Executing Salesforce Projects

How to successfully execute any Salesforce project

Shamli Nimbaji Nikam

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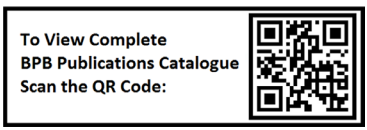

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Dedicated to

My mother and father,

Mandakini Nimbaji Nikam
and
Nimbaji Manik Nikam,
who sacrificed so much to provide a better life for their kids

To my daughter,

***Shruta**, who has enriched my life in so many ways*

To my teachers,
a special thank you to my teacher
Ms. Manisha Pagar
who dedicates her heart and soul to teaching

About the Author

Shamli Nikam, the author of this insightful guide on successfully deploying Salesforce projects, is a senior delivery analyst at JR Simplot. With an impressive educational background that includes an undergraduate degree in Information Technology, certifications in Marketing and Business Administration, and an MBA in International Business, the author brings a robust blend of technical expertise and strategic insight to the realm of Salesforce implementations. Certified as both a Project Management Professional (PMP) and a Scrum Master, the author has earned various Salesforce certifications, underscoring a deep commitment to mastering complex enterprise solutions.

An active Project Management Institute and Leaders Excellence member at Harvard Square, she has contributed extensively to the field through articles published in tech journals. These publications discuss nuanced project management techniques and Salesforce platform strategies, demonstrating thought leadership and a commitment to advancing industry knowledge.

In 2023, the author served as a judge for the Brandon Hall Group Awards, recognizing exceptional achievements in technology and innovation. Furthermore, her articles published by the PMI are utilized in PMI's AI tools, highlighting their credibility and relevance.

Driven by a passion for leveraging technology to foster organizational growth and efficiency, the author's extensive experience and certifications make this book an indispensable resource for anyone navigating the complexities of Salesforce projects successfully.

About the Reviewer

Gaius Libam Feunou is a passionate Senior Salesforce Developer with a rich experience in the Salesforce ecosystem. He has significant expertise in designing, implementing, documenting, maintaining and testing features and applications based on Salesforce solutions such as Sales Cloud, Experience Cloud, Marketing Cloud, and Salesforce Industries.

He started his career as a Salesforce Developer in Cameroon where he worked with several clients in various industries like Energy, Marketing, Cosmetic, and Telecommunication.

Guided by his passion when he was still in Cameroon, he got the attention of top tech companies like CGI, one of the best IT consulting companies in Canada.

He is currently living in Montreal, where he works at CGI headquarters as a Senior Salesforce Developer.

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I am grateful to my family and friends for their support and encouragement towards writing this book.

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Thank you to the esteemed readers for expressing interest in this book. I am grateful for your enthusiasm and willingness to bring a positive change into the world of software development. Your support is the foundation of my writing efforts.

Preface

This book covers different aspects of a Salesforce project. In recent years, the Salesforce platform has expanded and changed continuously. It becomes essential for all roles of the Salesforce project team to understand the complexities involved in successful project delivery. With the help of years of distilled insight and practical experience, this book seeks to provide readers with the fundamental knowledge and skills required to effectively manage and execute Salesforce projects. The different chapters in this book follow a methodical strategy for organizing, carrying out, and optimizing your Salesforce endeavors, regardless of your level of experience—from novices starting their first project to seasoned pros looking to hone your abilities. By incorporating real-world scenarios, expert tips, and comprehensive strategies, this guide aims to equip you with the knowledge and tools necessary to ensure your Salesforce projects are completed on time, within budget, and to the satisfaction of all stakeholders. Whether you are looking to streamline your approach, manage more complex integrations, or simply enhance your project management skills, this book will serve as your road map to success.

Chapter 1: This chapter covers the foundational information about the Salesforce.com CRM platform and the different stages involved in a Salesforce project execution. It also enlists key terminologies used in the Salesforce and project management world.

Chapter 2: This chapter includes details of Salesforce project planning and preparation. It offers guidance on how to specify project goals and objectives, make a strategy for the work, identify stakeholders, collect requirements, and handle other intricacies involved in the process of requirement gathering.

Chapter 3: This chapter is focused on Salesforce platform customizations and configuration changes. It shares information about setting up a brand new Salesforce org, basics of ensuring org security and settings related to it, the table structures in Salesforce and setting the relationships between different objects, and shares information about page layouts, lightning pages, record types, and dynamic forms. It also gives details of approval processes and flows in Salesforce. Lastly, it shares information about AppExchange and its purpose.

Chapter 4: The fourth chapter is focused on data migration and integration. It covers the specifics of the data migration plan, the importance of clean data, the data mapping exercise, how to set up an import connection, various tools for data migration tasks, and how to validate recently imported or migrated data.

Chapter 5: The focus of chapter five is quality assurance. It contains information about conducting various testing types, creating test case documents, conducting user acceptance testing, and various testing techniques. It also discusses defect tracking, which is a post-user acceptance testing activity, and the elements involved in resolving the defect log.

Chapter 6: This chapter has information related to training users on new business processes and platforms and helping them adopt the new change. It provides information on how to create training materials that are appropriate for users' needs, how to conduct user training sessions, how to develop training plans and the significance of tailored learning, and how important it is to offer users ongoing support, which eventually aids in platform adoption. Then, it contains details about keeping an eye on user adoption, fixing any problems, creating a hypercare support plan, and making necessary improvements or adjustments.

Chapter 7: The chapter has in-depth information on creating a deployment plan, carrying out the project deployment procedures, providing support following deployment, steps for managing the new code, and keeping an eye on system performance.

Case Study: This case study provides a comprehensive review of a Salesforce project case study focused on developing online subscription renewal capabilities for users. This case study delves deeply into the strategies that were pivotal to the project's success, offering detailed insights into the planning, execution, and outcomes of the initiative. Through this examination, readers gain a thorough understanding of the methodologies and best practices that contributed to the effective implementation and achievement of project goals.

This book is written to help Salesforce project managers, product owners, business analysts, architects, Salesforce developers, or anyone trying to learn more about the Salesforce platform.

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Chapter 1
Introduction to Salesforce

Introduction

This book is an all-inclusive manual created to prepare any reader to successfully handle Salesforce projects, overcome challenges, and get the maximum benefits of Salesforce implementations. Salesforce, the industry leader in **Customer Relationship Management** (**CRM**) platforms, provides unmatched flexibility, scalability, and functionality to boost customer experiences, accelerate corporate growth, and optimize operations across a range of sectors.

This book compiles years of industry expertise into useful advice and recommended practices. Regardless of the reader's level of experience with Salesforce, this guide will provide the skills, tactics, and resources required to carry out projects on the Salesforce platform efficiently. Every chapter covers a crucial phase of the Salesforce project lifecycle, from early planning and customization to deployment, user training, and continuous support.

Salesforce initiatives are exceptional because of their capacity to modernize corporate procedures and promote an inventive and productive culture. However, the strategic approach to implementing the technology is just as important to the success of these projects as the technology itself. It is essential to comprehend the typical risks, difficulties, and success elements. This book places a strong emphasis on taking a user-centric approach, which

guarantees that projects are both technically solid and in line with corporate goals and user requirements.

Depending on the need and goals all projects will have a different set of constraints and challenges. Therefore, the stages can be different for different projects. This chapter will give a high-level overview of the common stages a Salesforce project should go through.

Structure

This chapter will cover the following topics:

- Understanding Salesforce
- Overview of Salesforce project execution
- Key terminologies

Objectives

This book is written to provide the reader with best practices and guidelines for successfully executing a Salesforce project. It includes the key points that should be considered while executing a Salesforce project. This chapter will give a high-level understanding of Salesforce and the phases a Salesforce project should follow.

Understanding Salesforce

In the rapidly evolving digital landscape, the quest for robust, scalable, and flexible **Customer Relationship Management** (**CRM**) solutions has led many to the doorstep of Salesforce. Before the reader sets out on this journey through *How to Successfully Execute a Salesforce Project*, it is vital to establish some groundwork by learning about what Salesforce is, how important it is in today's business world, and the fundamental ideas that make it an essential tool for organizations all over the world.

Salesforce is a well-known cloud-based **Customer Relationship Management** (**CRM**) platform that offers businesses a range of tools and services to manage their sales, marketing, customer

care, and other company operations. It provides a variety of integrated solutions intended to strengthen client interactions, accelerate business operations, as well as streamline business operations. Salesforce is a **Software-as-a-Service** (**SaaS**) platform, meaning it is hosted on the cloud and accessed by end users via a web browser. This eliminates the need for businesses to set up and manage software on their own servers or databases, allowing for simplicity of use and scalability. Salesforce enables organizations to manage their client connections successfully. It offers resources for handling customer data, keeping tabs on sales prospects, automating marketing campaigns, and delivering first-rate customer support. Some of the different products or clouds of Salesforce are Sales Cloud, Service Cloud, Community Cloud, Finance Cloud, Non-Profit Cloud, Customer 360, Artificial Intelligence Cloud, Data Cloud, Net Zero Cloud, etc. Salesforce assists organizations in efficiently managing interactions with their clients resulting in customer retention and driving sales growth. It offers resources for maintaining customer data, monitoring sales prospects, automating marketing initiatives, delivering first-rate customer service, and much more. We will cover some of these terms throughout this book.

When Salesforce first emerged in the late 1990s, the CRM industry underwent a paradigm change away from on-premise solutions and toward cloud-based services. A new era of customer relationship management accessibility, scalability, and flexibility was ushered in by this shift. Salesforce's innovative approach has simplified technology, enabling companies of all sizes to take advantage of modern CRM features. Comprehending Salesforce's strategic importance is vital for every enterprise seeking to improve its approaches to customer engagement. The platform's flexibility enables it to meet the specific requirements of a wide range of industries, including manufacturing, retail, and finance in addition to healthcare. Salesforce's cloud-based architecture allows for instant access to vital company information, which supports well-informed decision-making and quick reactions to shifts in the market.