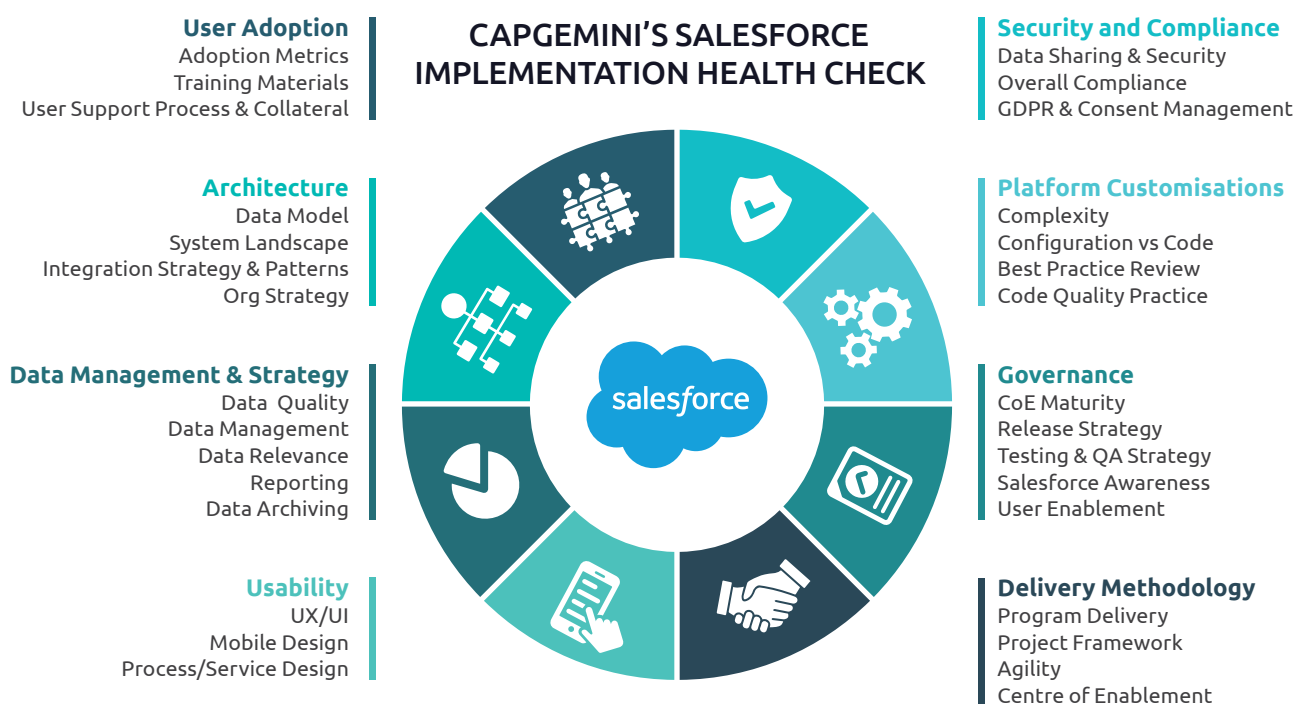




SALESFORCE IMPLEMENTATION HEALTH CHECK



Let's get one thing clear before we start: **there is no single road to Salesforce success.** Every organization is different and has different challenges in industry, business processes, internal IT structure, budgets and data. However there are certain Salesforce best practices that can be applied to multiple organizations.



ADOPTION



Keeping the CRM pipeline up to date is not the favourite task of any sales rep. If you're looking to implement CRM to get reporting data for controlling your sales organization, you may start off on the wrong foot. Salesforce is designed to support your sales team in selling more and selling more effectively, by sharing relevant information and providing them with the right advice just when they need it. This makes Salesforce a valued tool they will want to use every day. Of course, the same applies for your Service organization. Here, Salesforce can automate repetitive (and often boring) tasks so that employees can focus on delivering the best customer service possible.

So, whether it's selling more effectively or delivering the best customer service, it's important that your Salesforce deployment is delivered in such a way that it adds maximum value for your employees. Only then you will get the best return on your Salesforce investment.

Now that we have described how adoption is a crucial factor, let's look at some typical cases where adoption is impacted;

- Imagine you're an individual user. If your organization's Head of Sales, Head of Operations and CEO/MD aren't using Salesforce, then why should you? Especially if you're still asked to deliver report after report via e-mail so that your work is visible. The projects that have the highest adoption are those where Salesforce data is accepted as the single source of truth throughout the organization. This way, everybody gets the most value out of the Salesforce investment.
- What value does your organization's Salesforce implementation add to your users? If they can use a different or legacy system with the same level of effectiveness or if they still need to go to five other systems to perform key tasks, will they truly ever adopt Salesforce? Shadow IT is one of the biggest dangers for adoption. Surprisingly, one of the pitfalls that we see in many large organizations is the existence of these Shadow IT systems. We would advise you to turn that around and focus on ensuring that value adding features and key tasks are placed in Salesforce, integrated through,

for instance, Salesforce Lightning pages, flows or Salesforce Chatter.

- How many deals are you closing? How many new accounts have you activated? How has your first call resolution improved? Shared personal dashboards makes work come to life. By sharing goals, scoreboards and benchmarks, you can 'gamify' your teams' efforts and motivate employees in a whole new way.
- Your organization's implementation doesn't end after your first go live. If you don't keep updating your Salesforce configuration it won't stay relevant and useful. There are ways to get feedback on where improvements can be made. For example, by organizing user forums every 3 to 6 months that allow key users to add new features or propose changes to existing features. Or, if you prefer a lower barrier to entry, you could send out surveys that people can respond to anonymously. And by the way, a good product owner who is prepared to take all this feedback and transform it into actual change never hurts either.

ARCHITECTURE

“Why did we choose to do it this way?”, “Why did we end up having two different systems that do the same thing?”, “How did we end up with 4 different orgs?” Do these questions sound familiar? Don’t worry, these are common questions organizations are confronted with. Finding answers to these questions is not easy though. A lack of architectural robustness leads to conflict within IT teams and political battles. In the end, it can lead to overhead processes being set up to prevent this, but actually they end up crippling an IT organization completely. So, how do we prevent it?

Architecture can be expanded and elaborated on endlessly but finding the

right balance where the documentation is complete enough without slowing down time to market is the biggest challenge. There are a few must haves though; Architectural Principles, Capability Mapping and Design Decisions. These items will ensure traceability, even when many people are involved in decision making, as it stops the “we decided that in a meeting at some point” comments. If it’s not in these three artefacts, then it wasn’t agreed upon.

There are other architectural artefacts which are very helpful, but due to the size of the implementation and complexity of the landscape, such

artefacts can only be created up to a certain level of detail. Examples are strategy documents like an Identity & Access Management Strategy, an Integration Strategy, a Master Data Management Strategy, a Data Architecture, and Process Performance Mapping. The good thing is that there is a lot of information on these areas publicly available, ready to be shared through Salesforce Customer Success Management, or Salesforce Partners like Capgemini.

DATA MANAGEMENT & STRATEGY

When it comes to data, we literally have seen everything, from only using the standard Salesforce fields because organizations are afraid to change the system, to excessive configuration by adding 250 custom fields on one object. However, the cardinal sin that we see too often is migration of all the fields from a legacy CRM system to Salesforce - because “we might need them at some point”. Data needs to be high quality, it needs to be relevant to the user who is viewing it, and it needs to be manageable on the short and long term.

This doesn’t stop at the user level though. As an IT organization, you need to be able to manage data as well. Are you hitting data volume limits? Can your data be recovered if it is lost? Do you have an archiving strategy that meets compliance standards? The good news here: there are many companies that offer services around this. As such, they provide more security around these questions, ensuring that your Recovery Time Objective and Recovery Point Objective are minimal while making sure you’re not paying for storage that you don’t need to be paying for.

The last area of attention around data: can yours easily be reported on within your Salesforce system? And can it be easily be exposed to – and consumed by – external reporting systems? For many of our customers this is a fundamental condition for becoming a data driven business.



USABILITY

We already shared the importance to understand the value of your Salesforce investment. Usability is a key driver behind that. **"Can we get people to do things with one to two clicks instead of 15-20?" "Can we complete a process by only having to fill in 3 fields instead of 20?"**

Very often it's not something organizations put into a Minimal Viable Product, and rightly so. Only by using the system will you be able to pinpoint its flaws. Being able to take that feedback and improve usability is a key success factor in maintaining a healthy Salesforce system over a prolonged period. The goal should be to create a system that people want to use voluntarily because it enhances their human capital. Don't we all want a virtual assistant that does everything for us except making decisions?

Another item that has been much debated over the last five years is the subject of mobility. Can your workforce work from any place at any time on the device that makes most sense based on the situation? Salesforce Mobile has come a long way over the years, but there are still some situations where you need full offline capability or a customized application for certain business processes. These custom solutions are costly to implement and maintain.

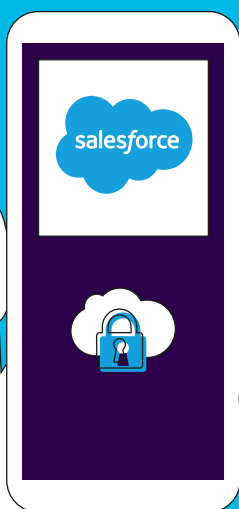


SECURITY & COMPLIANCE

Don't worry, this isn't just another GDPR or encryption related topic. Yes, GDPR and consent management are important to review, but there are many more aspects within a Salesforce implementation when it comes to Security and Compliance.

For example, does the sharing and visibility model in Salesforce allow you to introduce features like Salesforce Communities? Or to reorganize the organization without having to change the system excessively? Is there an audit trail that ensures critical changes are tracked? Salesforce has best practices in place that can be compared to your configuration to see where possible red flags could be. We strongly advise you to do that before implementing any major changes to your Salesforce configuration. By investing a small amount upfront, you will have less chance of running into unexpected issues (and an even more expensive delay) during the development phase.

Most likely, your organization uses cybersecurity related features such as Single Sign-On, Login Policies, Encryption at Rest. These are probably even part of regular audits. What we often see, however, is that code related security isn't checked. Do connected systems only have access to the data they need, or do they have blanket access? Are there hard-coded credentials in the system or is data being sent to e-mail addresses outside of your internal network? Luckily, with modern source-code control these issues can be discovered easily. You will someone to do that work though. Even better, it can be checked automatically as code progresses in the software delivery lifecycle.



PLATFORM CUSTOMIZATIONS

We have seen an increase of low-code or no-code implementations over the last couple of years. They stem from the fear of not being able to maintain a codebase. Either due to knowledge of internal staff or to the sheer amount of complexity being built into a system. The move is logical, but it doesn't always work. While we would always advise you to use declarative changes over programmatic changes when you can, we would caution against developing an environment with only declarative changes at all costs. For example, if you have Process Builders, Validation Rules, Flows and Workflows on the same object, possibly conflicting with each other, do you really have a more manageable system than if you wrote 50 lines of well documented code?

There are two questions we always ask; **"Is there a solution implemented using code that could have been implemented using point-and-click configuration which would not affect any performance KPI's negatively?"** and **"Can the declarative solution be replaced with a custom developed module that would actually simplify its**

maintenance?" If so, then these quick wins can remove a lot of technical debt from your systems.

Speaking of technical debt, this is unavoidable. The existence of **"// TODO"** tags in your codebase and items that will be "fixed later" is not really the issue; the issue is the sum of all of those items together and the amount of effort that at some point will need to be spent to refactor them before they become really problematic. And unfortunately, technical debt increases your dependence on your implementation partner. A codebase that is not well documented and cannot be transferred from developer to developer causes you to keep people who need to manage the codebase instead of building upon it.

The last point that we come across quite often is test classes that have been written to fool the system to think that the overall test coverage is above 75% when actually it contains a lot of filler lines. Unit testing is built into the system for a good reason

and trying to fool the system is not in anyone's benefit. Combining test class development with automated testing in later phases will lower risk when making changes to the system and will actually decrease time to market significantly.

The projects that have the highest adoption are those where Salesforce data is accepted as the single source of truth throughout the organization. This way, everybody gets the most value out of the Salesforce investment

GOVERNANCE

Governance is a challenging topic and requires investment and management in order to do it correctly. As a result people who struggle with it consider it as a time and money wasting activity. The truth however is that you cannot run a good Salesforce project without proper governance.

Three major areas in governance can be identified: change management, environment & release management, and test management.

Change management is really the entire process of embedding change in the

organization. It is about changes in culture, behaviour, processes and of course the implementation of the IT-solution to enable the change. This means that change goes beyond educating the workforce to use a new system; processes and responsibilities might also change. We believe change only really starts once the solution is implemented and it is important to improve based on feedback from your workforce. You need to collect feedback from users, put it into a format that can be used to develop upon, prioritize these user stories

to ensure that high value items are built first, and ensure that items are approved by all parties as quick as possible. In that way, you can make sure that new features hit the market based on business and customer expectations. Easy to set up, less easy to master.

Environment & Release Management has taken on a new identity with the launch of Salesforce DX and the move towards migrating metadata instead of the use of change sets for larger and more complex projects. This move improves the user friendliness

for developers significantly, but it also decreases the risk of rework and incorrect functionality significantly. Basically, you don't need to be in project mode all of the time; you could operate in a DevOps manner instead.

In our view, test Management has always been an underdeveloped piece in Salesforce implementations. Having the correct test strategy allows you to have a higher level of test coverage and allows you to include automated testing from the inception of a system. This reduces your risk significantly when applying changes, especially when changes are needed after a system is already live.

DELIVERY ABILITY

Simply put, Delivery Ability measures all the items that concern your capability to deliver a Salesforce project, no matter what the business use case is. For example, what if your implementation partner is offboarded, can you still manage changes? What if there is a data breach: will your internal staff be able to investigate and solve the matter?

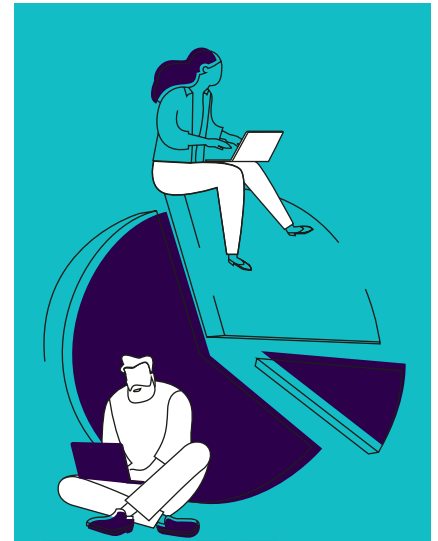
A step further is the ability to actually take advantage of the continuous development of the Salesforce ecosystem. One of the biggest advantages of investing in Salesforce is the fact that new functionality is added three times a year. Knowing the roadmap and how you can take advantage of the changes can be a daunting task. And then of course the question remains: are your users flexible enough to accept the size and frequency of change that your organization wants to push?

Luckily there are Centre for Enablement (C4E) frameworks that assist in setting up a system that allows you to be agile in your Salesforce change and support them from inside the organisation. They include a link to your Project Framework as well as to the Centre of Excellence that you have set up internally or with a Salesforce Partner. Using this C4E approach you're not implementing disparate systems, but instead a full Salesforce ecosystem that evolves over time.

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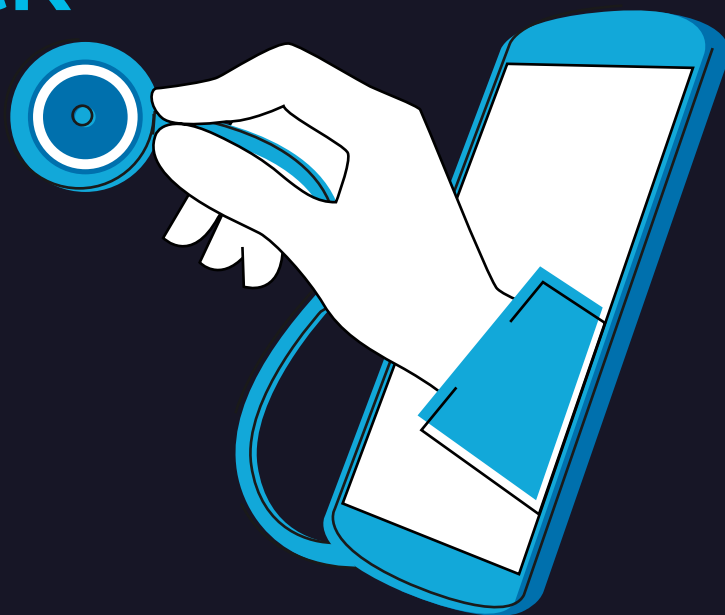
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CAPGEMINI SALESFORCE IMPLEMENTATION HEALTH CHECK

With the increasing strategic role of Salesforce in IT landscapes the Capgemini Salesforce Implementation Health Check is an effective assessment to ensure your Salesforce investment is on the right track.

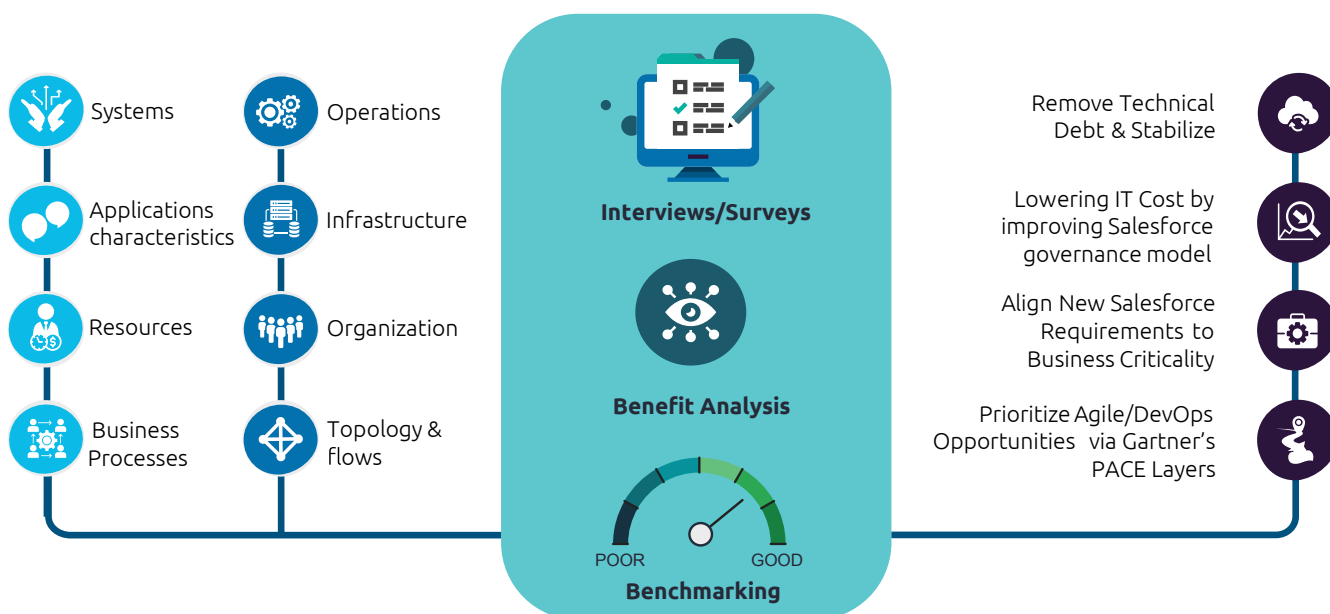
Capgemini earned a reputation in delivering quality Salesforce projects that stand the test of time and are scalable with the ever-expanding product base of Salesforce. This is down to strictly following the guiding design principles we apply on every single project, ensuring optimal usage of out-of-the-box Salesforce features and preventing unnecessary customization.



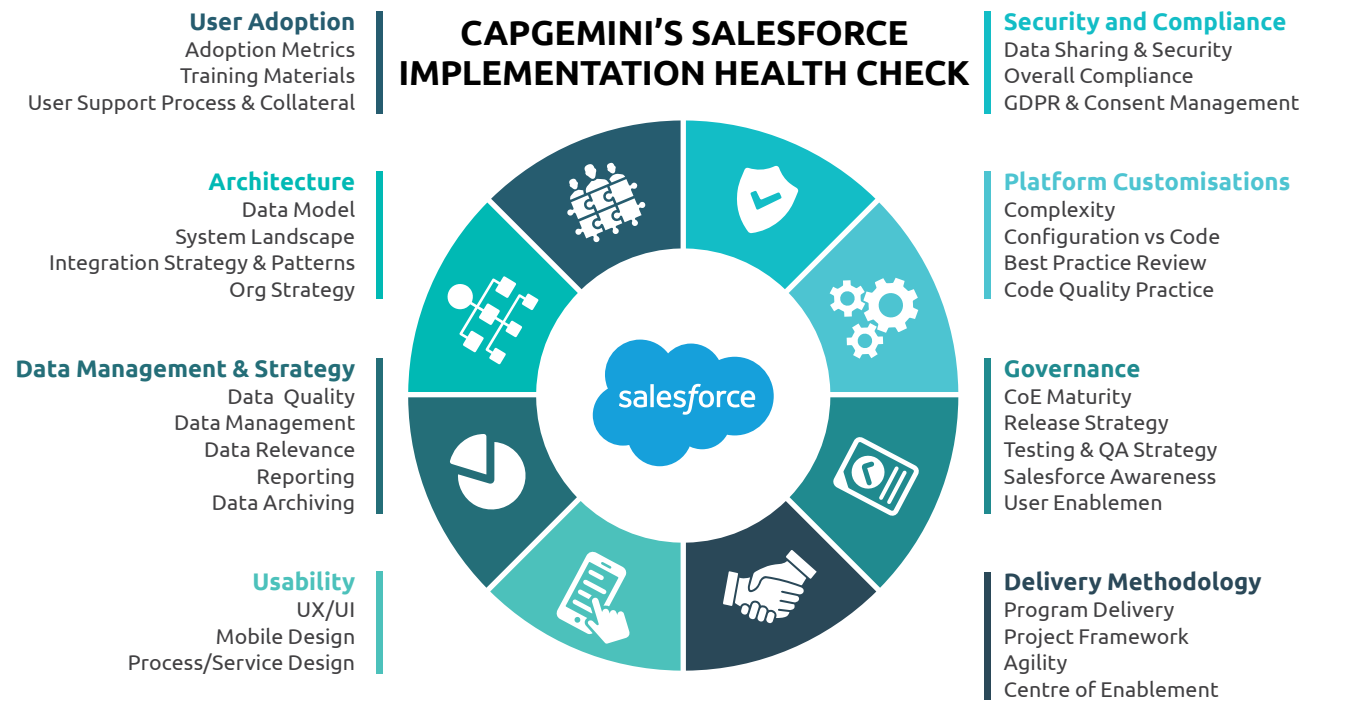
ANALYZE

RATIONALIZE

USING GUIDING PRINCIPLES



Our best practices encompass different areas that affect successful Salesforce projects such as release management, DevOps, architecture, and data management. We combined this in our Salesforce Implementation Health Check that is now available for you.



TIMELINE

	 Week 1 Kickoff & Align on Focus Areas	 Week 2 Analysis	 Week 3 Deep Dive	 Week 4 Playback
Activities	<ul style="list-style-type: none"> • Setup Connections • Review Artefacts • Get Access to Environments • Decide on Focus Areas • Create Required Reports 	<ul style="list-style-type: none"> • Collect Feedback • Systems Analysis • Document Initial Findings • Review Focus Areas 	<ul style="list-style-type: none"> • Systems Analysis • Impact Analysis on Initial Findings • Risk Assessment • Document Overall Findings 	<ul style="list-style-type: none"> • Final Documentation • Wrap Up • Systems Offboarding
Workshops	<ul style="list-style-type: none"> • Executive Briefing • Team Kickoff • Systems Intro 	<ul style="list-style-type: none"> • Conduct Interviews with IT, Product Owners, Champions, Relevant Business Stakeholders 	<ul style="list-style-type: none"> • Review Results with CTO Office • Informal Playback 	<ul style="list-style-type: none"> • Formal Playback Session • Next Steps

SUCCESS STORIES



One of the market leaders in Clinical Trial Studies was able to avoid 600k cost in Change Requests by simplifying the solution design and remove unnecessary complexity in future rollouts.



A leading retail company removed major security risks around payments and open API's. Also were able to use Marketing Cloud to its full potential allowing for Campaign Automation and a full 360 degree customer view.



A leading Pharmaceutical Company removed around 2 years of technical debt buildup that decreased development team by 1.5 FTE, removed the average build time from 35 minutes to 18 minutes, increased system stability, and removed OpEx cost of 40k per year.

CONTACT OUR EXPERTS



MIGUEL MANCELLOS

Head of DCX Practice, Capgemini Portugal



Miguel is an international business leader and an experienced strategic digital transformation expert, with over 20 years of experience across Consumer Products, Retail, Telecommunications and Manufacturing sectors. He brings the technology, expertise and knowledge to its customers allowing them to make the right connections across the whole of their enterprise, creating experiences that deliver high and sustainable value for their own customers and organizations.

Over the last several years, he's been focused in developing our CRM hub internationally, helping global organizations understand how to embrace Salesforce and redefine the relationship between vendor, business and IT.



ALESSANDRO TORNAGO

Alliances Director at DCX Practice, Capgemini Portugal



Alessandro is a business leader with more than two decades of experience in business management, strategic partnerships, and sales management, with both business and a technical background in digital transformation. He worked across Europe and LatAM in large, accelerated revenue growth plans, by orchestrating ecosystems of clients, partners, and suppliers, operating in B2B enterprise markets with deep specialization in key segments of the technology stack, including Infrastructure platforms, As-a-Service models, and System Integration.

He joined Capgemini Portugal to develop the Salesforce Alliance. In his role, within Capgemini Portugal, Alessandro is responsible for ensuring alliance effectiveness by fostering commercial collaboration and go to market initiatives.



RENATO ASSUNÇÃO

Head of Salesforce, Capgemini Portugal



Renato is responsible for the operations of the Salesforce team at Capgemini Portugal. He has experience in Salesforce implementations across several industries and in various roles, and today leads the Salesforce technical team at Portugal CoE.

His focus is to help clients shape and execute successful Salesforce Transformations that truly support their commercial agenda. This is to a large extent done by bringing our experts, experience, assets and accelerators to Capgemini's Portugal clients.



ROGÉRIO GRAÇA

Head of CRM Coe Évora, Capgemini Portugal



Rogério is a results-driven manager able to apply strategies that result in solid projects and with vast experience in transformational projects. He has worked with key Consumer Products and Retail customers with primary focus on customer centric and multichannel initiatives.

With a strong management and technical background, Rogério is successfully leading Capgemini Portugal CRM hub in Évora, delivering CRM solutions, mainly with Salesforce, aligned with our customers digital transformation roadmap.



CAPGEMINI & SALESFORCE

Capgemini has been a Salesforce global strategic consulting partner for more than 13 years. Our focus is on quality and customer success, resulting in numerous Salesforce awards.

We have a strong global network of over 2,500+ certified Salesforce and cloud experts. This has greatly enhanced our capabilities and solutions to meet the digital customer experience needs of our clients globally, accelerating innovation and competitiveness. Whether you are new to cloud technology or are looking for the right partner to help enhance your solution, Capgemini provides end-to-end support to help you transform your business including strategy, design, program management, implementation, as well as on-going support and maintenance.

Capgemini Portugal has also been nominated outstanding knowledge partner award of FY22.





salesforce

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 340,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion.

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