

Global Rollout and Organization Management



SWIFT AND AGILE
response to market demand for
CLOUD COMPUTING

Make the best of Salesforce deployments in global rollout, split and consolidation scenarios

Rapid innovation and strong performance have positioned Salesforce.com as a leader across major front-office application segments. From customer experience to business process efficiency, Salesforce has enhanced all aspects of business as we know it. The Cloud-based platform allows engagement across multiple channels of communication, making it efficient to keep on top of customers, leads, and deals. Increasingly, businesses are adopting Salesforce for its social engagement capabilities, customizability and scalability, which help increase returns on their IT investments. Developers have also embraced Salesforce as a platform to develop dynamic enterprise applications.

Businesses, however, lack a clear vision and requisite skills for establishing a CRM framework which could impact investment in Salesforce. Barriers such as an unstated CRM vision, undefined integration architecture, lack of role based trainings or clarity on outcome of deployment directly impact potential investments in the Salesforce organization. Additionally, businesses may not be proficient in methodologies to expedite Salesforce implementations without compromising quality. It is therefore essential to adopt a best practice area approach to deployment of Salesforce in a global rollout, split or consolidation scenario, to control impacting factors and accomplish organizational goals.



Capgemini Global Rollout and Organization Management (GROM) Best Practices

Capgemini GROM Best Practices help businesses get a clear understanding of best practices for global rollout or split/consolidation of your Salesforce organization, helping build agile, scalable yet robust deployment processes to ensure sustainable value. These best practices span across four stages of Salesforce deployment: Discover, Decide, Plan and Act.

The first stage revolves around discovery of business strategy, data requirements and resource gaps to allow a customized roll out program based on business demands. Some of the best practices of the stage include:

1. **CRM Framework:** An enterprise must have a CRM Framework which comprises eight building blocks of CRM: vision, strategy, customer experience, organizational collaboration, processes, information, technology and metrics.
2. **Business Motivation:** IT teams must understand why business is investing in Salesforce, prior to deciding on the architecture. The motivation to deploy, consolidate or split Salesforce may be cost savings, technology upgrades, enterprise environmental factors, competition, scale and alignment with the broader, organizational CRM vision and strategy.
3. **Business Case:** Businesses should build a case for Salesforce deployment in order to secure a buy-in from senior leadership and sponsors' support. Without leadership support, businesses may not be able to implement a CRM framework and realize full potential of Salesforce.
4. **Data Classification:** As a first step to Cloud data migration, business must classify data according to applicable regulations and internal/partner policies. Organizations should implement a data classification policy and procedures for deciding which data is ready for the Cloud, under which circumstances, and using what controls. Having a proper classification of data will help you plan for security architecture and its governance.
5. **Security:** Enable security features from field to application level and for data in transit or at rest using Salesforce native features and/or partner solutions.
6. **Capability Assessment:** Assess your capabilities for each of the knowledge areas and look for support of your IT and business partners if you think they can help.
7. **Accessibility:** Decide which business data will be accessed via which processes and by which user group. This will help you design a robust architecture for your application, data, and its security.

The second stage stresses on decision about selection of an appropriate Salesforce edition, architecture and security requirements to provide the required agility and flexibility with informed build or buy decisions. Best practices include:

1. **Salesforce Edition:** You should apply due diligence prior to finalizing an edition of Salesforce. A higher edition might incur excess license fees for features you don't need.

2. Application Architecture: The right architecture makes your application agile, scalable, and cheaper. A judicious decision should be made about what to configure and what to customize; whether to purchase a package or leverage an application to accomplish the functionality.
3. Integration Architecture: A fair assessment should be made to decide what data should be integrated at what frequency, at what layer of integration among Data, Application and UI and via which tools, like middleware, point to point integration or using some AppExchange package.
4. Data Management: Are your users happy with the quality of data? Consider the impact of data volume on your application performance. Regulations may impact your data storage and integration approach. Have a holistic assessment of your data requirements and plan design and architecture as best practices.

The third stage focuses more on planning or managing changes, user adoption, quality, and disaster recovery to easily manage the application, data and stakeholders in challenging situations and increase ROI. Best practices of the stage include:

1. Change Management: Users have a lot of ideas and Salesforce produces three releases per year, however each of these cannot be implemented. Businesses must plan for managing changes to reduce the impact to the enterprise and keep a high level of user motivation.
2. Training: Role-specific training using available tools and using appropriate techniques is necessary for a successful, smooth rollout.
3. Governance Planning: Governance should be planned separately for pre- and post-release scenarios. Pre-release governance focuses more on delivery, change management, pricing, and quality of coding and data whereas post-release governance focuses more on security, performance, and release management.
4. User Adoption: The key to increasing user adoption is supporting users and being responsive to their needs, tracking usage trends over time, and actively encouraging adoption. Understanding what works and what doesn't is critical, both immediately after going live and over the long term.
5. Code Quality: Use simple Salesforce-provided tools like TestMethods and Code Coverage to perform unit testing and build efficient code.
6. Disaster Recovery: Salesforce ensures protection and recovery of your data by running the service on multiple, geographically dispersed data centers with extensive backup, data archive, and failover capabilities. You should, however, also consider how in-transit data will be handled when your Salesforce instance is unavailable.

The fourth and last stage known as Act focuses on development, deployment, and the split or consolidation of a Salesforce organization. Application of relevant best practices will ensure a rapid configuration, deployment and shortened time-to-market. Some of the best practices of this stage include:

1. Development of Business Functionality and Integrations: Developers end up writing code which others find very difficult to understand. They should follow Generic and Salesforce/Apex Development guidelines.
2. Salesforce Deployment (migrating a Sandbox to production): Always integrate your Salesforce IDE with version control software for easy movement of code between environments. Configure Jobs to ensure constant flow of development changes and unit testing to detect conflicts and errors within the development cycle itself.
3. Salesforce Organization Consolidation: First understand the business motivation behind the consolidation of various Salesforce organizations as the consolidation design and approach will vary. Each approach carries varied effort and associated pros and cons. We recommend three approaches: single consolidated organization, single global reporting organization, and master – subsidiary organization for consolidation.
4. Salesforce Organization Split: Here again, understanding the motivation behind a split is very important. Salesforce organization split may be due to legal reasons like enterprise de-merger or one of subsidiary having an impact on overall cost and performance of Salesforce organization. Business and IT teams must do a feasibility analysis, mapping the CRM Framework, process convergence analysis, topology analysis (master-slave relationship) before acting on data and code.

Why Capgemini

Capgemini is one of Salesforce's top five global system integration partners, reinforcing its choice as a preferred IT partner to several enterprises. We help clients implement Salesforce CRM in a way that makes it a strategic resource, not just a tactical tool. Some of the key features of the Salesforce practice at Capgemini include:

- A vast resource pool of over 720 trained Salesforce practitioners worldwide, including 292 Certified Consultants across Sales Cloud, Service Cloud and Development and Administrators
- Over 520 certifications across Development, Sales and Service Cloud, 41 Sales Cloud and 38 Service Cloud certifications, 170 Administrator certifications
- Custom built and industry standard assessment and deployment accelerators across consulting, transformation, system integration and custom development shorten the time-to-market



About Capgemini

With more than 125,000 people in 44 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2012 global revenues of EUR 10.3 billion.

Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its worldwide delivery model.

Learn more about us at
www.capgemini.com