

Executing Salesforce Projects

*How to successfully execute
any Salesforce project*

Shamli Nimbaji Nikam



www.bpbonline.com

First Edition 2024

Copyright © BPB Publications, India

ISBN: 978-93-55519-047

All Rights Reserved. No part of this publication may be reproduced, distributed or transmitted in any form or by any means or stored in a database or retrieval system, without the prior written permission of the publisher with the exception to the program listings which may be entered, stored and executed in a computer system, but they can not be reproduced by the means of publication, photocopy, recording, or by any electronic and mechanical means.

LIMITS OF LIABILITY AND DISCLAIMER OF WARRANTY

The information contained in this book is true to correct and the best of author's and publisher's knowledge. The author has made every effort to ensure the accuracy of these publications, but publisher cannot be held responsible for any loss or damage arising from any information in this book.

All trademarks referred to in the book are acknowledged as properties of their respective owners but BPB Publications cannot guarantee the accuracy of this information.

To View Complete
BPB Publications Catalogue
Scan the QR Code:



www.bpbonline.com

Kup ksi k

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.

Acknowledgement

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

I want to thank BPB Publications for their incredible support and knowledge in completing this book. Their team's commitment and expertise made this journey achievable, and they handled every facet of the publication process with professionalism and care.

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.

Coloured Images

Please follow the link to download the
Coloured Images of the book:

<https://rebrand.ly/k625jga>

We have code bundles from our rich catalogue of books and videos available at **<https://github.com/bpbpublications>**. Check them out!

Errata

We take immense pride in our work at BPB Publications and follow best practices to ensure the accuracy of our content to provide with an indulging reading experience to our subscribers. Our readers are our mirrors, and we use their inputs to reflect and improve upon human errors, if any, that may have occurred during the publishing processes involved. To let us maintain the quality and help us reach out to any readers who might be having difficulties due to any unforeseen errors, please write to us at :

errata@bpbonline.com

Your support, suggestions and feedbacks are highly appreciated by the BPB Publications' Family.

Did you know that BPB offers eBook versions of every book published, with PDF and ePub files available? You can upgrade to the eBook version at www.bpbonline.com and as a print book customer, you are entitled to a discount on the eBook copy. Get in touch with us at :

business@bpbonline.com for more details.

At www.bpbonline.com, you can also read a collection of free technical articles, sign up for a range of free newsletters, and receive exclusive discounts and offers on BPB books and eBooks.

Piracy

If you come across any illegal copies of our works in any form on the internet, we would be grateful if you would provide us with the location address or website name. Please contact us at **business@bpbonline.com** with a link to the material.

If you are interested in becoming an author

If there is a topic that you have expertise in, and you are interested in either writing or contributing to a book, please visit **www.bpbonline.com**. We have worked with thousands of developers and tech professionals, just like you, to help them share their insights with the global tech community. You can make a general application, apply for a specific hot topic that we are recruiting an author for, or submit your own idea.

Reviews

Please leave a review. Once you have read and used this book, why not leave a review on the site that you purchased it from? Potential readers can then see and use your unbiased opinion to make purchase decisions. We at BPB can understand what you think about our products, and our authors can see your feedback on their book. Thank you!

For more information about BPB, please visit **www.bpbonline.com**.

Join our book's Discord space

Join the book's Discord Workspace for Latest updates, Offers, Tech happenings around the world, New Release and Sessions with the Authors:

<https://discord.bpbonline.com>



Table of Contents

1. Introduction to Salesforce	1
Introduction	1
Structure	2
Objectives	2
Understanding Salesforce	2
Overview of Salesforce project execution.....	4
Key terminologies.....	8
Conclusion	13
Points to remember.....	14
 2. Project Planning and Preparation.....	 15
Introduction	15
Structure	15
Objectives	16
Project planning and preparation.....	16
Defining project goals and objectives	19
Creating a project plan	21
Identifying project stakeholders and roles.....	23
Gathering requirements.....	25
Discovery sessions	27
Establishing a project timeline and milestones	29
Conclusion	30
Points to remember	31
 3. Salesforce Configuration and Customization	 33
Introduction	33
Structure	34
Objectives	34

Setting up Salesforce Org and security settings	35
<i>Org security</i>	36
Designing data model and custom objects.....	39
<i>Objects</i>	40
Configuring page layouts and record types	42
<i>Lightning pages</i>	43
<i>Dynamic Forms</i>	45
Creating custom fields and relationships.....	47
Defining workflows, approval processes and automation...	48
Implementing business processes with flows	49
Salesforce AppExchange.....	50
Conclusion	51
Points to remember.....	52
 4. Data Migration and Integration.....	53
Introduction	53
Structure	54
Objectives	54
Planning data import and migration strategy	54
Extracting and cleansing data from legacy systems	57
Mapping data to Salesforce fields.....	58
Loading data into Salesforce	60
Testing and validating data migration results.....	62
Integrating Salesforce with external systems.....	64
Conclusion	66
Points to remember.....	67
 5. Testing and Quality Assurance	69
Introduction	69
Structure	69
Objectives	70

Developing a testing strategy	70
Creating test cases and scenarios.....	74
Performing functional and integration testing.....	75
<i>Functional testing</i>	76
<i>Automation testing</i>	77
<i>Integration testing</i>	78
Conducting User Acceptance Testing	80
Resolving issues and defect tracking	82
Conclusion	83
Points to remember.....	85
6. User Training and Adoption.....	87
Introduction	87
Structure	87
Objectives.....	88
Developing a training plan.....	88
Creating training materials and documentation.....	91
Conducting user training sessions	93
Providing ongoing support and assistance.....	95
Monitoring user adoption and addressing challenges.....	97
Hypercare support plan.....	101
Conclusion	103
Points to remember.....	104
7. Deployment and Post-Implementation.....	105
Introduction	105
Structure	105
Objectives.....	106
Planning deployment activities	106
Executing deployment plan	109
Post-implementation support and maintenance.....	111

Monitoring system performance and security	113
Conducting post-implementation review and lessons learned	116
Project closing: Final steps and reflections	118
<i>Final deliverables and documentation</i>	118
<i>User training and support</i>	119
<i>Formal project closure</i>	120
<i>Reflections on success and impact</i>	120
Conclusion	121
Points to remember	122

Case Study: Streamlining Online Subscription

Renewal for SaaS Products at Nikam's	123
Introduction	123
Background	124
Project scope, goals, and objectives	126
Pain points of the current process	127
Stakeholder identification and engagement	128
Requirement gathering	133
<i>Surveys</i>	133
<i>Interviews</i>	133
<i>Workshops</i>	134
<i>Discovery sessions</i>	134
<i>Key requirements</i>	135
Project plan	136
Architectural plan	139
Salesforce configuration and customization	141
<i>Customization</i>	143
Data migration and integration	144
Challenge	146
Testing and validation	147

<i>Key scenarios</i>	149
Training	150
Change management.....	152
Phased rollout approach of deployment	154
<i>Contingency planning</i>	156
Analysis of project goals with outcomes	158
<i>Reduction in renewal time</i>	158
<i>Improvement in customer satisfaction</i>	158
<i>Decrease in operational overhead</i>	159
<i>User feedback and continuous improvement</i>	159
<i>Scalability and future readiness</i>	159
Lessons learned	160
Conclusion	162
Index	165-169

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.