



IMPACT: Chicago

IMPACT City Tour

27th June 2024

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Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



Change Intelligence



Ian Gotts

Founder & CEO



Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



/iangotts



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



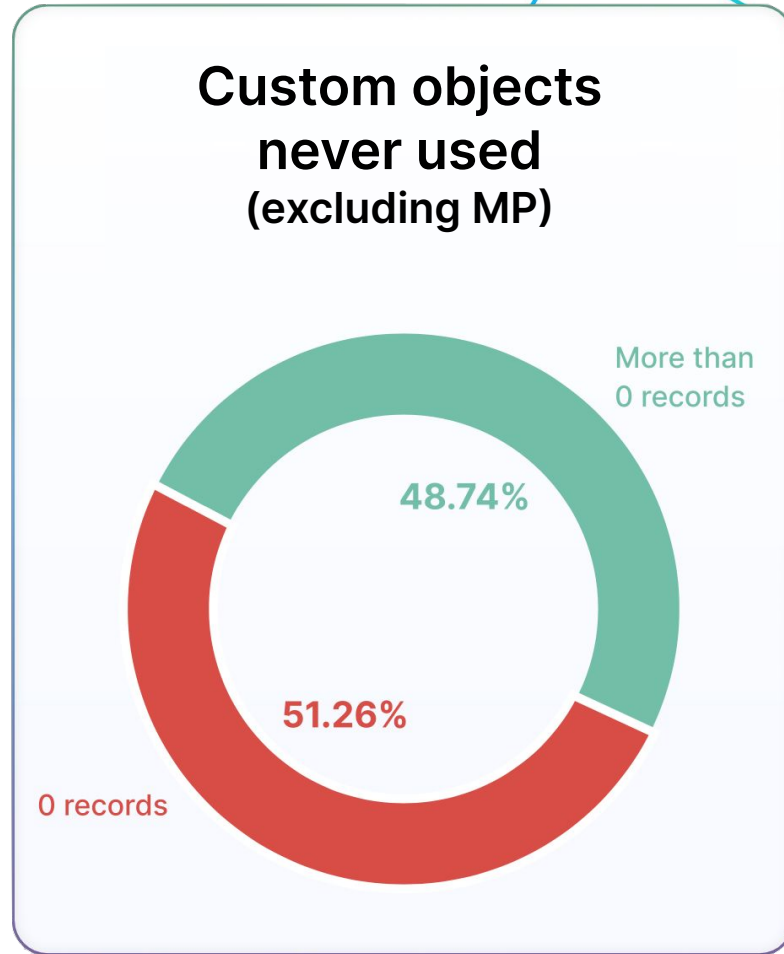
Change Intelligence Research Series

Data-driven insights
into the trends in
Salesforce configuration



Wasted effort

Feedback
Meetings
Slack messages
Development
Testing deployment
Documentation



Wasted effort

Feedback

Meetings

Slack messages

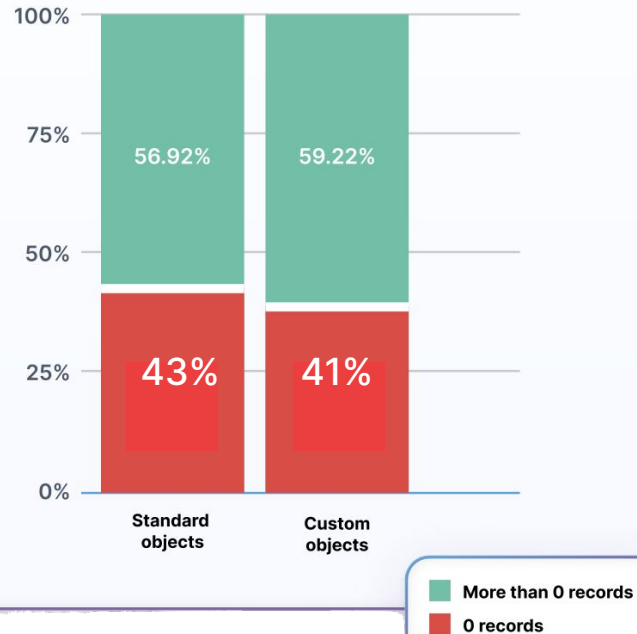
Development

Testing deployment

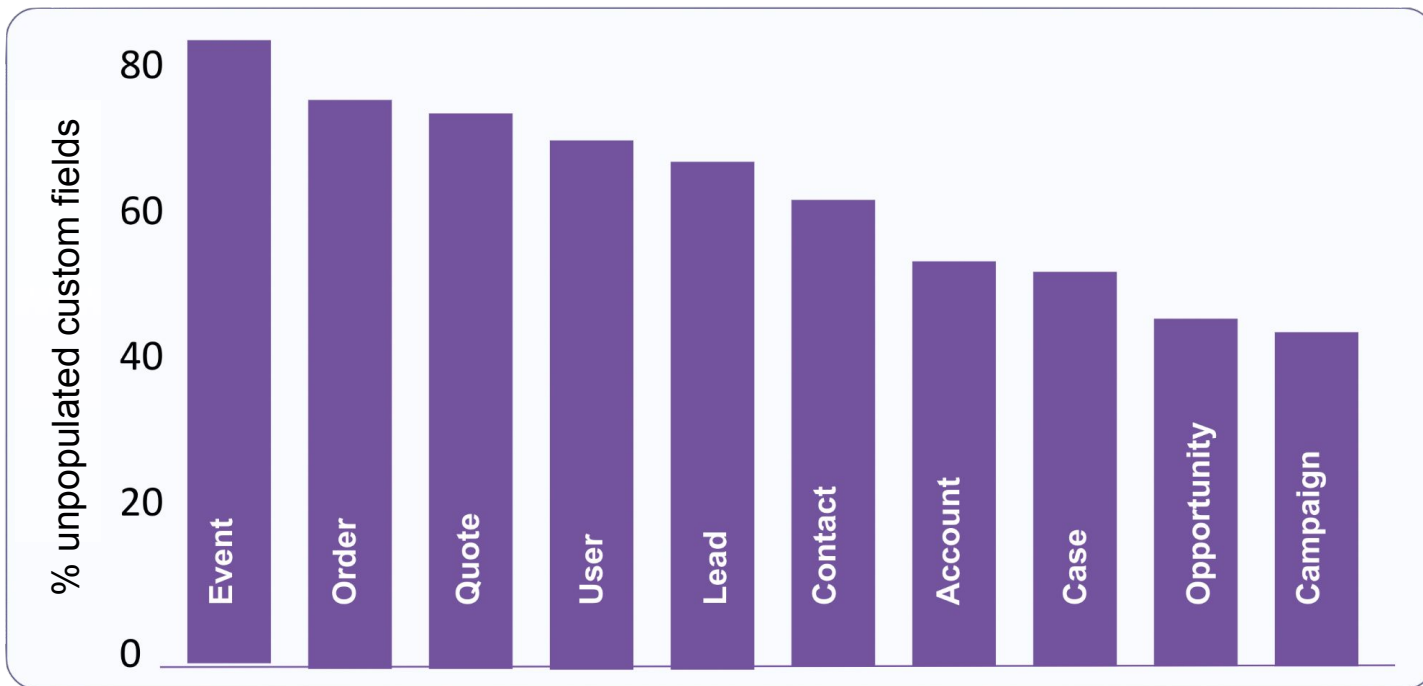
Documentation



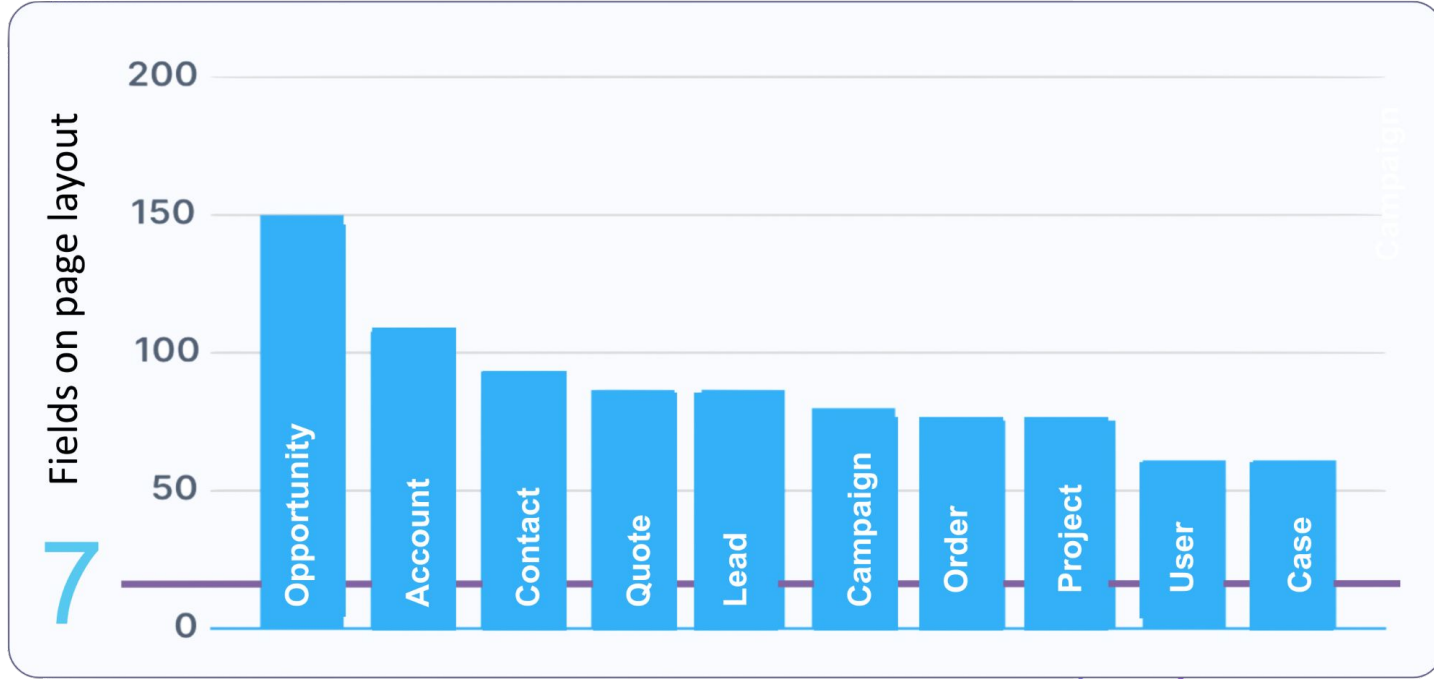
Custom fields with 0% data (excluding MP)



Far worse than 41% average



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®

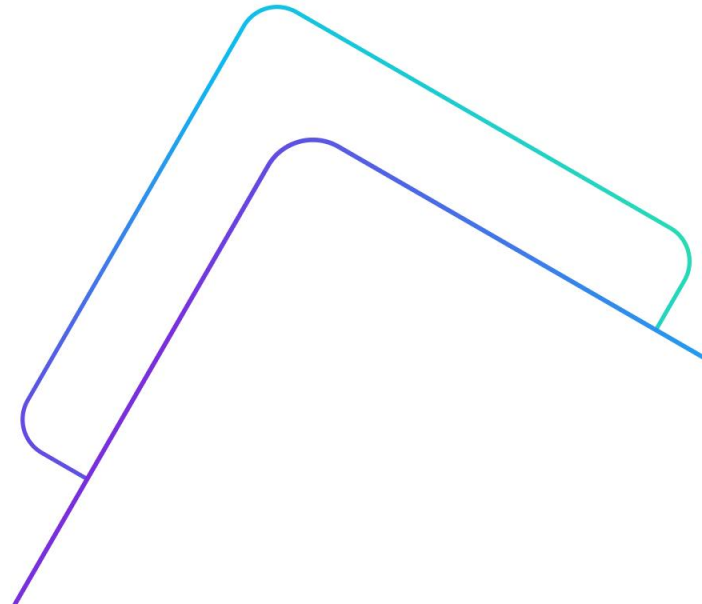
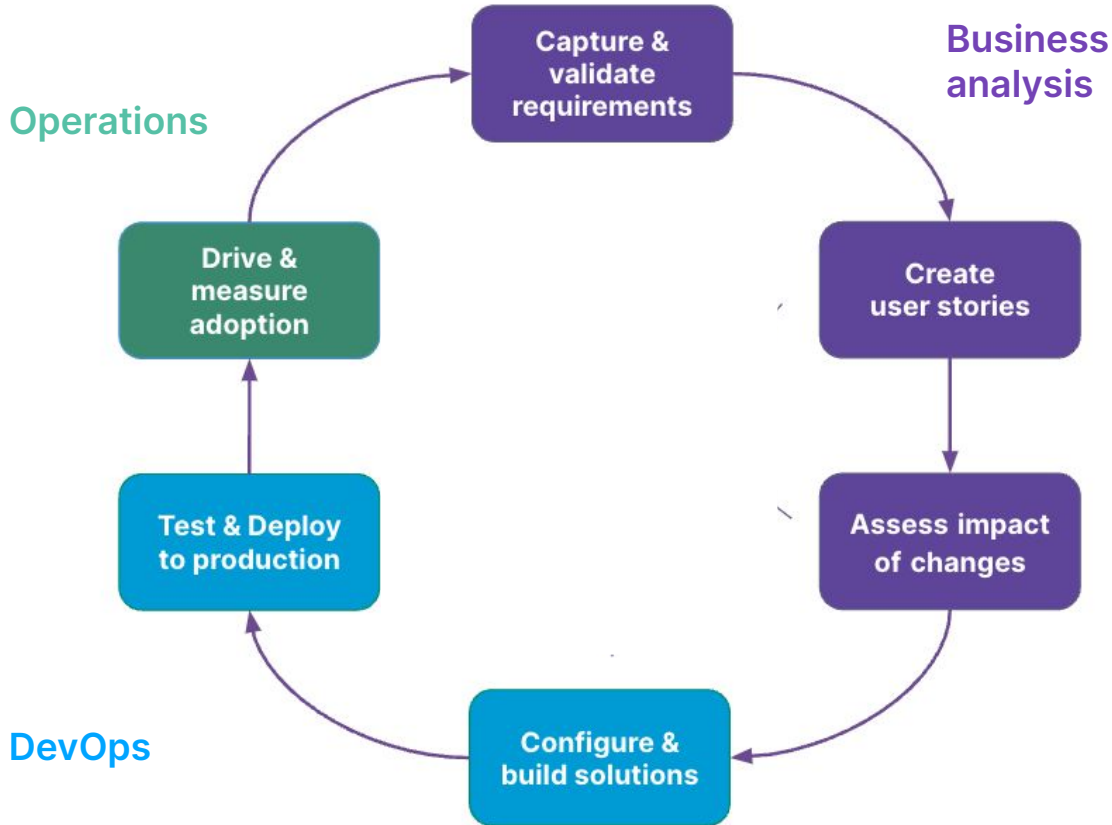
*The complexity of **scale crushes Salesforce's responsiveness.***

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

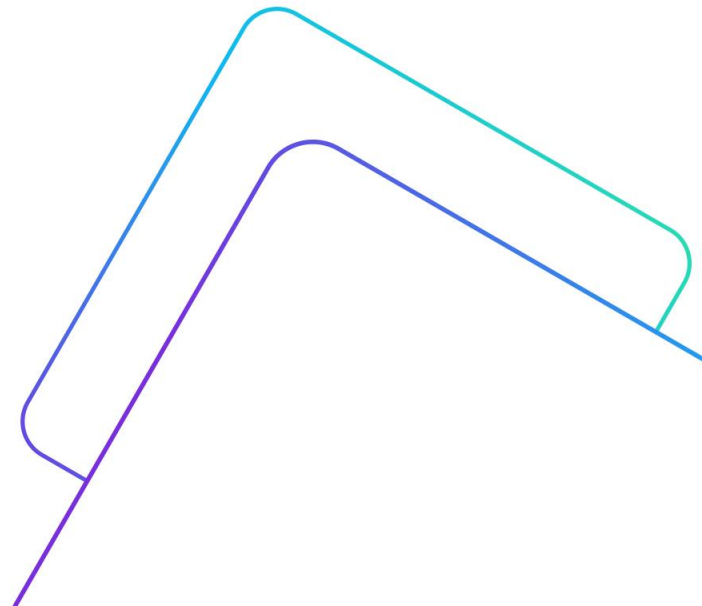
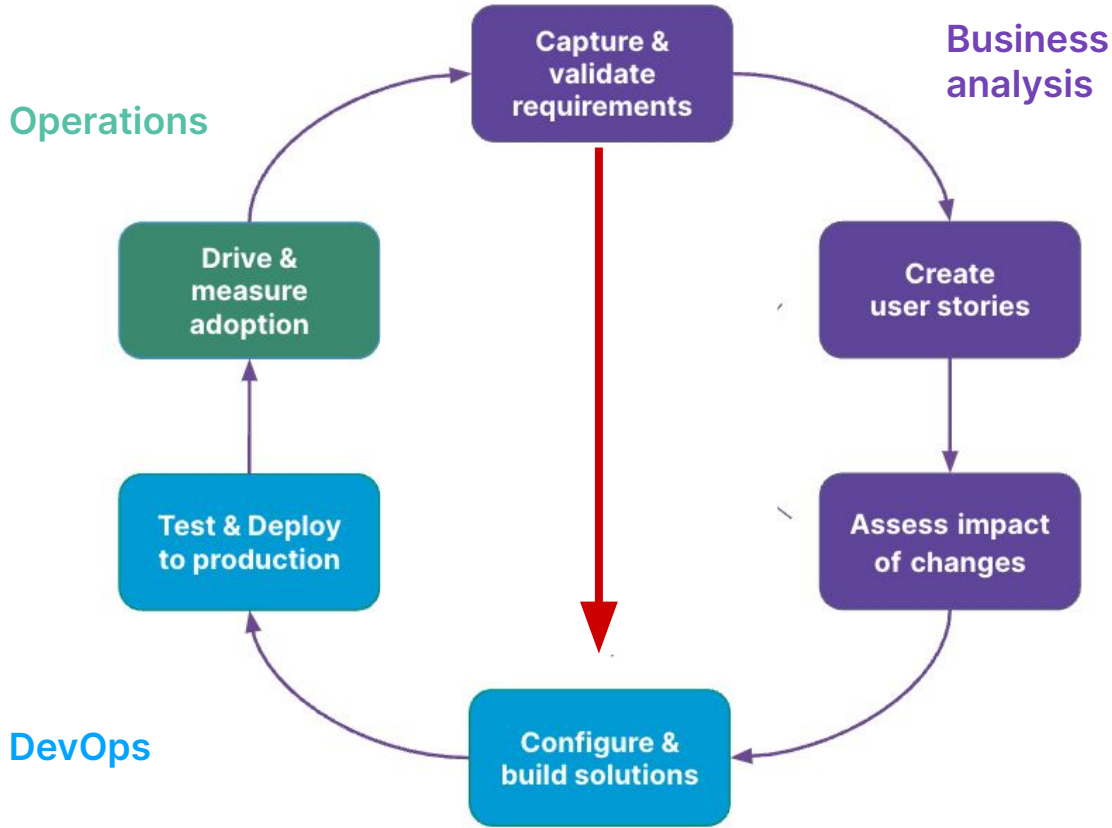
Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

*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

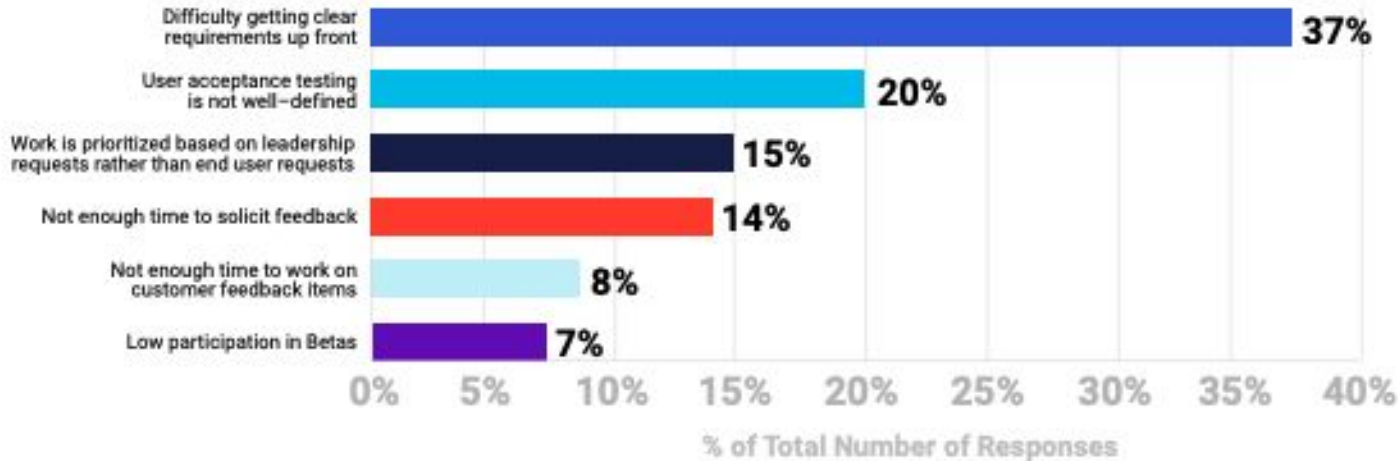


Copado State of DevOps Report



Difficulty getting clear requirements up front

Most challenging part of integrating customer feedback?



Change Intelligence Research Series

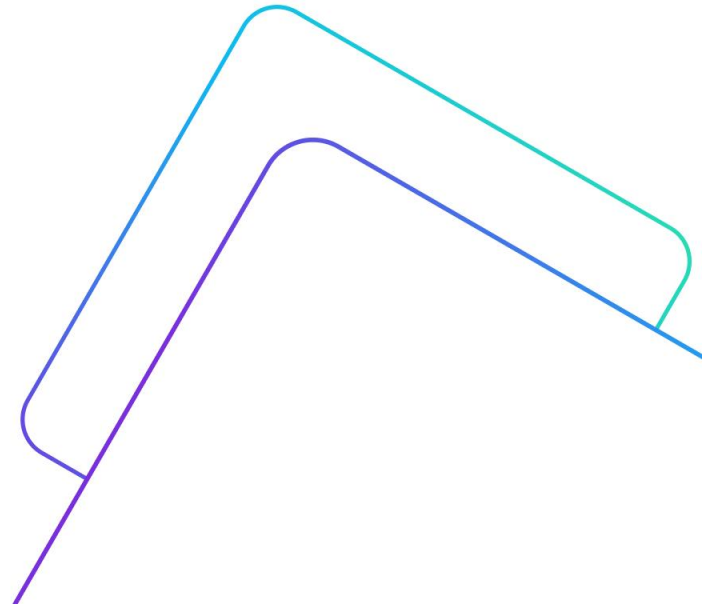
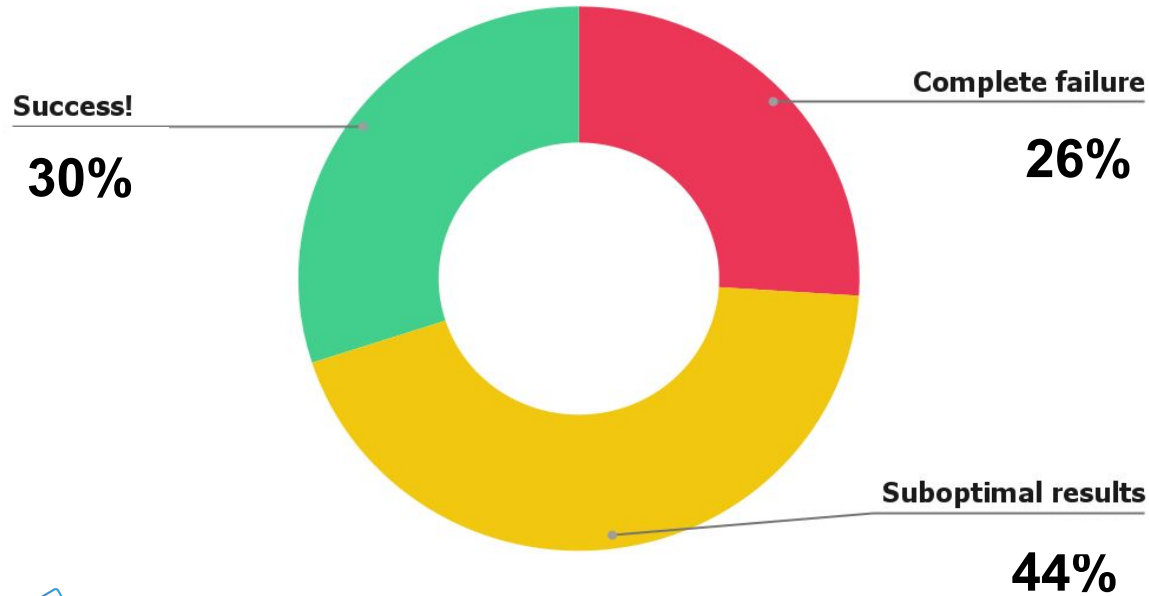


IMPACT

\$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

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



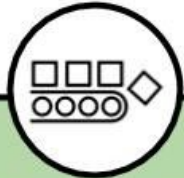
INVENTORY

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



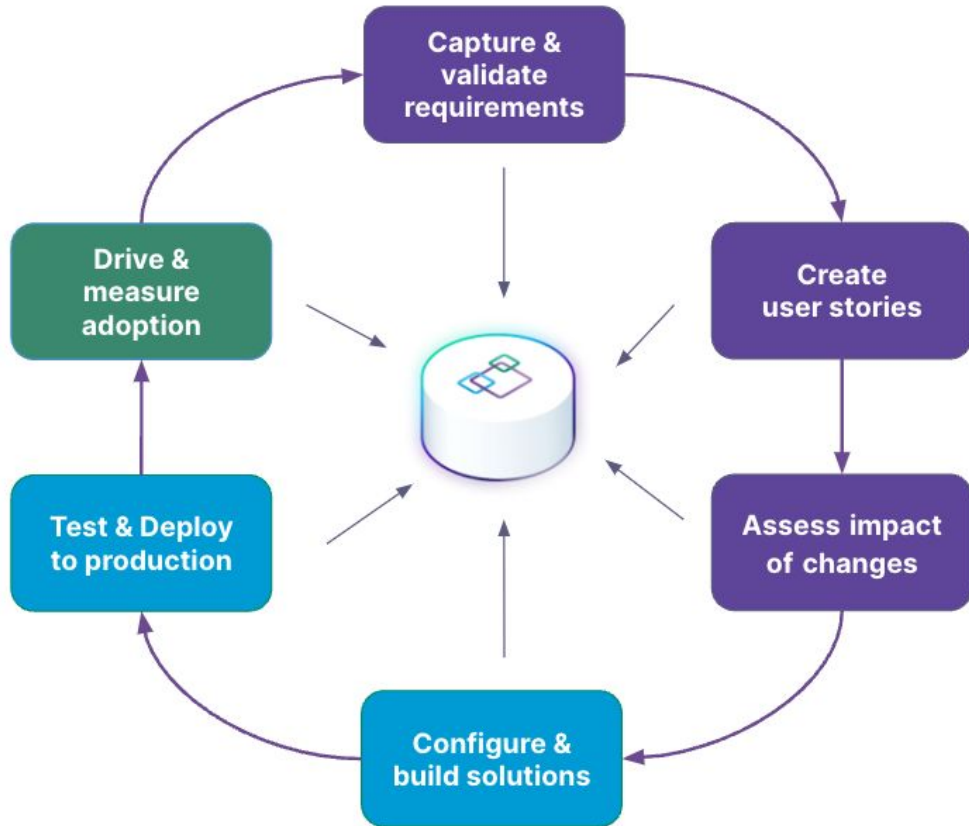
MISUSED TALENT

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

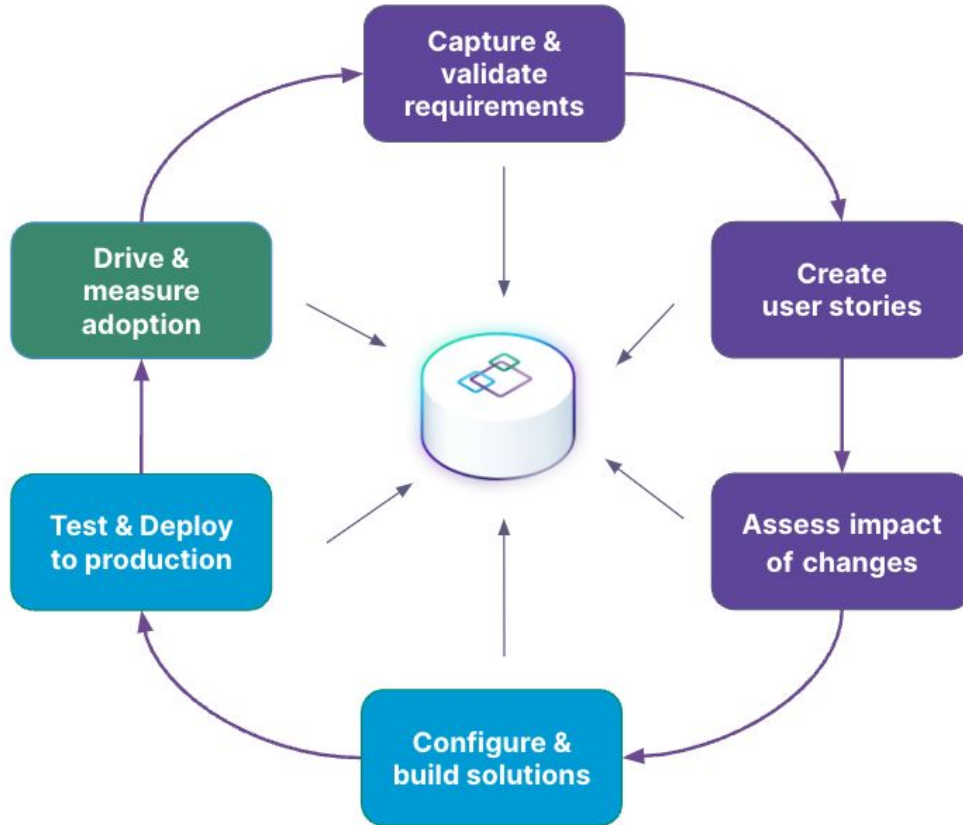
Change Intelligence



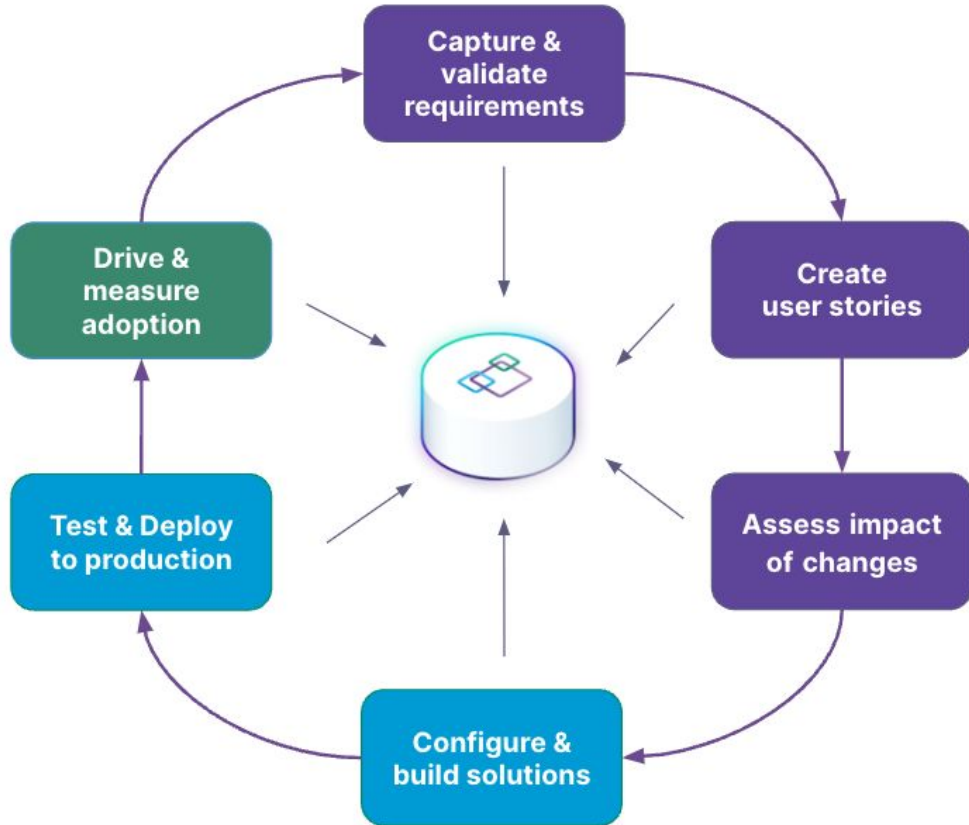
Change Intelligence



Process-led Change



Change Intelligence

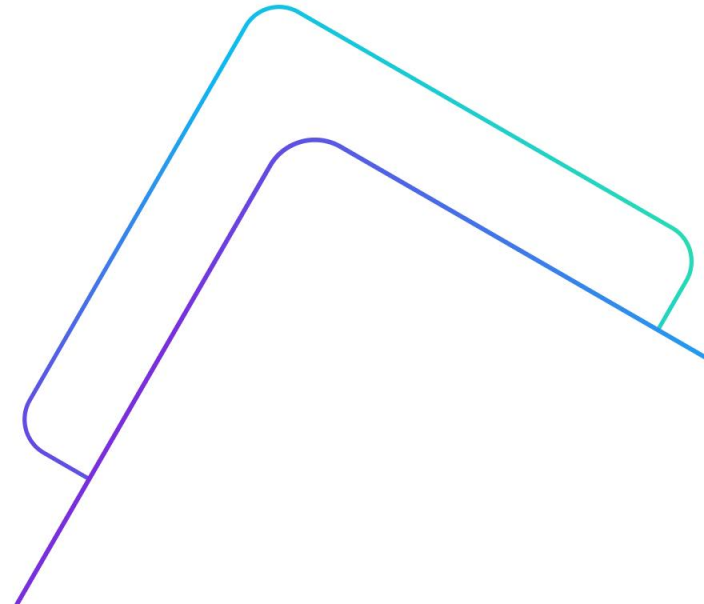
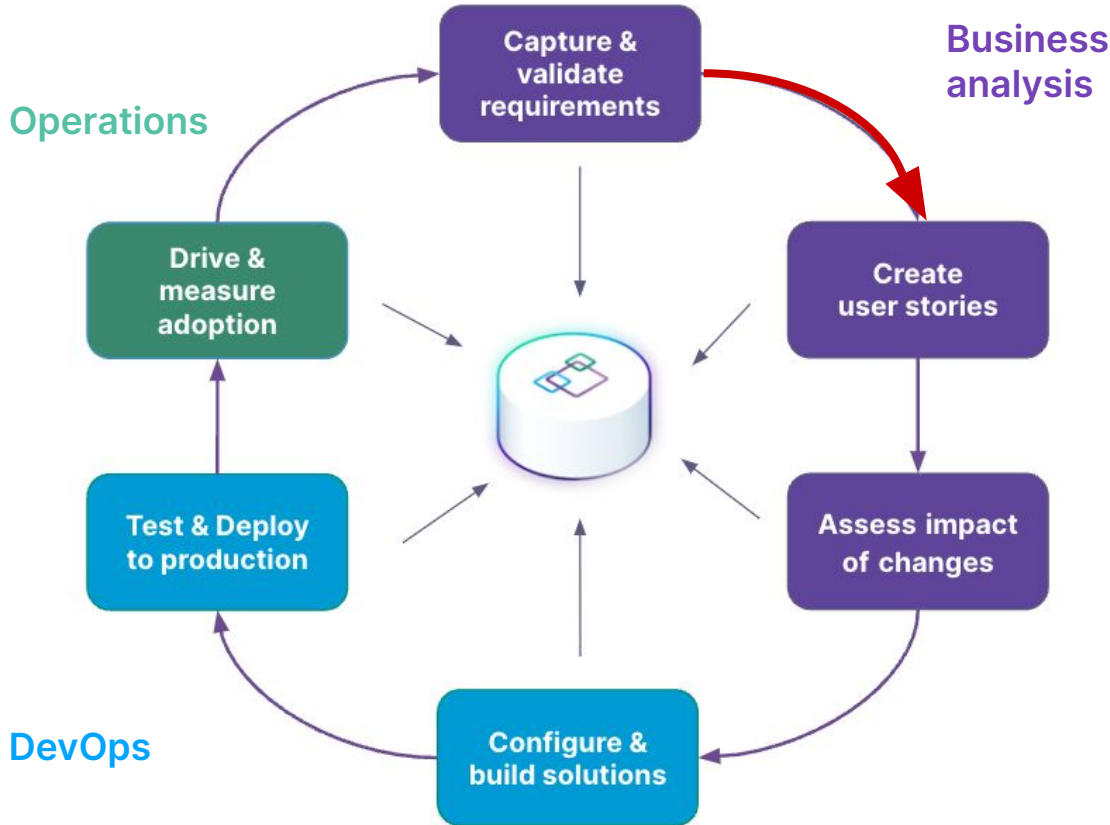


Process-led
Change

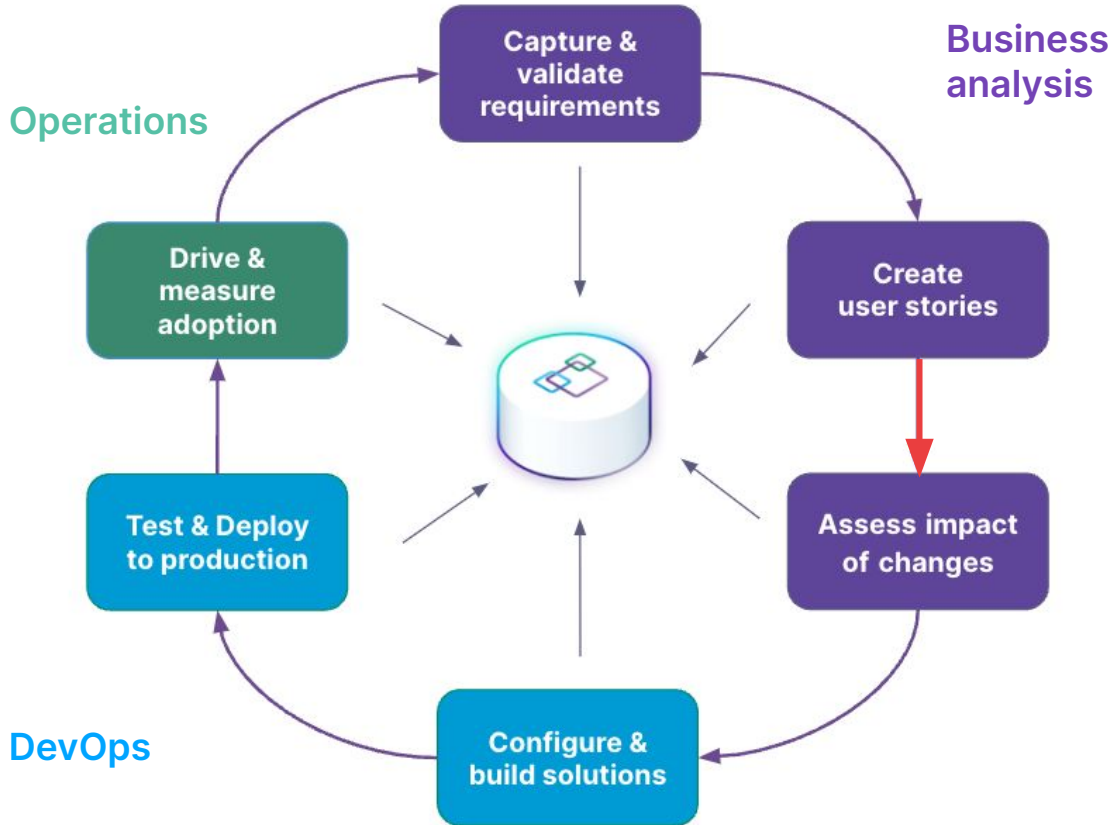
+

Metadata
management

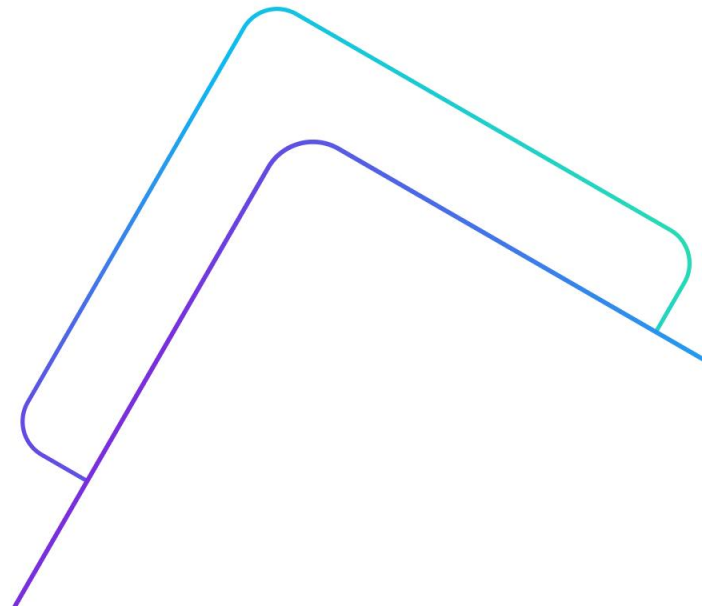
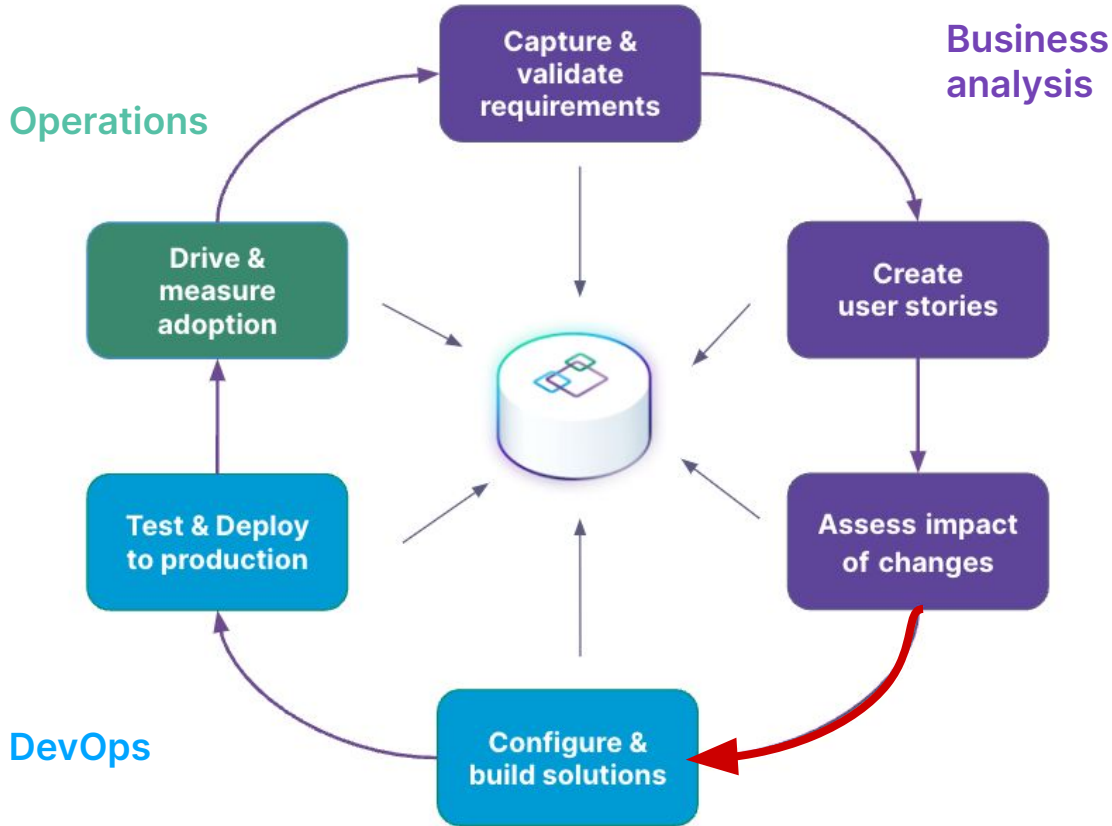
Handover : **validated** requirements



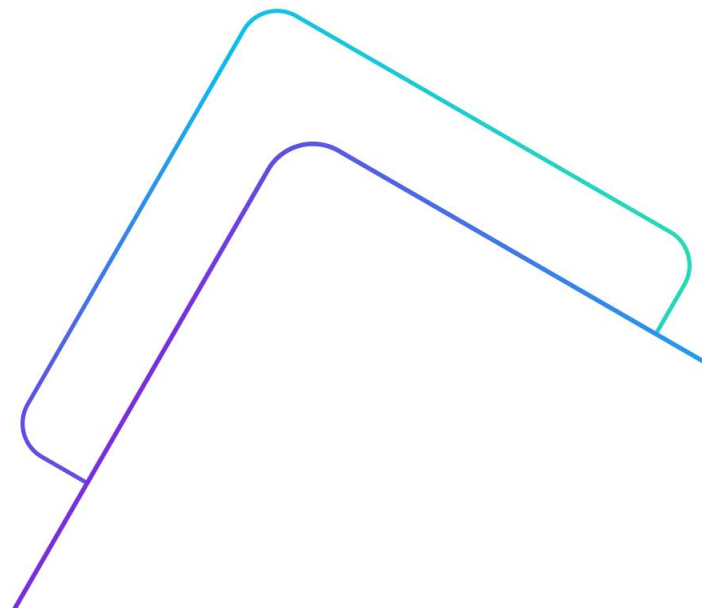
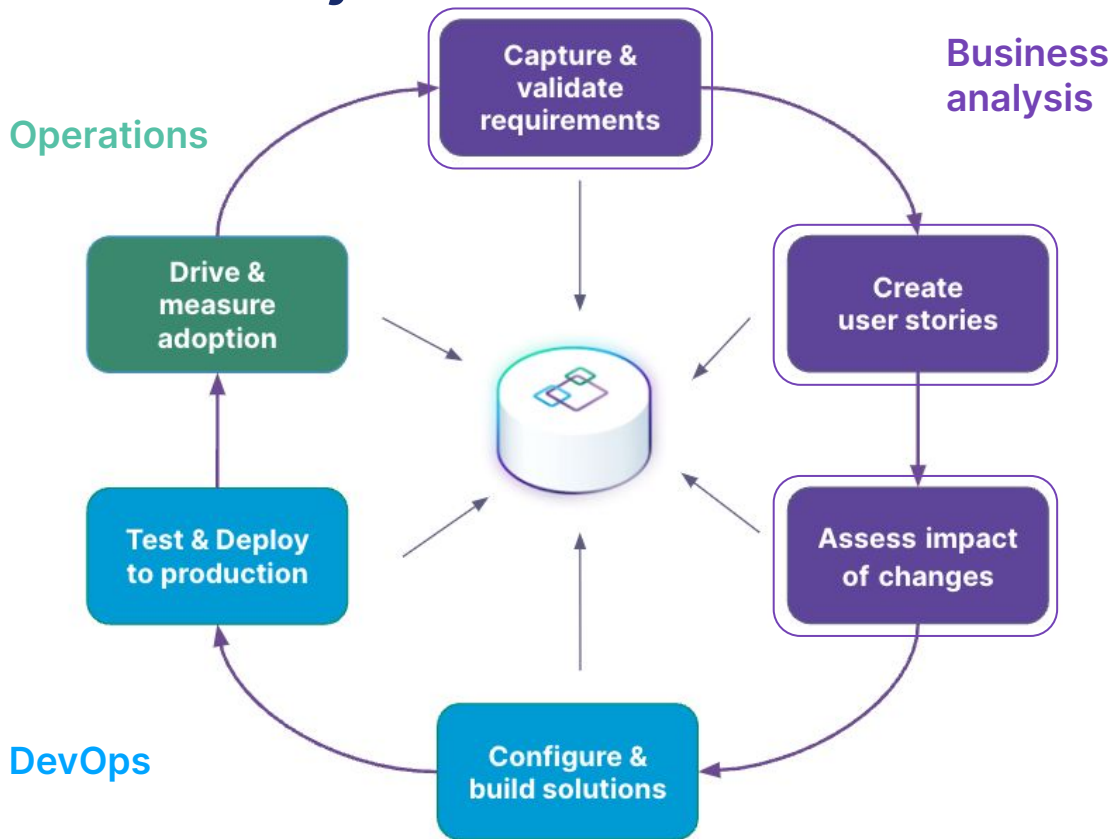
Handover: **complete** user story



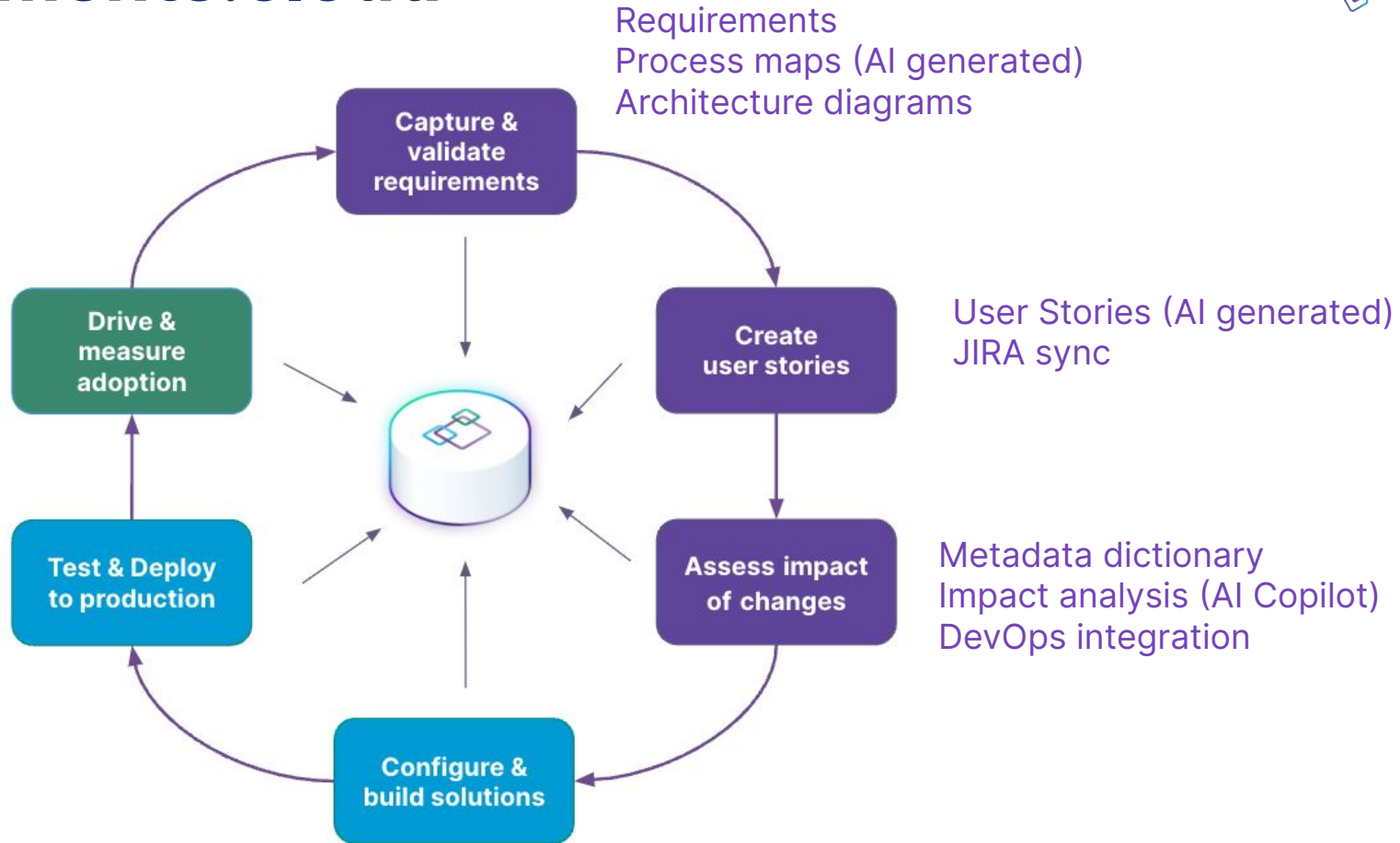
Handover: impact understood



Change Intelligence Platform (accelerated by GPT)



Elements.cloud

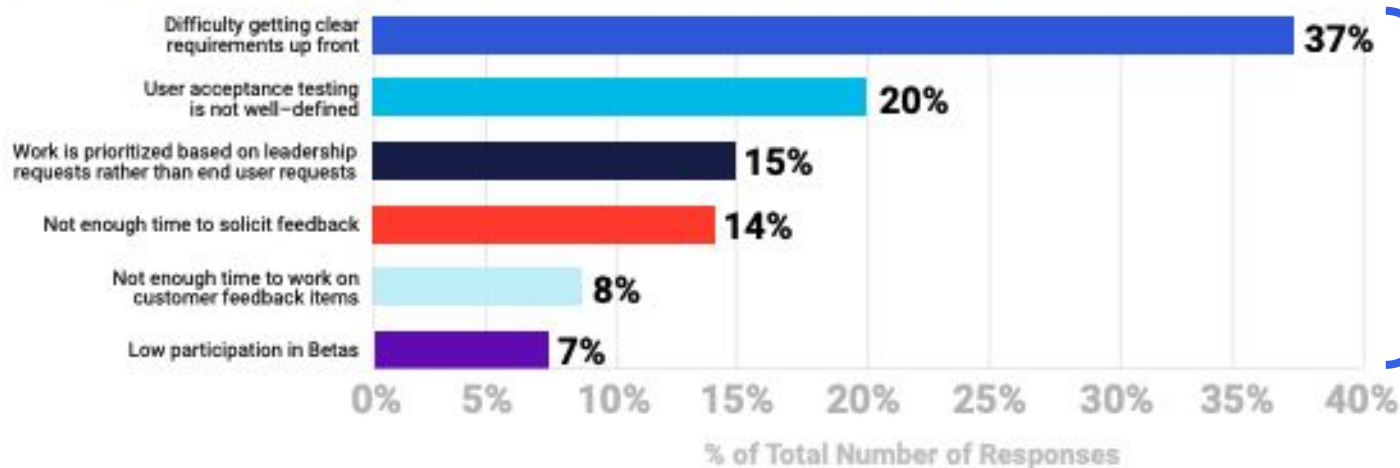


Copado State of DevOps Report



Change intelligence impacts all of these

Most challenging part of integrating customer feedback?





Einstein 1

Now AI works for business & everyone can be an Einstein

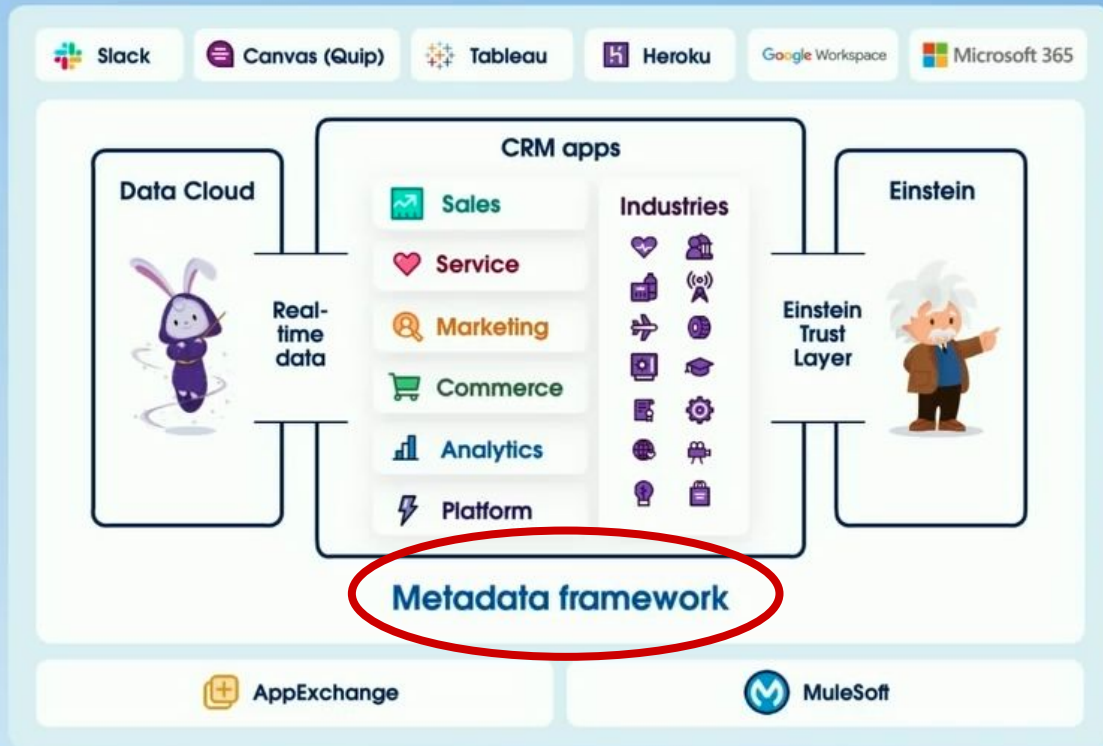
Integrated

Intelligent

Automated

Low code & pro code

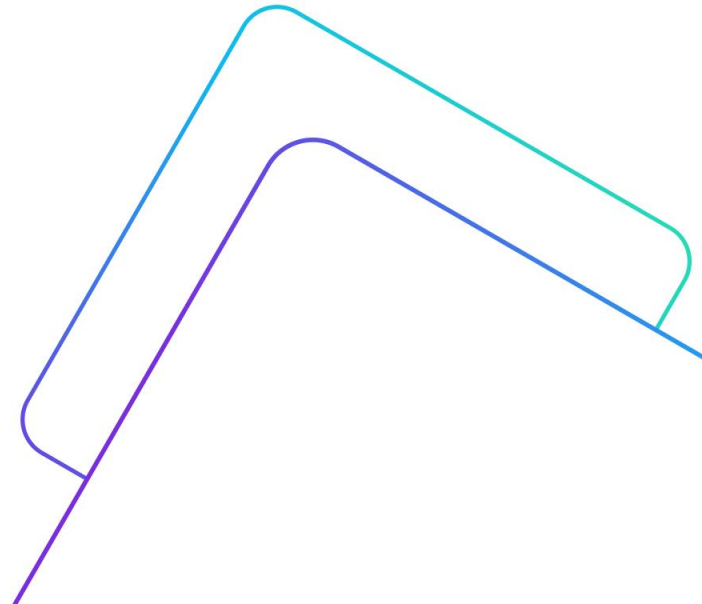
Open



Strategic vs Tactical

Accelerate time to value

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



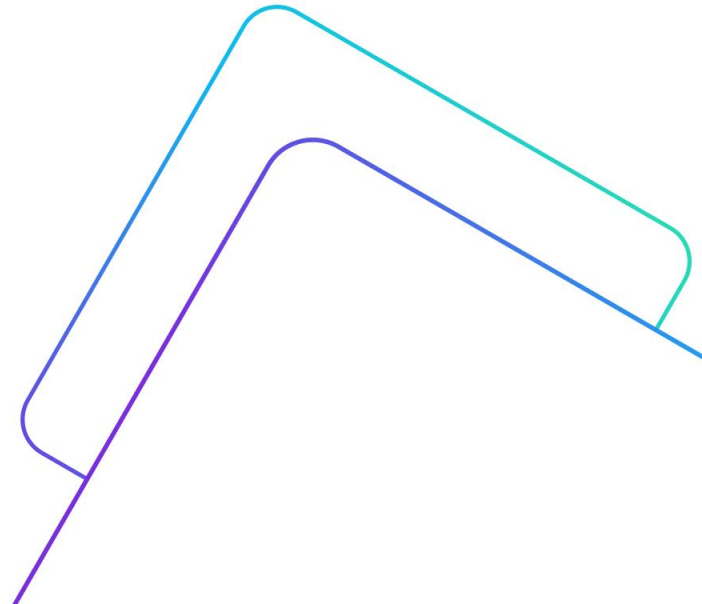
Strategic vs Tactical

Understand true requirements

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

Improve Salesforce agility

- Org complexity
- Technical debt
- Inadequate documentation



Implementing Data Cloud



Ian Gotts

Founder & CEO



“

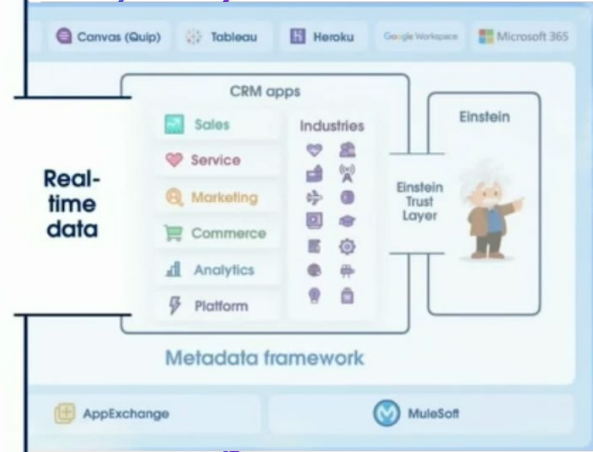
We saw more than 1,000 new Data Cloud purchases in the quarter. That's the second quarter in a row where we saw Data Cloud with more than...

Marc Benioff
Chair and CEO, Salesforce

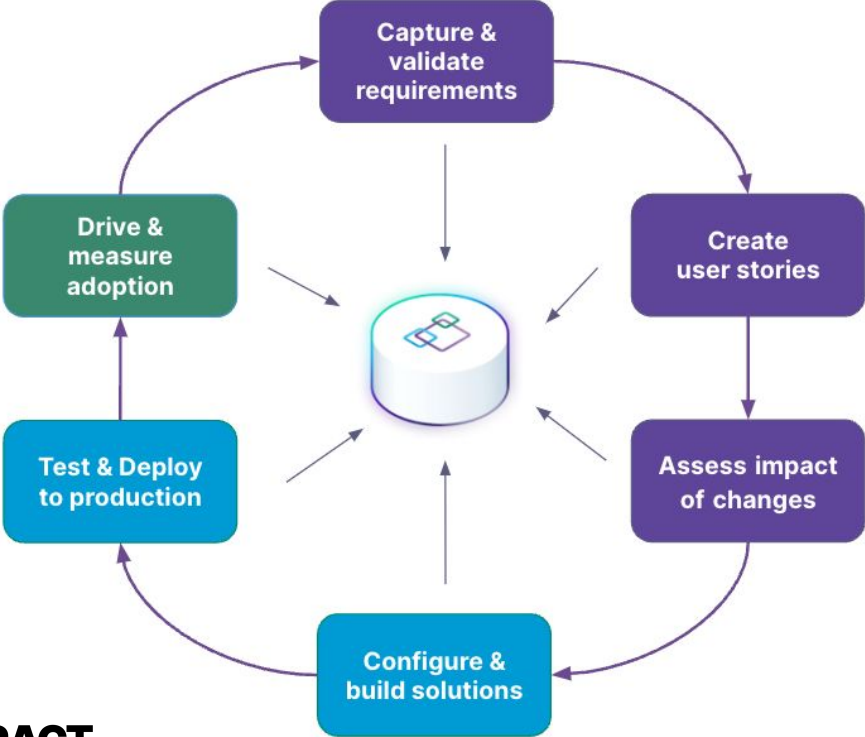


salesforce

Data Cloud is a step change



Implementation is the standard lifecycle

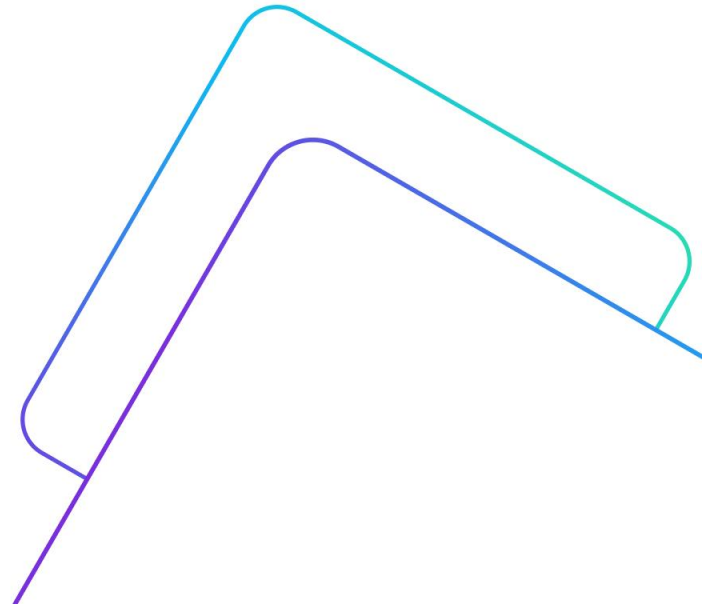


80% - 20%

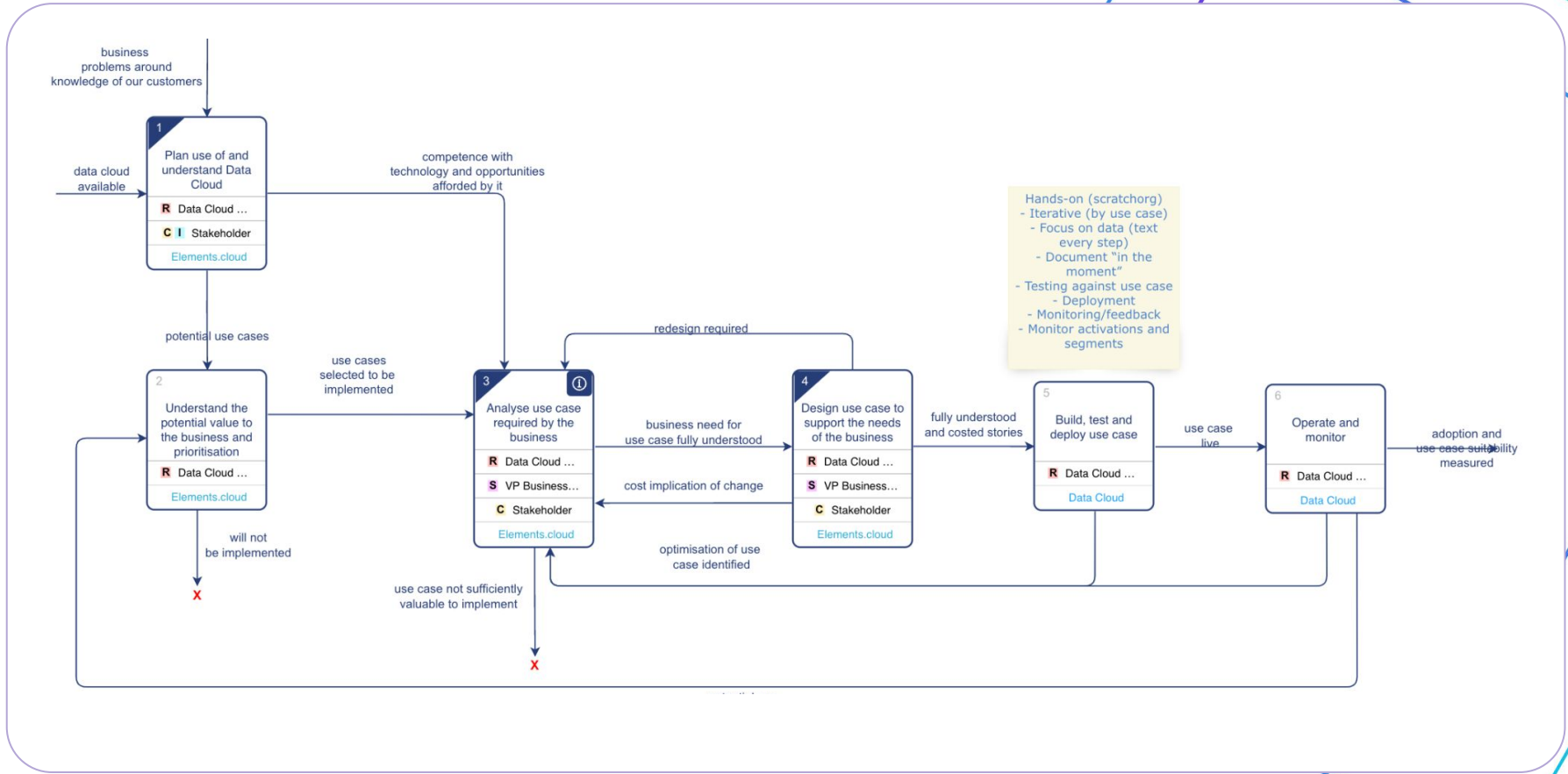
Focus on the use case

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

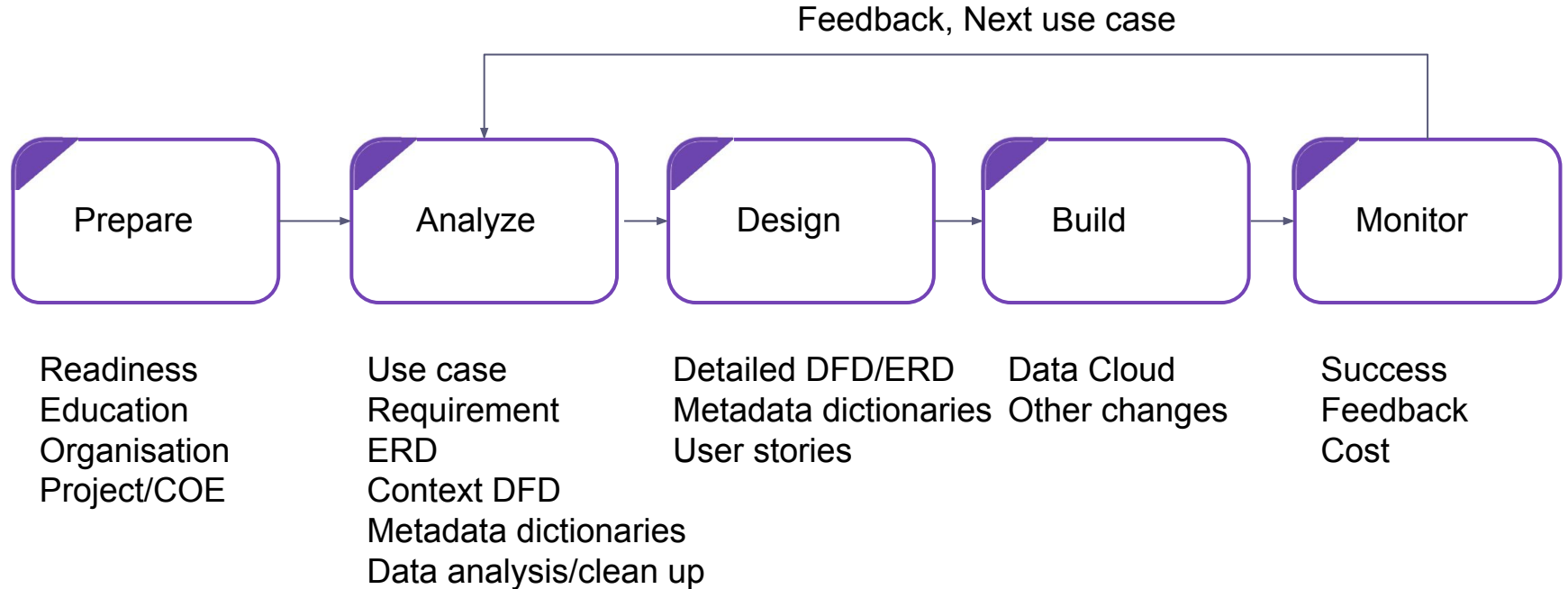
It is all about what you can do with actionable unified data.



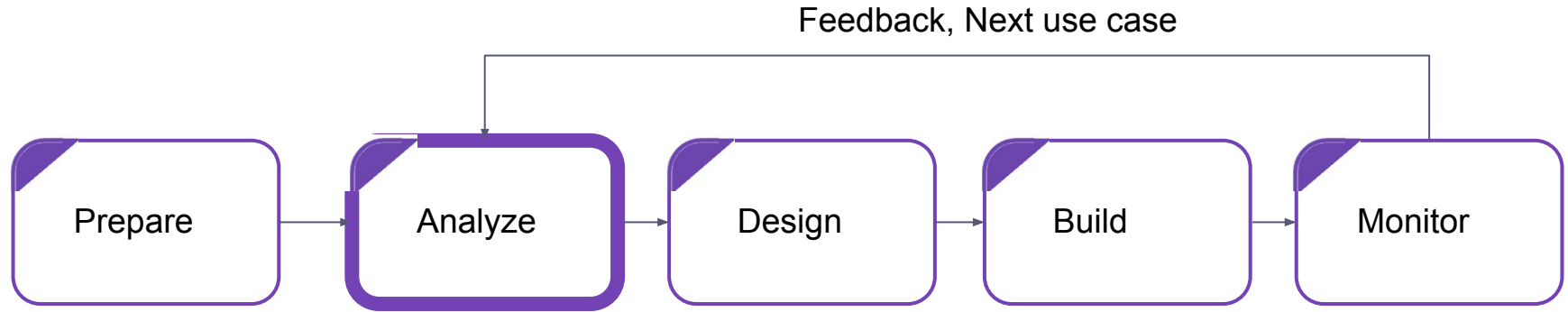
Implementation methodology



Implementation methodology



Implementation methodology

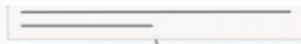


Use case
Requirement
ERD
Context DFD
Metadata dictionaries
Data analysis/clean up

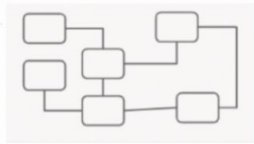
Planning documentation

ANALYSIS

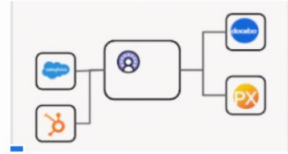
Requirements



Use Case ERD



Context DFD



Metadata dictionaries

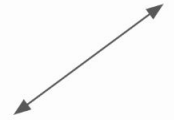


DESIGN

Detailed DFD/ERD



User Stories



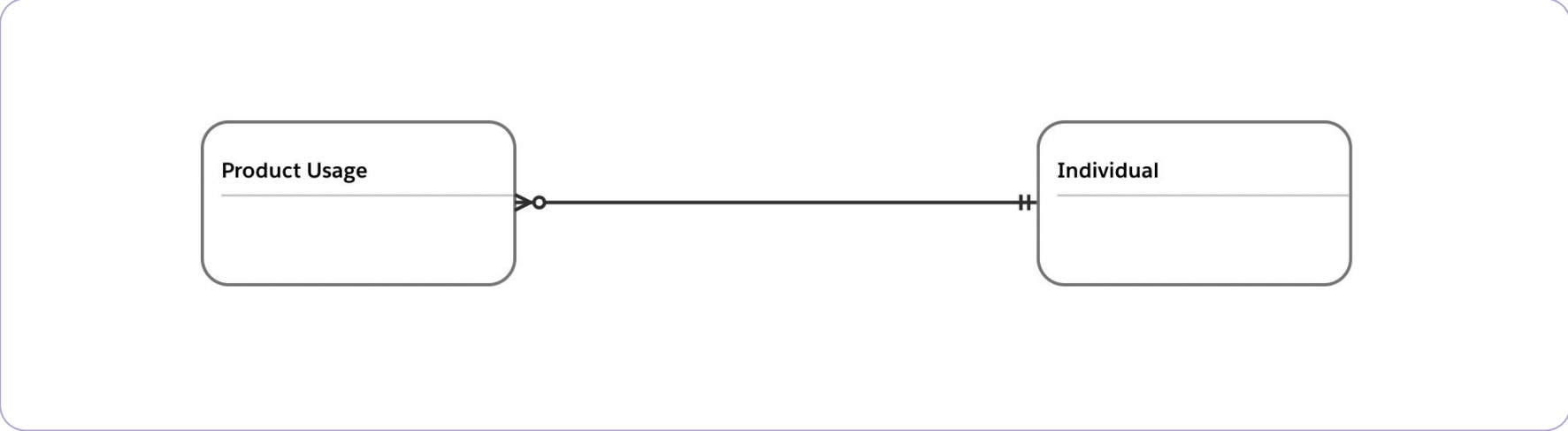
Requirements: Our internal use cases

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

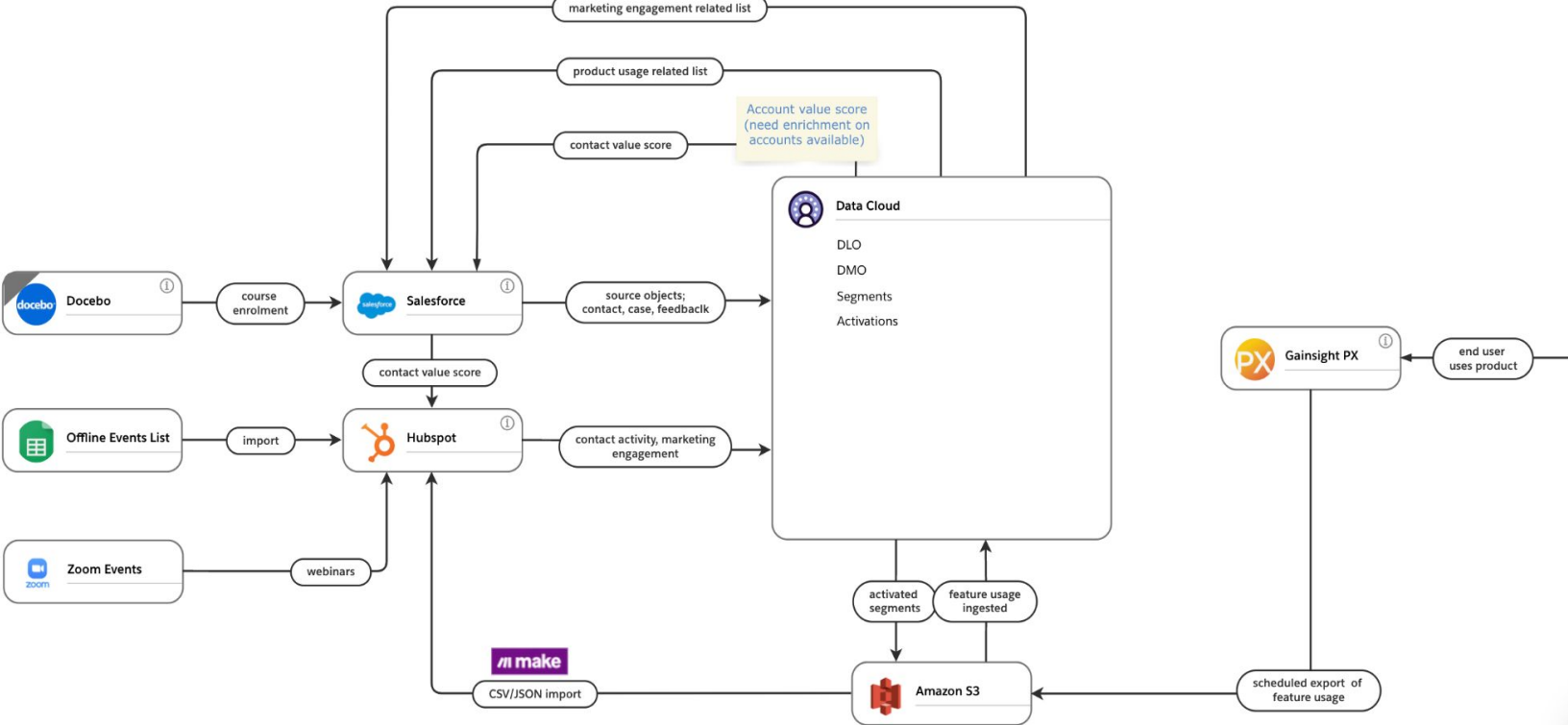


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Use Case ERD: each use case (Entity Relationship Diagram)



Context DFD (Data Flow Diagram)



Metadata dictionaries

App | Select your view | All types and Search by label or api | Analytics 360

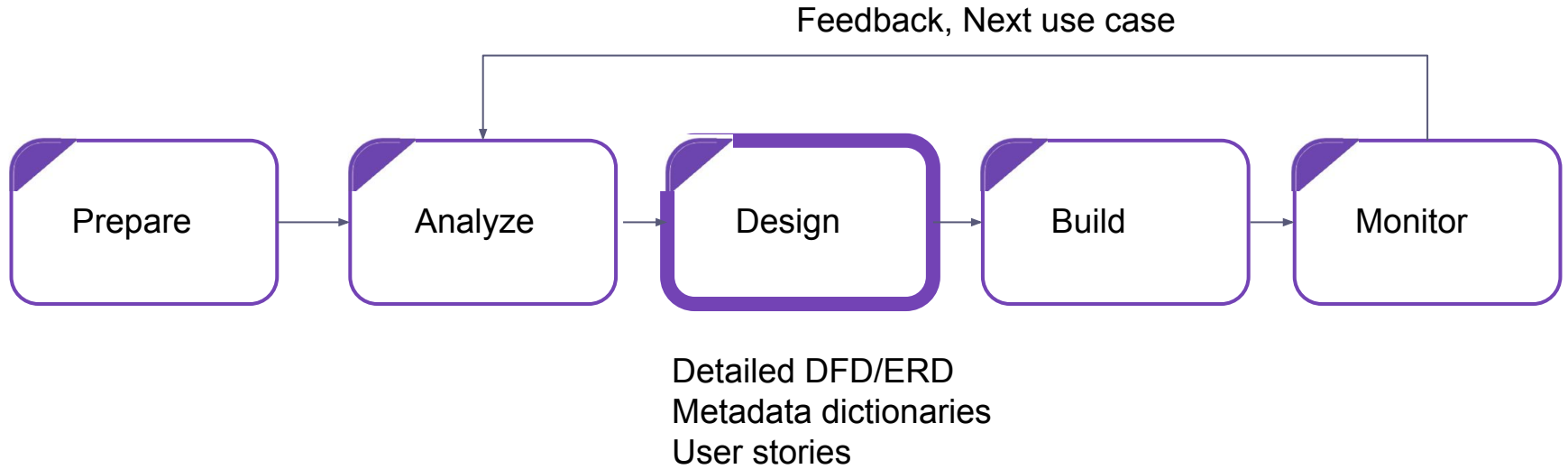
Data: Salesforce config | Last synced on: June 24, 2024 at 22:01

| Name | Status | # of links | Data privacy |
|-------------------------------|--------|------------|--------------|
| ▼ Standard Objects | | 0 | |
| ▼ Account | | 51 | |
| Approval Processes | | 0 | |
| ▶ Buttons, Links, and Actions | | 2 | |
| ▶ Compact Layouts | | 0 | |
| ▶ Duplicate Rules | | 0 | |
| Email Alerts | | 0 | |
| Field Sets | | 0 | |

number of Spac...
Owner ID
Photo URL
Record Type ID
Website
Usage period
Billing Countr...
Employees
Annual Revenue
Industry

USED BY:
Apex Classes (6)
Apex Pages (7)

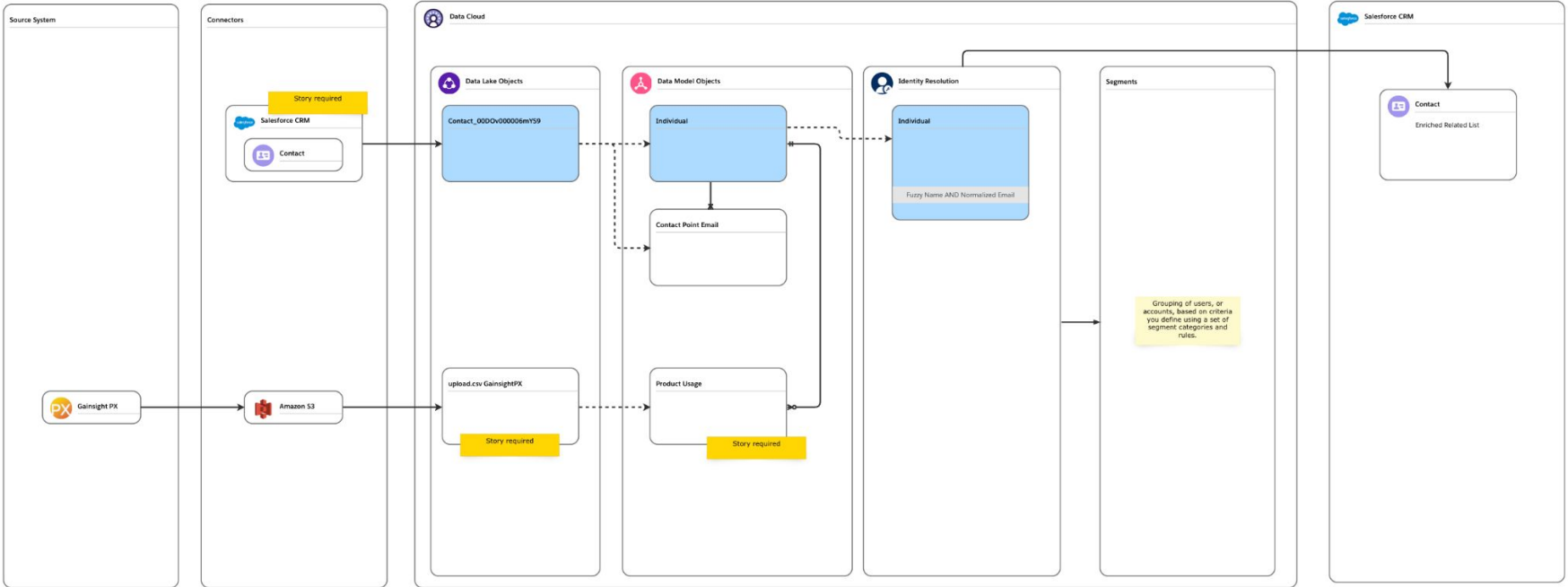
Implementation methodology



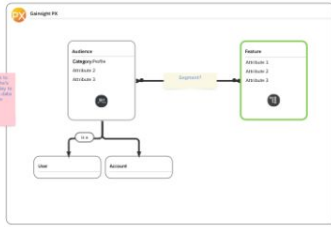
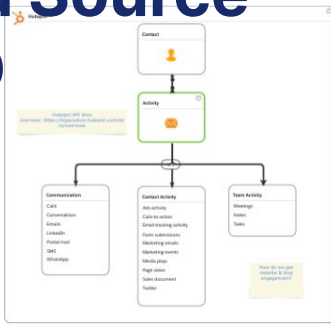
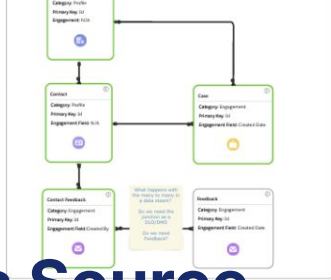
Detailed DFD/ERD: each use case

DFD - Product Usage

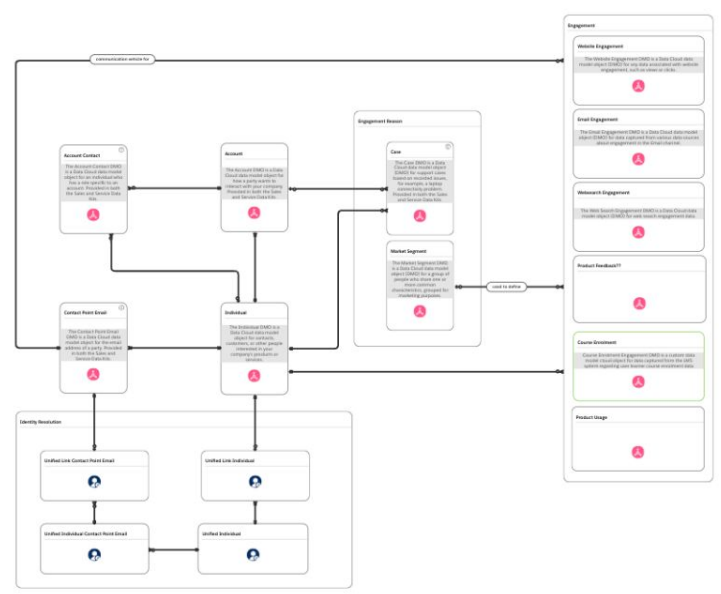
Data flow diagram for the product usage data cloud use case



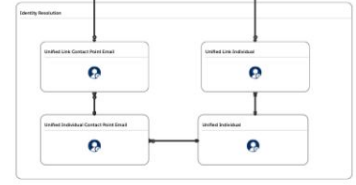
Data Source DSO



Data Lake DLO



Data Model DMO



User Stories: 1st use case

🏠 Home

📁 Elements Operations ?

Change space ▾
⚙️
📄 2
🔔 8
📧 1
🌐
?

REQUIREMENTS
STORIES
FEEDBACK

Grid views
All ▾

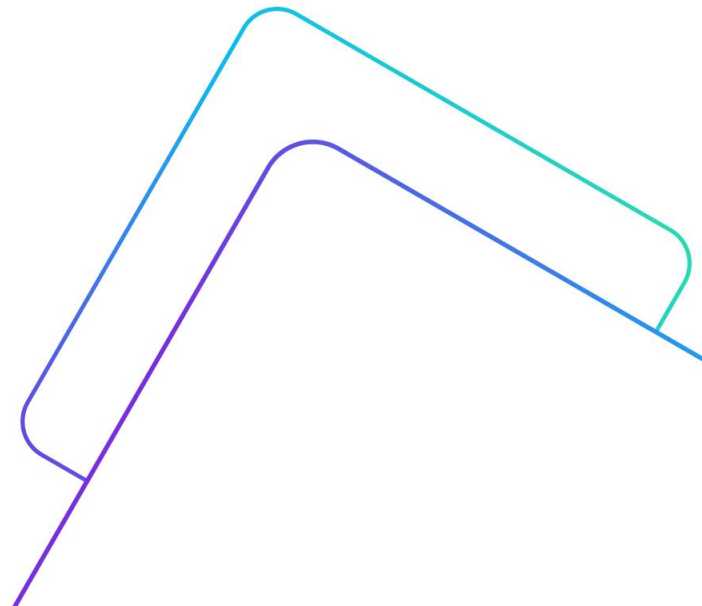
ADD NEW
RESET FILTERS
IMPORT
↻

| <input type="checkbox"/> | Summary | 3040 | | Description | Affected roles | Acceptance Criteria | Status | Risk | Conflict |
|--------------------------|--|------|----|---|--------------------------|---|---------------|------------|----------|
| <input type="checkbox"/> | Entitlement Field to appear in the choices of fields for moving an access to | 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"/> | opportunities and accounts for transferring record | 3039 | | | er | other users within the system without restrictions. Audit Trail: The | Shipped | Low | |
| <input type="checkbox"/> | other user page layout and renaming the system | 3038 | | rename the system admin layout to Space Layout so that the space object automatically assigned that priority points given to a sync error case, so that low priority trial sync error cases | Sales Team | users. Field Access All necessary fields remain accessible to both system administrators and other | In design | Low | |
| <input type="checkbox"/> | analysts to override trial priority points for sync error cases to adjust queue | 3037 | | | Customer Support Analyst | Update: The case queue must dynamically update to reflect the | Being defi... | Medium | |
| <input type="checkbox"/> | sync error cases with a trial license space to prioritize in | 3036 | | with a trial license space and assigns them 99 priority points, so these cases | 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"/> | Classic email template to support all types of time off | 3035 | | accommodate various types of time off so that I can easily submit requests for and receive its required news, so that I can take the data ingested into the | Data Cloud Admin | Cloud.Validation: The "Product Usage" DMO correctly stores and customers: in 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 | Shipped | Low | |
| <input type="checkbox"/> | Create custom DMO for Product Usage in Salesforce Data Cloud integration to apply appropriate tax rates based on the billing company and | 3034 | | Tax field to ensure that the correct tax rate is applied based on whether the | | the data from the MEDDICC fields is clearly marked and identifiable | Ready for ... | Medium | |
| <input type="checkbox"/> | VAT Required field from the opportunity form as it is no | 3033 | | the opportunity form because the tax calculation is now handled by | | 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"/> | from Salesforce and transfer existing data to the | 3032 | | | Sales Manager | | Shipped | Low | Open |
| <input type="checkbox"/> | and default discount on pricebook, product, and | 3031 | | transfer their existing values to the description field, ensuring that | | | Shipped | Low | Resolved |
| <input type="checkbox"/> | Delete unused fields on the feedback object | 3030 | | discount from pricebook, product, and opportunity product pages, so that the | | | Shipped | Low | |
| <input type="checkbox"/> | any integrations, not on any page layouts, and have not been filled out | 3029 | MH | any integrations, not on any page layouts, and have not been filled out | | | Shipped | Low | |
| <input type="checkbox"/> | Send Invoice for Sales Order | 3028 | | 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**



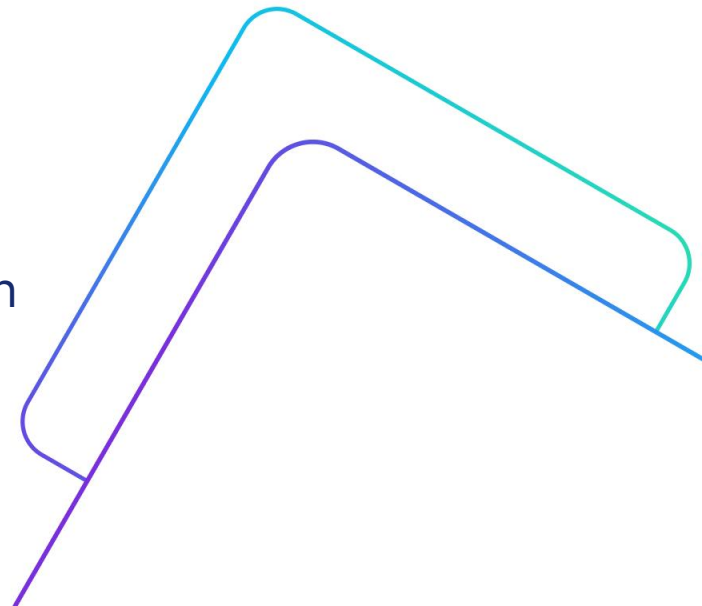
1. Data Cloud is step change

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.

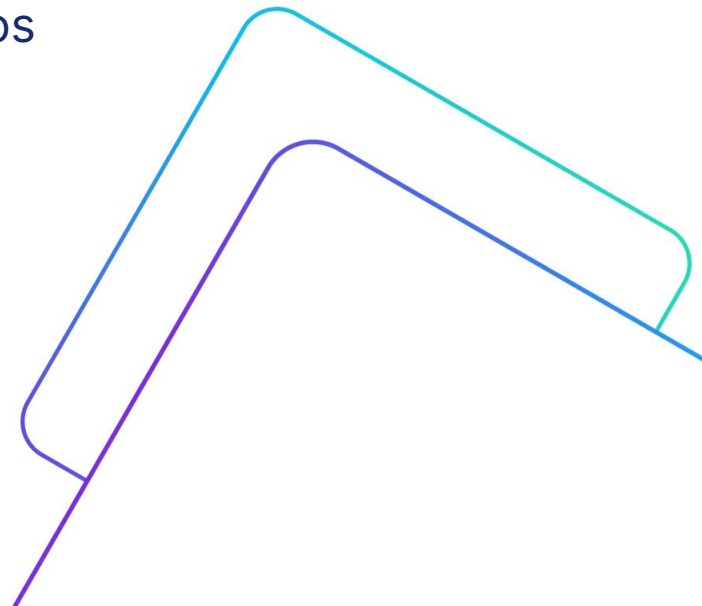


2. It's all about the use case

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



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 | Calculated Insights | Streaming | 800 DS Credits |
| | | Profile Unification | Batch |
| 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 |

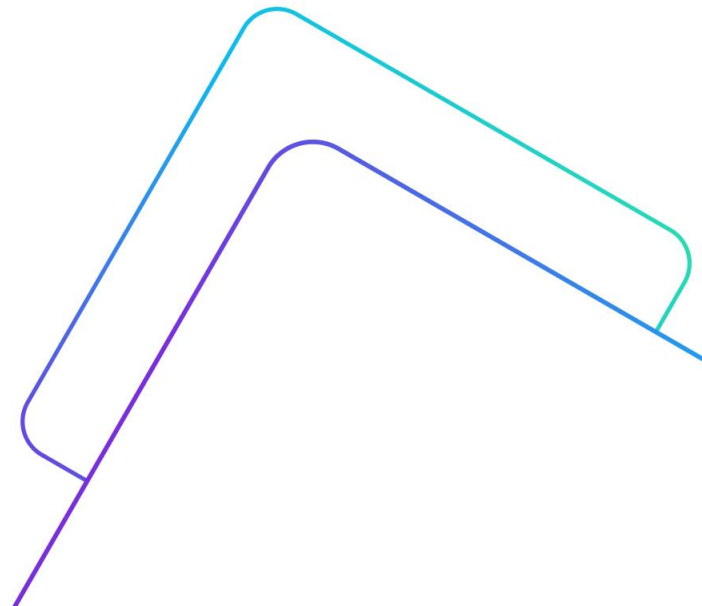
| Category | Service | Credits |
|------------------------|-----------------------|---------|
| Connect | Data Ingestion | 1 |
| | Integration | ✓ |
| | BYO Data Model | |
| Harmonize | Data Model Objects | * |
| | Profile Unification | 3 |
| | Data Lake Objects | * |
| | Calculated Insights | 2 |
| Predict, Analyze & Act | Data Actions | 4 |
| | Data Queries | 5 |
| | Accelerated Queries | 6 |
| | Segmentation | 8 |
| | Activations | 9 |
| | Real-time Profile API | 7 |

* 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

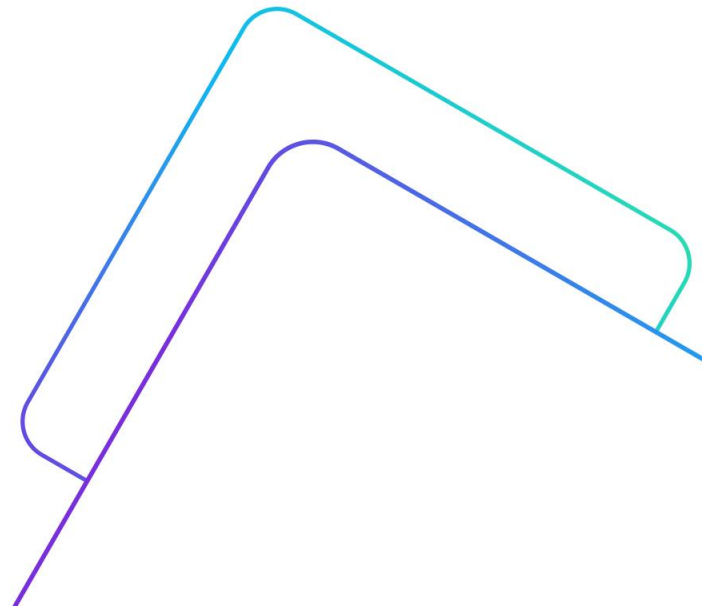


5. Data Cloud is the future

Data cloud is not a small add-on

It is the future of the Salesforce platform

Everybody needs to understand the value



Panel Session



Mitch Gouss

SVP Global Alliances



/mitchgouss



Panelists



Tom Leddy

Product Director, Well-Architected
Decision Guides

salesforce



Kelly Leslie

Salesforce Senior
Product Owner

