



WHITE PAPER

A SALESFORCE CENTER OF EXCELLENCE PLAYBOOK

FOR MID-MARKET COMPANIES

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THE BENEFITS OF BASIC COE FRAMEWORK SUPPORT ON YOUR SALESFORCE ORG

If you work at a mid-market company that uses Salesforce, chances are you've heard of a Salesforce Center of Excellence (COE), but that you haven't thought about standing one up to support your own org. Maybe it seems like too big an investment or you didn't include it in your most recent cost projections.

But all Salesforce orgs can benefit from the support of a basic COE framework, which helps companies of **all sizes** ensure their users adopt best practices and **maximize their return on investment**.

For those who are new to the COE concept, think of your Salesforce org like it's a car. Even a trusty and well-travelled vehicle needs regular oil changes, tire rotations and inspections. In the same way, your **Salesforce COE** ensures that routine maintenance happens in a timely manner. Simply put, a COE can help keep your Salesforce org running smoothly and efficiently for years.

Whether you're about to begin your own Salesforce journey or you already have an org in place, this playbook will outline why you need to consider setting up a COE and how to design one that meets your needs at your scale and sets you up for future growth.



WHERE TO BEGIN? DESIGNATE A SALESFORCE ADMIN FOR YOUR ORG

If you haven't already, you'll work with a Salesforce Solutions Architect and a Technical Architect during the implementation process. That engagement will ensure that your org is built in a way that will support your needs from day one.

Whichever route you choose, keep in mind that whoever takes this role must be an excellent collaborator. Their knowledge of your Salesforce data model and of the platform's capabilities will help you answer questions internally and make sure your teams don't paint themselves into a corner.

But for long-term success, you need to designate at least one Salesforce Admin for your org. If you haven't done this yet because you're at the start of your Salesforce journey, don't rush through the process of finding the right person. There are two ways you can approach this:

Upskill a current team member

While it's unlikely that one of your team members already has the Salesforce background, they'll need to run a Salesforce COE on their own. In fact, you may already have the right person on your team to upskill into this administrative role. In this case, you'll want to **direct them to Trailhead** and set them on a path to getting their Salesforce Admin certification as soon as possible.

Recruit a Salesforce Admin externally

If you can't locate the right talent or the bandwidth for this job internally, you may need to hire someone to take on this role. Be sure to include this in your project budget if you're just starting to scope the cost of your Salesforce implementation.

For example:

Imagine you're sitting in a meeting where a team member wants to know how to input a new customer – say their parent company is a subcontractor of a major corporation you already work with that's already entered into your org as its own contact. The Salesforce Admin in the room is the person who knows that the platform supports parent-child accounts and can let everyone know what's possible within this powerful CRM.


WHAT'S NEXT?


Once you've identified your admin, they'll work with company leaders, internal subject matter experts (SMEs), and technical staff to manage your Salesforce org.

Org management is a continuous, collaborative effort to ensure you're getting the most you can out of the platform. Mid-market organizations benefit from having smaller, dynamic teams, therefore they can forego the limitations often presented when having to rely on an enterprise-wide framework.





To guide this effort, the COE component model highlights six things mid-market companies need to do well to properly manage their Salesforce org (please note that architecture framework and development guidelines and policies have been omitted from this model):

 Intake and prioritization principles

 Business and technology design

 Data and integration standards

 Testing approach and protocols

 Adoption and support guidelines

 Environment management guidelines

Even if the company is small, internal stakeholders from the disciplines within your business should be engaged in this process. From here, your admin will handle intaking new requests, processing updates, and documenting everything related to your Salesforce org.

The table below gives a good overview of how each Component Group* can have a defined purpose, with relevant examples.

Component Group		Purpose	Examples
1	Intake & Prioritization Principles	Partner with business groups to identify and rank Salesforce project opportunities	<ul style="list-style-type: none">Idea generation workshops and guidelinesForce friendly analysisSalesforce resource demand / forecast
2	Business & Technology Design	Coordinate with business stakeholders to create technology standards that support cross operational groups and functions	<ul style="list-style-type: none">Profile, role and security guidelinesConfiguration and presentation standardsWorkflow processes, policies and standards
3	Data & Intergration Standards	Create standard definitions, ETL processes, and maintenance procedures to ensure data quality	<ul style="list-style-type: none">Data architecture frameworks and guidelinesNaming norms and conventions (based on busines needs)De-duplication and loading standards / feed creation guidelines
4	Development Guidelines & Policies*	Establish and enforce consistent development approaches and methodologies	<ul style="list-style-type: none">Configuration vs. customization guidelinesDesign Patterns and best practices for Apex Trigger / Class development, Visualforce pages / components, and acceptable web development tools
5	Architecture Frameworks*	Ensure architectural standards across projects and orgs	<ul style="list-style-type: none">Establish architectural best practice across orgsEnsure projects and purchased apps comply with established architectural standards
6	Testing Approach & Protocols	Establish test creation and execution standards for individual projects and the SFDC platform	<ul style="list-style-type: none">Test case templates, standards & automation (includes tools)Regression testing approach and methodologyTesting level of effort guidelines
7	Adoption & Support Guidelines	Provide consistent inputs into change management efforts	<ul style="list-style-type: none">Training and communications support and input guidelinesBusiness process and operating model support strategies
8	Environment Management Guidelines	Established inputs into change management activities supporting SFDC projects	<ul style="list-style-type: none">User License provisioning guidelinesMulti-org management processes & Dev OpsDeployment and source control tools (Continuous Integration)

*Component Groups 4 and 5 have been omitted for mid-market companies

THE 6 COMPONENTS OF A SALESFORCE COE FOR MID-MARKET COMPANIES

1

ESTABLISH INTAKE & PRIORITIZATION PRINCIPLES

You don't need to have a huge Salesforce COE to establish a logical order in which you'll intake and prioritize enhancements or problem resolutions. It's just a matter of deciding what order you'll work in and documenting that process for continuity.

This will help your Salesforce team determine how to maintain the platform and your backlog of issues, especially if you are a small org with only one or two admins. This process may be as simple as asking users to email the admin with an issue and that person entering their request into a queue (which could be as simple as a spreadsheet).

Perhaps a biweekly meeting with the business owner or other key stakeholders to review the queue by order priorities will be necessary. As a group, you might use business drivers to rank your list by priority level. You can do this by answering two questions:



What are the top five drivers behind our business, and how do each of the open items or enhancements rank against those five drivers?



Are you looking to maximize efficiency, grow the business and/or increase the marketing reach?

Alternatively, you might consider using the case functionality inherent in Salesforce to turn those emails from users into cases that are routed to your Salesforce Admin(s). Ultimately, the process should also help your admin prioritize issues as they arise.



By scoring those responses, you can quickly and systematically stack-rank the list. If this sounds overly complex, remember that your process only needs to be as complicated as your organization requires.

2

DETERMINE THE PRINCIPLES OF YOUR BUSINESS & TECHNOLOGY DESIGN




Your Salesforce Admin's job is to get acquainted with Salesforce's best practices and to manage the platform accordingly. This will allow your team to leverage the platform's capabilities and features as intended so that your org can mature with your business as they both grow.

There's also a higher level on which your admin must periodically ask:

-  What can Salesforce do for this business?
-  How does our team actually use Salesforce?

Based on your answers, you can focus your attention on the priorities that will have the biggest impact on your business and the outcomes you're targeting.

Some of the best practices you'll need to document and communicate with your users may seem quite simple, but adherence is critical to ensuring excellent data hygiene in the long term. For example, can you answer these questions?

-  What naming conventions do you use to name opportunities?
-  What constitutes an opportunity?
-  How do you manage accounts that have a parent-child relationship?

This leads directly into the next area that requires close attention from your admin.

3

SET UP DATA & INTEGRATION STANDARDS FOR YOUR ORG

In determining what principles you'll use to guide your business's use of the platform, you may start to think about how you'll manage your data.

For example, will you allow duplicate records to exist or will you use the Salesforce plug-in that helps prevent duplicates?

More than just deciding what data should be input, you'll need to establish a protocol to enforce data quality, standards, and cleanliness. And this goes back to the business use question.



How will you communicate that business opportunities should input following certain naming conventions?



What will you do to periodically cleanse your data?

Your admin will coordinate with business leaders to define what data quality means for your org, set standards, and establish a routine for data cleansing.

4

DOCUMENT YOUR TESTING APPROACH & PROTOCOLS

For mid-market businesses with smaller Salesforce orgs, the testing and approvals process is typically fairly straightforward. Your Salesforce Admin will collaborate with SMEs to test releases in a UAT environment and release them once they're ready to go.

But it's best to add one layer of approval to the testing process: external sign-off. At a minimum, it can be helpful to have a couple of business users or the business owner preview and sign off on any updates before they go live.

Why add this layer of protocol to what could be a very simple process? On a very basic level, a second set of eyes is always a good idea, especially if they come from an educated end user who can spot issues that may escape a busy Salesforce Admin's scrutiny.

5

DRAW UP ADOPTION & SUPPORT GUIDELINES

As with the rest of your scrappy Salesforce COE, your adoption and support guidelines don't need to be comprehensive to be effective, but they should include the answers to these questions:



How will we onboard new users to our Salesforce org?



What will we do to encourage adoption?



What is our platform support process going to look like?

If multiple people are engaged in executing any of these efforts, you'll also need a modest org chart to ensure everyone knows what they're responsible for and who they'll report those activities to.

The answer for many Salesforce orgs may be that your Salesforce Admin will meet with business stakeholders on a monthly basis to review the queue of issues and opportunities for updates. For others, a more complex and systematic approach will help yield the results you're looking for.

The key is to have guidelines in place as a jumping off point. These can and should be updated as your org matures.

6

MAINTAIN ENVIRONMENT MANAGEMENT GUIDELINES

Even smaller Salesforce orgs can benefit from using a lower environment to test updates before pushing them up to production.

It's easy enough to follow Salesforce's guidelines, and it's important to have an understanding of the sandboxes you have at your disposal and how you'll manage change across these environments.

Perhaps more importantly, when it's time to roll-out major updates to the platform, being able to demonstrate what an update will look like to users in a UAT environment can help get their buy-in and bolster usage.

Like the other five components in this list, establishing business processes and a support strategy will help drive consistency that will ensure your users feel their Salesforce org supports their goals and their daily work. This satisfaction is what drives use and ultimately, your return on investment.

EVEN A SIMPLIFIED SALESFORCE COE PROVIDES A LAYER OF SUPPORT FOR YOUR ORG

The goal of even the most basic Salesforce COE is to help you get the most out of the core capabilities of the platform. The closer you adhere to an out-of-the-box Salesforce implementation, the easier it will be to update and maintain your platform following Salesforce's best practices. This, in turn, makes your Salesforce Admin's role much simpler and keeps the metaphorical car – your Salesforce COE – running smoothly.

Most SMBs and mid-market organizations tend to over-customize their Salesforce orgs, but we strongly recommend the out-of-the-box approach. Using this framework, your COE's goal is to govern the platform in a way that will keep it as simple and highly functional as possible. This will ensure your business capitalizes on the investment you've made in the Salesforce platform, and it doesn't take a complex Center of Excellence to help you meet your goals.



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