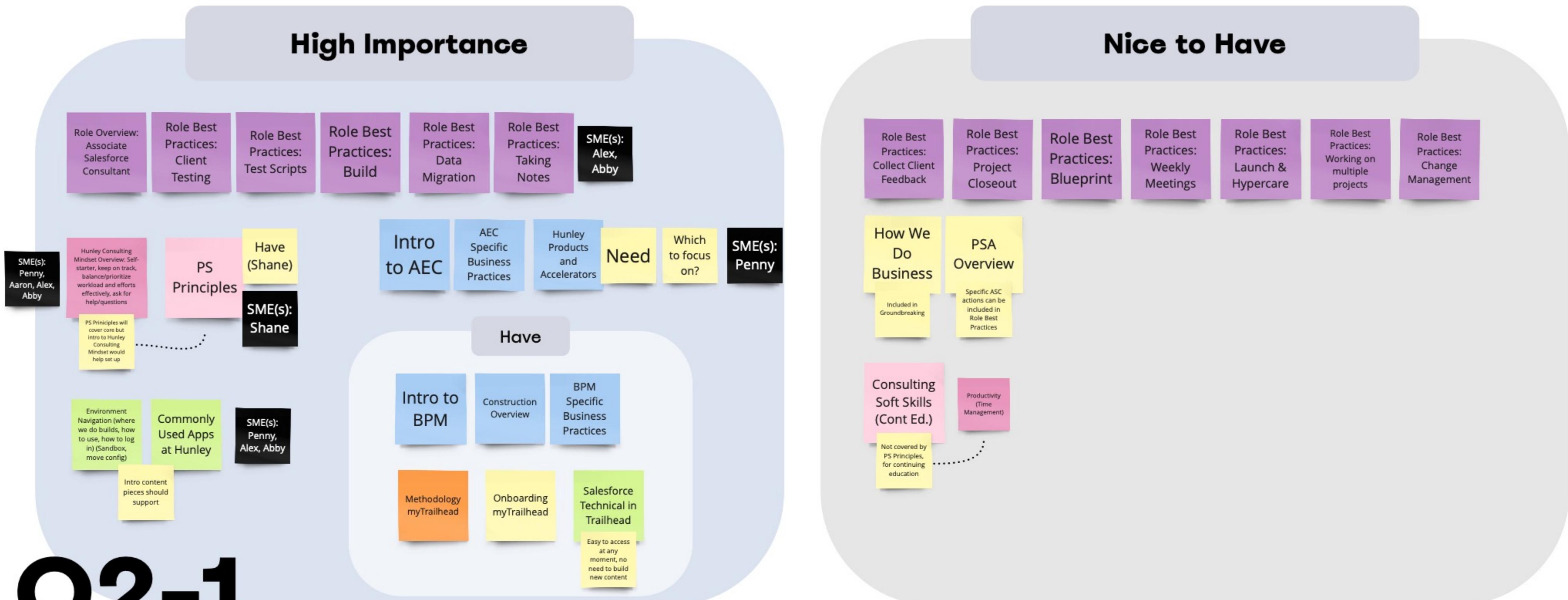
Industry



Methodology



Knowledge Prioritization



02-1



Academy Phases

4 Phases that integrate the different Knowledge Buckets

Onboarding

Academy Participants learn about the Hunley Group, gain an overview of the Academy, and get setup.

Consulting & Salesforce Basics

Academy Participants learn Salesforce Basics and work on their Consulting soft skills.

On a Project

Academy Participants learn Hunley's Methodology and apply role best practices while working on a Mock Project.

Capstone & Shadowing

Academy Participants work on, complete, and present their Capstone Project while shadowing others.

Considerations in Design:

- Remote Environment
- Independent Work
- Opportunities to Apply & Practice

ASCM
Onboarding &
Consulting/SF
Basics

ASCM
processes?

03

Different
project
cycle

different
process - need
to define MS
process (borrow
some from PS)

Different
flavors for
discovery
as example

borrow
from PS
processes

3 months, pass admin cert, lead primary but not independent (2 basic clients, not average client), aligned with senior members as support

basic admin cert, support simple clients, work with senior CSM (works on tasks but someone else maintains relationships)

no prior experience get better technically but work with others to accomplish tasks

missing consulting, processes,

Hunley:
best examples
of work



Academy Curriculum

4 Phases that integrate the different Knowledge Buckets

Curriculum Link

[Hunley Academy Curriculum](#)

Learner Actions

Knowledge: Written content or media that learners can consume passively and independently.

Application: Learners take an active role in using recently acquired knowledge to solve a problem or reflect with guidance.

Practice: Learners utilize what they've learned in a "real world" scenario, a Capstone Project, leveraging known resources and teammates.

Academy Breakdown

Segments 1.1 - 1.5

Segment
1.1

Segment
1.2

Segment
1.3

Segment
1.4

Segment
1.5

- Remote environments require flexibility
- Allows facilitators to adjust curriculum based on candidates and circumstances

O4



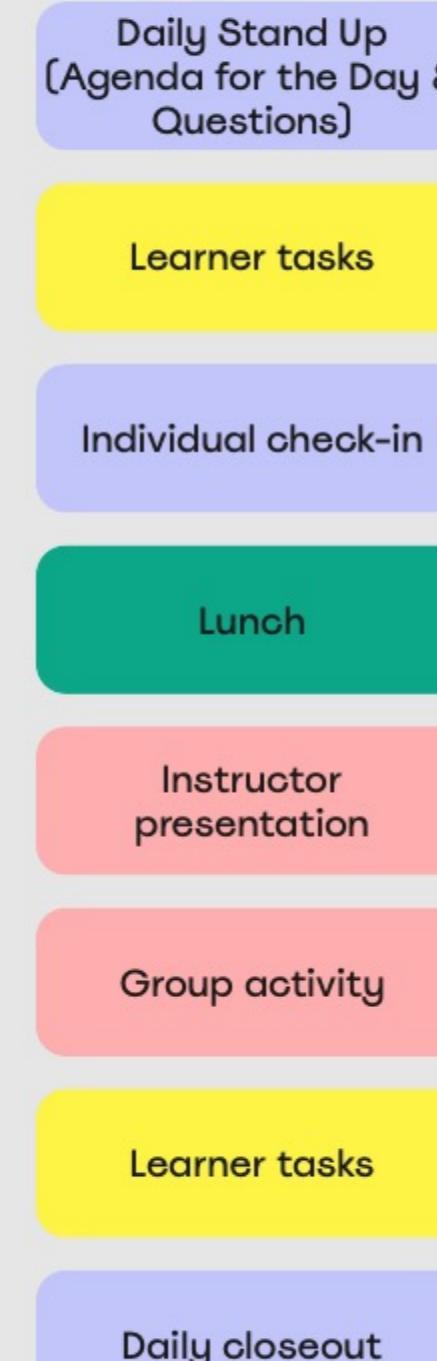
An Academy Day (Segment)

What does a day look like?

- Up to 6 hours of work each segment
- Breaks and lunch considered
- Daily Stand Up and Closeout
- Individual check-ins
- Consider Recommendations like Icebreakers, Coffee Chats, Lunch Breaks with Hunley employees outside of cohort, Physical Exercises, etc

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Day (Segment) Structure Example 1



Day (Segment) Structure Example 2



Assets

What tools are needed?

In addition to content creation, there are also tools that are required to support both Facilitators and Learners in their roles throughout the Academy.



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Recommendations

What are some other things to consider?

- Build Culture:
 - Icebreakers help break up the day and get to know each other (cohort connection, fun activities, virtual mixers)
 - Setup social events for the cohort to bond
- Stress Management
 - **Suggest physical activities (good for company overall)**
 - Incorporate fun competitions
 - Weekly/Monthly lunch/dinner meal budget
- Slack Channel for Academy Cohort
 - Slack Profile sharing
 - Polling in channel
- If possible, gather Academy participants for in-person kick-off for one or two days
 - Hunley Internal Question: Who would need to be involved?
- Academy End Celebration - Capstone Project Presentations

06-1



Supports

Subject-Matter Expert

- Time required, dependency based on priority of content build
- Input on building Role Best Practices
- Capstone Mock Client creation
- Input on Consulting content
- Provide feedback on Facilitator Guide
- Hunley Onboarding missing pieces (PSA overview, how we do business, etc)
- Review, edit and sign-off on content/activities
- SME support and availability for Facilitator during Academy (answer questions, presenter for specific topics, interact with Slack cohort)

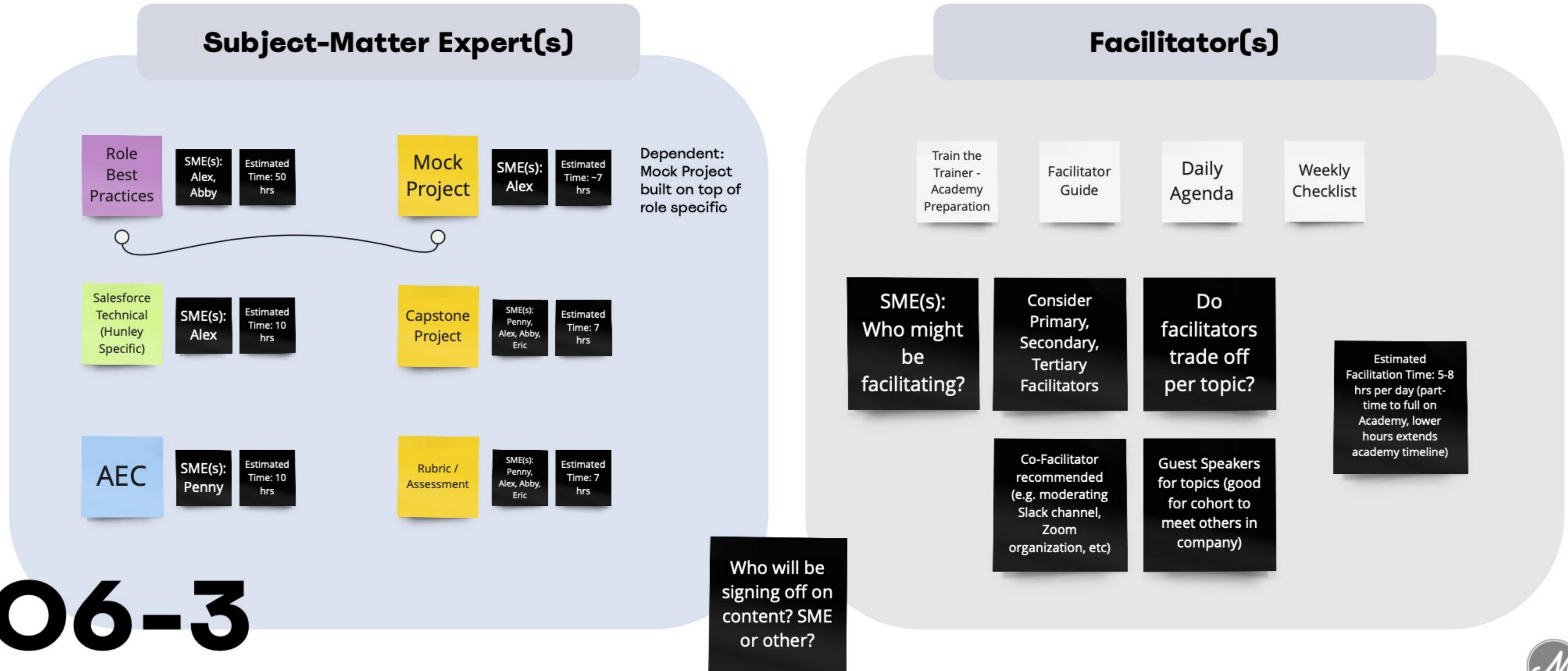
Facilitator

- During Academy:
 - Managing schedule
 - Creating agendas
 - Giving feedback & supports
 - Meeting 1:1 with learners during check-ins
 - Assessing projects & learners
 - Provide coaching
 - Initial assessment of additional curriculum needs
- Assume full time Academy work while in session
- Moderator for Slack cohort
- Facilitator should be one person but can have multiple supports

06-2



Supports



Mock Project

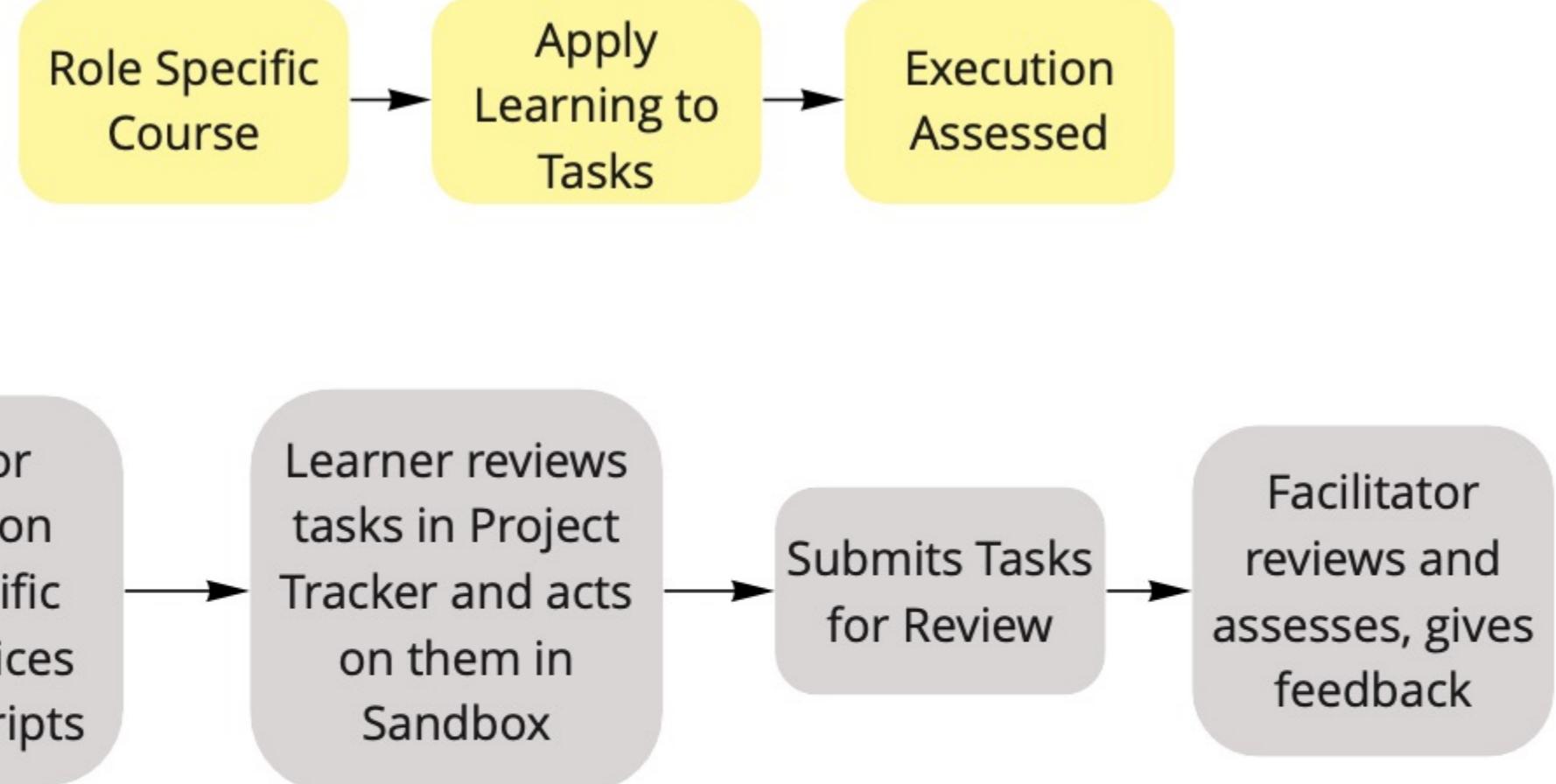
Outline & Implementation

- Integrated into the Role Specific knowledge area
- ASC completes tasks assigned to them
- Role Specific topics are introduced and reviewed using Instructor Led Presentations (A Hunley example to give context would help setup learners tasks)
- ASC Learner reviews tasks assigned and takes actions (Tasks can be assigned in Project Tracker, executed in a Sandbox)
- We can also build Short Simulations for specific actions or context that don't require Salesforce technical knowledge for learners to apply what they've learned

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Checkpoint: Learners apply their Role Specific knowledge + Salesforce Technical Knowledge.

Hunley Effort:
What steps are needed to get this into sandbox?
Estimate of time?



Capstone Project

Outline & Implementation

- Each group is given a mock client, SOW, and use case (scenario outline) to work from
 - Mock client can either be written or previously recorded client meeting OR Facilitator/Hunley Employees can role-play as a client
- Capstone Projects are non-guided practice opportunities
 - Learners have to manage tasks, the process, and the team
 - Facilitators can be asked questions but learners are asked to review resources or discover other resources
- 3 - 4 weeks

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Live
role-
play?

Checkpoint & Milestone:

Learners apply their Role Specific knowledge + Salesforce Technical Knowledge to complete group project.

Project Phase
Introduction
Presentation
(~3 hours)

Teams work
on Project
together
(~6 hours)

End of
Capstone:
Teams Present
Project

Facilitator
presents on
project phase,
address
questions, and
ask learners to
share experiences

Learners work
as a team to
manage their
project to
completion

Project teams
use resources
and best
practices to
address project
issues

Facilitator
reviews and
assesses
projects, gives
feedback

Hunley Effort:
What steps are
needed to get this
into sandbox?
Estimate of time?

Resource
Materials:
User Story
Bank

Different
Examples
needed for
ASC vs ACSM



Rubric Mockup

What might the rubric look like?

- Instructor assessment
- Self assessment
- Team assessment

Align levels
with
benchmarks?

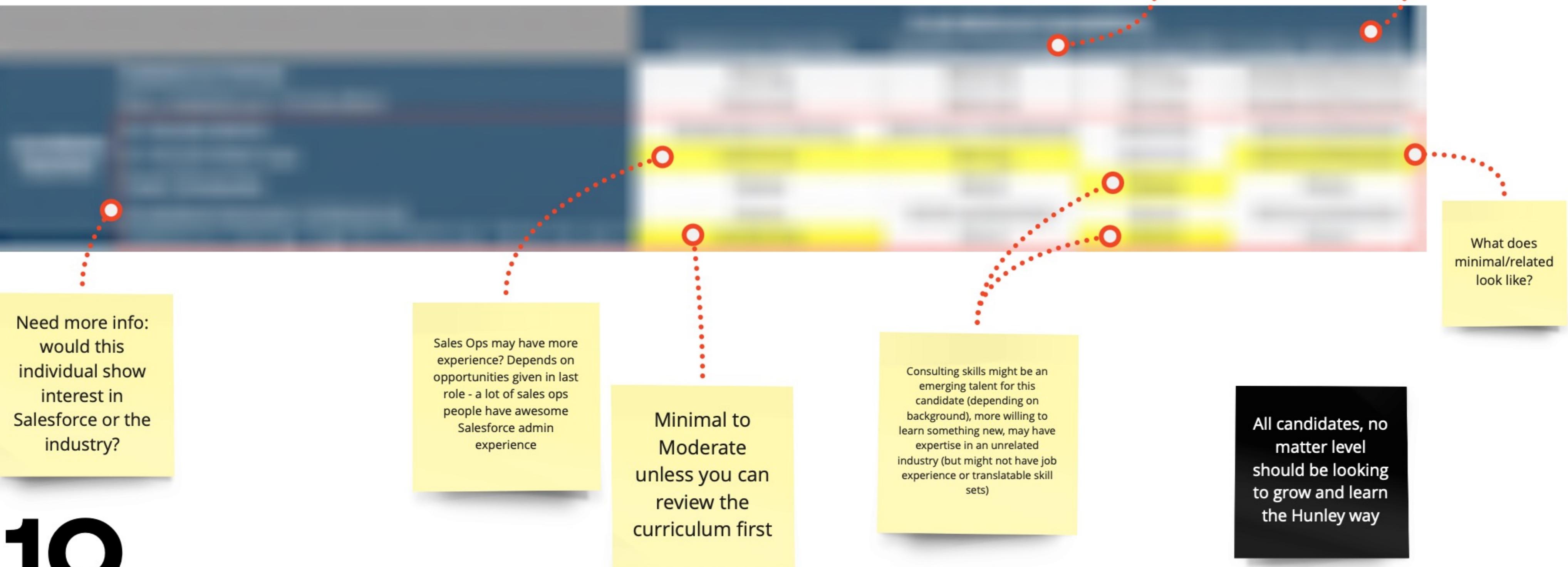
Knowledge Area	Knowledge Topic	Emerging (1)	Developing (2)	Proficient (3)	Advanced (4)	Expert (5)	Score	Notes
Role Best Practices	Note Taking	<p>Know: Has trouble understanding the note-taking process and how to use template</p> <p>Apply: Uses note-taking practices inconsistently and relies heavily on resources</p> <p>Practice: Requires more opportunities to take notes in context to better understand how to apply</p>	<p>Know: Understands best practices</p> <p>Apply: Uses note-taking practices consistently with some errors or guidance</p> <p>Practice: Able to complete note-taking process independently but requires additional time and support</p>	<p>Know: Understand best practices and context</p> <p>Apply: Uses note-taking practices without error and can give feedback on the process</p> <p>Practice: Able to follow note-taking processes in context, but may need additional time to complete (time efficiency)</p>	<p>Know: Understand best practices, can explain the process and support others</p> <p>Apply: Uses note-taking practices without error and can give feedback on the process</p> <p>Practice: Completes note-taking process in a time efficient manner</p>	<p>Know: Understand best practices, and mentors others</p> <p>Apply: Improves on the note-taking process and innovates</p> <p>Practice: Completes note-taking process easily, innovates and standardizes new practices</p>	3	Can improve time efficiency on project tasks

09



Notes on Candidates

Who might be a good fit?



Candidate Goals

Expectations of Candidates after Graduation

How do you see ASC adding value to a project after the Academy?

Actively listen, contribute and review requirements and complete declarative setup

Manage their time efficiently (complete tasks, seamless hand-off)

Own their processes to optimize, rinse and repeat

Provide perspective and feedback for projects

At the end of their first year, what do you see them achieving?

Contributing consistently on projects (e.g. SF recommendations, bring up red flags, pitfalls, time to task completion efficiency)

Strive for certification (potentially)

Choose a career pathway based on interests and strengths

ASC SME: sense of confidence and elegance, presenting solutions (owning a process and presenting it, internal facing), increased independence, expert on simple SF apps, able to mentor new ASCs

Ideal: Admin Cert (within 1st year) (ASC/ACSM)

Recommended Ideal Candidates

Optimal

In-House Admin

Salesforce Training Programs (VetForce, Climb Hire, etc.)

In-House Sales Ops

Acceptable

Unrelated Business Professional

Fresh Graduate

10-1



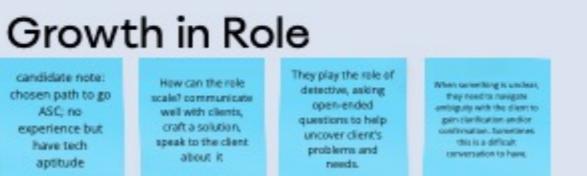
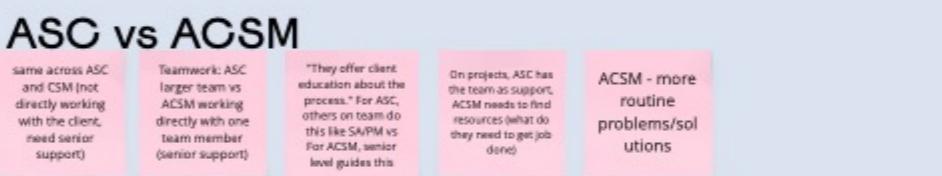
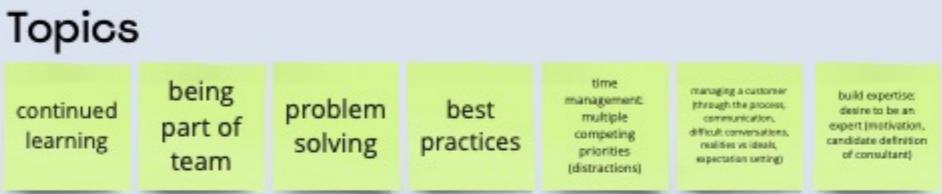
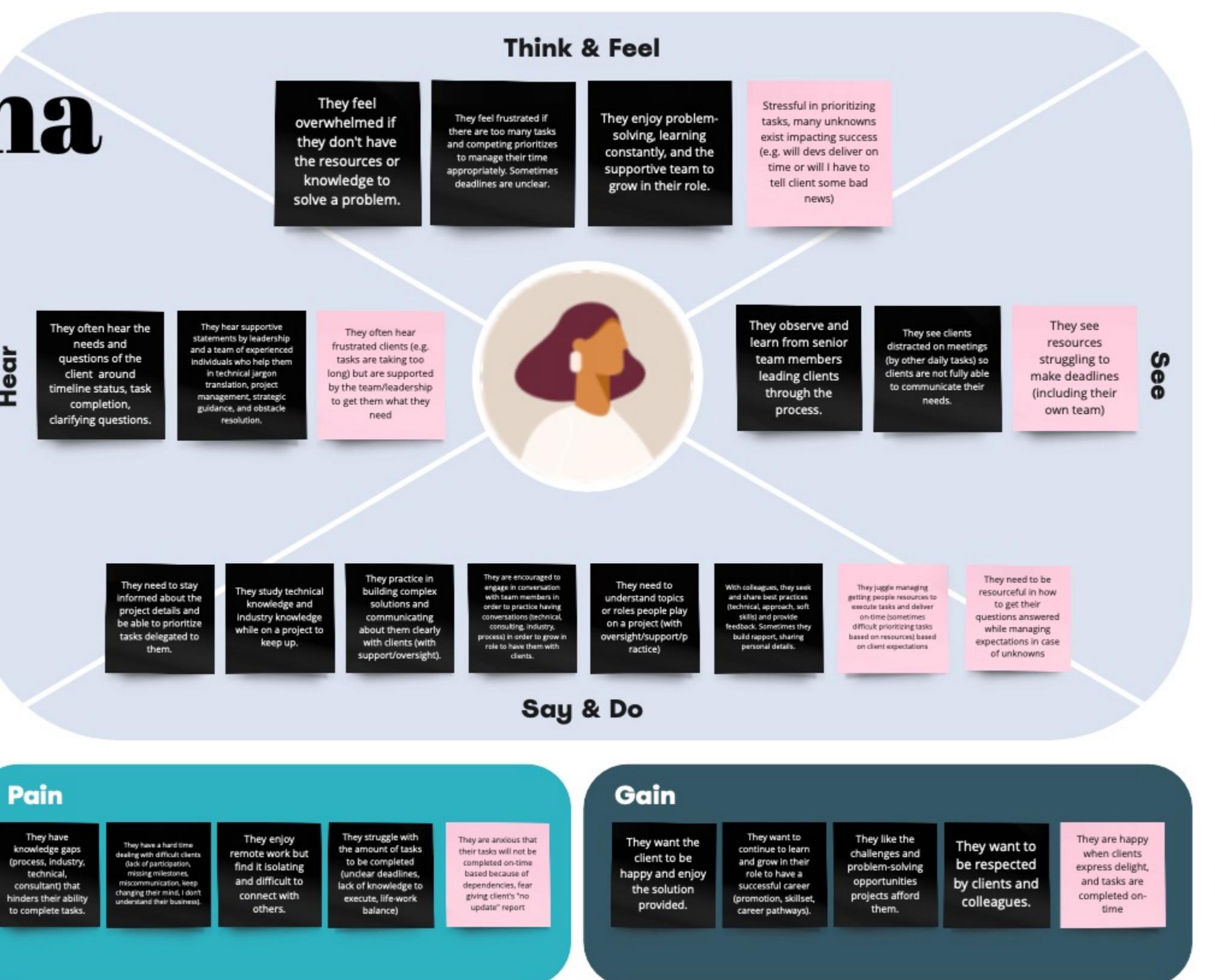
User Persona

 **Hi, my name is** Taylor
Taylor is our Consultant.

They work remotely, individually and/or collaboratively with a team, to engage and identify a client's business problem. Using their technical skills, they support the build of a Salesforce solution. They have solid technical aptitude and may have technical command; they may have been an "accidental admin" and/or may come out of a Salesforce Admin course.

On a project, they may find themselves listening into and sometimes participating in conversations by actively listening to capture takeaways. They ask questions with their team to clarify/define/synthesize/analyze the client's needs in order to build the best solution. If they don't know something, they research to find it. This can be challenging in the moment in navigating project nuance, ambiguity, and juggling deadlines. They have to keep learning to maintain or excel in their role.

10-2



Build Phases

What needs to be built?

Phase 1

Academy Assets:

- Facilitator Guide
- Daily Agenda
- Weekly Checklist
- Capstone Project
- Rubric / Assessment
- Mock Project

Role Specific:

- Role Overview: Associate Salesforce Consultant
- Role Best Practices: Client Testing
- Role Best Practices: Test Scripts
- Role Best Practices: Build
- Role Best Practices: Data Migration
- Role Best Practices: Taking Notes

Industry:

- Intro to AEC

Salesforce:

- Environment Navigation (where we do builds, how to use, how to log in) (Sandbox, move config)
- Commonly Used Clouds and Apps at Hunley
- Intro Presentations per Topic/Section
- Discussion Activities

Consulting:

- PS Principles
- Integrated into curriculum

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Phase 2

Role Specific:

- Role Best Practices: Collect Client Feedback
- Role Best Practices: Project Closeout
- Role Best Practices: Blueprint
- Role Best Practices: Weekly Meetings
- Role Best Practices: Launch & Hypercare
- Role Best Practices: Working on multiple projects
- Role Best Practices: Change Management

Industry:

- AEC Specific Business Practices
- Hunley Products and Accelerators

Consulting:

- Hunley Consulting Mindset Overview: Self-starter, keep on track, balance/prioritize workload and efforts effectively, ask for help/questions

Iterate
on
Phase 1

Phase 3 Continuing Education

Consulting Soft Skills (Cont Ed.)

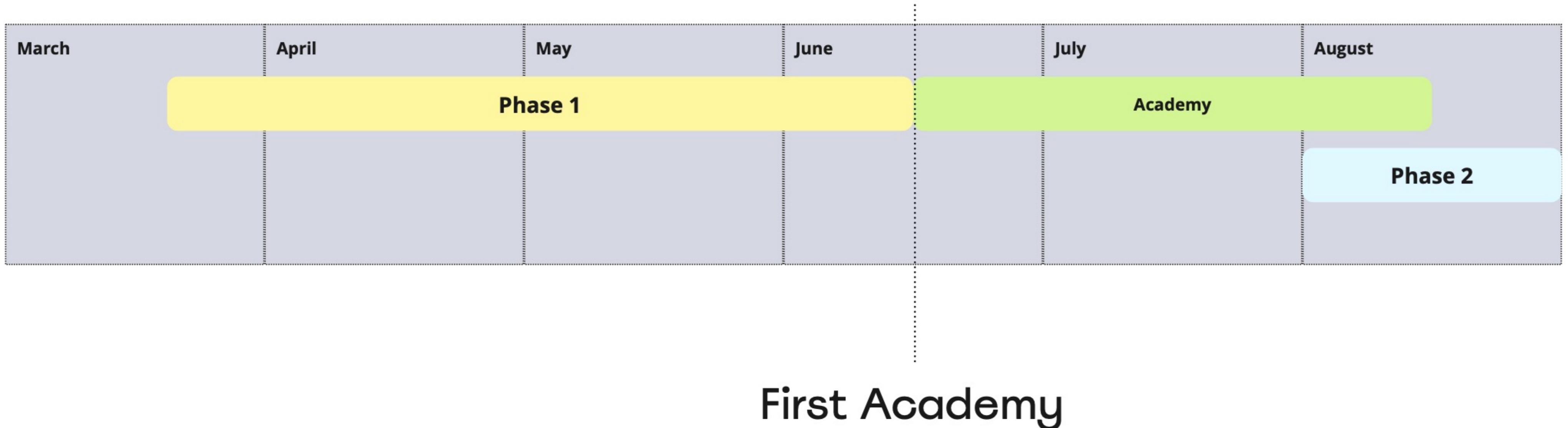
Not covered by PS Principles, for continuing education

Other Best Practices



Build Timeline

When will things be built?



11-1



Build Requirements

What is need during build, Phase 1?

