[redacted] Associate Salesforce Consultant Academy

A synthesis of insights and recommendations to develop [redacted] Consultant Academy, based on workshops conducted by Montage Learning.

Press Record

2022 Consultant Academy

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Academy Mission Statement

What is our goal?

[redacted] 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** [redacted] Academy is an opportunity for those that exhibit the right attributes to join [redacted], 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

2022 Consultant Academy

Knowledge Buckets

Support Areas

Role Best Practices

- Role Best Practices: Test Scripts
- Role Best Practices: Blueprint
- Role Best Practices: Build
- Role Best Practices: Client Testing
- Role Best Practices: Collect Client Feedback
- Role Best Practices: Data Migration
- Role Best Practices: Launch & Hypercare
- Role Best Practices: Project Closeout
- Role Best Practices: Taking Notes
- Role Best Practices: Weekly Meetings
- Role Overview: Associate Salesforce Consultant
- Role Best Practices: Change Management
- Role Best Practices: Working on multiple projects

Onboarding

- Company & Culture
- Getting Started (Setup)
- PSA Time Tracking
- How We Do Business
- Systems & Tools Setup
- The Hunley Way Overview
- PSA Overview

4 Areas of Focus

Consulting (Soft Skills + What it is)

- Hunley Consulting Mindset

Integrated Soft Skills

- Active Listening
- Communication (Presentation Skills)
- Communication Basics (Verbal)
- Communication Basics (Written)
- Communication: How to ask for help
- Continuing Education (not taught by PS Principles)
- Productivity (Time Management)
- Teamwork (Collaboration)
- Engagement (Empathy)
- Engagement (Curiosity)
- Feedback & Accountability

Consulting Fundamentals (PS Principles)

- Managing client expectations and alignment
- Being a Subject Matter Expert
- Adapt to environment: customers are different from each other
- Process alignment / getting on the same page
- What does "done" look like
- Acceptances at different stages of the project
- Having difficult conversations (Prioritization - eisenhower matrix)
- Focus on client's outcomes
- 8 hours, 16 hours included discussion recorded - 4 hours (canned 4-5 hrs) = aiming for certification
- implementation: person-led, program-mod ppl behavior (outcome/impact), cognitive recognition (discussion, written), practice they do in the field (ROI, written reflection, guided activity), PSCC1, PSCC2 (with evidence)
- Dealing with tensions with the client
- Speak their language
- Customer's position in the market
- Working within the scope & budget
- Speed of delivery
- The law of the triple constraints (scope, effort, time)
- Escalations
- Customer sense of pride - empathy, understanding, and resolution

Technical (Salesforce)

- Automation: Workflows, PBs, Approvals & Flows
- Create & Customize App
- Custom & Standard Objects
- Data Modeling
- Security Structure
- Commonly Used Apps at Hunley
- Fields & Field Types
- Formulas & Validations
- Import/Export Data Basics
- Lightning Experience
- Use Case Examples
- Environment management
- Page Layouts
- Platform Basics
- Quick Actions/Global Actions/Buttons
- Reports & Dashboards
- Hunley Group Build Standards

Industry

- Construction Overview
- Intro to BPM
- Intro to AEC
- Hunley Products and Accelerators
- BPM Specific Business Practices
- AEC Specific Business Practices

Methodology

- Blueprint 1 Getting Ready
- Blueprint 2 Requirements Gathering & User Stories
- Blueprint 3 Design & Plans
- Blueprint 4 Estimating & Read Out
- Sprint Demo
- Intro to Project Tracker
- Blueprint SubPhase Intro
- Build
- Client Testing
- Data Migration
- Sprint Planning
- Internal Testing
- Launch & Hypercare
- Project Closeout
- Project Lifecycle (Methodology Intro)
- Weekly Meetings

02

2022 Consultant Academy

Knowledge Prioritization

High Importance

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

SME(s): Alex, Abby

SME(s): Penny, Aaron, Alex, Abby

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

PS Principles will cover core but intro to Hunley Consulting Mindset would help set up

PS Principles

Have (Shane)

SME(s): Shane

Intro to AEC

AEC Specific Business Practices

Hunley Products and Accelerators

Need

Which to focus on?

SME(s): Penny

Environment Navigation (where we do builds, how to use, how to log in) (Sandbox, move config)

Intro content pieces should support

Commonly Used Apps at Hunley

SME(s): Penny, Alex, Abby

Have

Intro to BPM

Construction Overview

BPM Specific Business Practices

Methodology myTrailhead

Onboarding myTrailhead

Salesforce Technical in Trailhead

Easy to access at any moment, no need to build new content

Nice to Have

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

How We Do Business

Included in Groundbreaking

PSA Overview

Specific ASC actions can be included in Role Best Practices

Consulting Soft Skills (Cont Ed.)

Not covered by PS Principles, for continuing education

Productivity (Time Management)

O2-1

2022 [redacted] Consultant Academy

Academy Phases

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,

ACSM mentorship?

client management excellence - best practices?

what do clients look like? examples of clients

Hunley: best examples of work

4 Phases that integrate the different Knowledge Buckets

Onboarding	Consulting & Salesforce Basics	On a Project	Capstone & Shadowing
Academy Partici ants learn about the [redacted] Group, gain an overview of the Academy, and get setup.	Academy Participants learn Salesforce Basics and work on their Consulting soft skills.	Academy Participants learn [redacted] Methodology and apply role best practices while working on a Mock Project.	Academy Participants work on, complete, and present their Capstone Project while shadowing others.

ASCM Onboarding & Consulting/SF Basics

ASCM processes?

Considerations in Design:

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

Length of Academy:

- 7 - 12 Weeks
- **Dependencies:** Content Priority, Time allotted for Capstone + Shadowing [redacted] Group[redacted]ities

Different project cycle

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

Different flavors for discovery as example

borrow from PS processes

03

Academy Curriculum

4 Phases that integrate the different Knowledge Buckets

Curriculum Link	Learner Actions	Academy Breakdown
[redacted] Academy Curriculum	**Knowledge:** Written content or media that learners can consume passively and independently.	Segments 1.1 - 1.5 Segment 1.1 | Segment 1.2 | Segment 1.3 | Segment 1.4 | Segment 1.5
	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.	

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

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 [redacted] employees outside of cohort, Physical Exercises, etc

Day (Segment) Structure Example 1

- Daily Stand Up (Agenda for the Day & Questions)
- Learner tasks
- Individual check-in
- Lunch
- Instructor presentation
- Group activity
- Learner tasks
- Daily closeout

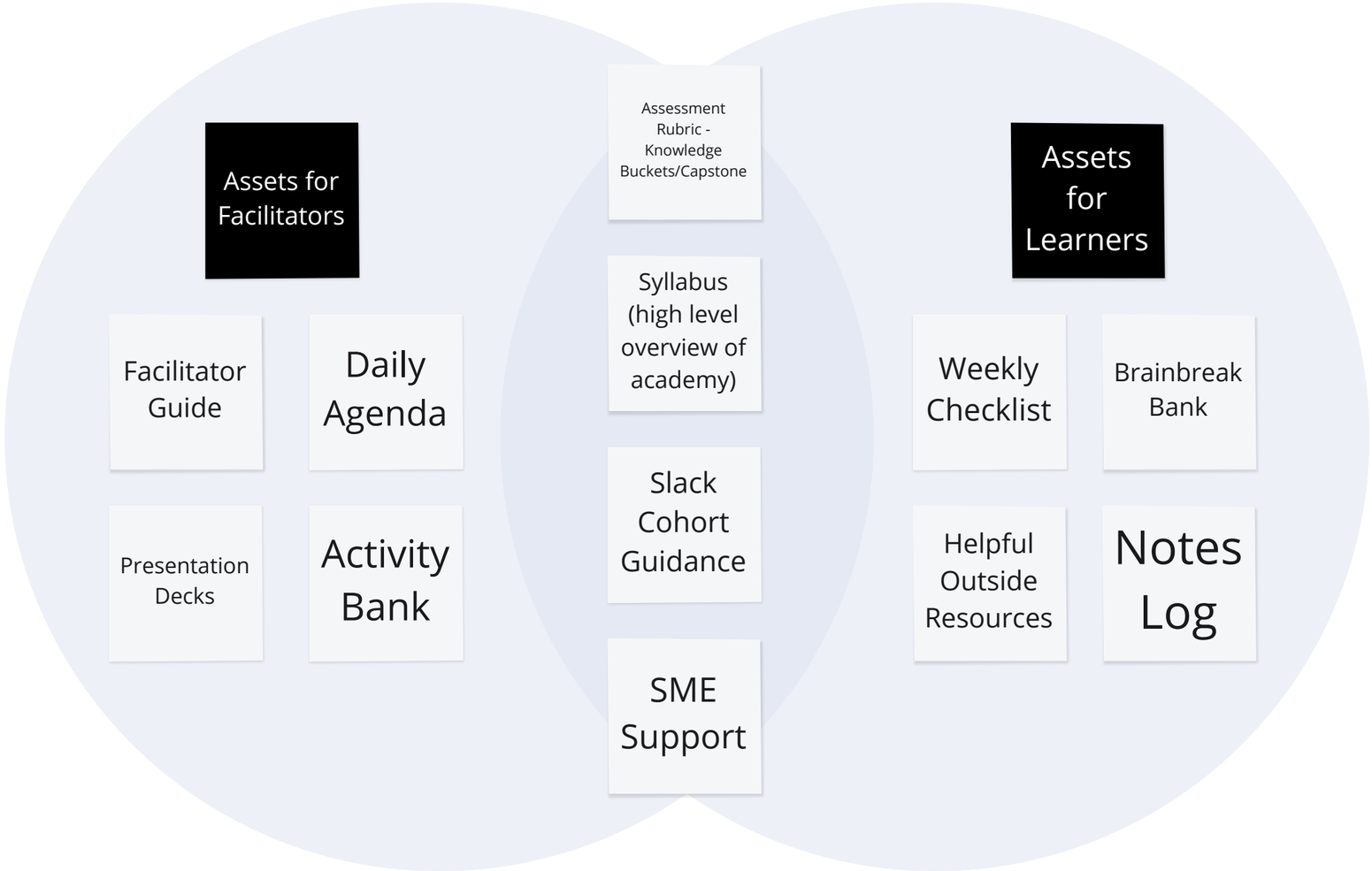
Day (Segment) Structure Example 2

- Daily Stand Up (Agenda for the Day & Questions)
- Instructor presentation
- Group activity
- Capstone Project work
- Lunch
- Individual check-in
- Shadowing
- Daily closeout

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.



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, ather Academy participants for in-person kick-off for one or two days
  - [redacted] Internal Question: Who would need to be involved?
- Academy End Celebration - Capstone Project Presentations

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
- [redacted] 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

Supports

Subject-Matter Expert(s)

Role Best Practices	SME(s): Alex, Abby	Estimated Time: 50 hrs	Mock Project	SME(s): Alex	Estimated Time: ~7 hrs
Salesforce Technical (Hunley Specific)	SME(s): Alex	Estimated Time: 10 hrs	Capstone Project	SME(s): Penny, Alex, Abby, Eric	Estimated Time: 7 hrs
AEC	SME(s): Penny	Estimated Time: 10 hrs	Rubric / Assessment	SME(s): Penny, Alex, Abby, Eric	Estimated Time: 7 hrs

Dependent: Mock Project built on top of role specific

Facilitator(s)

Train the Trainer - Academy Preparation

Facilitator Guide

Daily Agenda

Weekly Checklist

SME(s): Who might be facilitating?

Consider Primary, Secondary, Tertiary Facilitators

Do facilitators trade off per topic?

Estimated Facilitation Time: 5-8 hrs per day (part-time to full on Academy, lower hours extends academy timeline)

Co-Facilitator recommended (e.g. moderating Slack channel, Zoom organization, etc)

Guest Speakers for topics (good for cohort to meet others in company)

Who will be signing off on content? SME or other?

06-3

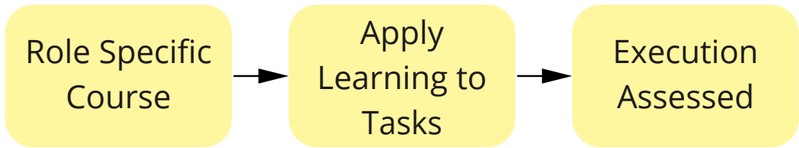
Mock Project

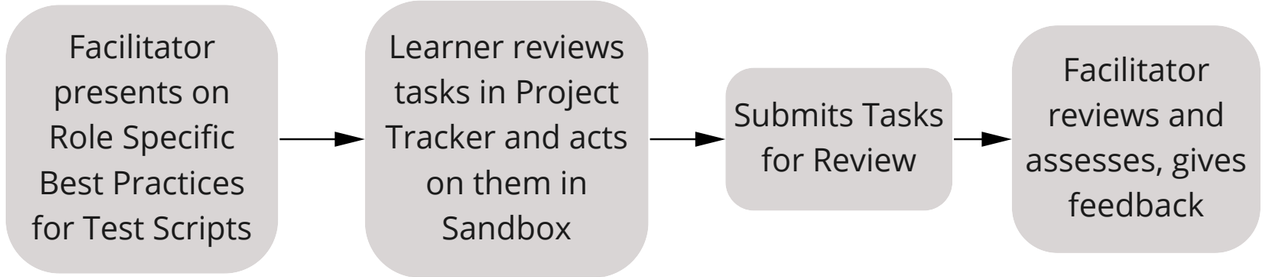
Outline & Implementation

- 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 spciefic actions or context that don't require Salesforce technical knowledge for learners to apply what they've learned

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

[redacted] 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/[redacted] 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

Live role-play?

Checkpoint & Milestone: Learners apply their Role Specific knowledge + Salesforce Technical Knowledge to complete group project.

[redacted] 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

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

08

Rubric Mockup

Align levels with benchmarks?

What might the rubric look like?

- Instructor assessment
- Self assessment
- Team assessment

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

Notes on Candidates

Who might be a good fit?

		Foundational Capabilities			
		Salesforce Expertise	Industry Knowledg	Consulting Skills	Hunley Methodology
Candidate Sources	Salesforce Partner	Strong	Minimal	Strong	Moderate/Related
	Non-Salesforce IT Consultant	Minimal	Minimal	Strong	Moderate/Related
	In-House Admin	Moderate to Strong	Minimal to Moderate	Minimal	Minimal/Related
	In-House Sales Ops	Minimal	Strong	Minimal	Minimal/Related
	Fresh Graduate	None	None	None	None
	Unrelated Business Professional	None	Minimal/Related	None	Minimal/Related
	Salesforce Training Programs (VetForce, Climb Hire, etc.)	Moderate	None	None	None

Would industry include BPM or AEC or both?

For methodology does it mean they understand Hunley's, Industry, Salesforce? but haven't implemented?

What does minimal/related look like?

Need more info: would this individual show interest in Salesforce or the industry?

Sales Ops may have more experience? Depends on opportunities given in last role - a lot of sales ops people have awesome Salesforce admin experience

Minimal to Moderate unless you can review the curriculum first

Consulting skills might be an emerging talent for this candidate (depending on background), more willing to learn something new, may have expertise in an unrelated industry (but might not have job experience or translatable skill sets)

All candidates, no matter level should be looking to grow and learn the Hunley way

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)

10-1

Recommended Ideal Candidates

Optimal

- In-House Admin
- Salesforce Training Programs (VetForce, Climb Hire, etc.)
- In-House Sales Ops

Acceptable

- Unrelated Business Professional
- Fresh Graduate

2022 Hunley Consultant Academy

User Persona

Hi, my name is Taylor

Works in a state of urgency to accomplish client asks based in feasibility and functionality, while trying to understand it themselves

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

Think & Feel

- They feel overwhelmed if they don't have the resources or knowledge to solve a problem.
- They feel frustrated if there are too many tasks and competing prioritizes to manage their time appropriately. Sometimes deadlines are unclear.
- They enjoy problem-solving, learning constantly, and the supportive team to grow in their role.
- Stressful in prioritizing tasks, many unknowns exist impacting success (e.g. will devs deliver on time or will I have to tell client some bad news)

Hear

- They often hear the needs and questions of the client around timeline status, task completion, clarifying questions.
- They hear supportive statements by leadership and a team of experienced individuals who help them in technical jargon translation, project management, strategic guidance, and obstacle resolution.
- They often hear frustrated clients (e.g. tasks are taking too long) but are supported by the team/leadership to get them what they need

See

- They observe and learn from senior team members leading clients through the process.
- They see clients distracted on meetings (by other daily tasks) so clients are not fully able to communicate their needs.
- They see resources struggling to make deadlines (including their own team)

Say & Do

- They need to stay informed about the project details and be able to prioritize tasks delegated to them.
- They study technical knowledge and industry knowledge while on a project to keep up.
- They practice in building complex solutions and communicating about them clearly with clients (with support/oversight).
- They are encouraged to engage in conversation with team members in order to practice having conversations (technical, consulting, industry, process) in order to grow in role to have them with clients.
- They need to understand topics or roles people play on a project (with oversight/support/practice)
- With colleagues, they seek and share best practices (technical, approach, soft skills) and provide feedback. Sometimes they build rapport, sharing personal details.
- They juggle managing getting people resources to execute tasks and deliver on-time (sometimes difficult prioritizing tasks based on resources) based on client expectations
- They need to be resourceful in how to get their questions answered while managing expectations in case of unknowns

Pain

- They have knowledge gaps (process, industry, technical, consultant) that hinders their ability to complete tasks.
- They have a hard time dealing with difficult clients (lack of participation, missing milestones, miscommunication, keep changing their mind, I don't understand their business).
- They enjoy remote work but find it isolating and difficult to connect with others.
- They struggle with the amount of tasks to be completed (unclear deadlines, lack of knowledge to execute, life-work balance)
- They are anxious that their tasks will not be completed on-time based because of dependencies, fear giving client's "no update" report

Gain

- They want the client to be happy and enjoy the solution provided.
- They want to continue to learn and grow in their role to have a successful career (promotion, skillset, career pathways).
- They like the challenges and problem-solving opportunities projects afford them.
- They want to be respected by clients and colleagues.
- They are happy when clients express delight, and tasks are completed on-time

Topics

- continued learning
- being part of team
- problem solving
- best practices
- time management: multiple competing priorities (distractions)
- managing a customer (through the process, communication, difficult conversations, realities vs ideals, expectation setting)
- build expertise: desire to be an expert (motivation, candidate definition of consultant)

ASC vs ACSM

- same across ASC and CSM (not directly working with the client, need senior support)
- Teamwork: ASC larger team vs ACSM working directly with one team member (senior support)
- "They offer client education about the process." For ASC, others on team do this like SA/PM vs For ACSM, senior level guides this
- On projects, ASC has the team as support, ACSM needs to find resources (what do they need to get job done)
- ACSM - more routine problems/solutions

Resources

- language (technical, industry)
- taking notes, capture user stories (add to bio/actions)
- standard note taking (template, process)

Growth in Role

- candidate note: chosen path to go ASC; no experience but have tech aptitude
- How can the role scale? communicate well with clients, craft a solution, speak to the client about it
- They play the role of detective, asking open-ended questions to help uncover client's problems and needs.
- When something is unclear, they need to navigate ambiguity with the client to gain clarification and/or confirmation. Sometimes this is a difficult conversation to have.

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:

Productivity (Time Management)

- 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

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

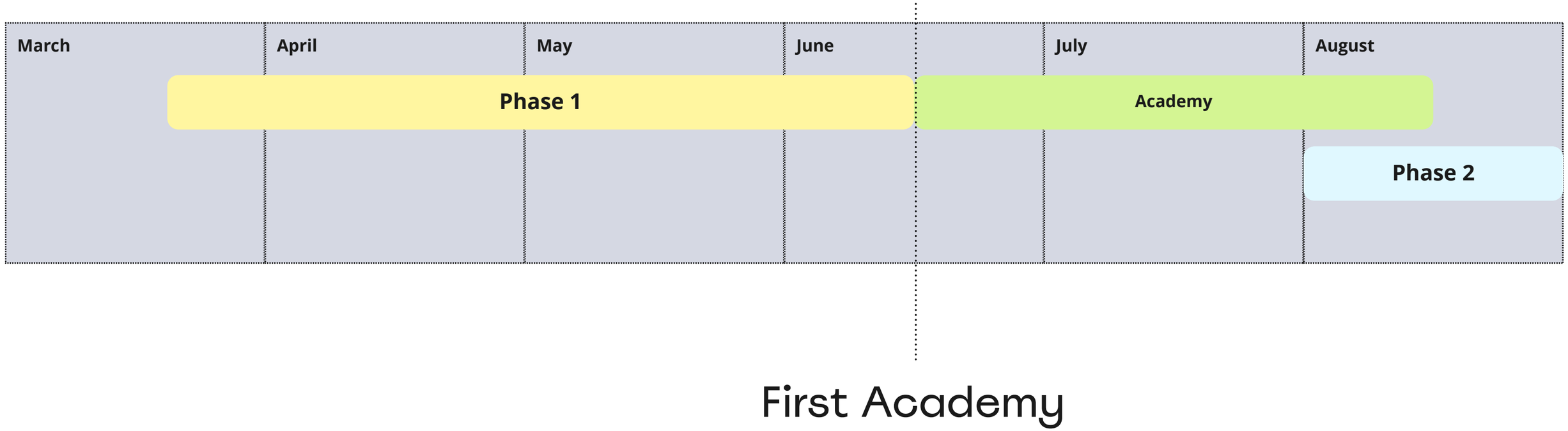
Consulting Soft Skills (Cont Ed.)

Not covered by PS Principles, for continuing education

Other Best Practices

Build Timeline

When will things be built?



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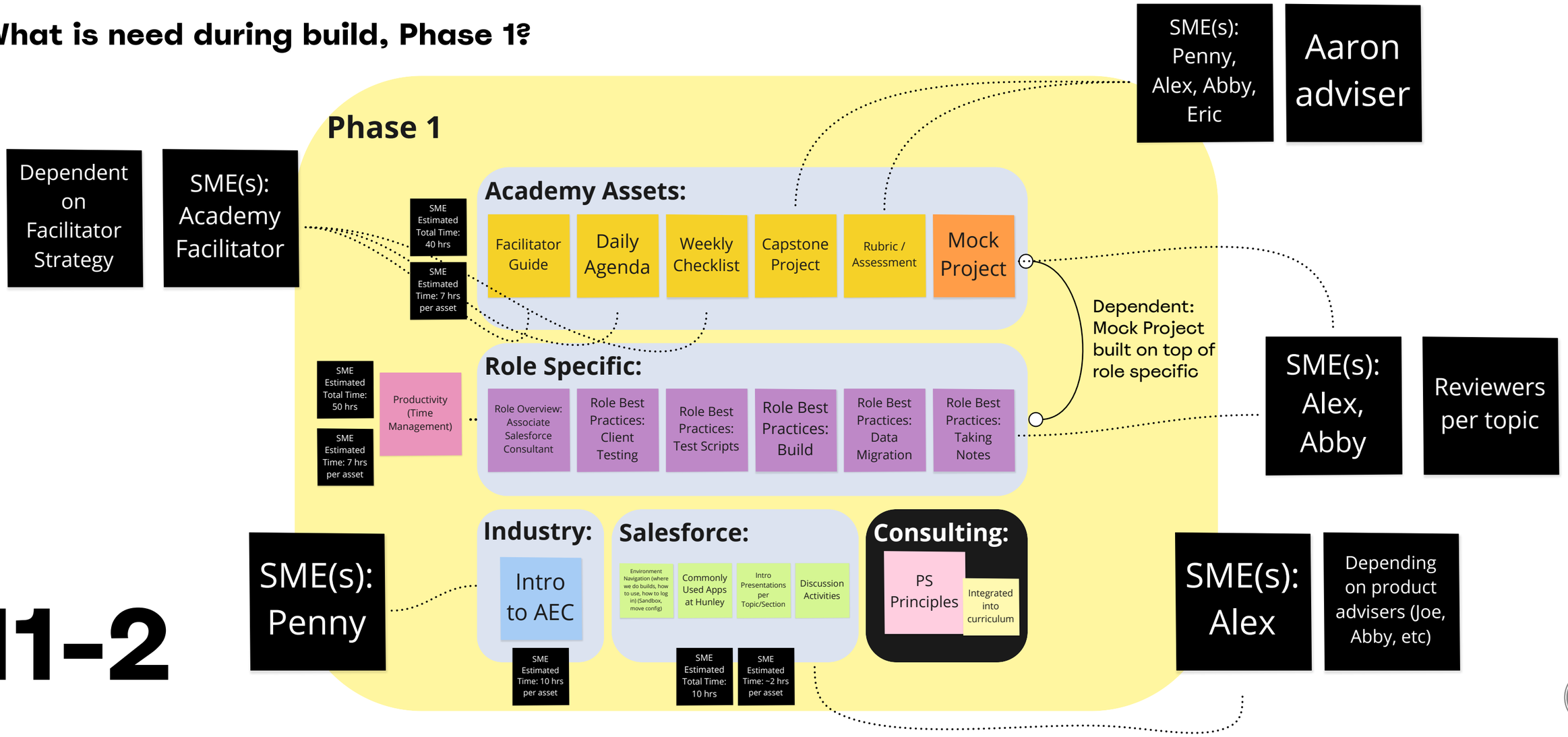
Build Requirements

What is need during build, Phase 1?



11-2

ACSM Academy Phases

4 Phases that integrate the different Knowledge Buckets

Onboarding	Consulting & Salesforce Basics	Processes & Client Management	Mentoring & Shadowing
Academy Partici ants learn about the [redacted] Group, gain an overview of the Academy, and get setup.	Academy Participants learn Salesforce Basics and work on their Consulting soft skills.	Academy Participants learn [redacted] ACSM processes and how to apply client management best practices in scenarios.	Academy Participants are assigned and support senior CSMs on simple project tasks and have the opportunity to shadow on more complex projects.

Considerations in Design:

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

Needs to Identify:
1. Who is the ideal candidate (is it the current ACSM (best buy) or somebody more experienced in specific area?
2. How do you the ACSM adding value after the academy, after 30, 60, 90 days?
3. Importance of missing content (methodology, best practices, commonly used clouds/apps, consulting, hunley processes)
4. What tangible skills from CSM attributes (SF skills, project mgmt, account mgmt) do you want them to come out of / be proficient with after the academy?

Length of Academy:

- TBD Weeks
- **Dependencies:** Process definition, Time allotted for Mentoring + Shadowing time, Group activities

2022 Consultant Academy

ACSM Knowledge Buckets

Stars label dependencies needed to build Academy

Support Areas

Role Best Practices

Should role best practices focus on client types and how to interact?

Role Best Practices: How to manage clients during Discovery

Onboarding

Company & Culture

Getting Started (Setup)

PSA Time Tracking

Systems & Tools Setup

4 Areas of Focus

What other consulting skills might ACSM need?

Consulting (Soft Skills + What it is)

Hunley Consulting Mindset

Integrated Soft Skills

Active Listening

Communication (Presentation Skills)

Communication Basics (Verbal)

Communication Basics (Written)

Communication: How to ask for help

Continuing Education (not taught by PS Principles)

Productivity (Time Management)

Teamwork (Collaboration)

Engagement (Empathy)

Engagement (Curiosity)

Feedback & Accountability

Consulting Fundamentals (PS Principles)

Managing client expectations and alignment

Being a Subject Matter Expert

Adapt to environment: customers are different from each other

Process alignment / getting on the same page

What does "done" look like

Acceptances at different stages of the project

Having difficult conversations (Prioritization - eisenhower matrix)

Focus on client's outcomes

8 hours, 16 hours included discussion recorded - 4 hours (canned 4-5 hrs) = aiming for certification

implementation: person-led, program-mod ppl behavior (outcome/impact), cognitive recognition (discussion, written), practice they do in the field (ROI, written reflection, guided activity), PSCC1, PSCC2 (with evidence)

Dealing with tensions with the client

Speak their language

Customer's position in the market

Working within the scope & budget

Speed of delivery

The law of the triple constraints (scope, effort, time)

Escalations

Customer sense of pride - empathy, understanding, and resolution

Industry

Construction Overview

Intro to BPM

Intro to AEC

Hunley Products and Accelerators

BPM Specific Business Practices

AEC Specific Business Practices

What might be different for an ACSM to know for Salesforce?

Technical (Salesforce)

Automation: Workflows, PBs, Approvals & Flows

Create & Customize App

Custom & Standard Objects

Data Modeling

Security Structure

Commonly Used Apps at Hunley

Fields & Field Types

Formulas & Validations

Import/Export Data Basics

Lightning Experience

Use Case Examples

Environment management

Page Layouts

Platform Basics

Quick Actions/Global Actions/Buttons

Reports & Dashboards

Hunley Group Build Standards

CSM Processes

CSM Flavor of Discovery

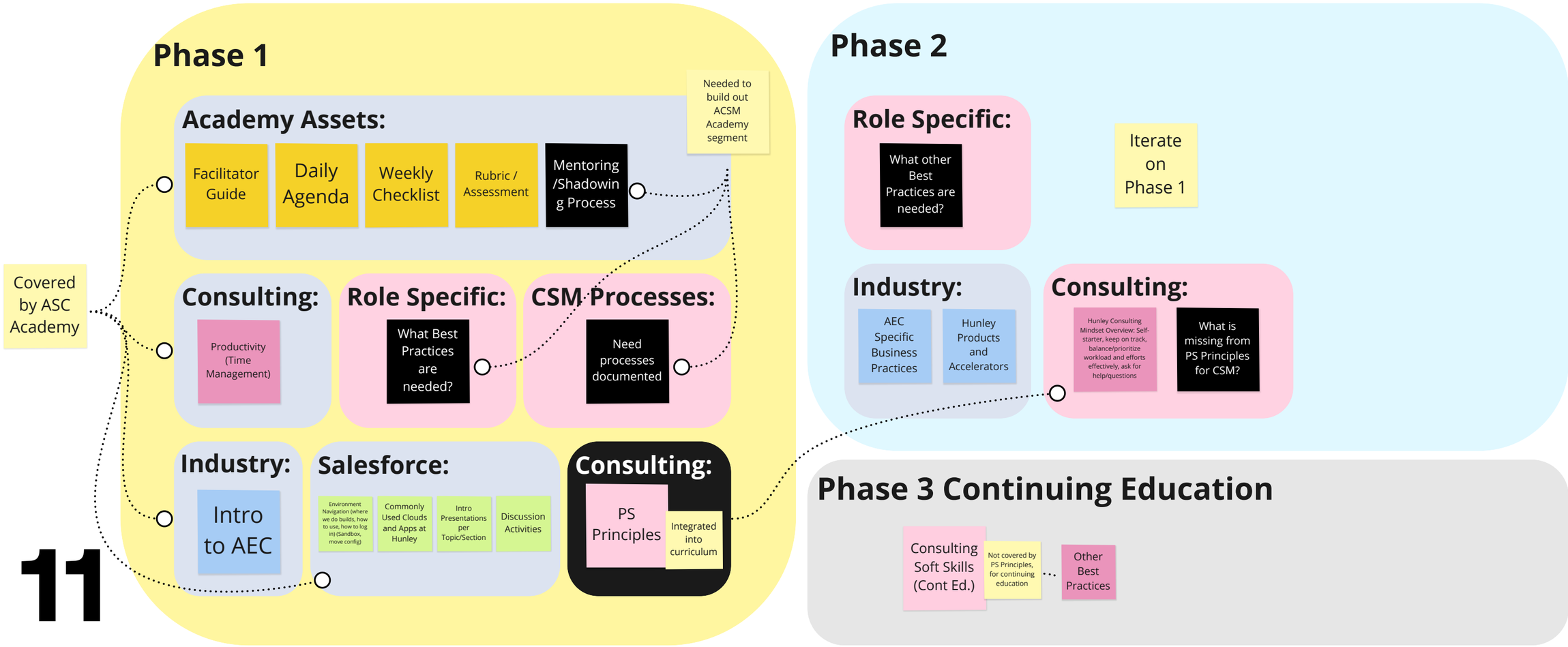
What do clients look like? Examples of clients

What are the steps in the CSM process?

What tools are used in the CSM process?

Who are the SMEs?

02

ACSM Build Phases

What needs to be built?