Notes for Salesforce Business Analyst Credential

Acronym/Concept	Description/Definition
Metadata Coverage report	The Metadata Coverage report shows you which metadata types are supported in Metadata API and other metadata channels. This dynamically generated report is your best source for metadata coverage information. To access the Metadata Coverage report, go to https://developer.salesforce.com/docs/metadata-coverage.
JTBD framework	Jobs to be Done Framework. What does the user want to do? our product ? or our ideas? Jobs to Be Done, or JTBD for short, is a framework designed to help us define success from a customer perspective. It starts with a deeper inquiry that seeks to answer a simple question: What jobs are customers hiring your product or service to do for them? JTBD empowers you to focus on the outcomes that people using your product want. It's a great way to stand in the users' shoes.
Constraints	Design depends largely on constraints, Constraint sounds negative, but it's actually extremely helpful. Constraints allow you to eliminate possibilities, which narrows the scope of your design options. three main types of constraints: • technical constraints • business constraints • and design constraints.
Features of UPN	• UPN is a new process modeling language that uses symbols to describe business processes universally. It is A simple, engaging diagramming notation applicable across industries and companies of different sizes.

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<tr><th>Acronym/Concept</th><th>Description/Definition</th></tr>
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A UPN encapsulates every process level, from top-level overview down to detailed, actionable diagrams, and can be viewed online or embedded within apps.
It can be viewed online and embedded within apps.
It can be created collaboratively.
It can have a broad or narrow scope.
Supports regulatory and compliance considerations.
Provides context for metrics and management decisions.
A process mapped using UPN answers, “Who needs to do what, when, why, and how?” at a glance.
How Many Levels Should You Drill Down?

There’s no one-size-fits-all answer.
Although the example above has three levels, different parts of the top-level process have fewer (or more) levels.

There are three drivers that determine how many levels of detail you need to describe a process.

Complexity:

You need to add enough levels of detail to remove all ambiguity.
If in doubt, add more detail. If a business process map leaves room for ambiguity, it wastes time and effort for both developers and end users.

Regulatory requirements:

If a process has compliance obligations, it needs to be very specific—and version controlled—so that you can prove it’s being followed accurately and consistently.

User expertise:

The less experienced the staff who are following the (new) process, the more prescriptive the processes need to be.
They need supporting content linked to each process step.
If the process is followed less frequently, more documentation is required.

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Acronym/Concept	Description/Definition
	○ Think of the process as a self-serve help resource.
What Is Business Process Mapping?	• Business process mapping creates visual representations of business processes. • A business process map includes the steps in the process, who does what, additional context, and how success is measured. • Good Business Analysis Means Better Architecture ○ Business analysis increases Salesforce adoption ○ Business analysis reduces rework ○ Business analysis impacts architecture ○ Business analysis increases agility and drives digital transformation
Elicitation techniques	• Requirement Elicitation techniques • Brainstorming • Document analysis • Focus groups • Interface analysis • Interviews • Observation • Process modeling • Prototyping • Requirements workshops • Surveys/questionnaires

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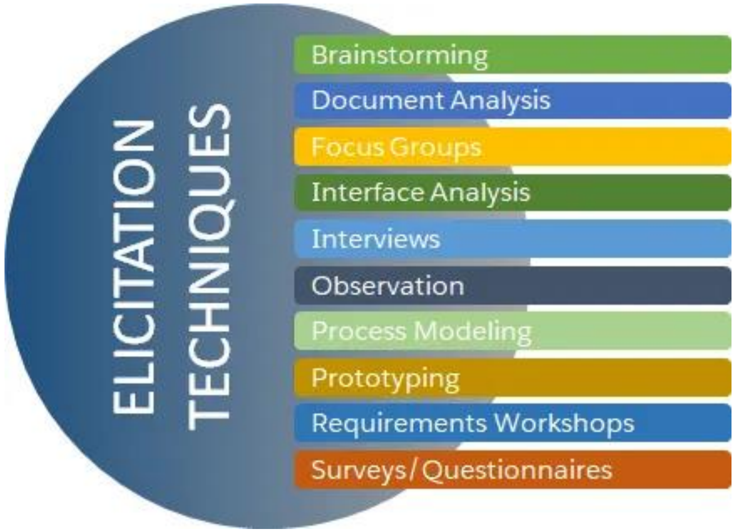
Acronym/Concept	Description/Definition
	
Job Stories format	When I______ (situation), I want to______ (motivation) so that I can ______ (outcome).
in-person Dare working sessions	
V2MOM	Vision—What's your goal? Values—Why does it matter?

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Acronym/Concept	Description/Definition
	Methods—How will you achieve it? Obstacles—What challenges will impede your success? Measures—How will you measure your performance?
TAM	• **Technology acceptance model** or TAM. • it says that if users perceive the system to be easy to use, and they perceive it to be valuable (as in, useful to their own needs), then they're more likely to adopt and use the system.
Trifecta in the business analyst world.	Effective **communication**, **collaboration**, and **documentation**
WIIFM	"What's-in-it-for-me? ("O que eu ganho com isso?") employee needs and benefits should be one of the first things you consider—well before your build or launch.
• **SIPOC**	• SIPOC (or COPIS) stands for **Suppliers**, **Inputs**, **Process**, **Outputs**, and **Customers** is a tool used by teams to identify relevant elements of a process improvement project before work begins. • It summarizes the inputs and outputs of one or more processes in table form.
governance	At its most basic level, governance is a framework for how organizations operate and make decisions
Stakeholders of governance	• Information Technology • Business Units • End Users
JAD	JAD: **Joint Application Development** sessions are a series of meetings that outline the basic scope and objective of the project, conducted in collaboration with internal and external stakeholders, developers, business analysts, and other

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Acronym/Concept	Description/Definition
	team members.
Bubbles Sort Technique	**Bubbles Sort Technique:** • This technique involves the process of comparing the importance of every task on your list to the importance of every other task on your list. • If you find out that one requirement has a greater priority over the other, you swap them accordingly and continue in this fashion until the very last requirement is properly sorted. • This results in a list of requirements that are ranked.

Kano Analysis	**Kano Analysis:**
	
	In this methodology, a question-based approach is followed. The participants are asked questions based on the importance of every requirement.
	
	• Rate your **satisfaction** if you have this feature.
	• Rate your **dissatisfaction** if you don't have this feature.
	• The model assigns three attributes to products and services:
	  ○ **Threshold Attributes**: The basics that customers expect.
	  ○ **Performance Attributes:** these increase a customer's enjoyment but are not essential.
	  ○ **Excitement Attribut**e: The surprise elements of a product or service that delight customers.

Analytic Hierarchy Process	This is a decision-making method that involves comparing all possible pairs of requirements to determine which of the two is of higher priority and to what extent.

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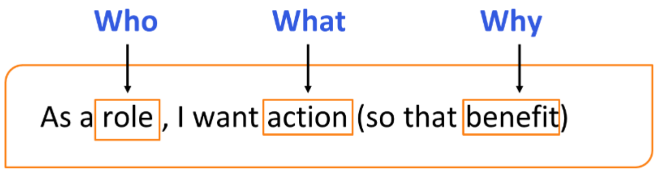
Acronym/Concept	Description/Definition
User Stories	**Three parts**
	Who: From whose perspective (aka user persona) within Salesforce will this user story be written?
	What: What goal will be accomplished or implemented within the Salesforce org as the result of the user story?
	Why: Why does the user need the Salesforce functionality or feature outlined in the user story?
	Format
	As a < who >, I want < what > so that < why >. 
	INVEST
	Independent: User stories should be independent and not overlapping in concept with another user story.

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Acronym/Concept	Description/Definition
	Negotiable: A user story is not a contract. A story is an invitation to a conversation. It captures the essence, not the details.
	Valuable: The user story needs to be useful to the end user. If a story does not have value, it should not be created.
	Estimatable: A successful user story's timeline can be estimated. An exact estimate is not required, but just enough to help prioritize and schedule the story's development/implementation.
	Small: Most effective user stories are small. Smaller user stories tend to get more accurate timeline estimates. Remember, the details can be elaborated through conversations.
	Testable: A good user story is testable. For a successful story, anyone on the project team can look at the user story and say, "Yes, I understand this user story so well that I can write acceptance criteria for it."
3 C's to help guide	clarity, consistency, and contrast.
adoption	adoption is about someone using a solution that's available to them.
Design Process	
	Empathize: Learn about the audience you're designing for, by observation and interview techniques.
	Define: Create a point of view that's based on your users' needs and insights.

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Acronym/Concept	Description/Definition
	Ideate: Brainstorm as many creative solutions as possible to solve the problem you defined in the previous stage.
	Prototype and Test: Build and share a representation of one or others. Refine and test again. more of your ideas from the Ideate stage. Test a rough draft out on
Popular UX Frameworks	• Double Diamond, by Design Council • Design Sprints, by Google Ventures • Laseau's Funnel, by Paul Laseau • Design Thinking, by Stanford d.school
Personas	Personas are like categories of people that help you keep your **users at the center of the design process**, without having to remember hundreds, or even thousands, of individuals' behaviors, motivations, and goals.
UX artifacts	
Journey map:	A journey map is a visualization of each step of a persona's experience with a product or service over a period of time. This map helps you tell the story of a user's interaction across all **touchpoints**. Talk to users to piece together their journey, and sometimes you find that their actual journey is not the same as you thought it was.

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Acronym/Concept	Description/Definition
	Use a journey map to identify process optimizations, pain points, and potential solutions for the pain points.
Service blueprint:	• A service blueprint extends a journey map by **diagramming the before and after states.** • While a journey map focuses on interaction while using a product or service, **a service blueprint shows what happens before and after using the product or service.** • Service blueprints go a bit deeper than journey maps and establish relationships between digital and physical interactions. • These maps help you understand the complete lifecycle of user interaction.
Ecosystem map:	• An ecosystem map helps visualize complex relationships among multiple systems. • This map can be a doozy in enterprise businesses that rely on interdependent applications that share data through a series of touchpoints. • Ecosystem maps aren't just for technology. • They include information, services, channels, and even people. • They also include social systems when teams of people work together toward a common goal. • For instance, consider a legal contract: ○ the buyer, seller, finance office, and management folks are all involved in negotiating, editing, and approving the agreement. ○ Ecosystem maps help you understand complicated environments and how users interact with them.
Empathy map	• An empathy map is a visualization of how a user thinks, feels, acts, and speaks. • This type of map helps you consider user psychology and identify the motivations behind your product or service's persona.

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Acronym/Concept	Description/Definition
	• Create an empathy map for each persona. They are square with four equal quadrants. **Say**: The Say quadrant holds direct quotes from user interviews. **Think**: The Think quadrant lists things that matter to the persona and things they think about when using your product or service. **Feel**: The Feel quadrant describes the emotional state of the persona from excitement to frustrations. **Do**: The Do quadrant lists actions a user takes while interacting with your product or service.
Mental model	• A mental model is an interaction pattern in your brain. • It represents how you think a system should work. • Mental models are used in web and application design to build functionality that users learn to use easily because it parallels something they're already familiar with. • One famous example is the shopping cart icon on ecommerce websites. When you shop online, you don't need a physical shopping cart as you do at a grocery or department store; however, your mental model of a physical shopping cart is the basis for how you expect the online shopping cart to work. • Mental model maps are an outcome of user research that lists users' common mental models for a given experience. Use mental models to inform your design concepts.
Storyboard:	• A storyboard is a visual representation of your demo story. The goal of storyboarding is to transform your story idea into a screen-by-screen, click-by-click presentation. You don't use it as an end design for your customer. Instead, you and your teams use it as a template to begin creating your demo.

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Acronym/Concept	Description/Definition
	- A storyboard is a sequence of illustrations that helps designers and stakeholders visualize how users interact with your product or service at each stage of their journey. - Storyboards are similar to little comic strips that help you and your stakeholders empathize with users. - Storyboards don't have to be perfect illustrations. - Collect data through research and ideation. - Use that data to inform your storyboard and align with your stakeholders on a shared understanding of users' experience with your product or service.
Prototypes	- The goal of a prototype is to convey the interaction to the user. - The more interaction a design has, the more complicated and time-consuming the prototype can be.
Tests	
Unit test	Unit tests are key if you have done any kind of custom coding in your org. They focus on the smallest bits (also known as units) of low-level code you've added to your org. The aim here is to catch bugs early to avoid costly fixes later on.
Integration Tests	Integration tests apply if you have code interacting with anything not native in your org. Examples include displaying live weather or stock price data from a third-party service on a page layout, or exchanging information with your company's billing systems. If you have multiple Salesforce orgs, test interactions between them.
Functional Tests	Functional tests verify that features work as defined in your technical requirements. These can be carried out by

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	developers or end users. In small projects, they can be merged with user acceptance testing.
Performance Testing	Performance testing evaluates how your system responds when large volumes of records or operations are being handled. For example, for a web service callout from your org, you could require a maximum response time of 10 seconds for a transaction processing up to 10,000 records.
User Acceptance Tests (UAT)	User acceptance tests (UAT) **give end users the opportunity to accept or reject the final feature delivery**. You can couple this with end-user training if user feedback is relatively easy to implement. To prioritize your functional and UAT testing efforts, a good rule of thumb is to focus on business processes meeting one of the following criteria. **High value**: Critical to your business, such as creating opportunities or support tickets **High usage**: Used by most or all users, such as a quota-tracking report Both, such as login
regressions tests	changes that negatively impact existing functionality

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Acronym/Concept	Description/Definition
Customer-Centric Discovery for Salesforce Partners	
Know Your Customer	• Know the Business • Know Who the People Are

Be Your Customer	• Experience Your Customer's Experience
	  ○ empathy
	  ○ curiosity
	  ○ engagement.
	• Empathize Like a Pro
	• Take a Walk in Your Customer's Shoes
	• Get In Tune with Your Customer's Consumer

Connect with Your Customer	• **Prepare to Connect**
	• **Connect Over Thoughtfully Delivered Insights**
	• **Three levels of issues, or 3Ls**
	  ○ Level 1: Tactical or technical issues
	  ○ Level 2: Overall business consequence
	  ○ Level 3: Personal impact on their customers or employees
	• **Ask the Right Questions to Connect the Details**
	  ○ Who—who's most affected by this issue?
	  ○ What—what's the result of this issue?
	  ○ Where—where does this issue happen?
	  ○ When—when does this issue happen?

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Acronym/Concept	Description/Definition
	○ Why—why does this issue happen? ○ How—what conditions cause this issue? • **Connect It All at the Whiteboard**
Create with Your Customer	• **Create a Case for Change** • **Re-Create Your Customer's Story** ○ Problem—start with their top priority. ○ Business impact—recognize how this challenge affects their employees, customers, and the bottom line. ○ Problem levels—factor in whether this is a tactical, business, or personal challenge. ○ Metrics—determine how they want to measure the results of what you do together. • **Create a Scene with Storyboarding** • **Co-Create a Plan**

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- UPN COMPONENTS

    - **1 Activity box:**
        - A verb phrase labels each activity box.
    - **2 Resource:**
        - A resource in each activity box designates the who.
        - Resources are tagged with RACI (responsible, accountable, consulted, and informed).
        - Some teams choose to indicate who is "supporting" the work using a RASCI model.
    - **3 Line with text:**
        - Lines with text connect every activity box to another box and represent the handoff between steps.
    - **4 Attachment:**
        - Attachments provide documents, metadata, or metrics in the context of the process.
    - **5 Decision:**
        - Several lines coming out of an activity box with line text explaining the flow represent a decision, simplifying the diagram.
    - **Drill down:**
        - Any activity box can drill down to a lower-level diagram.

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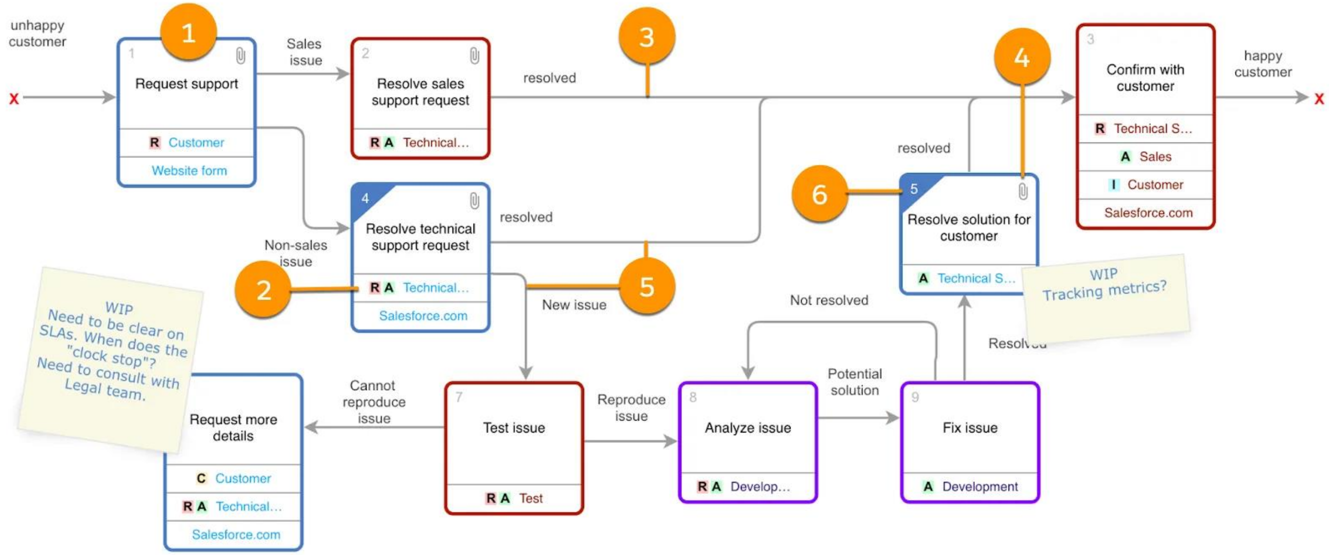

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Fifteen UX Principles to Live By

Principle	Summary
Clarity	Eliminate ambiguity
Common Region	Elements within the same area are perceived as related
Doherty Threshold	Productivity soars when a computer and its users interact at a pace faster than .4ms, which ensures that neither has to wait for the other

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Efficiency	Anticipate needs to help people work better, smarter, and faster
Fitts’s Law	The longer it takes to move to a target, and the smaller the size of the target, the greater the error rate
Goal-Gradient Hypothesis	The closer people are to completing a task, the faster they work toward completion
Hick’s Law	The more options and complexities, the longer it takes to make a decision

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Jakob's Law	People spend more time on other websites than yours, so they expect your website to work similarly to the rest of the web
Occam's Razor	The simplest solution is almost always the best solution
Pareto Principle	The 80/20 rule; 80% of consequences come from 20% of the causes
Parkinson's Law	Work expands to fill the time available for its completion

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Proximity	Objects that are closer together are perceived as more related than objects that are further apart
Robustness Principle	Be conservative in what you send, be liberal in what you accept
Similarity	Elements that share similar characteristics are perceived as more related than elements that don't share those characteristics
Tesler’s Law	Every system has a certain amount of complexity that cannot be removed

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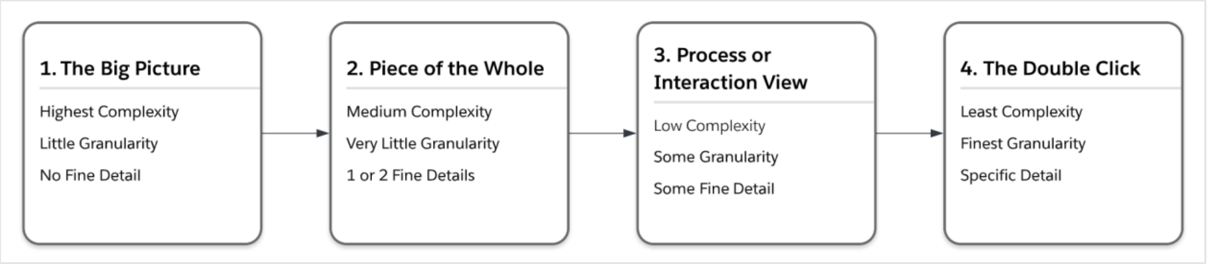
Diagram Levels

Being clear about the intentions and audience for your diagram is an important first step. After that, you have to decide what kinds of details best support your purpose. This is where diagram levels come into play. We use a concept of 'levels' to help separate different kinds of details into easy to choose categories.
Selecting the right level for your diagram helps you communicate with the right amount of detail, which means even highly complex diagrams can still be easy for a viewer to understand.



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Key Characteristics	Documentation & Implementation Diagram Levels			
	Level 1: The Big Picture	**Level 2: Piece of the Whole**	**Level 3: Process or Interaction View**	**Level 4: The Double Click**
Scope	System landscape or solution overview	A subset of a system landscape or solution	Limited view of products or technologies in a solution, focused on showing more complex detail	Most narrow view, focused on showing fine-grained details
Audience	Business and executive stakeholders, technical stakeholders, delivery teams	Some business and executive stakeholders (example: a product owner), technical stakeholders, delivery teams	Technical stakeholders, delivery teams	Technical stakeholders, delivery teams
Elements	Actual products or technologies in a specific implementation	Actual products or technologies involved in specific pieces of functionality, services, interfaces	Time-based interactions or data flows, or system interactions required to support a process	Fine-grained technical specifications or requirements
Example Diagram Use Cases	System Landscape	Integration Layer	Authentication Flow	Data Model (ERD/UML)

Types of Analysis

Enterprise Analysis

As a BA, you need to learn and understand an **organization's structure**, including **who reports to whom,** and the **functions and interactions** of **departments within the organization**. The information you gain here helps your team successfully collaborate and communicate (more on those in the next unit).

Strategy Analysis

This is about getting to the heart of the problem. It's about understanding. First, you identify the need of strategic or tactical importance—the business need. This is an important first step; the business need guides the rest of the project.

Then, you observe the current state and define the future and transition states that will address the business need. **This is a gap analysis—identifying what is different between the current and desired state**. Now, assess options for achieving the desired state, including the work or scope required, and recommend the highest value approach for reaching that state.

The BA should also assess the risks associated with the identified change solution and what effect those uncertainties might have on the project lifecycle or end goal. Develop a plan of action to address the potential risks.

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Stakeholder Analysis

Stakeholders are the individuals or groups (internal or external to the immediate organization) who make decisions and who have an important role in determining the priorities and requirements for your project. Because of this, it is essential to identify the stakeholders early on. To identify your stakeholders, start with this measurement: anyone who has an interest in, or may be affected by, the issue under consideration.

Document Types

Document Type	**What It Is**
Glossary of terms	This is a list of key terms and definitions that boosts understanding across teams involved in the project.

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RACI chart	RACI stands for responsible, accountable, consulted, and informed. It’s a matrix that delineates who is responsible for what in the context of the business analysis effort. Responsible: A person who performs an activity or does the work. Accountable: A person who is ultimately accountable for the outcome Consulted: A person who needs to provide feedback or contribute to the activity. Informed: A person who needs to know of a decision or action.
Interview and elicitation records	These documents capture important information from stakeholders.

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Stakeholder analysis	This document identifies: • Who you should talk with to understand the business problem • Who can help flesh out the requirements • The individuals who can give you a range of perspectives
User stories	A user story describes the functionality that a business system should provide so that it can be developed. It is often called a ticket or work item. The format is "As a.... I want to... So that I can..."
Use cases	A use case identifies, defines, and organizes the system requirements from the perspective of a user.

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Business analysis plan	This plan lists all the business analysis activities that will take place throughout the project.
Current state analysis	If the current business process or domain is not well understood, the BA analyzes and documents the current state before scoping a project to improve upon it.
Scope statement specification	This is the most fundamental deliverable on any project. It is a clear definition of what needs to be achieved and the work that must be done to deliver the project or product.
Functional requirements specification (FRS)	This is the business requirements that are defined from an end user or business perspective. It will specify the expected outcomes.

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System requirements specification (SRS)	This document details how the complete system should function and enumerates hardware, software, and functional and behavioral requirements of the system.
Gap analysis document	This document describes the gaps between the current processes and the intended processes.
Change request logs	This document is a log of all the change requests in the project including date of request, requester, and any other key information.
Wireframes and other visual documentation	This document contains renderings of the user interface, often in the form of low-fidelity wireframes.

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Test plans, test cases, or user acceptance test plans	These documents describe the test plans and detailed test cases that the team will use to validate the functional requirements.
Change management	This document describes the method for pushing out changes to the business.

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Journey Mapping

What Is a Journey Map?

Journey maps are documents that visually illustrate the experiences customers have with a business or an organization. A journey map identifies several things.

- Steps or activities a customer or user takes to accomplish a goal
- Challenges they face in accomplishing their goal
- People they interact with in a single organization or in an ecosystem of organizations
- Touchpoints and channels—like devices and apps—they encounter as they accomplish a goal
- Feelings, thoughts, and reactions they have throughout their journey

Who should be invited to the journey mapping workshop?

- People who know your customer
- People who are generative
- People who are optimists and realists
- People who bring diversity

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Benefits of Journey Mapping

- **Better team alignment:** Expose *how the work of different teams*, like sales and service or design and community, come together. It also helps disparate teams speak in a common language about the customer.
- **Strategic thinking:** Promote strategic conversations about where to invest your company's resources and effort for the highest impact.
- **Deeper understanding of customer pain points:** Expose gaps, places where the flow isn't as smooth as it could be, and moments of vulnerability or dissatisfaction for your customers.
- **Increased empathy:** Increase empathy for your audience's experience by assessing your customer's expectations and emotions as they move through their journey.
- **A strong case for innovation:** Expose the innovation work that needs to be done, and discover what matters most to customers.
- **A guide to measuring impact:** Model changes in current customer experience, analyze each change's potential for impact, and model new experiences before they are officially designed.

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How to start à journey map

- **Why you're doing it**, or the business objectives.
- **Who you're focusing on**, the audience that will be most impacted or best served by the experience you're examining.

Architecture of a Journey Map

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- **Phases**
    - the distinct stages of an experience.
    - This example includes awareness, consideration, purchase, onboarding, and advocacy.
- **Actions**
    - what the customer or user does in each phase.
- **Thoughts**
    - what the customer or user thinks.
    - Changes here often hint that they're entering a new phase in the experience.
- **Feeling**
    - how the customer or user is feeling.
    - Changes here often hint they're entering a new phase as well.
- **Touchpoints**
    - where your brand, product, or service comes into play.
    - These are the times when you are reaching the customer, or they're reaching you.
- **Context**
    - the environmental, social, and time factors that are important either to your customer's ability to reach their goal, or to the experience of your product or service.
- **Opportunities**
    - where and how you can have the most impact.
    - Are you reducing pain or reinforcing your strengths?

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Who to Invite to the Journey Mapping Workshop?

- **People who know your customer**—sales people, researchers, customer support people, and so on.
- **People who are generative**—people you know who like coming up with new ideas and have an easy time brainstorming.
- **People who are optimists and realists**—people who know what's possible and who don't default to "no" or thinking of all the reasons why an idea won't work.
- **People who bring diversity**—people from different cultures, backgrounds, and disciplines.

Which of these is a benefit of CoE?

1. Prioritize Across Teams
2. Streamline Processes
3. Plan for Growth
4. Reduce Risk

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