Salesforce Business Analyst Team Sprint

(April 10 – April 28)

Sreedevi Langoju

Everlong Consulting (Team #17)

SPRINT PROJECT DETAILS:

As a Salesforce Business Analyst team, we have been hired for a consulting project to support the Arizona State University (ASU), a public research institute known for its innovation and excellent academics. Up until this point, ASU used Forms and Google Sheets to manage course enrollment. They recently hired one team to adjust their system to begin using Salesforce to manage course enrollment, as there has been an increase in demand for expanded course offerings.

Analytics and reporting were not an emphasis in the earlier phases of the project. ASU has now realized how powerful a robust dashboard can be for decision-making between teams.

It is our role to assist them in making recommendations for how they may adjust their current Salesforce instance to support this objective and creating a recommendation and proposal for new reporting and dashboards in Salesforce.

Key Business Insights:

- Number of courses offering: 50.

- Modes of Delivery: Online, Hybrid, and In-person

- Teams Involved: Curriculum Team, Marketing Team, and Finance Team

- Currently using Salesforce for course enrollment management

Exercise: Stakeholder Interview

I have come up with the following questions for the Stakeholder interview exercise.

Stakeholder Interview Questions

- How are you reporting and analyzing the data currently?

- What data you want to track through salesforce reports? On what data you want reports on?
- How many reports do you want?
- What are your goals?
- What actions do you want to take based on the report?
- What's data you want to see in each Report?
- Who's going to be looking at this?
- which teams are involved in this project?
- In which format do you want to visualize this data?
- Who can access it?
- What reports needs to be included in the dashboards?
- Which metrics should the dashboard include?
- Who is the dashboard for?
- Who can access it?
- What questions do they need answered?
- What actions do you want to drive out of each report?
- Which report is most important?
- Do you need more than one version of the dashboard?
- Do you want to share it? How will you distribute it and in which format?
- What does the data mean to the business?

Deliverable: User Stories:

A key component of any consulting methodology is discovery – listening intently to the customer to User stories are a key component of Agile methodology and a common way to communicate target users' desired activities and expectations. As a tool for communicating criteria for a solution, user stories are critical for any project's success!

I have created user stories for the Curriculum department, few are mentioning below. All the user stories excel document has been added to the portfolio.

User Story 1: As a member of the curriculum department team, I want to generate a report that shows the student enrollment details for each course offered by the Arizona State University (ASU), So that I can assess the popularity of each course and make informed decisions to create more classes in the future.

Acceptance Criteria:

1. The report should show the percentage of student enrollment for each course.
2. The report should be generated for all courses offered by Arizona State University.
3. The report should be able to filter by date range and course type.
4. The report should be exportable to a spreadsheet or PDF format.
5. The report should be accurate and up to date with the latest enrollment data.

User Story 2: As a member of the curriculum department team, I want to have access to a dashboard that provides a comprehensive view of all the course enrollment reports, so that I can easily monitor key metrics and trends related to course enrollment, drops, cancellations, and delivery methods.

Acceptance Criteria:

1.The dashboard should include charts and graphs that show key metrics such as overall enrollment trends, drop and cancellation rates, hybrid and online enrollment percentages, and waitlist sizes.

Deliverable: User Stories Grooming:

The process of grooming user stories involves breaking them down into smaller, more manageable chunks, identifying any missing information, and ensuring that the acceptance criteria are clear and concise. Grooming also includes prioritizing the user stories based on their importance, estimating their effort, and identifying any dependencies or potential roadblocks.

I have groomed the user story 2 mentioned in the User stories section as below.

Groomed User Story 2: As a member of the curriculum department team, I want to have access to a dashboard that provides a comprehensive view of all the course enrollment details, So that I can easily monitor key metrics and trends related to the student enrollment, drops, cancellations, and delivery methods for all the courses offered by ASU to make informed decisions and to add more courses in the future.

Acceptance Criteria:

   1.The dashboard should be added to the home page of the application. The dashboard should display the following components:
   • Overall enrollment percentage of students for each course on a horizontal bar chart.
   • Drops and cancellation rates for each course on a stacked horizontal bar chart.
   • Enrollment percentages for Hybrid, Online, In-person delivery methods for each course on a stacked vertical bar chart.
   • Waitlist sizes for each course on a vertical bar chart.

   2.The dashboard should be added to the Home page of the application.
   3.The dashboard should be dynamic dashboard
   4.The dashboard should be accessible only to authorized members of the curriculum department team.
   5.The dashboard should be accurate and up-to-date with the latest enrollment data

Priority: High

Sizing: Large

Deliverable: Dashboard Mockup:

Creating mockups or visualizations of our Salesforce analytics dashboards can be an effective way to ensure client satisfaction before finalizing the dashboard. By providing a preview, clients can suggest changes, saving time and resources by avoiding potential miscommunications during the development process. Walking through the mockups also helps build a shared understanding of the dashboard's benefits, leading to a more successful implementation.

I have created a mockup dashboard for Curriculum department as below:
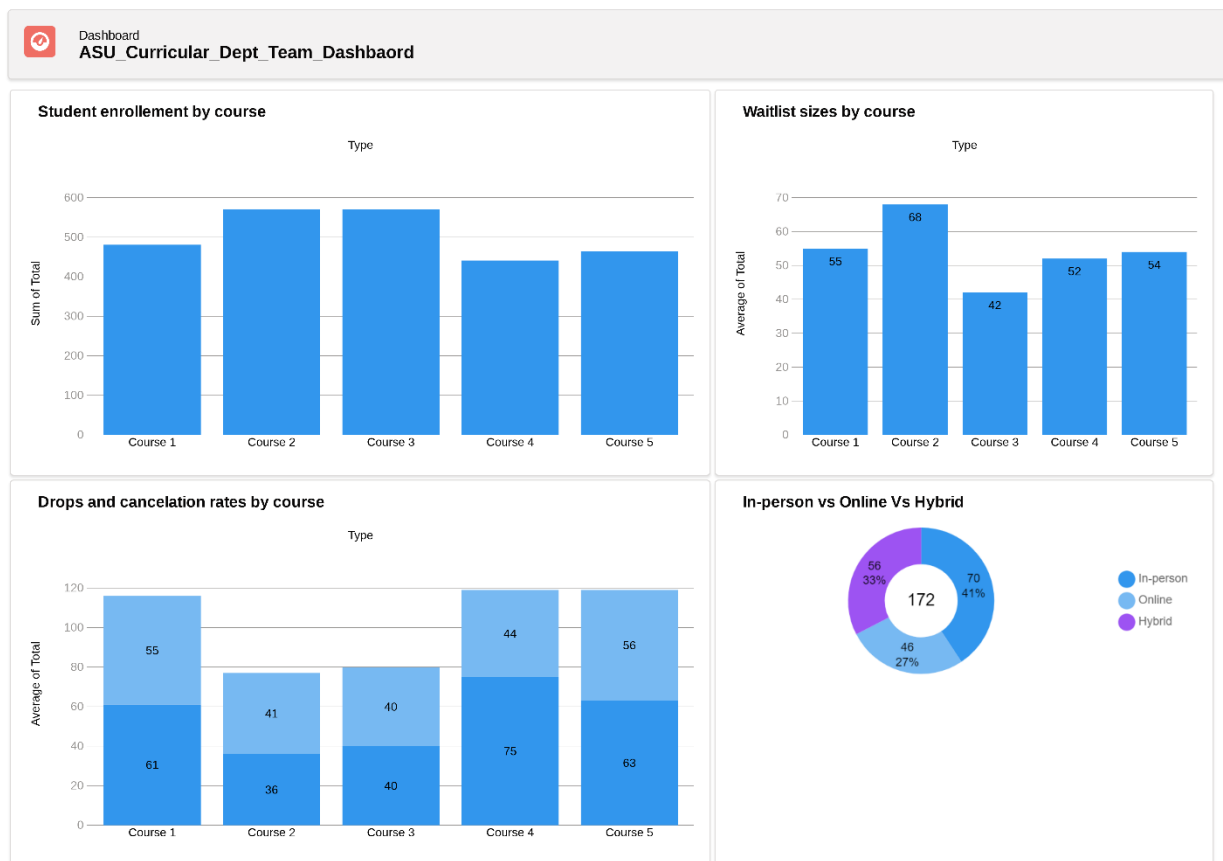
Final Presentation:

I have prepared the final presentation slides for our team. Jim and I have presented on behalf of our team. I have attached the final presentation PDF in portfolio.

Conclusion:

As a member of the team, I have been working hard to ensure that each deliverable is completed on time. This is our second team sprint as Business Analysts, and I have learned about the BA's roles and responsibilities, how to gather requirements, and how to solve business problems.

In addition to my technical contributions, which include analyzing, solving, and documenting given tasks, I have also been an active participant in team meetings and discussions. I have offered new ideas and insights to help drive the project forward.

I am confident that the final presentation we submitted showcases our hard work and dedication. I am proud of what we have achieved as a team and grateful to Clicked , Salesforce and Talent Alliance for this opportunity to contribute to the project. This has allowed me to improve my skills and gain hands-on experience.