**Senior Business Analyst - Business Case**

**Background:**

The Channel Digital team supports the D2C (Direct to Consumer) organization by maintaining and enhancing an instance of Salesforce. The Salesforce products implemented in this instance are Sales cloud, Trailhead and Service cloud voice. The implementation covers multiple areas depending on the team accessing the platform - D2C rep management, MDU opportunity management, opportunity funnel and tracking, lead collection and a dialer solution

**Use Case:**

D2C is an extensive organization, with multiple units and lines of business that roll up to different director teams. Each team generates requests for system enhancements based on their specific needs. There is currently no unifying, overall strategy that aligns each of the different teams in the D2C organization - this creates a scenario where there are multiple requests for feature changes with conflicting priorities. The development team is limited in capacity in terms of which changes they take on - so there is a need for a strong prioritization process to manage the work items.

**Task:**

As the Senior BA, it is your role to establish a prioritization process that takes into account the needs of our stakeholders, and communicate the work items taken on by the team. Please prepare a presentation detailing the approach you will follow to establish this process. The presentation should be no more than 20 minutes in length and ideally no more than 6 slides

**The following should be included:**

* How you will identify key stakeholders to contact and their key priorities for delivery
* Prioritization process/logic to apply to work item
* Communication plan to stakeholders to ensure they have awareness of work items selected, throughput of the team, and intended delivery dates
* Your 30 day plan to establish this process

**Key questions to answer/consideration points**

* What analysis would you perform and how would you accomplish this?
* How would you identify areas of improvement/evolution?
* Which key stakeholder groups would you want to engage and how would you identify them?
* How would you go about prioritizing improvement opportunities?
* What KPIs would you establish and how would you measure success?
* What industry best practices and emerging trends would you consider?

**Presentation Slides:**

**Slide 1: Introduction**

* **Problem Statement (Bulleted):**
  + D2C teams lack a unified strategy, leading to conflicting Salesforce enhancement priorities.
  + Conflicting requests and priorities overwhelm the development team's limited capacity.
  + The current process doesn't ensure that the most valuable enhancements are prioritized
* **Mission (Statement):**
  + We will establish a clear, data-driven prioritization process that aligns Salesforce enhancements with broader D2C objectives and maximizes the value of our investment.

**Slide 2: Identifying Key Stakeholders and Priorities**

* **Stakeholders (Bulleted):**
  + D2C Directors and VPs (Strategic decision-makers)
  + D2C Team Leaders (Day-to-day operations leads)
  + Salesforce End-Users (Provide frontline insights)
  + IT Development Team (Technical feasibility)
  + Channel Digital Leadership (Oversight and alignment)
* **Methods (Bulleted with short explanations):**
  + **Interviews:** One-on-one conversations for in-depth understanding of challenges and priorities.
  + **Surveys:** Gather broader feedback and quantify feature preferences.
  + **Workshops:** Collaborative sessions to foster shared understanding and identify cross-team dependencies.

**Slide 3: Prioritization Process and Logic**

* **Prioritization Matrix (Visual):** A table with the following headers:
  + **Work Item**
  + **Business Value** (High/Medium/Low)
  + **Effort & Complexity** (High/Medium/Low)
  + **Urgency** (High/Medium/Low)
  + **User Impact** (High/Medium/Low)
  + **Total Score**
* **Explanation:**
  + Describe the matrix's purpose – to objectively evaluate enhancement requests.
  + Briefly explain how each factor contributes to the overall prioritization score.
  + Mention the use of weighted scoring (if applicable)

**Slide 4: Communication Plan**

* **Cadence (Table):**
  + **Frequency** | **Meeting Type** | **Attendees**
  + Weekly | Work-in-progress Updates | Dev team, Channel Digital leadership
  + Monthly | Prioritization Review | Key stakeholders
  + Quarterly | Progress Report | D2C leadership
* **Tools (Bulleted):**
  + Jira (or your project management tool) for tracking and reporting.
  + Shared dashboards for real-time progress and key metrics.

**Slide 5: 30-Day Action Plan**

* **Timeline Table**
  + **Week** | **Action Items**
  + Week 1 | Stakeholder identification, Develop interview/survey tools
  + Week 2 | Conduct interviews and surveys
  + Week 3 | Data analysis, Develop prioritization matrix
  + Week 4 | Present plan, refine, begin prioritizing backlog

**Slide 6: Key Considerations and Metrics**

* **Questions to Answer (3-4 Bulleted Questions):**

What are the core business objectives that Salesforce enhancements must support?

How can we balance innovation with maintenance and bug-fixes?

What early wins can we identify to gain buy-in?

* **KPIs for Success (Bulleted):**

Reduction in conflicting requests

Increased stakeholder satisfaction

Faster time-to-delivery for high-priority items

Increased user adoption of new features

Enhancement success rate (percentage of enhancements meeting stated goals).

* **Best Practices (Bulleted):**
  + Brief mentions of Agile methodologies, Value Stream Mapping, and low-code/no-code possibilities. Emphasize staying updated on these.
* **Continuous Improvement:**

Quarterly review of prioritization and communication processes.

Adjustment based on feedback and changing business needs.

* **Industry Trends:**
  + Regular benchmarking against industry best practices and consideration of emerging technologies and methodologies to enhance responsiveness and efficiency.

**Additional Tips**

* Where possible, use simple diagrams to illustrate processes or data.
* Aim for bullet points and short explanatory sentences.

**Key questions to answer/consideration points**

**1. What analysis would you perform and how would you accomplish this?**

* **Stakeholder Feedback Analysis:**
  + **Qualitative Analysis:** Analyze interview transcripts and workshop notes for themes. Identify common pain points, highly desired features, and perceived bottlenecks. Look for alignment or conflicts in priorities between different teams.
  + **Quantitative Analysis:** Analyze survey results. Calculate percentages of users experiencing specific issues, frequencies of feature requests, and the level of urgency stakeholders assign to problems.
* **Current Process Mapping:**
  + Document the existing workflow for requesting Salesforce enhancements. Identify any bottlenecks, handoffs leading to delays, or lack of clarity in the decision-making process.
* **Usage Data Analysis (if available):**
  + Examine Salesforce usage reports. Analyze under-utilized features (potential for removal), frequently used areas (opportunities to optimize), and user adoption rates with new rollouts (success measure).

**2. How would you identify areas of improvement/evolution?**

* **Map pain points to opportunities:** Connect stakeholder frustrations to potential process improvements or feature enhancements. For example, if multiple teams complain about a slow reporting process, a new dashboard feature might be the solution.
* **Look for misalignment:** Identify enhancements built for one team that cause issues for another, indicating conflicting needs within the system.
* **Future-proofing:** While focusing on immediate needs, consider how the D2C organization might change over time, keeping Salesforce scalable to support new lines of business or evolving processes.

**3. Which key stakeholder groups would you want to engage and how would you identify them?**

* **Decision-makers:** D2C Directors and VPs. They have the broadest strategic view and budget ownership. Identify them through org charts or in consultation with Channel Digital leadership.
* **Operational Leads:** D2C team managers/supervisors, as they have close understanding of daily challenges and efficiency gaps. Likely suggested by the directors and VPs.
* **Frontline Users:** A representative sample of Salesforce end-users across different D2C teams. May need to work with team leads to identify power users and those representing different use cases.
* **Development Team:** Lead Developers or Architects with insight into technical constraints and past maintenance issues.
* **Channel Digital Leadership** Ensure alignment with their vision for the platform.

**4. How would you go about prioritizing improvement opportunities?**

* **The Prioritization Matrix:** Detailed in the presentation, it quantifies the value of each request. This is your primary tool.
* **Risk Assessment:** Consider risks *not* addressing specific features (e.g., compliance issues, critical feature breakdowns).
* **Quick Wins:** Identify a few items with high value and low effort to implement early in the process, building confidence in the new system.

**5. What KPIs would you establish and how would you measure success?**

* **Throughput:** Number of prioritized feature requests completed within a given timeframe (e.g., quarterly).
* **Stakeholder Satisfaction:** Measured through surveys, comparing satisfaction levels before and after the new process.
* **Time-to-Delivery:** Measure time from an enhancement's approval to successful implementation. Aim for reduction over time.
* **Reduction in Conflicting Requests:** Track this qualitatively initially. Over time a well-functioning process should reduce contradictory asks.
* **End-User Adoption:** If usage data is available, track increased adoption rates for new features or improved workflows.

**6. What industry best practices and emerging trends would you consider?**

* **Agile Methodologies:** Explore how iterative prioritization and short development cycles could be adapted to your case.
* **Value Stream Mapping:** Techniques to identify inefficiencies within D2C processes that Salesforce might address.
* **Low-Code/No-Code Solutions:** Stay updated on these tools as they could potentially empower users to solve some problems without development involvement.
* **Industry-Specific Trends:** Research how other D2C organizations manage their CRM platforms for innovation inspiration.