


MARIA ŚLISKA INPUT TO TEAM2 „THE BULL CONSULTANTS”

PROJECT „WORLD HEALTH ORGANIZATION (WHO) GRANT ALLOCATION
PROCESS RESTRUCTURATION BY IMPLEMENTING SALESFORCE

Salesforce Admin & Analyst Team Sprint

June 5 - June 22, 2023

by  **clicked**



First of all, I would like to thank YOU: The Clicked Team for organizing this amazing experience. Nowadays, when the future is uncertain and there are really few opportunities for Salesforce „rookies” the events you provide are invaluable experience.

 **clicked YOU ARE AWESOME**

THE EXPERIENCE

This Salesforce Admin & Analyst Team Sprint gave me a Chance to meet and cooperate with wonderful people: Fulvio, Kola and Cyrine. Even though we are based in different countries and all of us are having every-day personal commitments we managed to meet every week-day and conduct lots of project work together. Specially for that I am thankful because each of us have different skills and we were able to learn from each other.

For me, this experience was a real-life checkup of my theoretical knowledge. It turned out that business process mapping haven't changed a lot from what I've learned during studies (although now there are great tools like Lucidchart that helps you a lot). Also, the course of manual testing which I've taken half year ago paid off during UAT deliverable.

What I am taking with me from that experience is especially:

- passion to team work as it lets you see the things from the other perspective
- belief that I actually can do things and have the knowledge needed
- Even more knowledge 😊

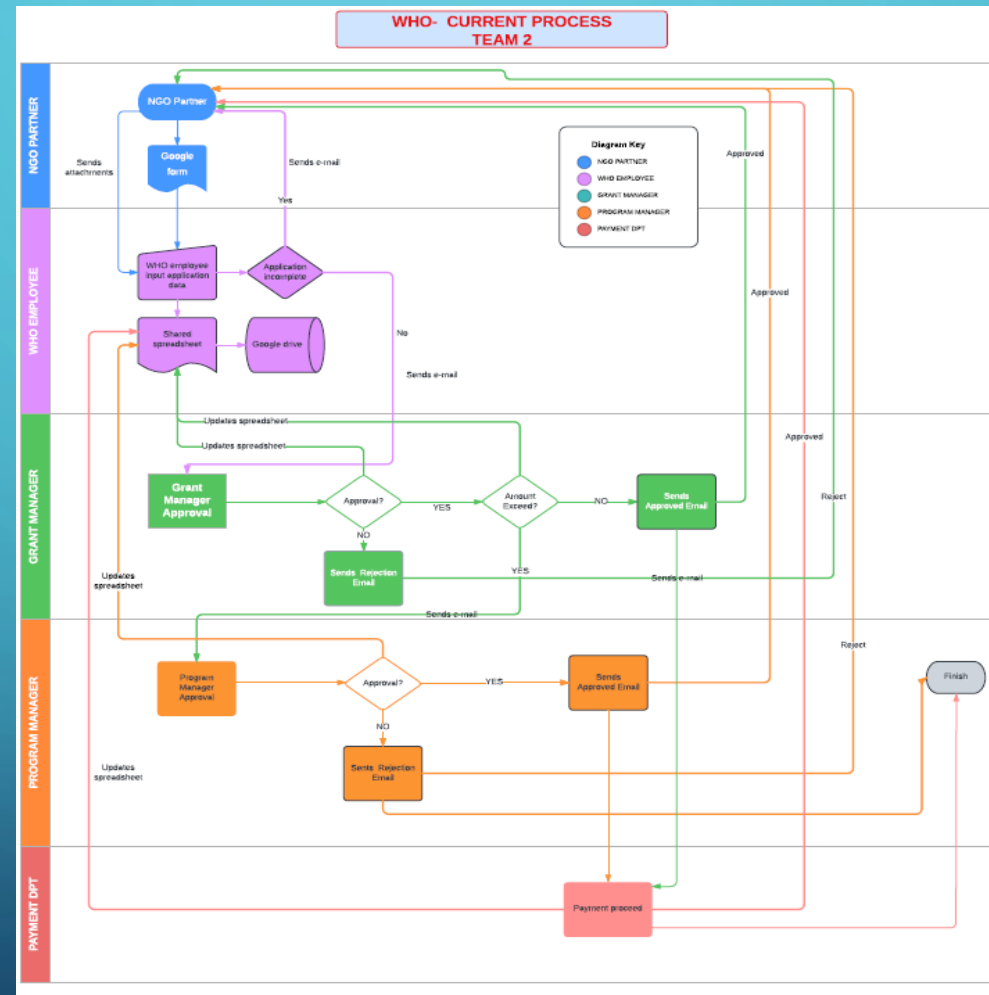
WHAT I DID – USER STORIES

USER STORIES THAT I HAVE WRITTEN

USER STORIES ID	WHO (As a)	WHAT (I want)	WHY (so that)	AC (Verify that)
3 - US	Program Manager	all of the information regarding grant applications to be stored in one place (application, attachments, photos, word documents, emails, calls)	I can easily track changes on the applications	<ul style="list-style-type: none">- can access application- can review application status- can add attachments- can add e-mails- can log a call
4 - US	Program Manager / Grant Reviewer	applications to be submitted automatically to the system via different resource	we can eliminate the burden of manual tasks	<ul style="list-style-type: none">- application submitted automatically- applications stored in one place- applications collected via form- applications collected via e-mail- notification sent to PM
5 - US	Program Manager	to have application form branded with WHO logo	applicants are aware to which organizations they apply to	<ul style="list-style-type: none">- WHO logo added to form- WHO brand book applied to application form
6 - US	Program Manager	track the communication with applicants	I can reduce the number of complaints	?
7 - US	Program Manager	to keep personal information secured	WHO complies with regulations around the world	<ul style="list-style-type: none">- personal information visible only to authorized team members
8 - US	Program Manager	to see how long does it take to proceed and close the application	I can deliver the funds to the applicant earlier	<ul style="list-style-type: none">- count close-start date
9 - US	Program Manager	establish a standardized and centralized communication platform	we can improve efficiency	
10 - US	Program Manager	Maintain a consistent set of tools for communication	to avoid confusion	
11 - US	Program Manager	Implement a centralized system	to streamline operations	
12 - US	Program Manager	Standardize data collection	to ensure the availability of relevant information.	
13 - US	Program Manager	Automate the application approval process	to improve consistency and efficiency.	

WHAT I DID – BPM

I HAVE PREPARED CURRENT BUSINESS PROCESS WITH LUCIDCHART



WHAT I DID – UAT (I'VE PRESENTED)

I HAVE WRITTEN HALF OF UAT AND DESIGNED THE PLAN USING TESTMONITOR

The screenshot displays the TestMonitor web application interface. The top navigation bar includes a logo, tabs for Define, Design, Plan, Track, Resolve, and Analyze, a search bar, and user information (WHO Salesforce Nonpr...). The main content area is titled 'Requirements' and shows a test plan for 'TC1 - send application through WHO web to Lead form filling in all mandator...'. The plan includes sections for Name, Instructions, Attachments, Preconditions, Expected result, and Test data. A table on the right lists requirements and their associated test cases.

Code	Name	Type	Test Cases
RQ1	Lead from application	Functional	8 test cases
RQ2	Approval process Grant Manager	Functional	15 test cases
RQ3	Approval process Program Manager	Functional	6 test cases
RQ4	Payment procedure	Functional	3 test cases

WHAT I DID – MVP (I'VE PRESENTED)

I HAVE DONE WEB-TO-LEAD WITH TEAM AND THEN FORMATTED SITE USING
ADOBE DREAMWEAVER



The screenshot shows a web browser window with multiple tabs. The active tab is titled 'bullconsult.html' and the address bar shows the file path 'C:/Users/maria/OneDrive/Pulpit/CLICKED/html/bullconsult.html'. The page content features the World Health Organization logo and the text 'World Health Organization'. Below this is a 'Grant Application Form' with the following fields: First Name, Last Name, Project Name, Project Value, Company, Email, Phone, City, and State/Province. A 'Prześlij' (Send) button is located at the bottom of the form. The browser's taskbar at the bottom shows various application icons and the system clock indicating 22:03 on 18.06.2023.

World Health Organization

Grant Application Form

First Name:

Last Name:

Project Name:

Project Value:

Company:

Email:

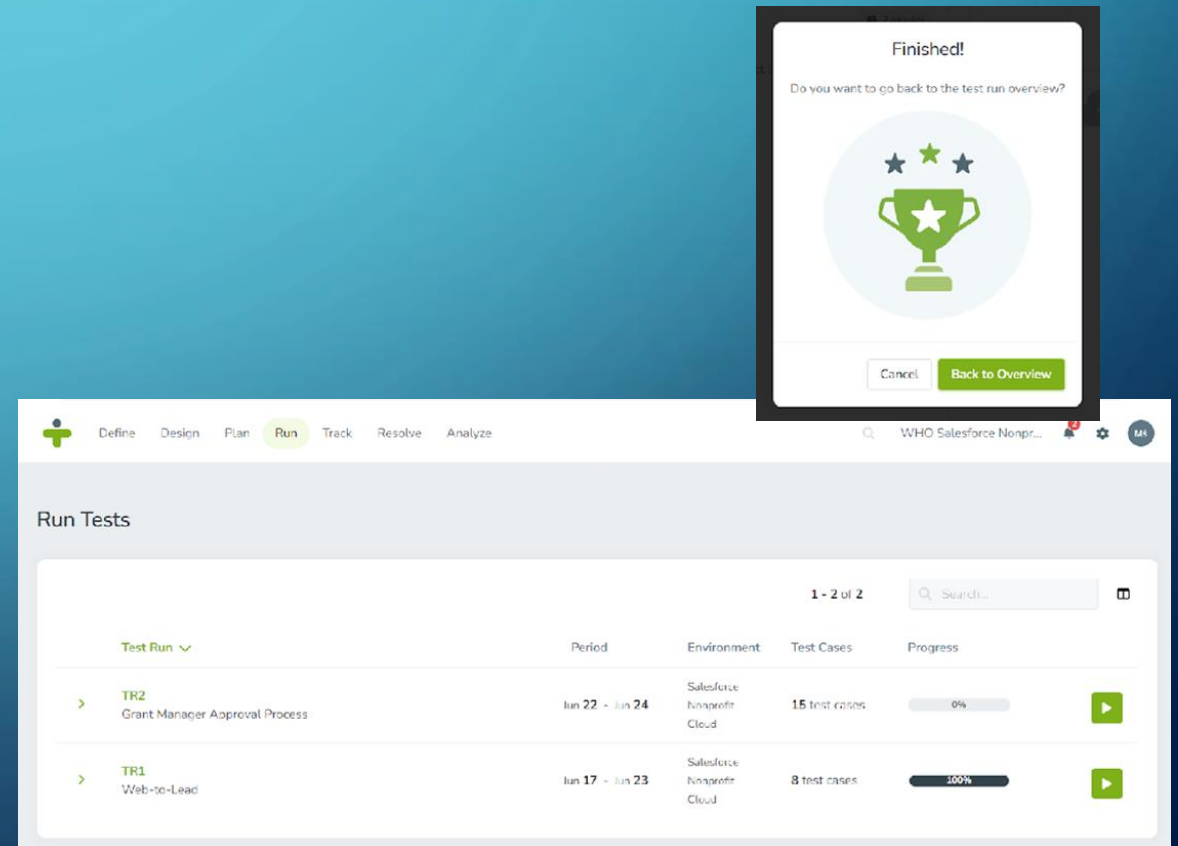
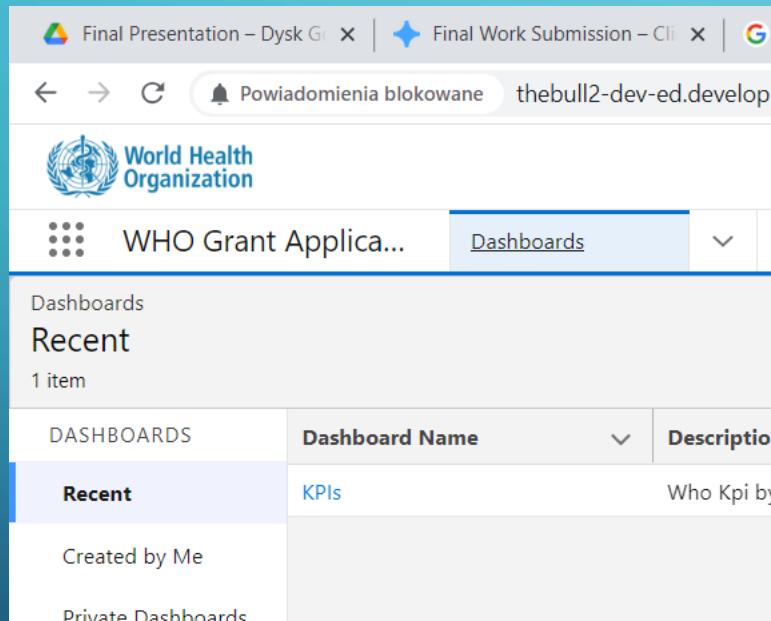
Phone:

City:

State/Province:

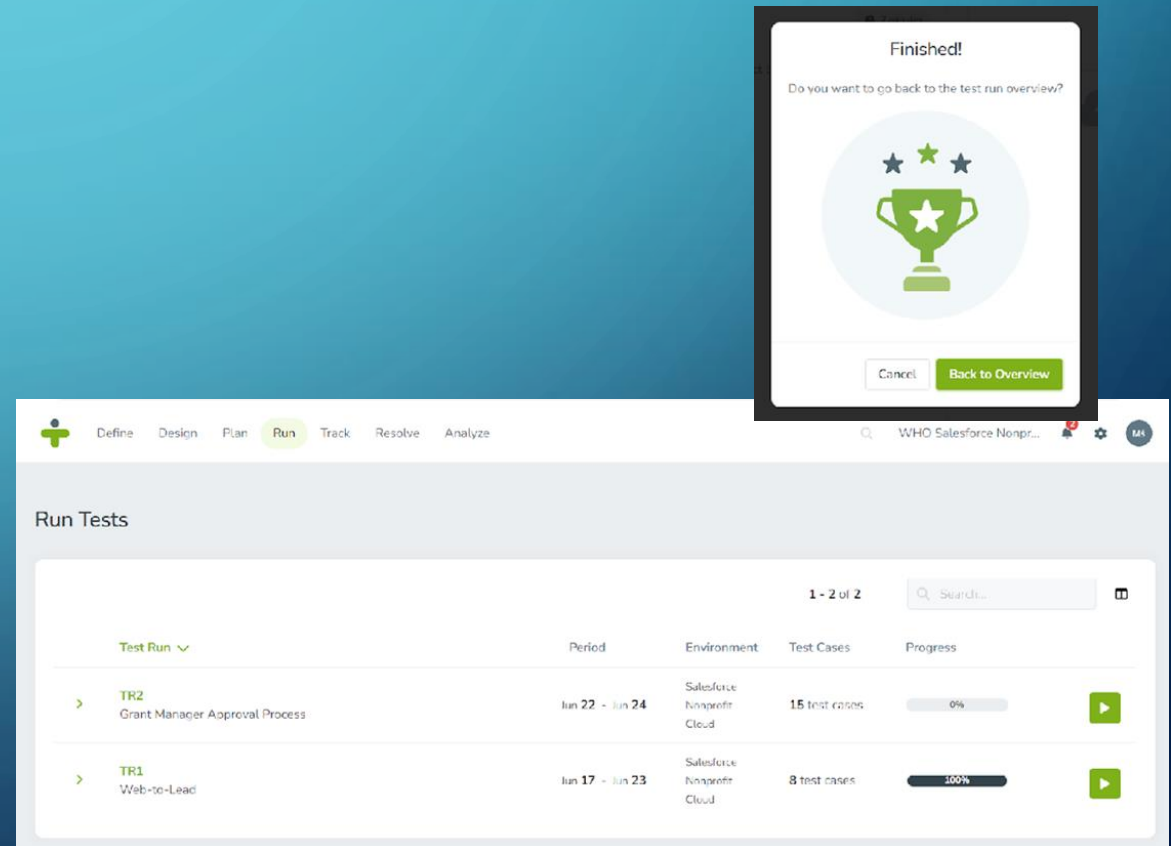
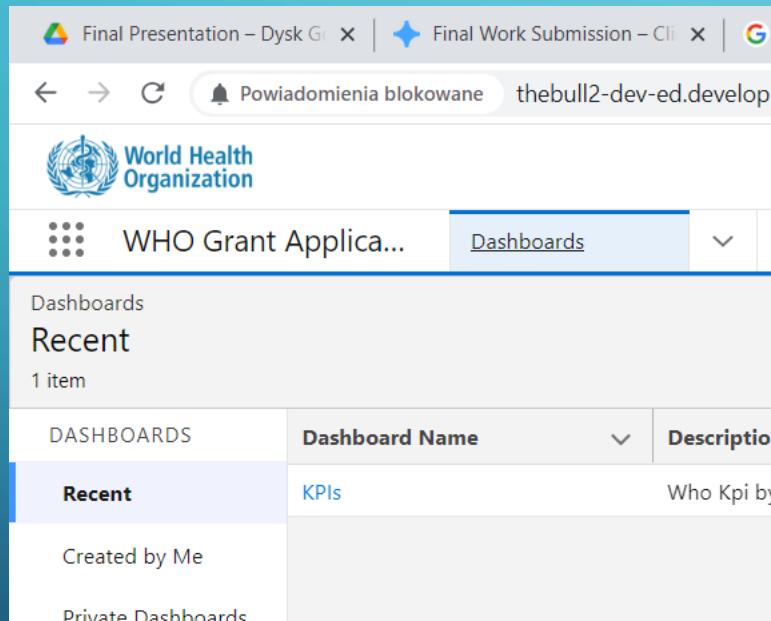
WHAT I DID – MVP (I'VE PRESENTED)

- I MADE AN APP FOR WHO IN SF
- ADDED USERS & SET UP PERMISSIONS
- CONDUCTED TESTS ACCORDING TO OUR UAT ON TEST MONITOR



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WHAT I DID – FINAL PRESENTATION

- DESIGNED TEAM LOGO



- FORMATTED PRESENTATION AND ADDED SECTIONS „ABOUT THE PROJECT” & PROJECT TIMELINE

About the project

Project	Background	Pain Points
<p>World Health Organization (WHO) grant allocation process restructuration by implementing Salesforce</p> 	<p>World Health Organization (WHO) emphasizes the need of improvement in grants allocation process.</p> <p>WHO would like to:</p> <ul style="list-style-type: none">streamline grant management,improve efficiency,enhance grant approval processes.	<ul style="list-style-type: none">Lots of manual administrative tasksLack of centralized systemInefficient communication

