

Salesforce Application Governance



Contents

Making the Case for Salesforce Governance in Your Organization

Getting Started with Salesforce Governance: 4 Focus Areas

- Establishing a Center of Excellence
- Introducing Change Management
- Setting an Organization Strategy
- Formalizing Design Standards

Successfully Scaling Salesforce in Your Organization

Making the Case for Salesforce Governance in Your Organization

Introducing Salesforce in any form can deliver enormous benefits to your organization. But the initial implementation is only the beginning, as the breadth and flexibility of the Salesforce solution allow it to grow and evolve alongside your business.

So how do you continue to make the most of everything Salesforce has to offer beyond that initial implementation? Far too many organizations struggle to answer this question, largely because they lack a formal Salesforce governance strategy.

Salesforce is a powerful solution, and it can not be treated with a “set it and forget it” mentality. When that happens, organizations leave significant value on the table. Rather, Salesforce requires ongoing maintenance and attention, particularly when it comes to configuring the solution in a way that can help scale your business quickly.

Specifically, introducing a formal governance model for Salesforce can help your organization:

- Maintain high levels of user adoption
- Improve cost effectiveness
- Stay up to date on new product functionality
- Increase agility for new developments
- Roll out updates and new developments effectively
- Minimize the risk of change
- Centralize control and decision-making

Given these benefits, when it comes to getting the most out of Salesforce in the long term, your organization needs a formal approach to Salesforce governance. Whether you're first implementing Salesforce or are a few years in with the solution, it's never too early or too late to introduce a Salesforce governance strategy.



Getting Started with Salesforce Governance: 4 Focus Areas

Introducing a formal Salesforce governance strategy in your organization requires proper planning. This planning should center around four key focus areas:

1. Establishing a Center of Excellence
2. Introducing Change Management
3. Setting an Organization Strategy
4. Formalizing Design Standards



1. Establishing a Center of Excellence

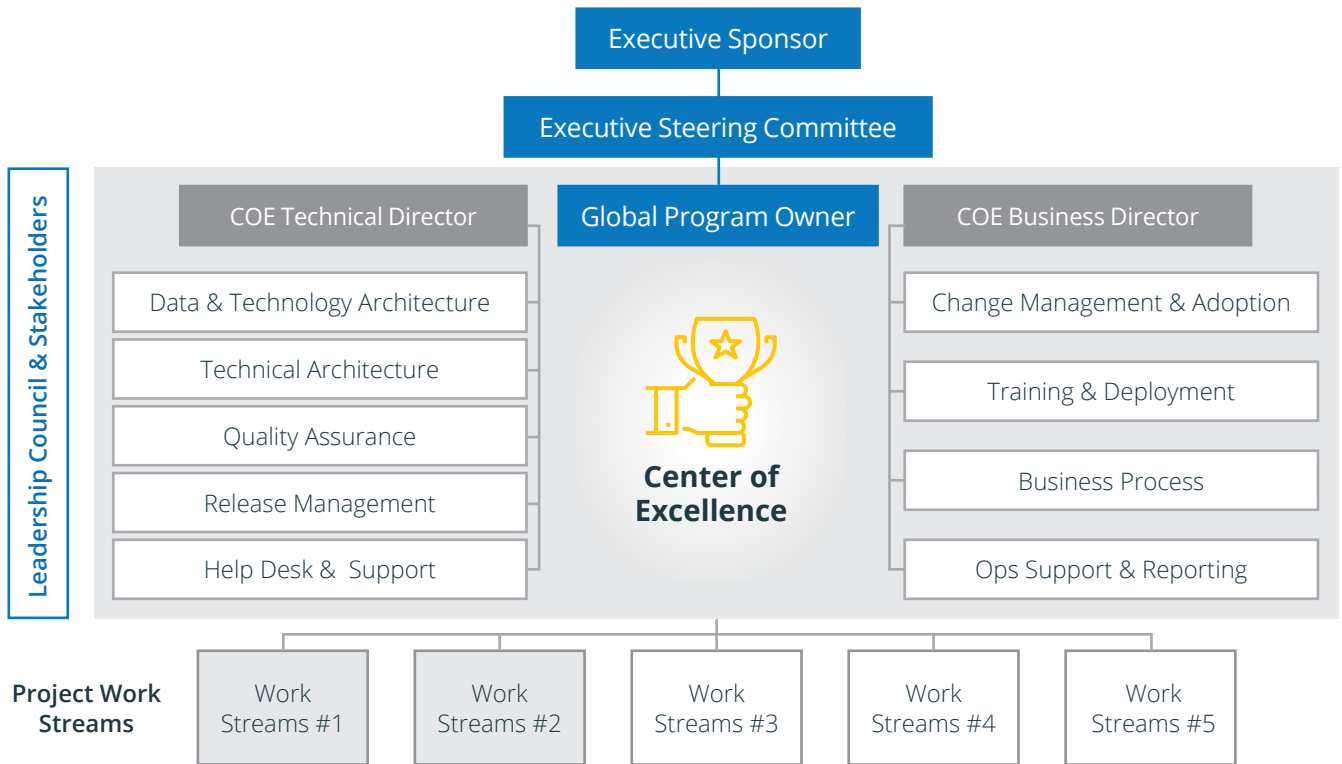
Establishing a Center of Excellence (COE) allows you to get the most out of Salesforce by centralizing the CRM functions for the entire organization.

The first step to establishing a COE is assembling a team that can set the standard for Salesforce architecture, updates and enhancements to deliver a consistent user experience and minimize administrative overlap. At a high level, this centralized governance can include:

- Setting documentation for standards and metrics for reporting at the individual user level up to managers and executives/key stakeholders
- Creating a documented methodology, including business processes, templates, tools, and best practices, for using specific areas of the application
- Introducing development initiatives for continuous improvement and thought leadership in the areas of presales, account management and customer support
- Enforcing standards on administrative permissions and changes within the application
- Regularly collecting feedback and insight from the Salesforce user community
- Deciding on the implementation of new functionality in future work streams

The most important piece of establishing a COE is making sure the initiative gets driven from the top down. To succeed, every COE needs an executive sponsor who acts as a program evangelist. Given that Salesforce is a big investment, having an executive at the helm who can drive adoption and work streams is essential.

Beyond your executive sponsor, other roles on your COE should include a program owner, departmental stakeholders and business and technical stakeholders. Altogether, the group might look something like this:



Once you assemble your COE team, you can begin holding monthly steering committee meetings that bring everyone together. During these meetings, you should review responsibilities that fall under the purview of the COE, such as how to incorporate or respond to feedback from users, how to increase adoption or how to best onboard new employees.

2. Introducing Change Management

Proper change management is essential to promoting adoption of Salesforce within your organization, particularly as you expand your use of the solution and introduce new features.

Introducing change management starts by issuing a readiness analysis of your user community. Important considerations for this analysis include:

- How do users feel about Salesforce and what's their attitude toward using it?
- Are users finding ways to use different parts of Salesforce that help enhance their daily activity?
- Are users competent on the best practices of using Salesforce, and has this created a positive corporate culture related to adoption of existing processes?

Together, the answers to these questions should help you determine if Salesforce is implemented in a way that allows it to automate business processes and drive workflows to create value for users. If it is not and your users feel like they're simply putting data into a system, you will not get the most out of Salesforce and adoption of any new developments will likely be low.

The results of this analysis should help diagnose the readiness of your user community to accept changes to the Salesforce program. Based on those results, you can develop a change management model that addresses the following areas (note: this model is important regardless of level of readiness):

- **Communication:** How will you communicate changes to the user community and what is the right time to do so?
- Driving awareness of and excitement about a change requires clear communication about the need for and benefits of the new way of doing things.
- **Sponsorship:** Do you have proper sponsorship from the top down? Any directives must come from the top down if you want to create a culture that enforces the change.
- **Adoption:** What will prevent acceptance of the application into users' daily activities? User adoption ultimately comes down to how people feel about the change and how clear the reasoning is to them. Providing a forum for users to give feedback can also promote adoption.
- **Process:** How effective is the application as it relates to overall business processes (sales, support, etc.)? People must view the change as something that adds value rather than simply an administrative update.
- **Training:** How will you deliver ongoing user training (train the trainer, 1:1 training, etc.)? Initial training and ongoing support help people see the change firsthand, know how to use new features or follow new processes and feel comfortable doing so.

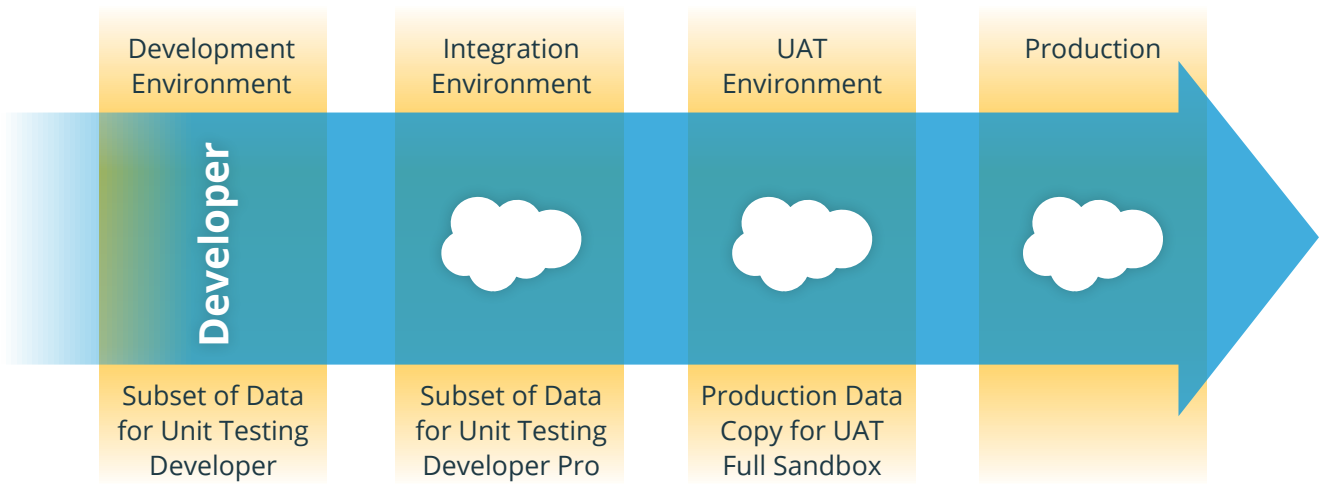
3. Setting an Organization Strategy

Implementing an organization strategy that governs new developments for your Salesforce instance will minimize the risk of change. The best way to implement such a strategy is through the use of sandboxes, which allow your development team to handle development and testing in isolated environments before pushing any changes to production.

When you first create a sandbox, it is an identical copy of your production instance. You can then use the sandbox to test changes, such as the impact of new features or enhancements, or test net-new applications without risking any damage to your production data or configuration. In terms of data replication, you can use sandbox templates

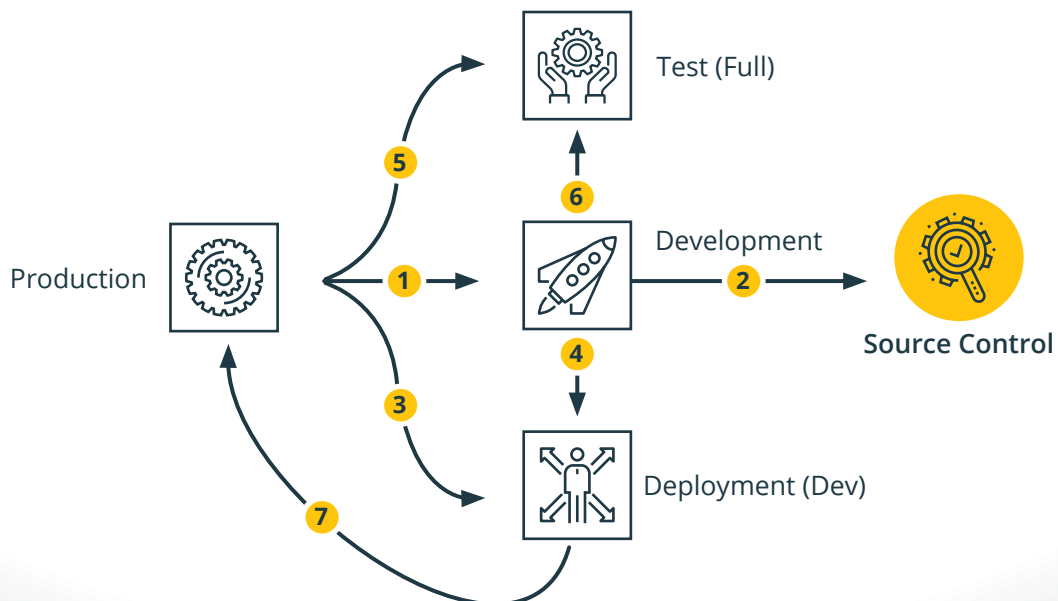
to create new sandboxes containing specific data sets from production data. AllCloud strongly recommends implementing a sandbox strategy with multiple sandboxes, including a full copy of your production environment, that way you can confidently build a variety of new elements across departments with minimal disruption to users.

The Salesforce Platform Development Process



As a best practice, you should refresh your sandboxes periodically to ensure a recent, exact copy of your production environment for development, testing and training. From a testing perspective, you should require a minimum of 75% test code coverage by line to deploy code to production and enforce a rule that all tests must be complete with no errors. Proper test design dictates that they pass one or more assertions, or expressions that encapsulate testable logic to demonstrate that the code is functional as intended.

Finally, you should implement a source control system (whether as a custom application in Salesforce or a system such as Jira, an Atlassian product) that captures version control data on pre-deployment tasks, Salesforce metadata for deployment, post-deployment tasks and data loader reference data.



4. Formalizing Design Standards

Design standards (and coding naming conventions) within Salesforce help reduce the risk around having large data volumes, extensive security considerations and complicated integration requirements. They do so by clearly identifying why code was written or why something was configured in a certain way and the group for which it was done. Essentially, they label everything in the backend of Salesforce with a standard naming convention. This naming convention is important for understanding what was done, why it was done and what purpose it serves, which becomes critical as growth or turnover within the organization causes Salesforce ownership to change hands.

You can apply design standards to categories such as configuration via code, Apex and Visualforce. As you think through your design standards, important questions to ask include: Are requirements clearly defined in the application? And have user personas been defined?

As you configure your design standards, it's imperative to establish and then enforce best practices around naming convention standards. For example, you might apply naming conventions to workflows, validation rules, field labels and even descriptions so that anyone can easily understand how and why each field was created or customized in a specific way.

When introducing custom development to accommodate requirements that cannot be addressed using declarative functions, you may require Apex or Visualforce. Some best practices for Apex coding and Visualforce include:

- "Bulkify" your code to handle processing of large data batches and helper methods
- Avoid SOQL Queries inside FOR Loops
- Use collections, streamlining queries and efficient FOR Loops
- Query large data sets
- Use the limits Apex methods to avoid hitting governor limits
- Use @future appropriately
- Write test methods to verify large data sets
- Avoid hardcoding identifiers
- Optimize Salesforce Object Query Language (SOQL)
- Use standard set controllers

Successfully Scaling Salesforce in Your Organization

As you scale the role of Salesforce within your organization, you will end up with multiple work streams occurring in parallel, and the only way to make those work streams successful is to have a clear, centralized governance strategy.

A key part of developing this governance strategy is getting people excited about Salesforce so that they want to continue using it and provide feedback for changes that can benefit their team. A governance strategy not only gets people to this point of excitement, but it also provides a forum to voice this feedback, a clear path for recommended changes to get reviewed and approved and then an effective plan for improvements to get built, tested and deployed into production.

Salesforce is a big investment for any business, but it's one that comes with even bigger benefits when appropriately managed. The key to unlocking those benefits lies in proper Salesforce governance that can help your organization stay updated on ways to grow and improve its use of the application in an organized and effective way.