



IMPACT: Boston

IMPACT City Tour

25th June 2024

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Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



Change Intelligence Research Series

Data-driven insights to help change behaviour



Ian Gotts

Founder & CEO



Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



/iangotts



You guys start coding, and
I'll find out what they want



Change Intelligence Research Series

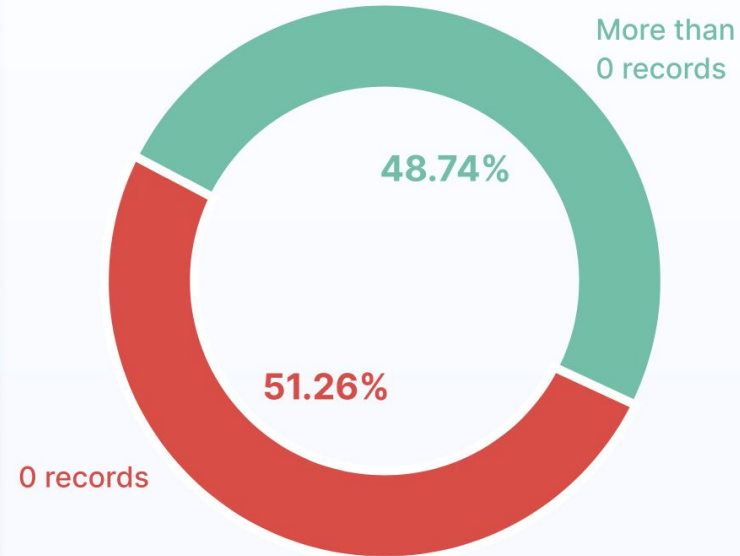
Data-driven insights
into the trends in
Salesforce configuration



Wasted effort

Feedback
Meetings
Slack messages
Development
Testing deployment
~~Documentation~~

Custom objects never used (excluding MP)



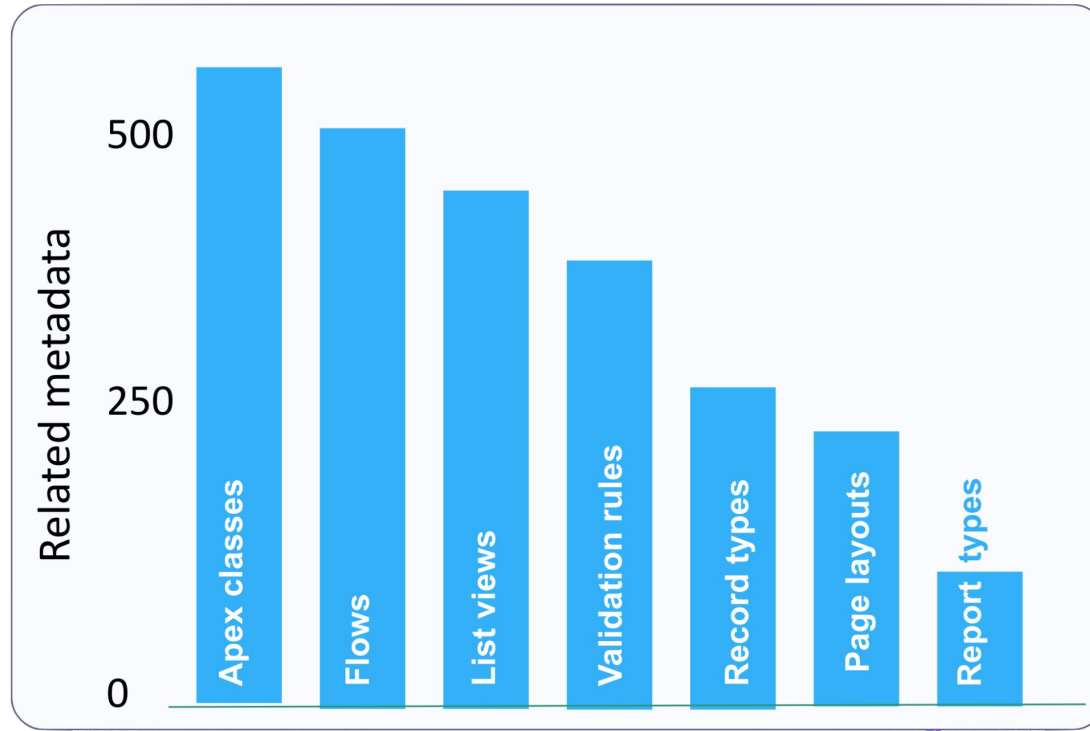
Wasted effort

Feedback
Meetings
Slack messages
Development
Testing deployment
~~Documentation~~

Custom fields with 0% data (excluding MP)

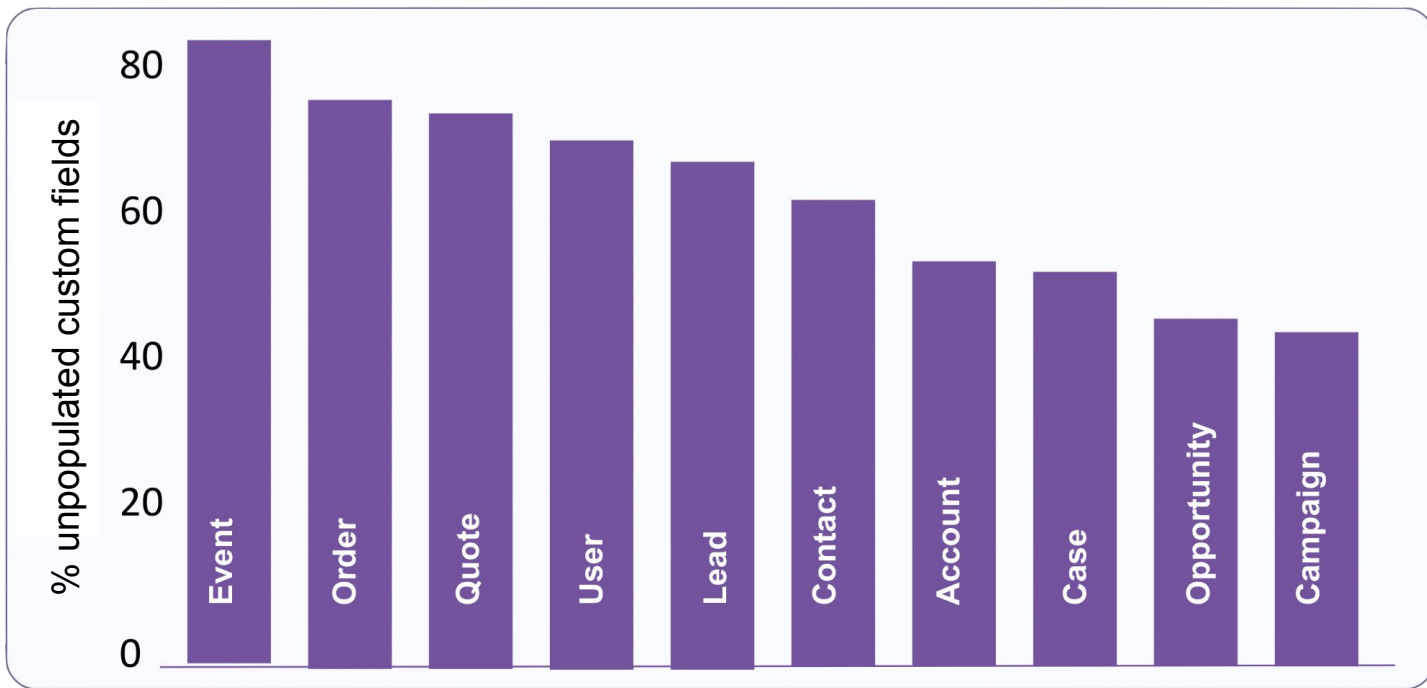


Related development effort



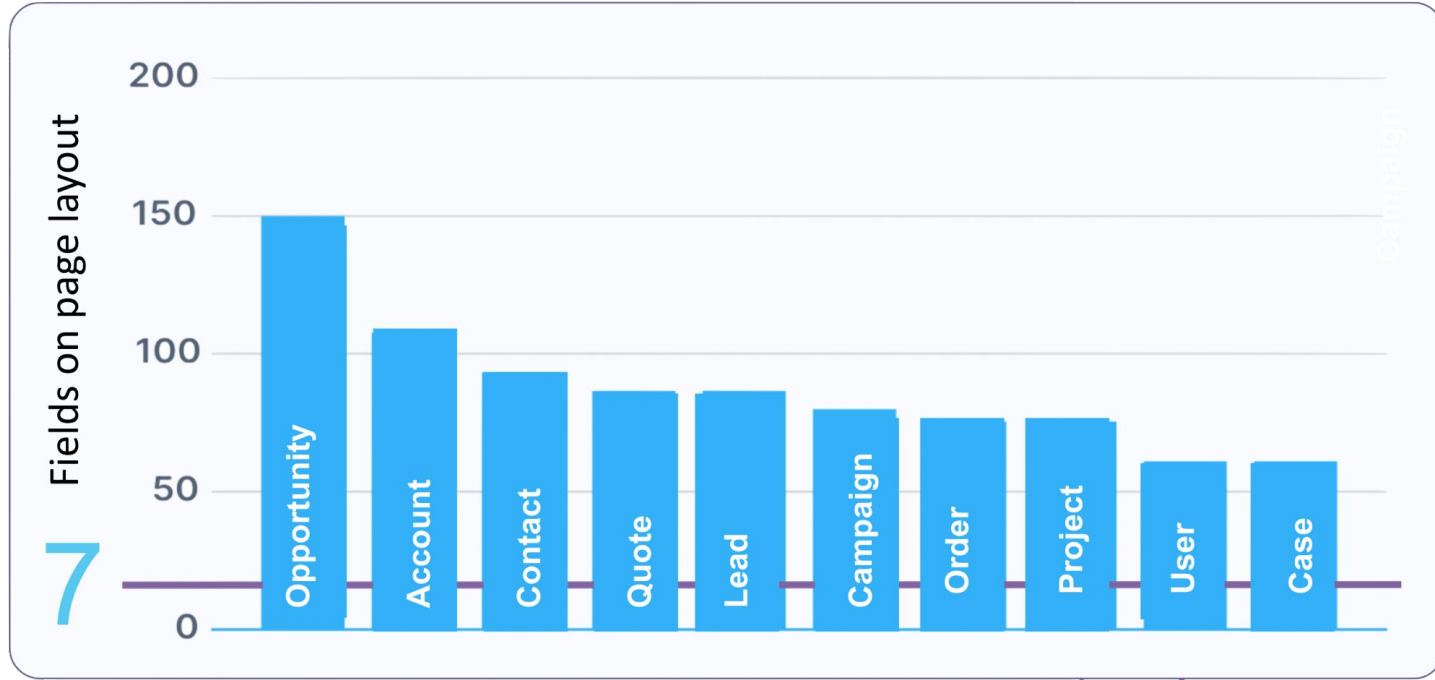
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Far worse than 41% average



IMPACT

Confused users and poor data



Salesforce @scale dilemma



FORRESTER®

The complexity of scale crushes Salesforce's responsiveness.

As Salesforce use grows, innovation slows and flexibility evaporates.

Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

The result: every change requires long and expensive impact-analysis and regression testing projects – killing the responsiveness that made Salesforce attractive at the start.

Salesforce @scale dilemma



FORRESTER®

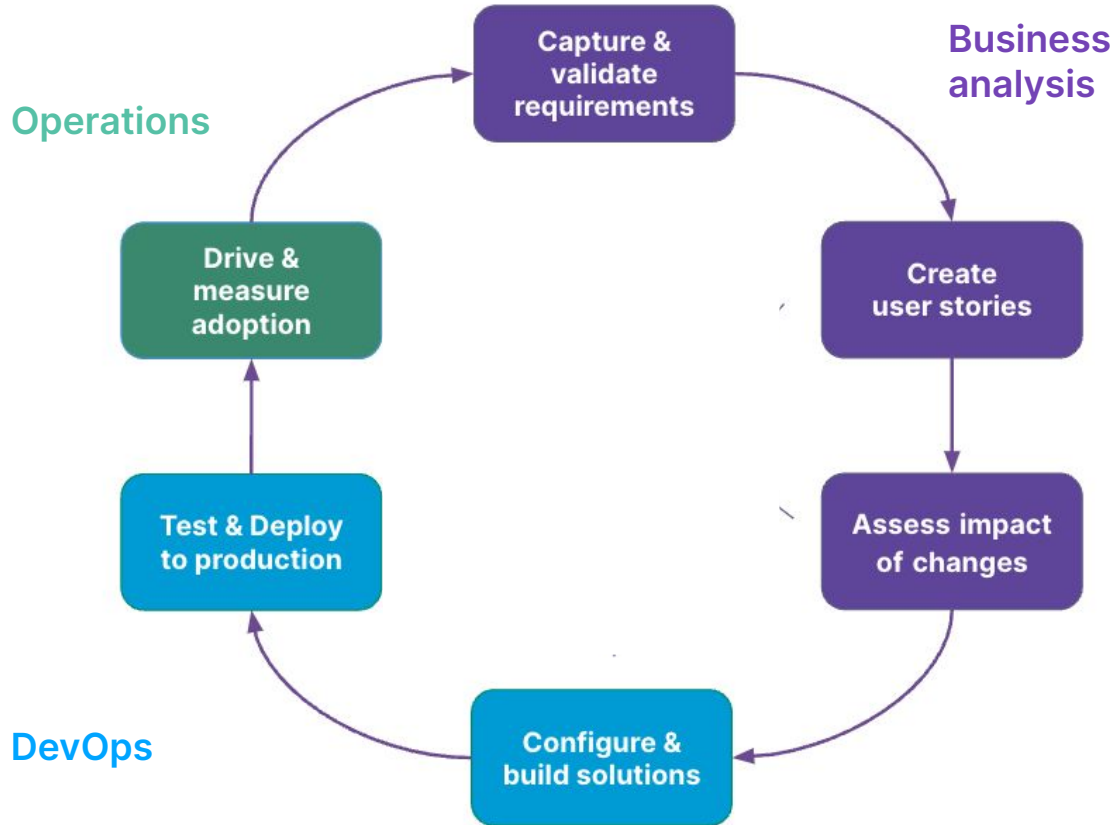
*The complexity of scale **crushes Salesforce's responsiveness.***

*As Salesforce use grows, **innovation slows** and flexibility evaporates.*

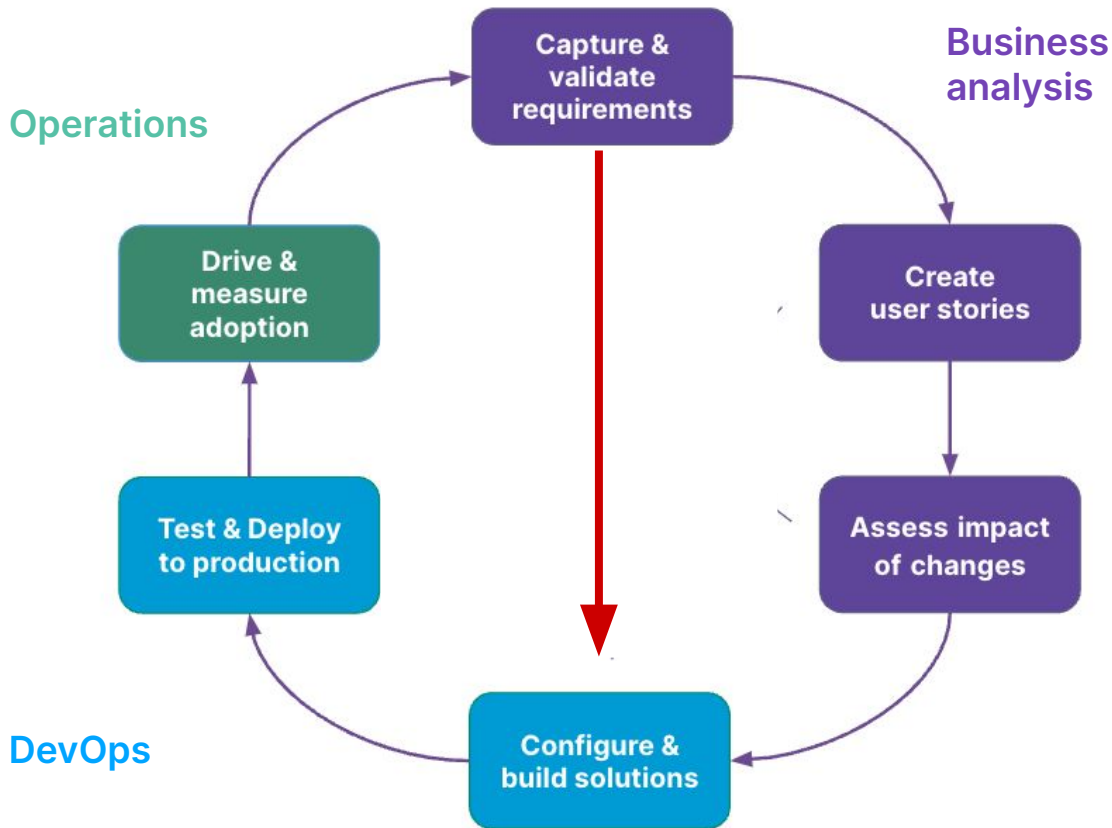
Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

*The result: every change requires long and expensive impact-analysis and regression testing projects – **killing the responsiveness** that made Salesforce attractive at the start.*

Implementation lifecycle



Shortcuts take longer

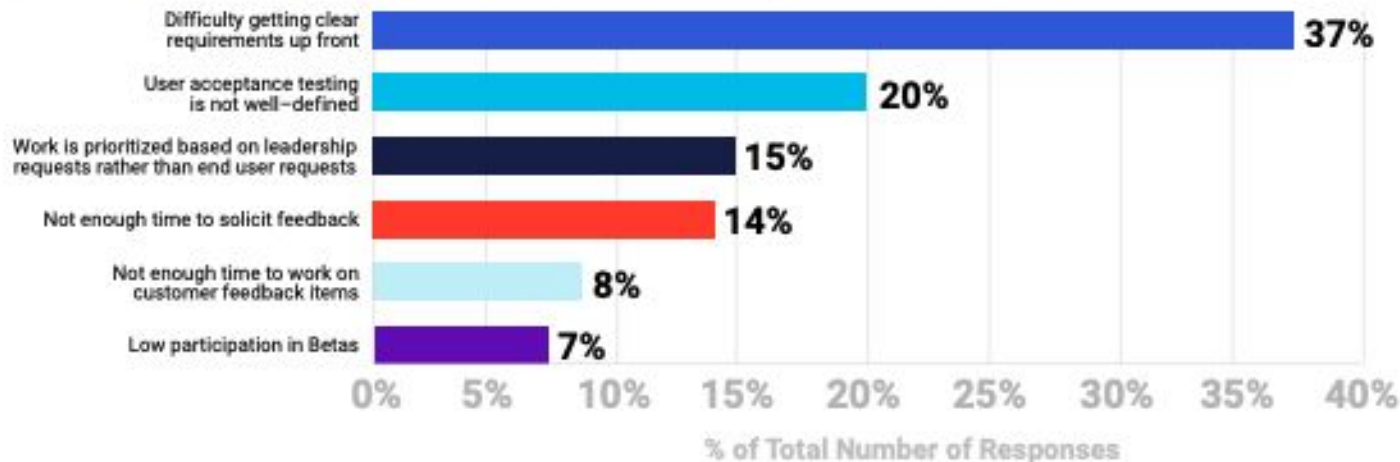


Copado State of DevOps Report



Difficulty getting clear requirements up front

Most challenging part of integrating customer feedback?



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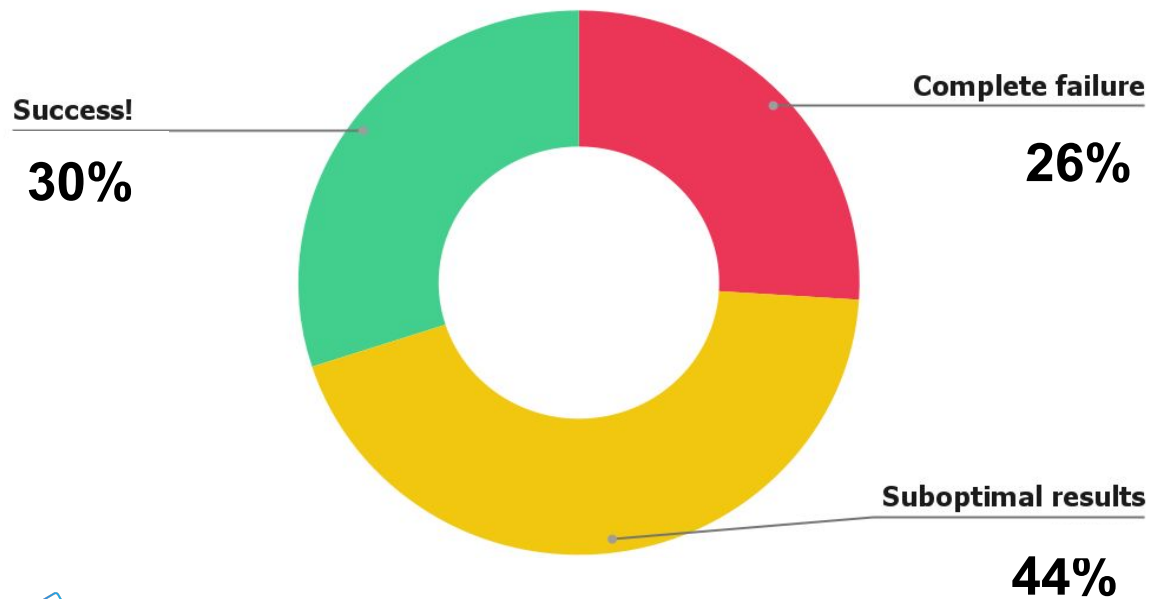
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\$1 TRILLION WASTED

% of projects that end in failure

Based on BCG's "Flipping the Odds of Digital Transformation Success" 2020 report



Noisy Waste

87.5%

Fail to meet objectives

3 Stages of a Successful Digital Transformation

Harvard Business Review, September 20, 2022

Didier Bonnet

26%

Deemed 'total' failures

Flipping the Odds of Digital Transformation Success

Boston Consulting Group, October 29, 2020

*Patrick Forth, Tom Reichert, Romain de Laubier, and
Saibal Chakraborty*

69%

Wasted spend

Digital Transformation Is Not About Technology

Harvard Business Review, March 19, 2019

Behnam Tabrizi, Ed Lam, Kirk Girard, and Vernon Irvin



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Not a technology problem...

THE 8 WASTES.. IN DIGITAL SOLUTIONS

www.linkedin.com/in/vincentdupuis



DEFECT

Rework due to malfunctioning or over-complex solution to complete desired operation right first time



WAITING

Low performance, outage or poor response time inducing waiting time by the user



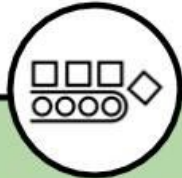
INVENTORY

On-going process waiting to be actioned ("stuck" workflow, untreated inbox items...)



USELESS MOTION

Complex ergonomics, excessive number of clicks or screens/apps to provide data and complete desired operation



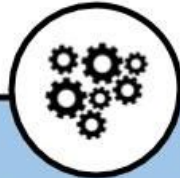
OVERPRODUCTION

Features that nobody uses, report nobody reads, email sent to everyone...



TRANSPORT

Excessive or unnecessary number of process steps to get the desired operation completed



EXCESS PROCESSING

Useless steps, Redundant or obsolete operations adding no value add to the desired outcome



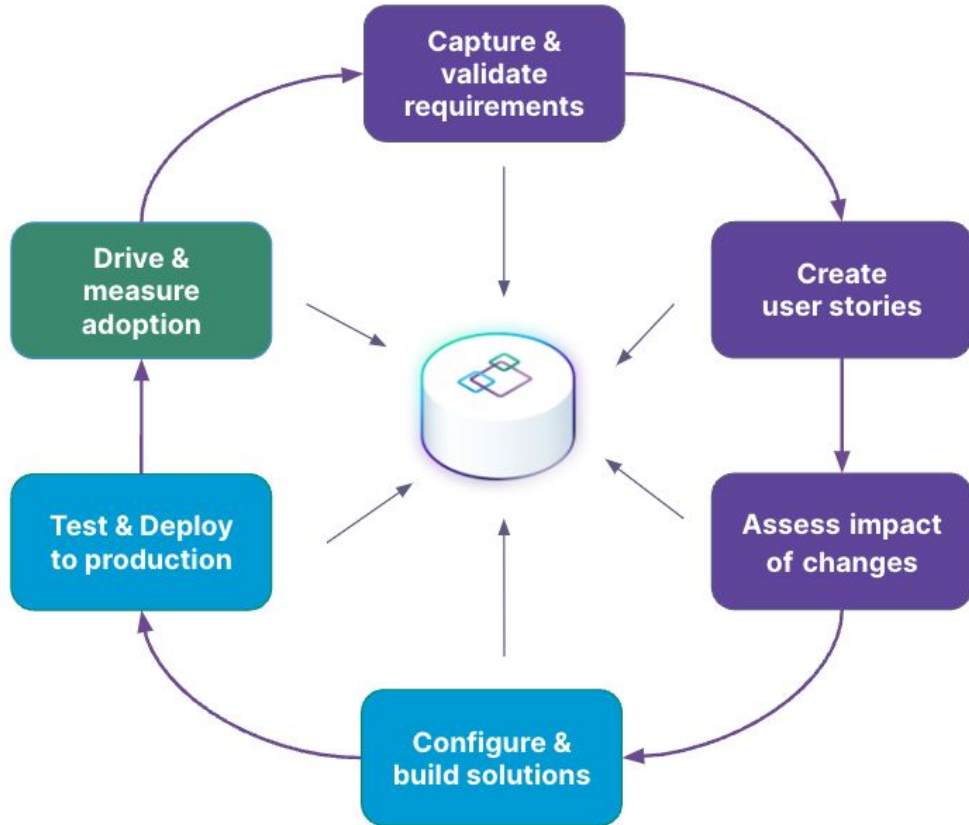
MISUSED TALENT

Poor use of people's time learning solutions or repeated basic tasks that could be automated or skipped

v1.0

credit : Airbus : www.linkedin.com/in/vincentdupuis

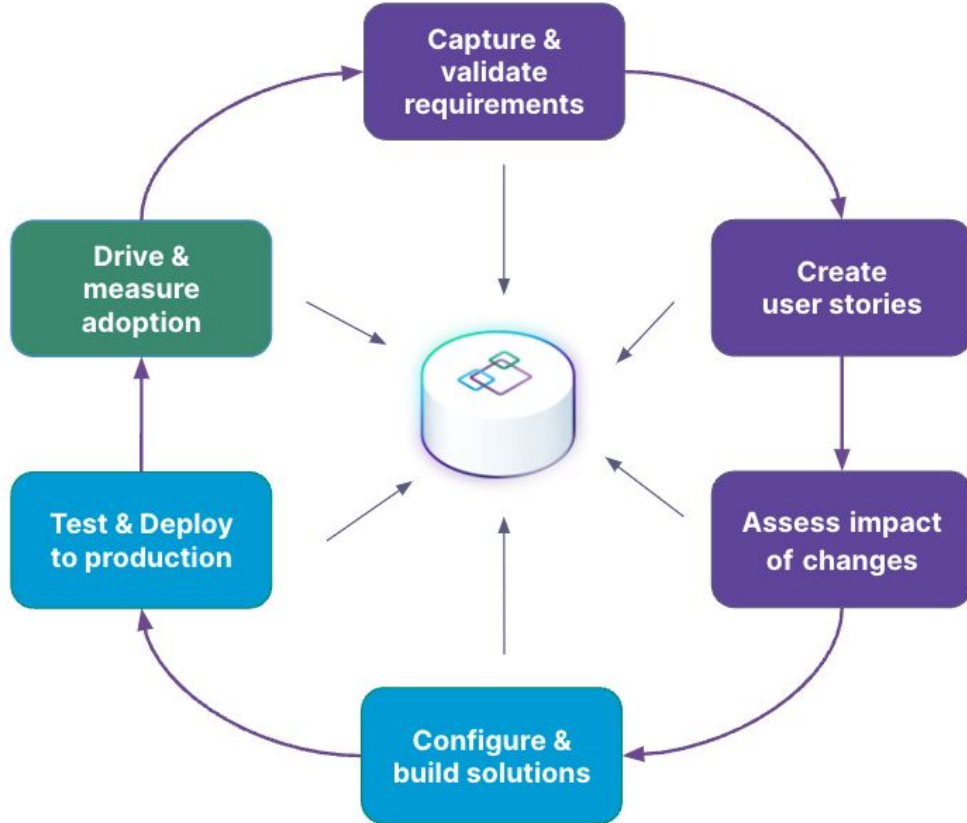
Change Intelligence



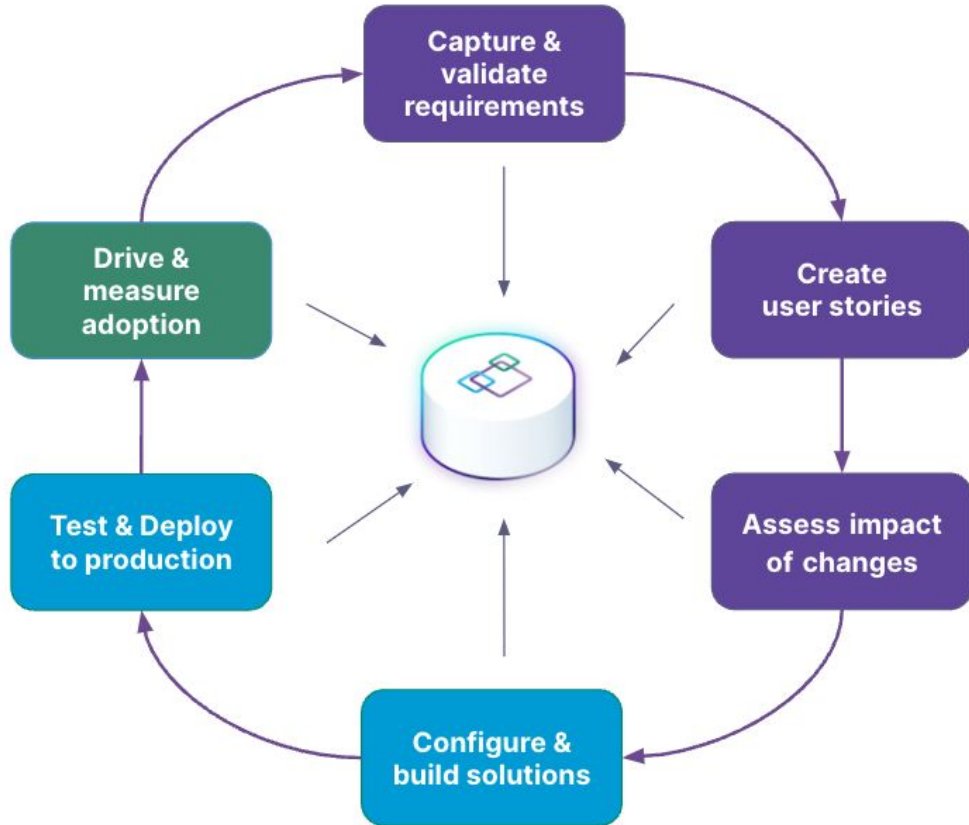
Change Intelligence



Process-led Change



Change Intelligence

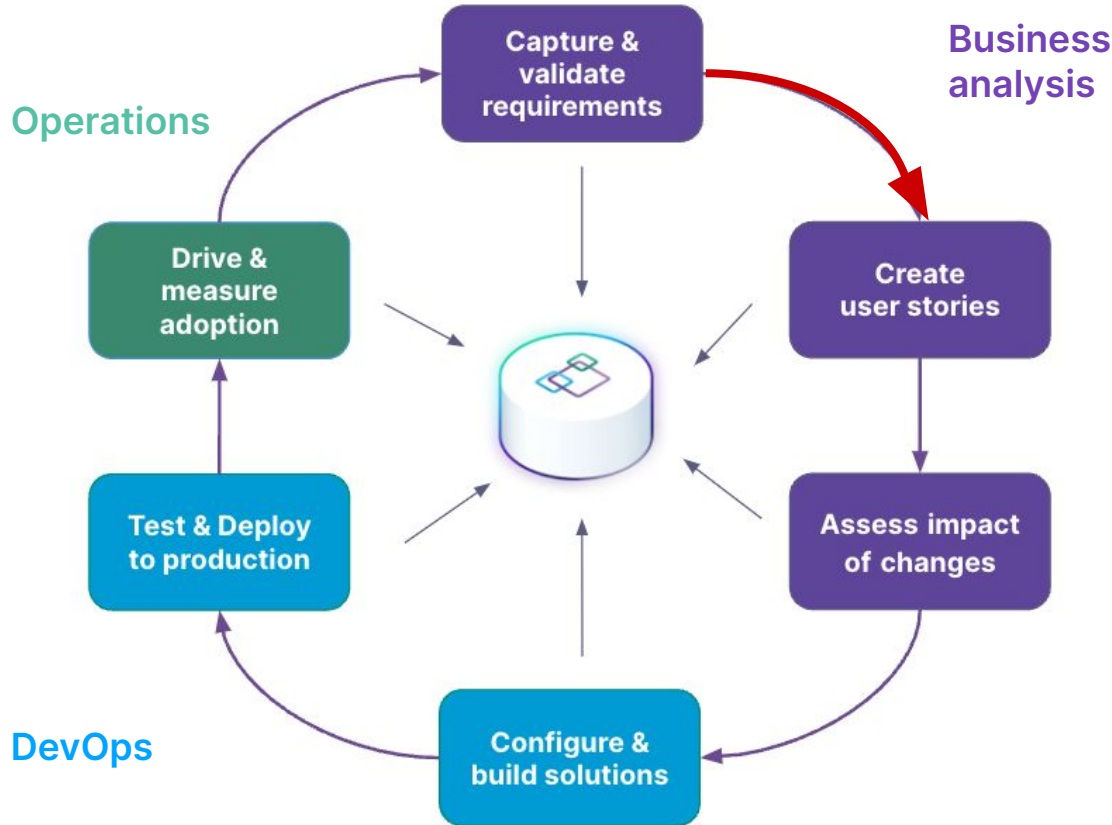


Process-led
Change

+

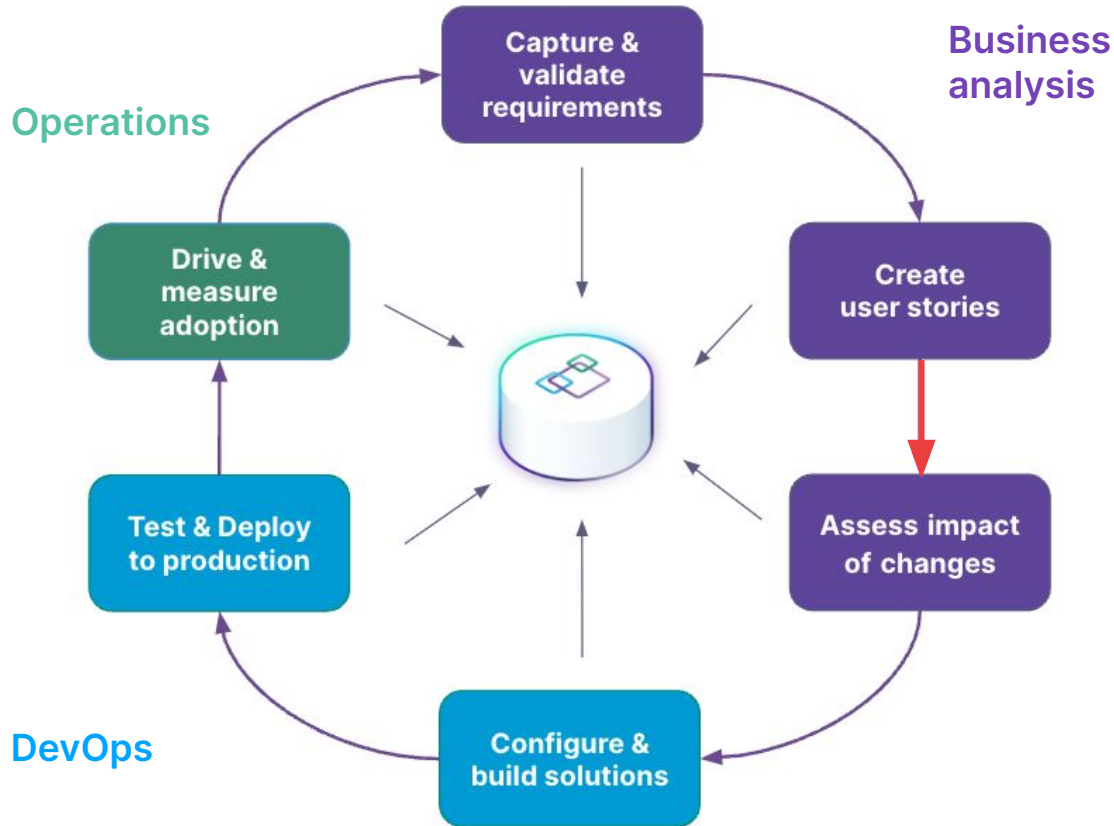
Metadata
management

Handover : **validated** requirements

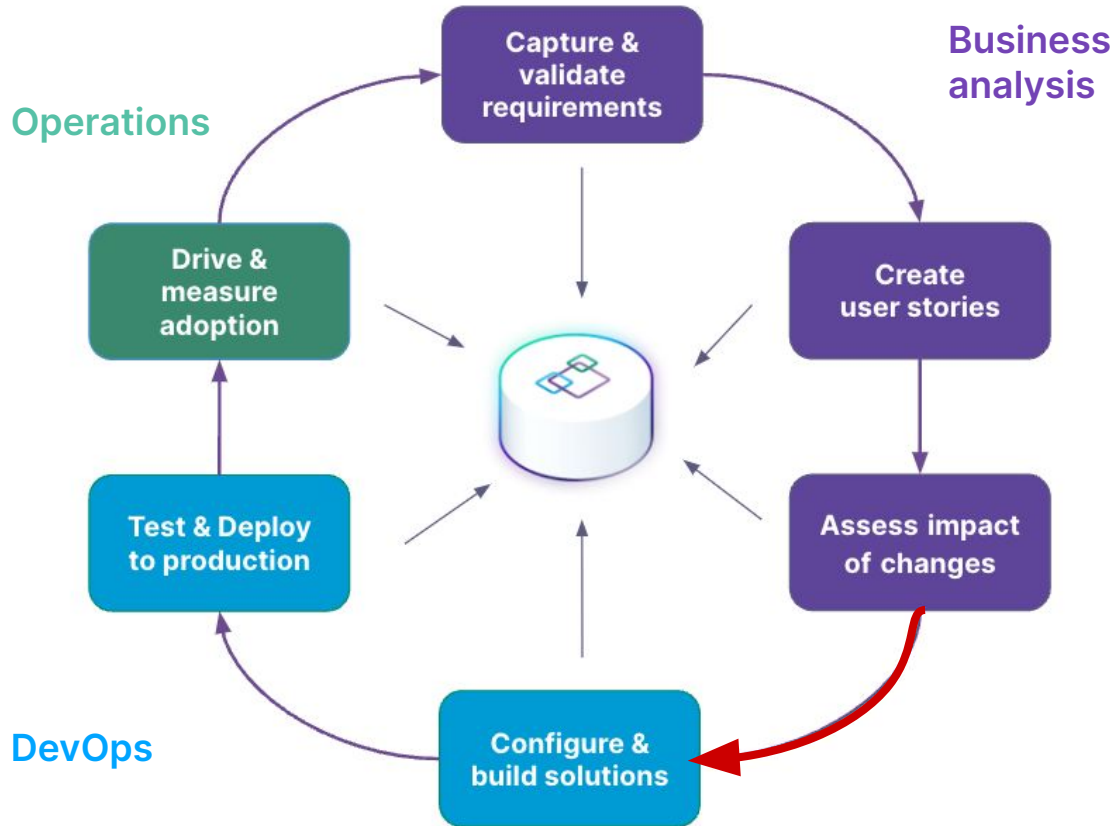




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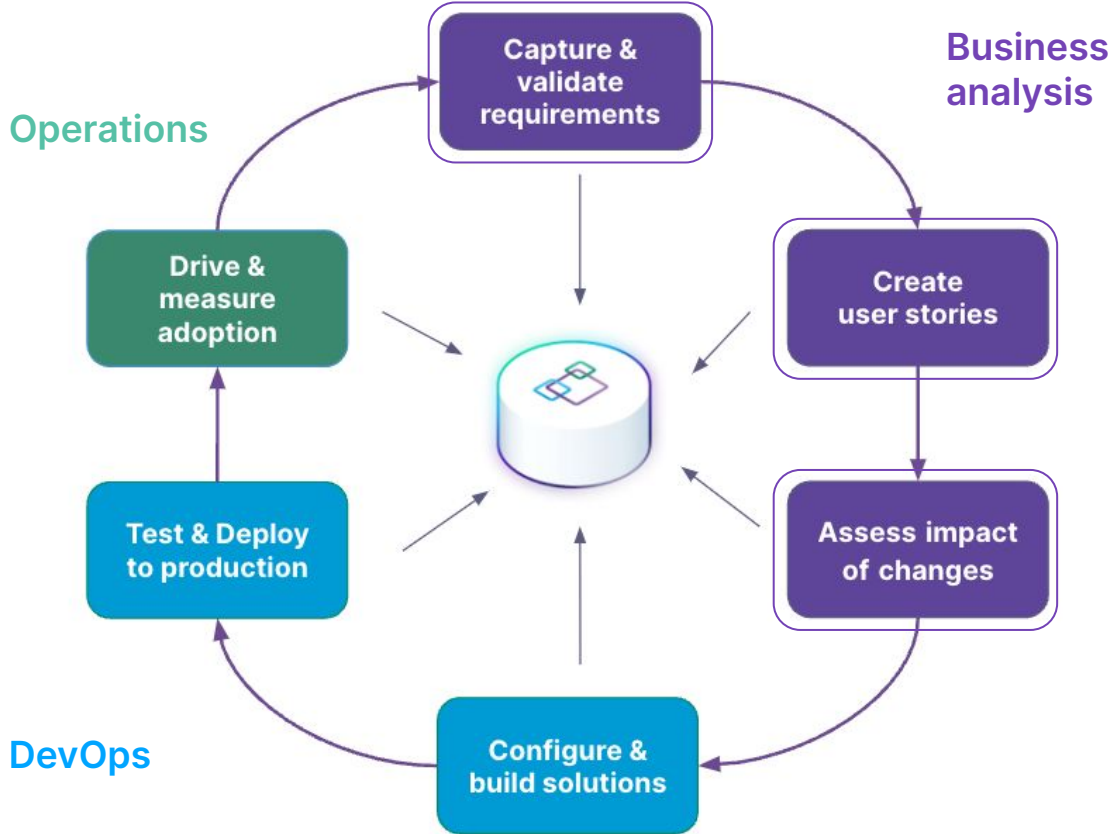


Handover: change impacts understood



Change Intelligence Platform

(accelerated by GPT)

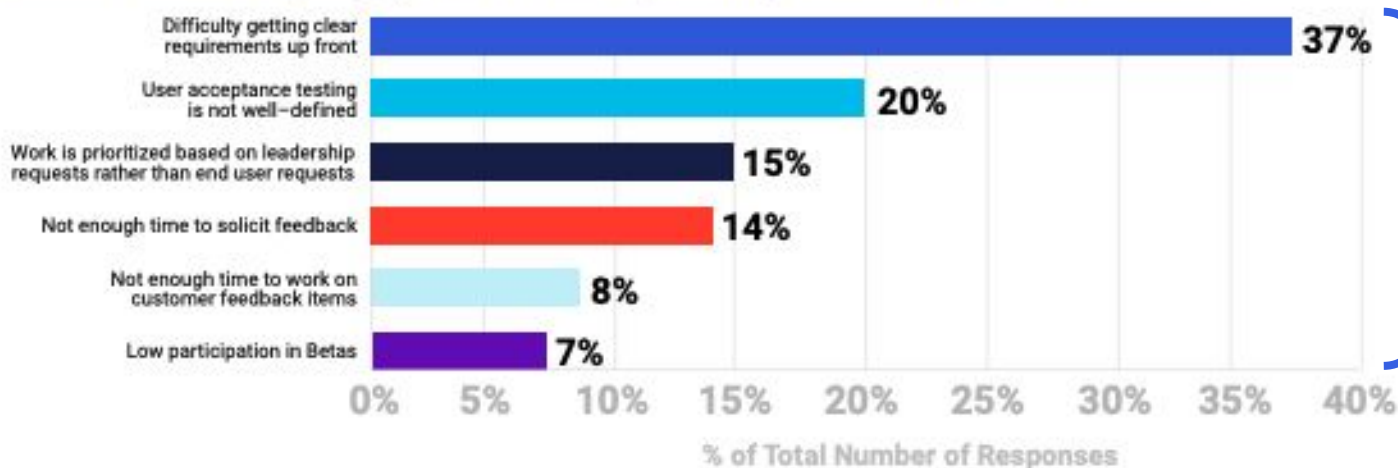


Copado State of DevOps Report



Change intelligence
impacts all of these

Most challenging part of integrating customer feedback?



salesforce

Einstein 1

Now AI works for business & everyone can be an Einstein

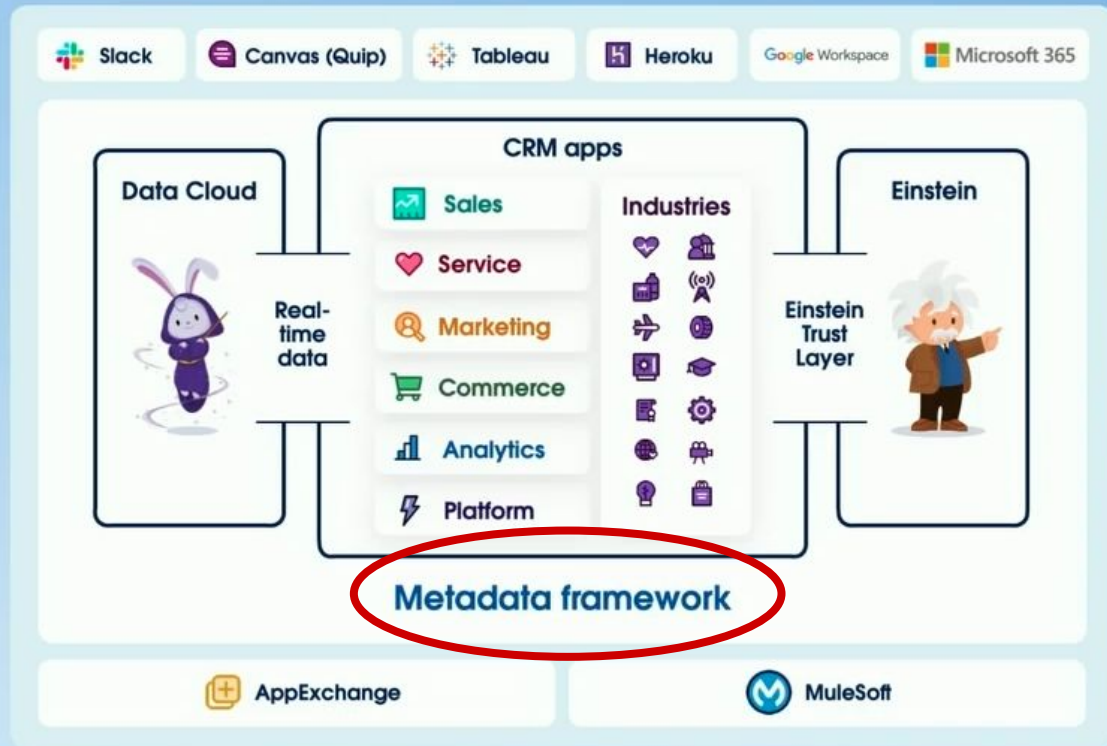
Integrated

Intelligent

Automated

Low code & pro code

Open



“

We saw **more than 1,000 new Data Cloud purchases** in the quarter. That's the second quarter in a row where we saw Data Cloud with more than...

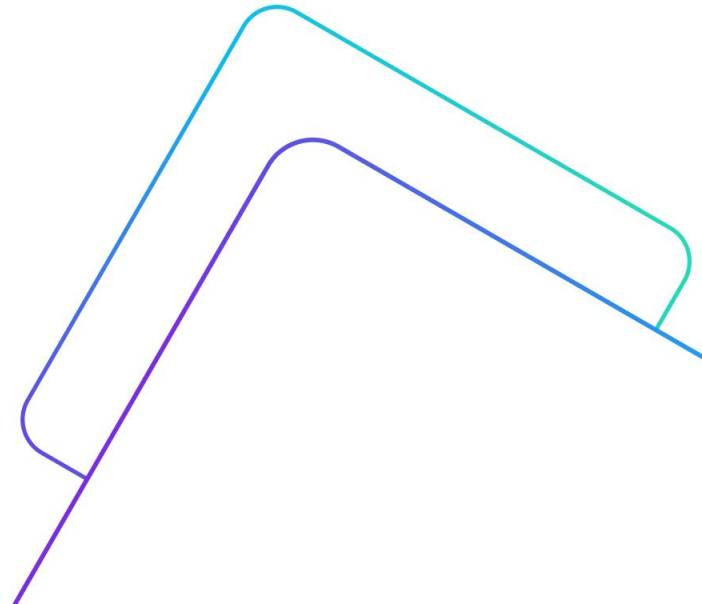
Marc Benioff
Chair and CEO, Salesforce



Strategic vs Tactical

Accelerate time to value

- Salesforce agility and ROI lost
- Rework required to get user adoption
- Wasted effort building the wrong thing



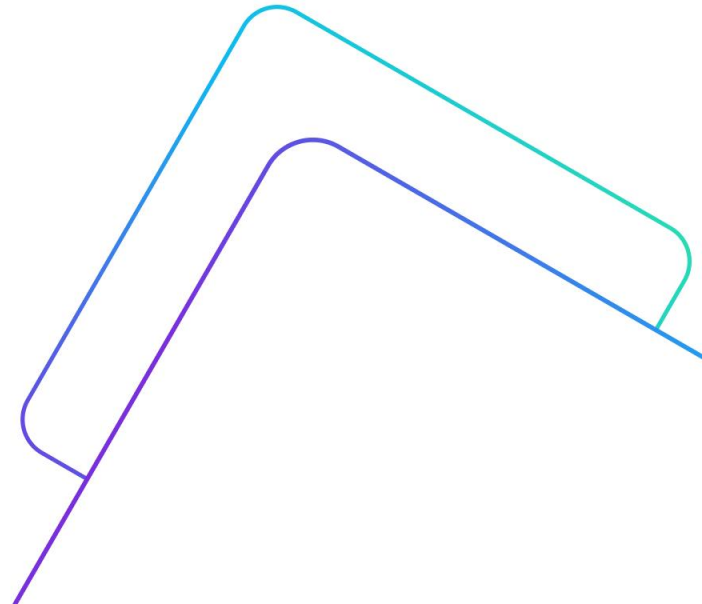
Strategic vs Tactical

Understand true requirements

- Lack of business and IT alignment
- Incomplete Business Analysis
- Incoherent user stories

Improve Salesforce agility

- Org complexity
- Technical debt
- Inadequate documentation



Data Cloud



Brooke Mohnkern

Senior Customer Success Manager



Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



/brookemohnkern



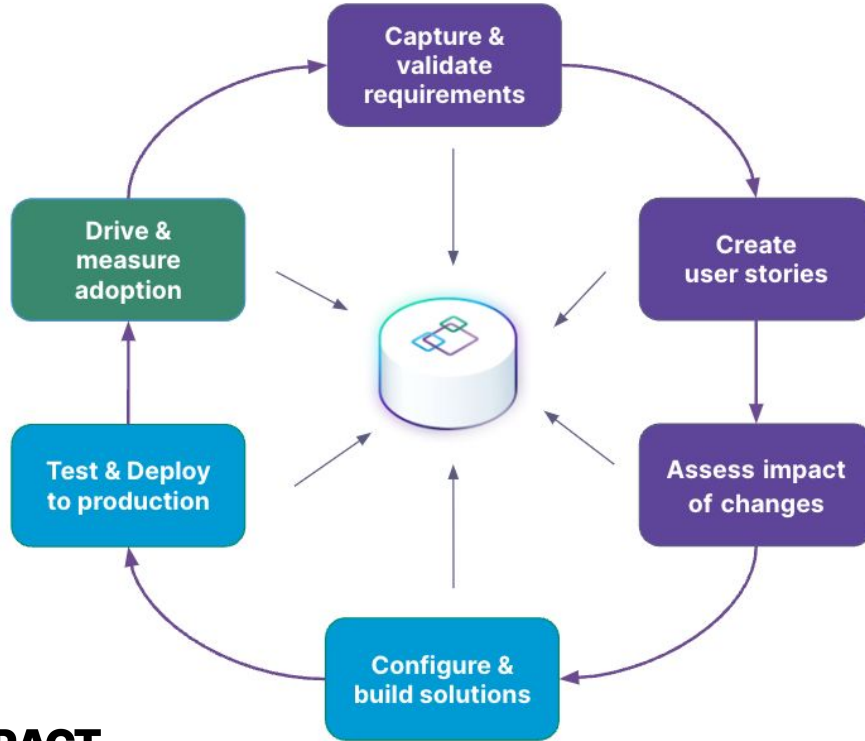
What is Data Cloud?

It is an ACTIONABLE data lake.

Allows the data lake to be integrated into Salesforce



Implementation is the standard lifecycle



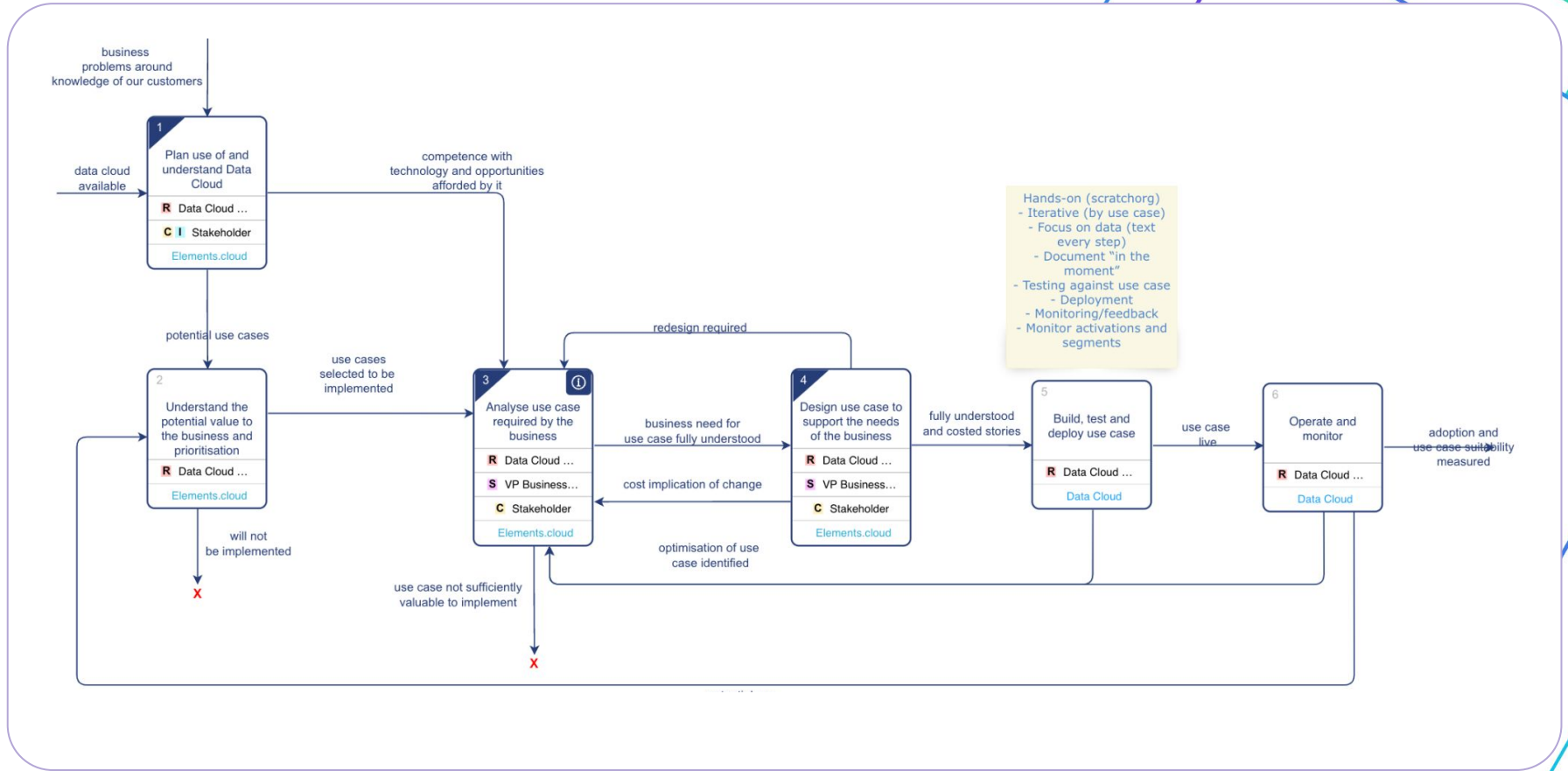
80% - 20%

Focus on the use case

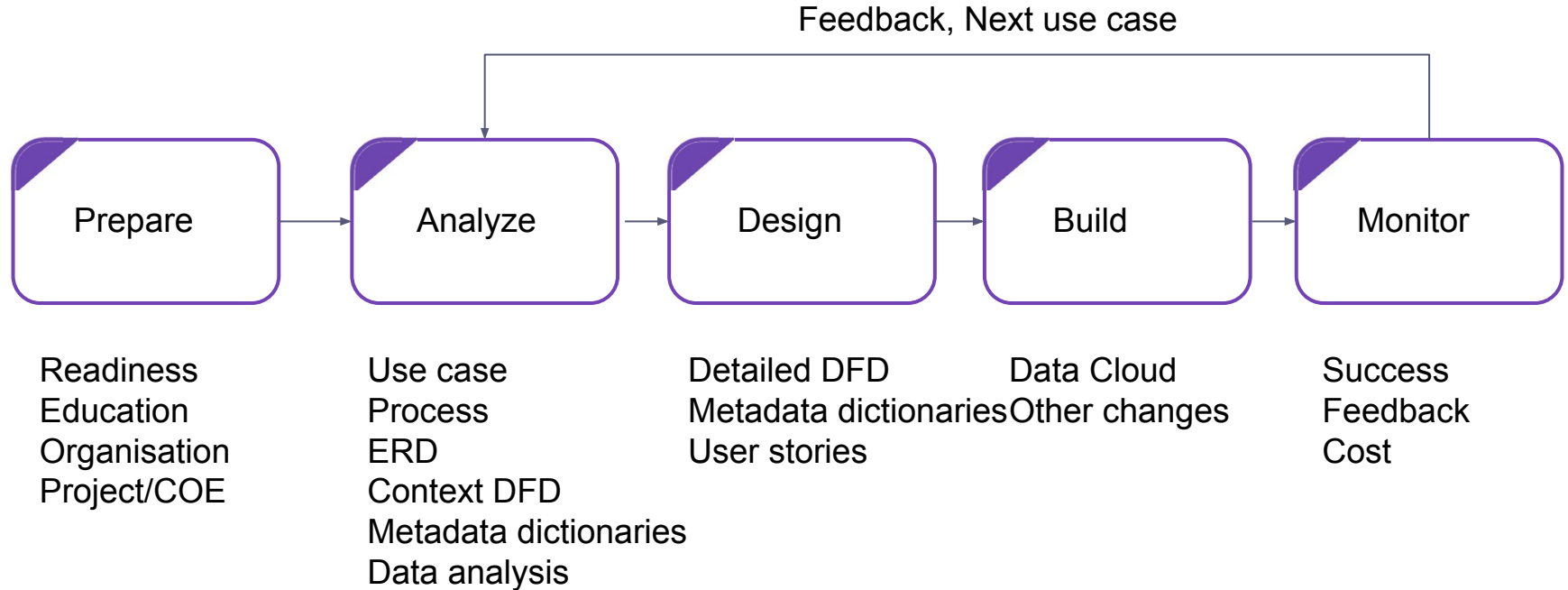
It is too easy to get wrapped up in the technology.

It is all about what you can do with actionable unified data.

Implementation methodology



Implementation methodology



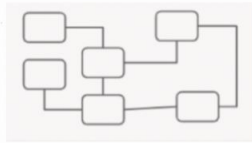
Planning documentation

ANALYSIS

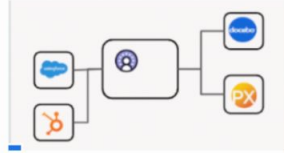
Requirements



Use Case ERD



Context DFD



Metadata dictionaries



DESIGN

Detailed DFD/ERD



User Stories



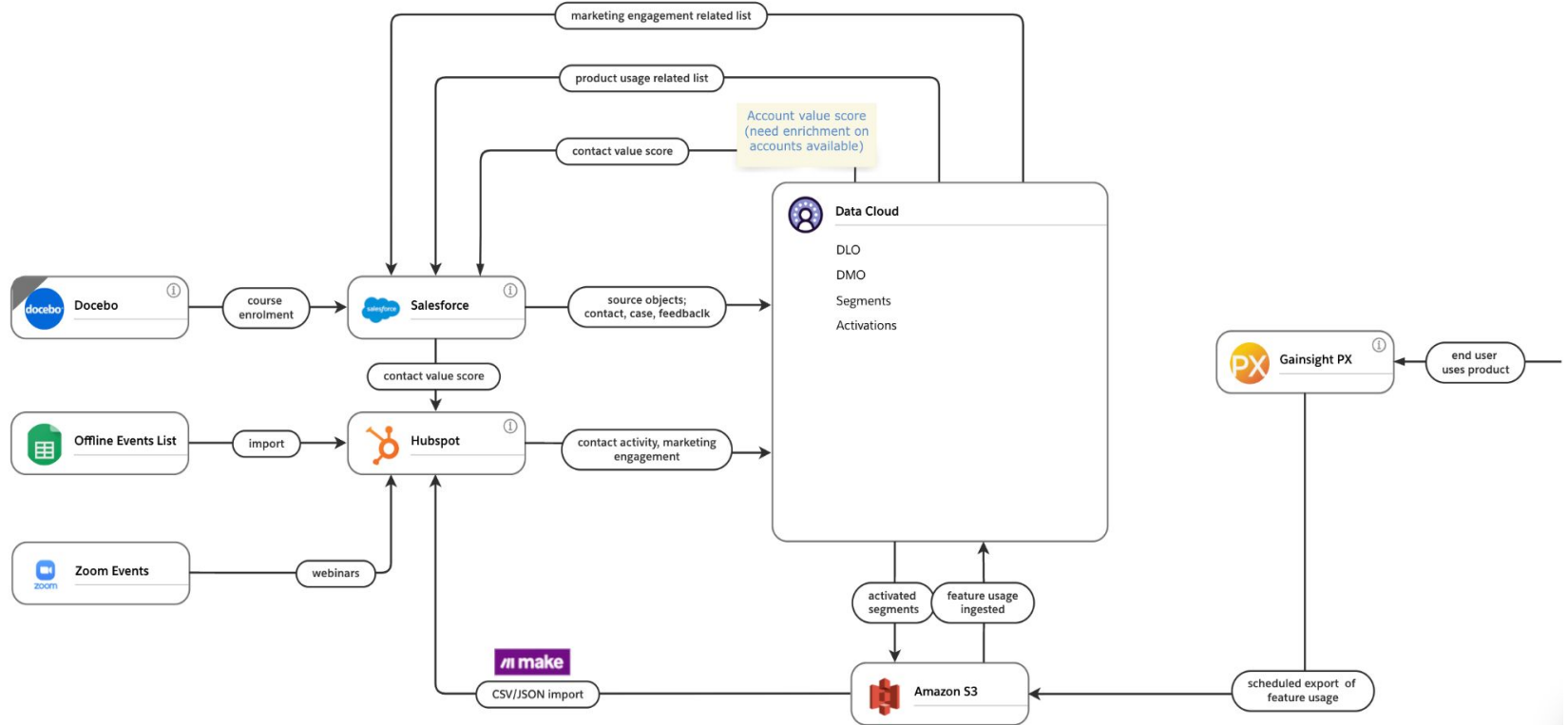
Requirements: Our internal use cases

1. Engage contacts who have been on a product webinar and have:
 - a. Used that feature in Elements in the next 15 days.
 - b. Not used that feature in the next 15 days.
2. Calculate an engagement score for a contact and make it visible in SF
3. **Display detailed product usage data directly in the Salesforce UI**
4. Recommend personalised training plan or feature to individuals

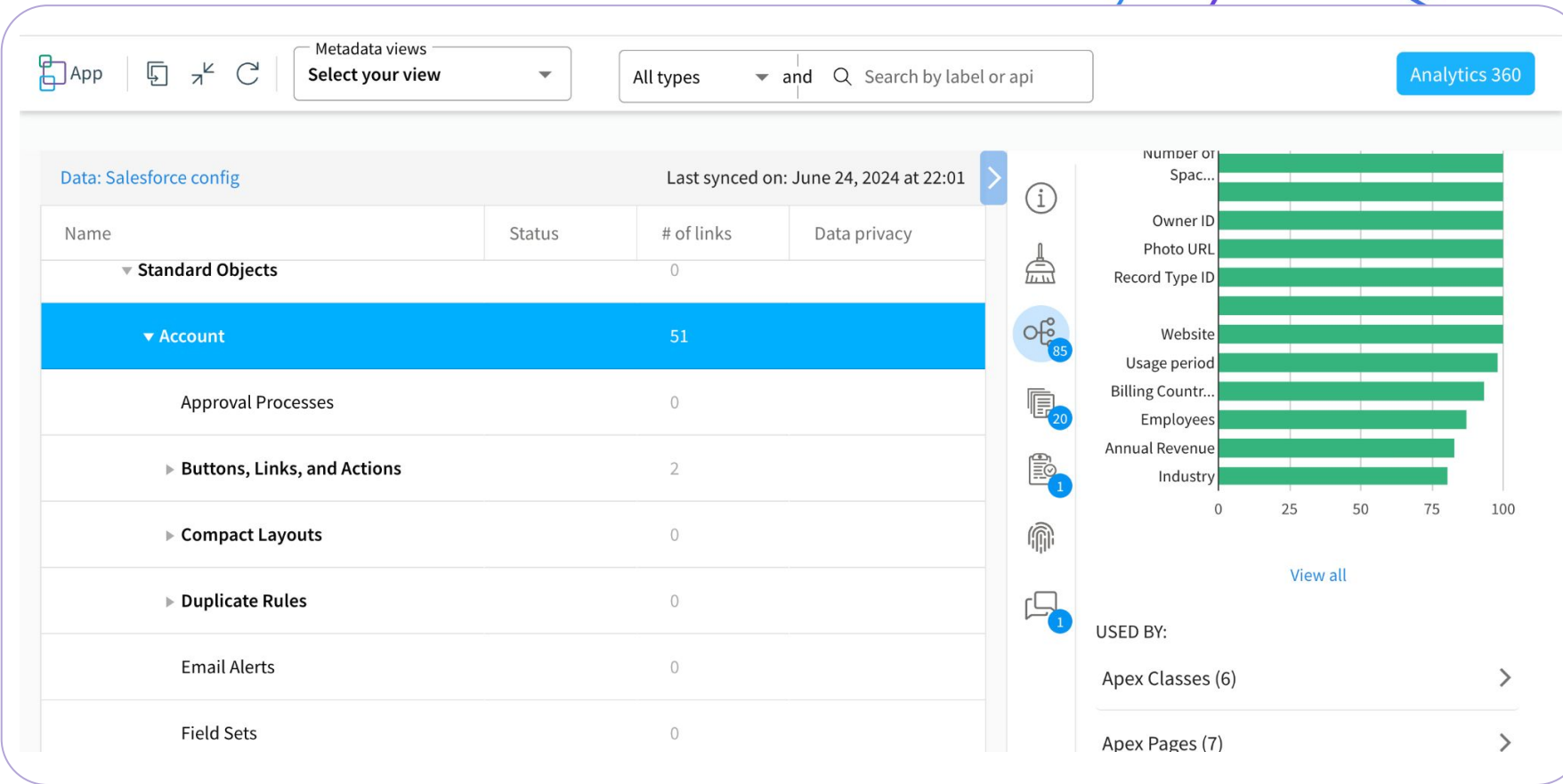
Use Case ERD: each use case



Context DFD



Metadata dictionary



Detailed DFD/ERD: each use case

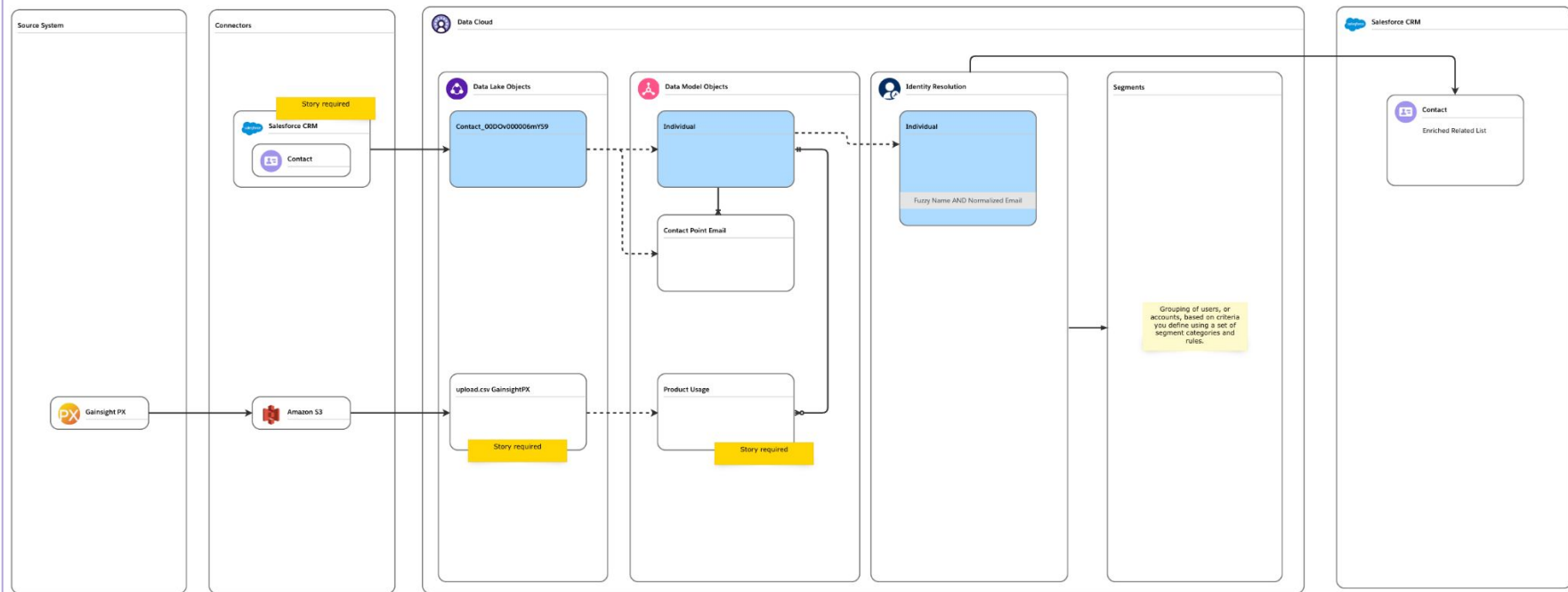
DFD - Product Usage

Data flow diagram for the product usage data cloud use case

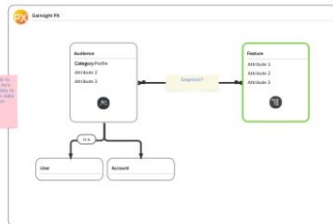
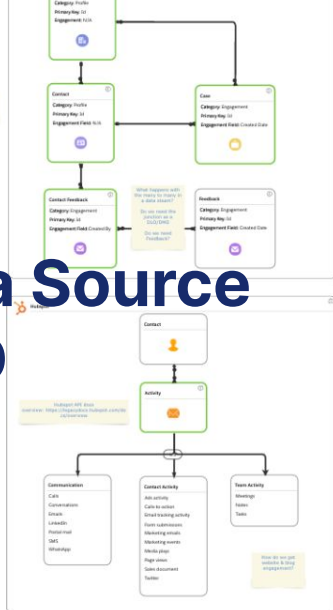
Data Mapping

Data Ingestion

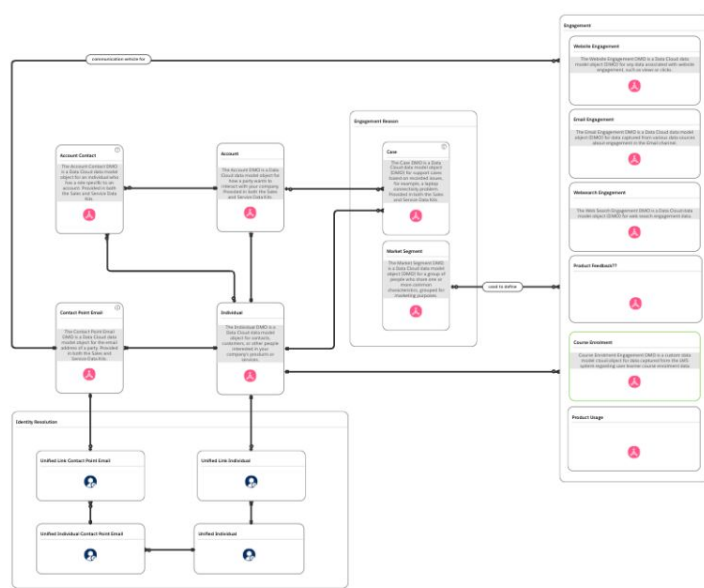
Parent-child relation



Data Source DSO



Data Lake DLO



Data Model DMO

User Stories: 1st use case

Home

Diagrams

Changes

Salesforce Orgs

Ref Models

URL Library

Releases

Elements Operations

Change space

2

8

1

REQUIREMENTS

STORIES

FEEDBACK

Grid views

All

ADD NEW

RESET FILTERS

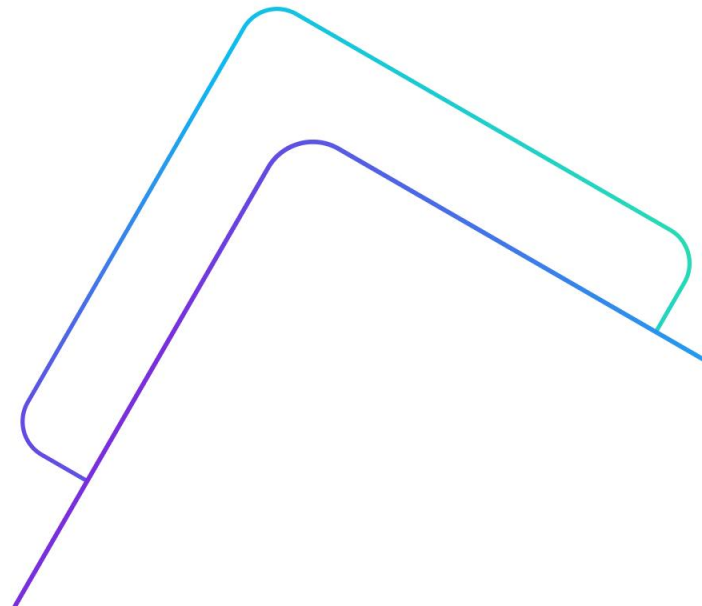
IMPORT

<input type="checkbox"/>	Summary				Description	Affected roles	Acceptance Criteria	Status	Risk	Conflict
<input type="checkbox"/>	Entitlement Field to appear in the choices of fields for moving all access to opportunities and accounts for transferring record	3040			Field to appear in the choices of fields to display in My Pipeline so that the want our vps of regions to have moving all access to both opportunities and accounts so that they can transfer		Product Entitlement field should display the correct data for each record in My Pipeline view. User	Ready for ...	Low	
<input type="checkbox"/>	other user page layout and renaming the system analysts to override trial priority points for sync error cases to adjust queue	3039			rename the system admin layout to Space Layout so that the space object automatically assigned trial priority points given to a sync error case, so that low priority trial sync error cases	er	other users within the system without restrictions.Audit Trail:The users field access all necessary fields remain accessible to both custom administrators and other	Shipped	Low	
<input type="checkbox"/>	sync error cases with a trial license space to prioritize in	3038			with a trial license space and assigns them 99 priority points, so these cases	Sales Team	Update:The case queue must dynamically update to reflect the	In design	Low	
<input type="checkbox"/>	Classic email template to support all types of time off Create custom DMO for Product Usage in Salesforce Data Cloud integration to apply appropriate tax rates based on the billing company and VAT Required field from the opportunity form as it is no	3037			accommodate various types of time off so that I can easily submit requests for and define its required fields, so that I can take the data ingested into the Salesforce BY DMO and use it within the	Customer Support Analyst	number left of DP.Queue Placement:Cases with 99 priority (e.g., radio buttons or checkboxes) to select the type of time off being requested. Automatic	Being defi...	Medium	
<input type="checkbox"/>	from Salesforce and transfer existing data to the and default discount on pricebook, product, and	3036			Tax field to ensure that the correct tax rate is applied based on whether the	Customer Support Analyst	Cloud.Validation:The "Product Usage" DMO correctly stores and customers: if the invoice is billed from Ltd to a customer outside the United Kingdom, the integration for tax calculation are functioning correctly without reliance on the UK VAT Required field. User	Being defi...	Medium	
<input type="checkbox"/>	Delete unused fields on the feedback object	3035			the opportunity form because the tax calculation is now handled by	Data Cloud Admin	the data from the MEDDICC fields is clearly marked and identifiable	Shipped	Low	Open
<input type="checkbox"/>	Send Invoice for Sales Order	3034			transfer their existing values to the description field, ensuring that		Discount Process: The system should support a manual discount entry of 50% without any percentage change in the system log and update any relevant documentation. Notify relevant customer user needs to be able to track the status of the sent	Shipped	Low	Open
<input type="checkbox"/>		3033			discount from pricebook, product, and opportunity product pages, so that the	Sales Manager		Shipped	Low	Resolved
<input type="checkbox"/>		3032			any integrations, not on any page layouts, and have not been filled out			Shipped	Low	
<input type="checkbox"/>		3031			department, when a sales order is created, I want to send the invoice to	Accounting Department		Being defi...	Unassessed	

Five key takeaways



- 1. Data Cloud is a step change**
- 2. It's all about the use case**
- 3. Consumption based cost model**
- 4. Apply 80/20**
- 5. Data Cloud is the future**



1. Data Cloud is step change

Spend the time to understand Data Cloud before you start

Don't try to learn on your first real implementation

Make sure you really understand each of the concepts

Technically configuring Data Cloud is easy - when you know what to click.



2. It's all about the use case

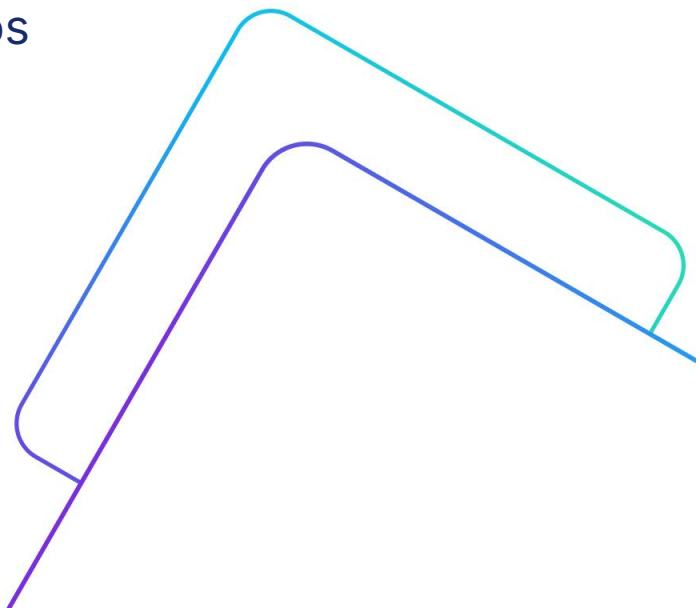
It is easy to get focused on the technology

Remember it is all about the use cases

You have to break down preconceived mental silos
about your data



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3. Consumption based cost model

It is essential that you develop a volumetric model of the use case

You can then work out the cost of the solution

The cost may not justify the use case

Is there an ROI?



Data Cloud Credit Consumption Guide			
Services		Type	Consumption Per 1M Rows Processed, Accessed, or Changed
1	Data Ingestion	Batch	2,000 DS Credits
		Streaming	5,000 DS Credits
	Calculated Insights	Batch	15 DS Credits
2		Streaming	800 DS Credits
3	Profile Unification	Batch	100,000 DS Credits
4	Data Actions	Streaming	800 DS Credits
5	Data Queries	N/A	2 DS Credits
6	Accelerated Queries	N/A	2 DS Credits
7	Real-time Profile API	N/A	900 DS Credits
8	Segmentation	Batch	10 S&A Credits
9	Activation	Batch	20 S&A Credits

★ Data Storage is measured separately but most customers have been ok w/ the base Data Storage

4. Apply 80/20

Spend 80% of your time on planning (analysis, design, volumetric analysis...)

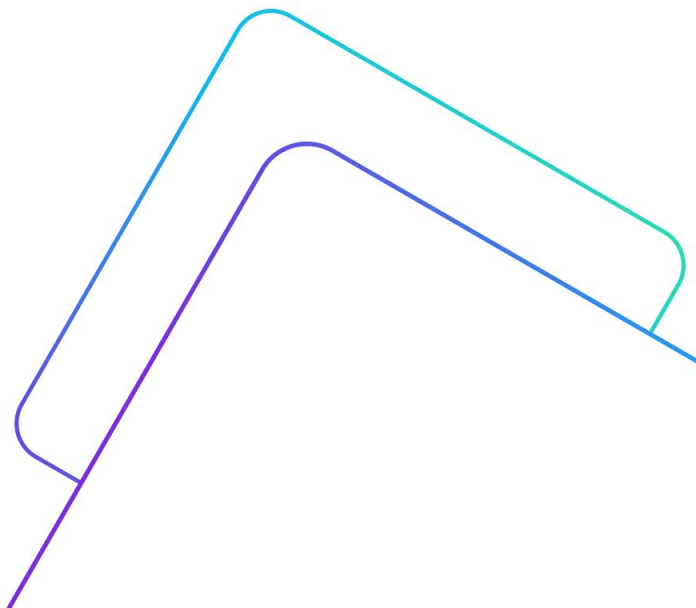
Spend 20% of your time on implementation

5. Data Cloud is the future

Data cloud is not a small add-on

It is the future of the Salesforce platform

Everybody needs to understand the value



Panel Session



Panelists



Liv Porter

Head of Operations



Tony Kirumba

Senior Salesforce Developer



Corey Snow

Director of Digital Strategy



Panelists



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