Preparing for Data Cloud

Adrian King

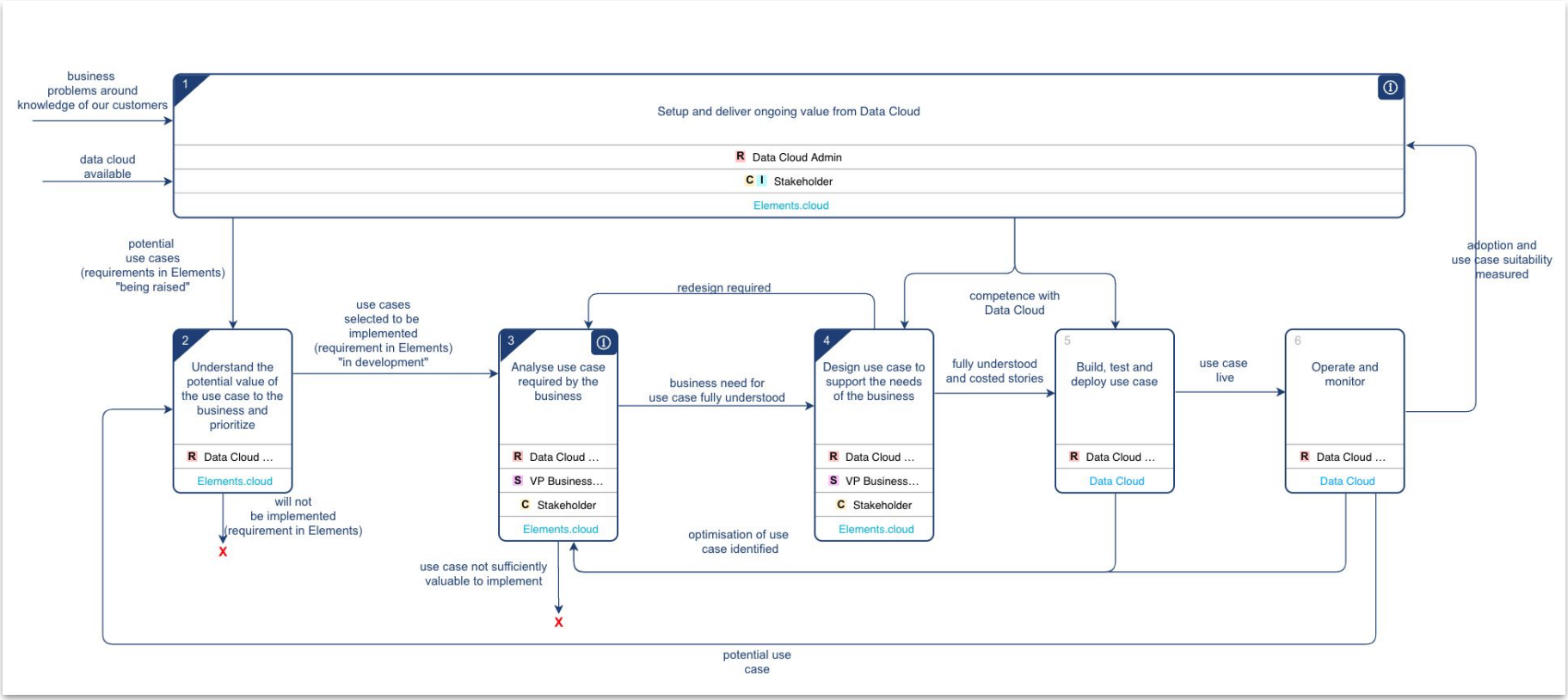
Founder, CTO

Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM

/adrianfking

Data Cloud Implementation Approach

The methodology as a UPN Process



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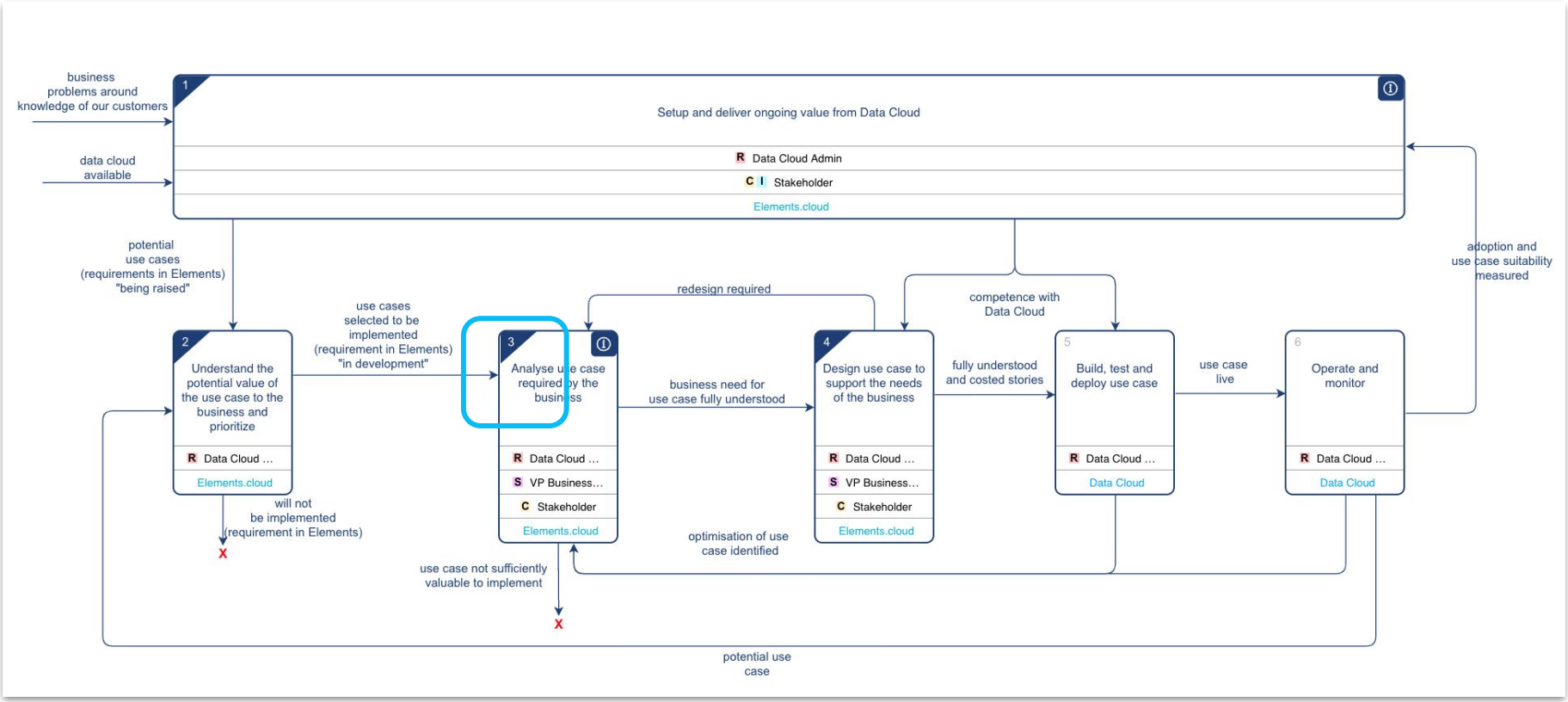
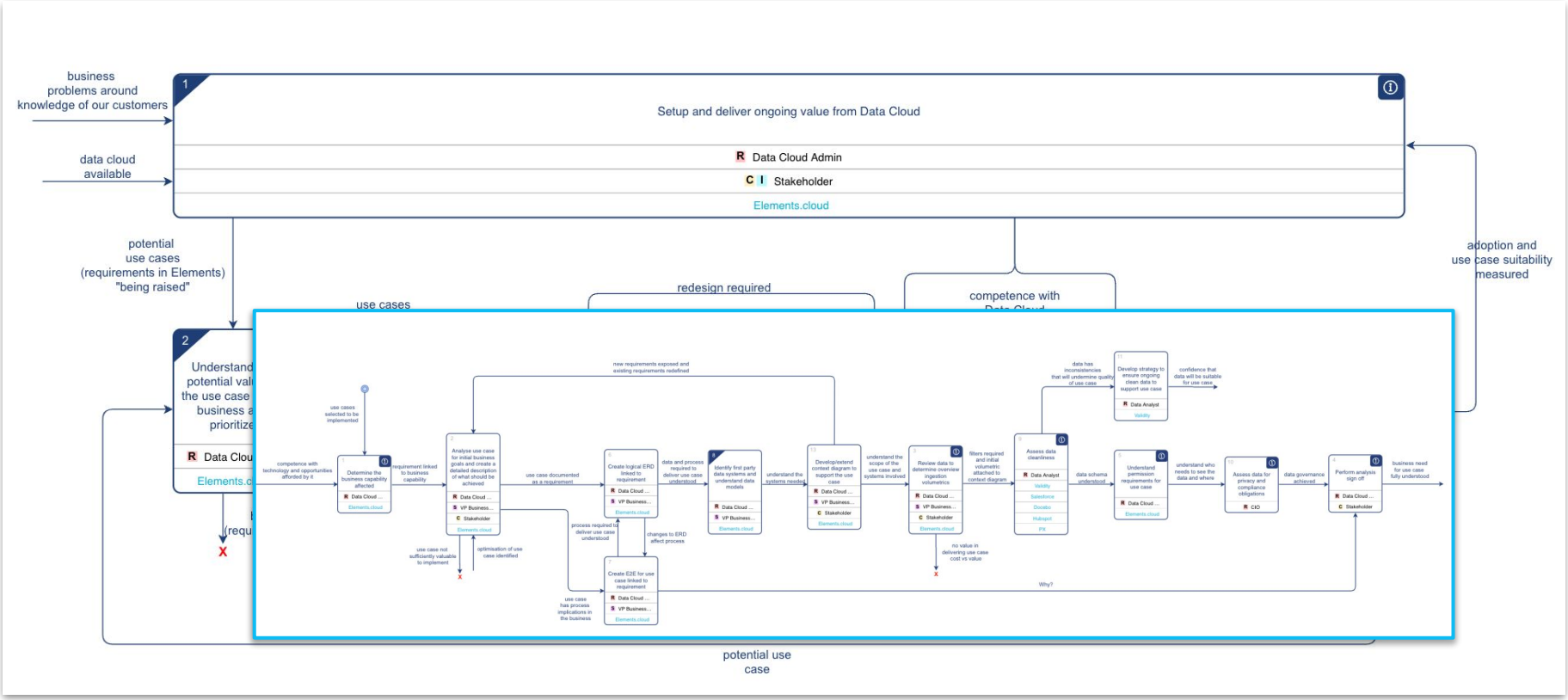


Detail for Analysis phase



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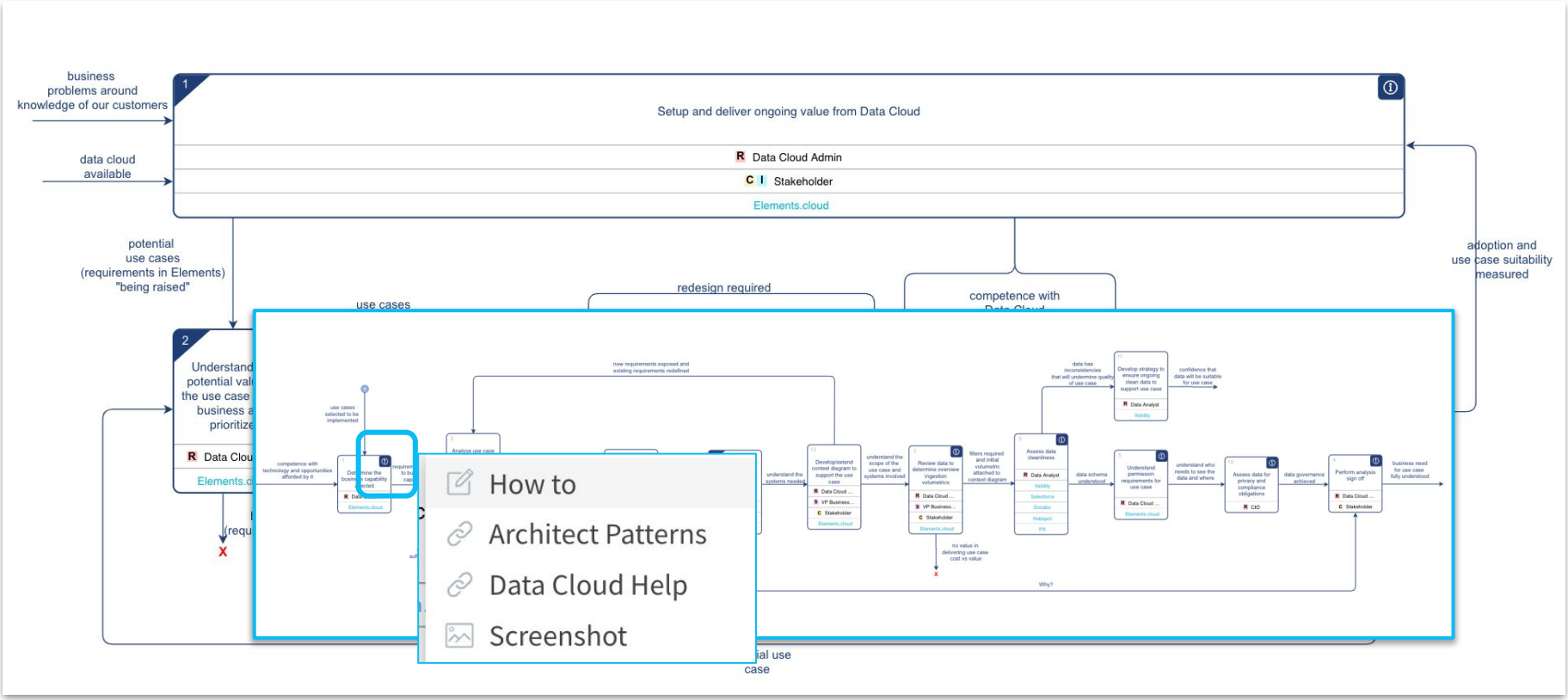
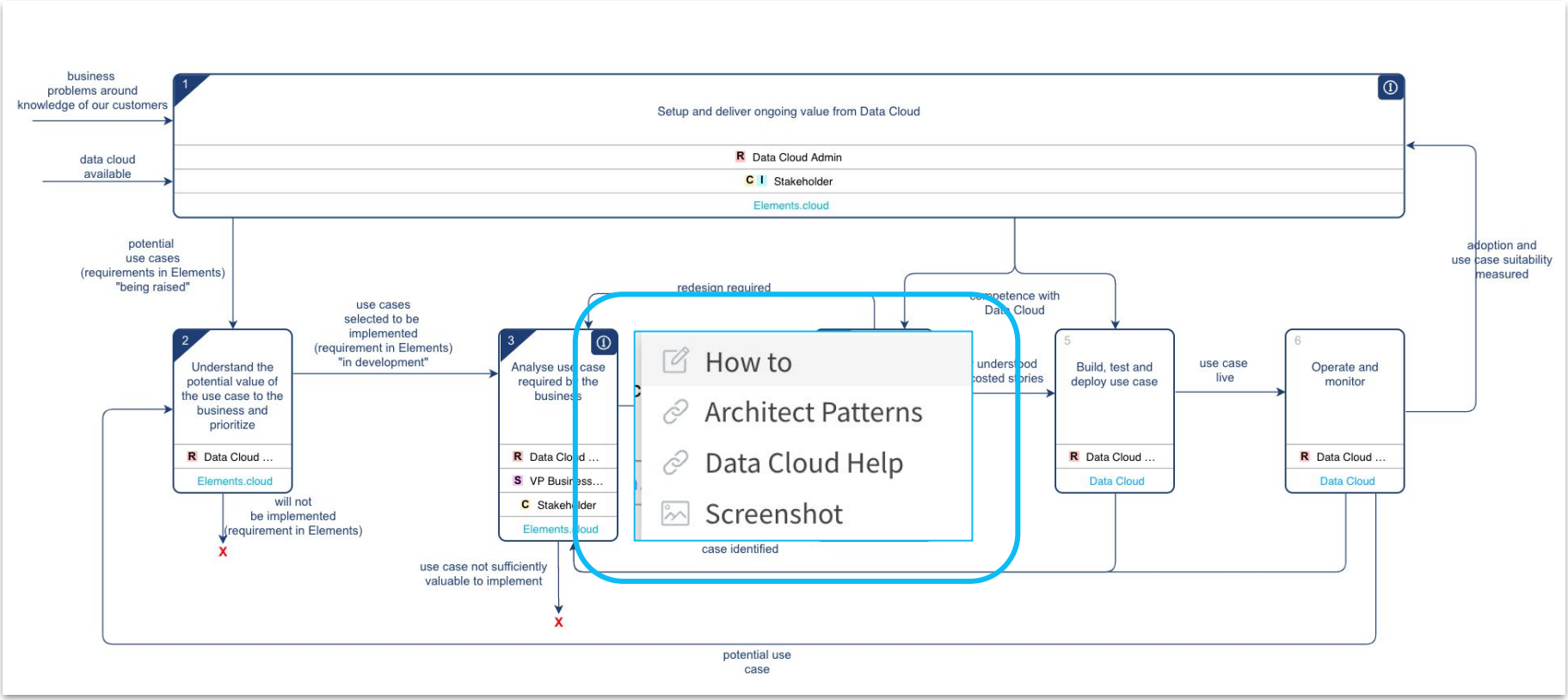
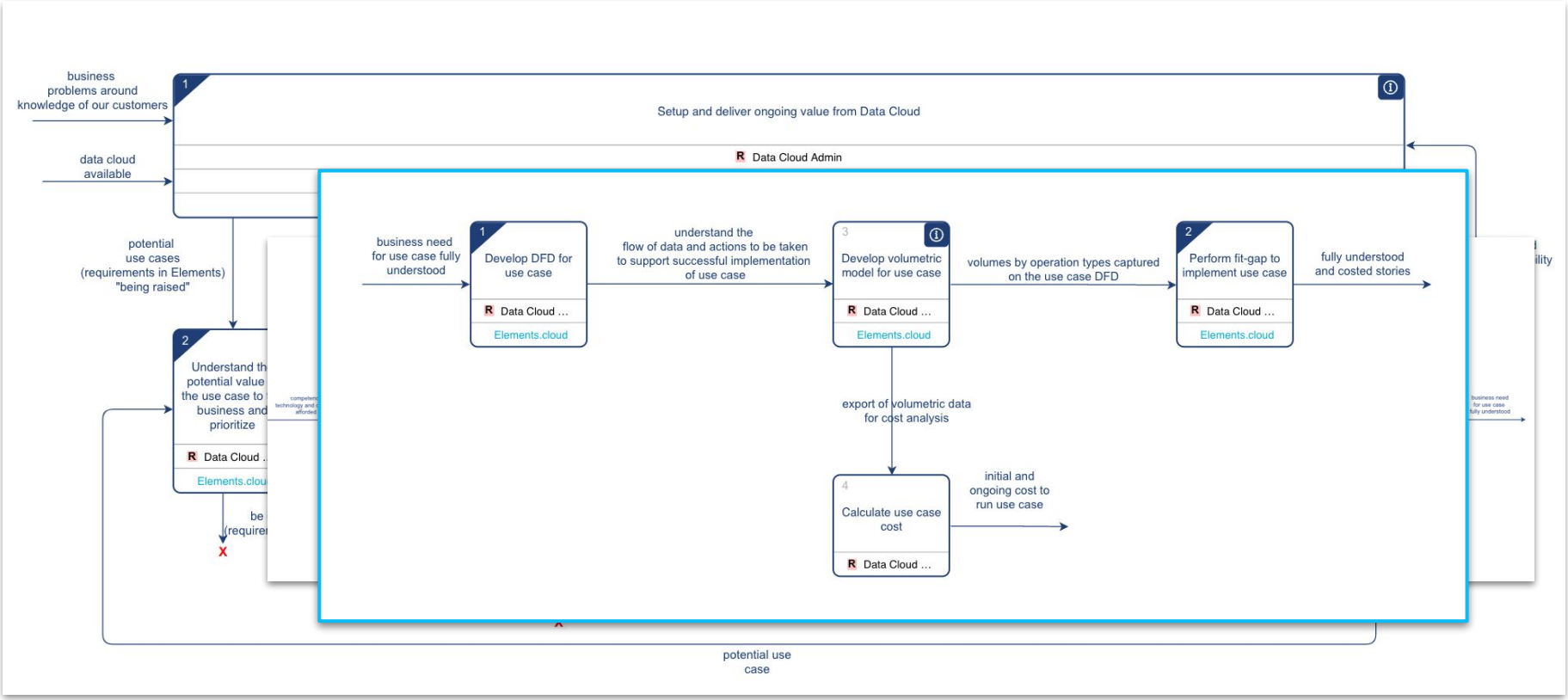


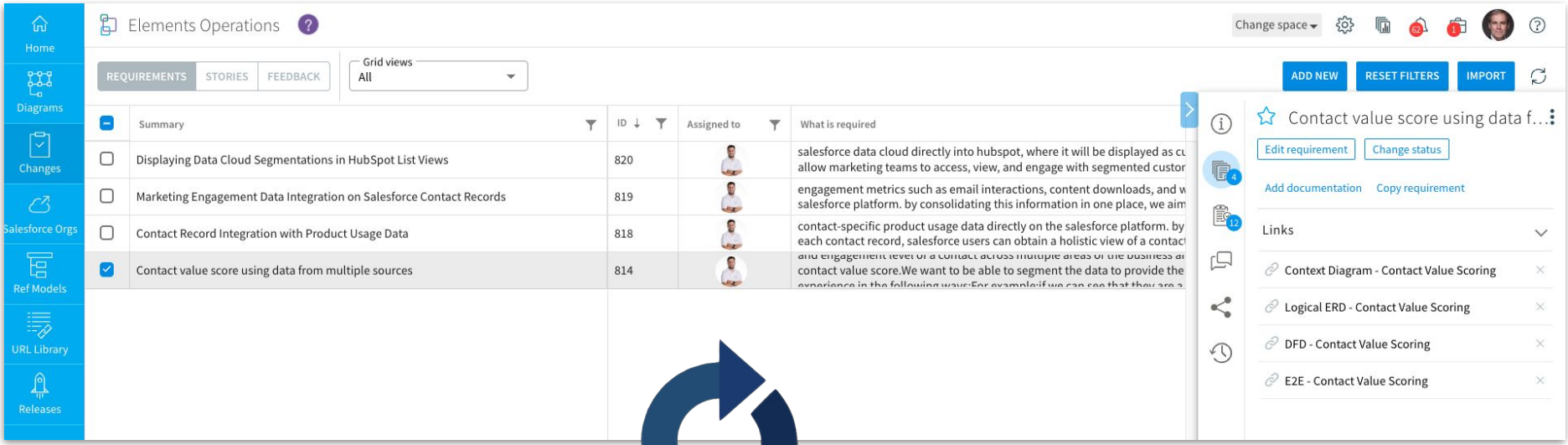
Attachments link to supporting content



Detail for Design phase



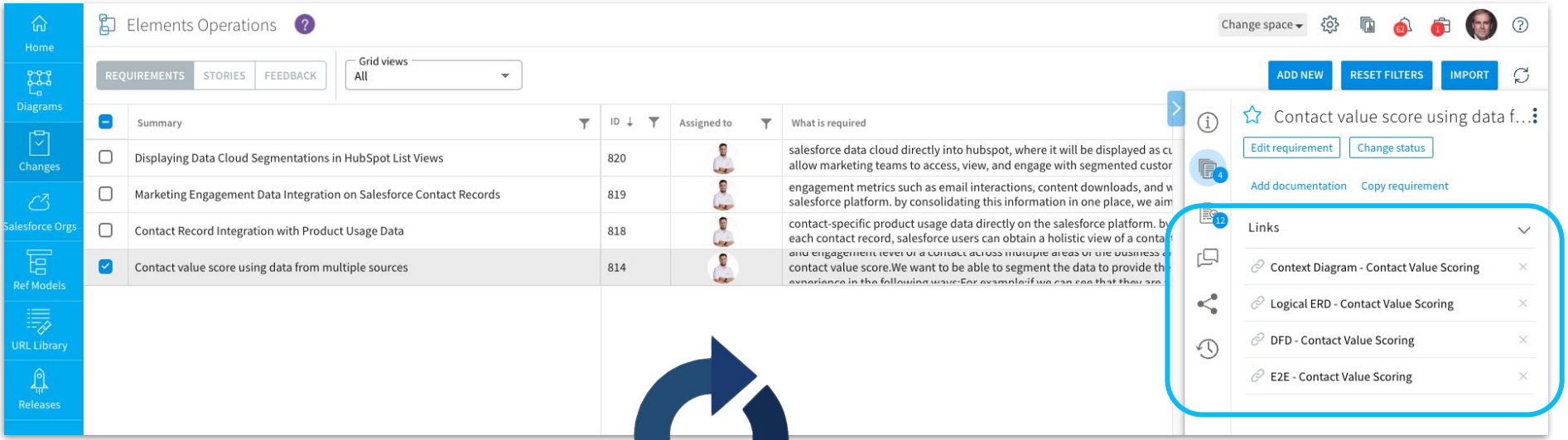
Capture the Use Cases as Requirements



Azure DevOps

Jira Software

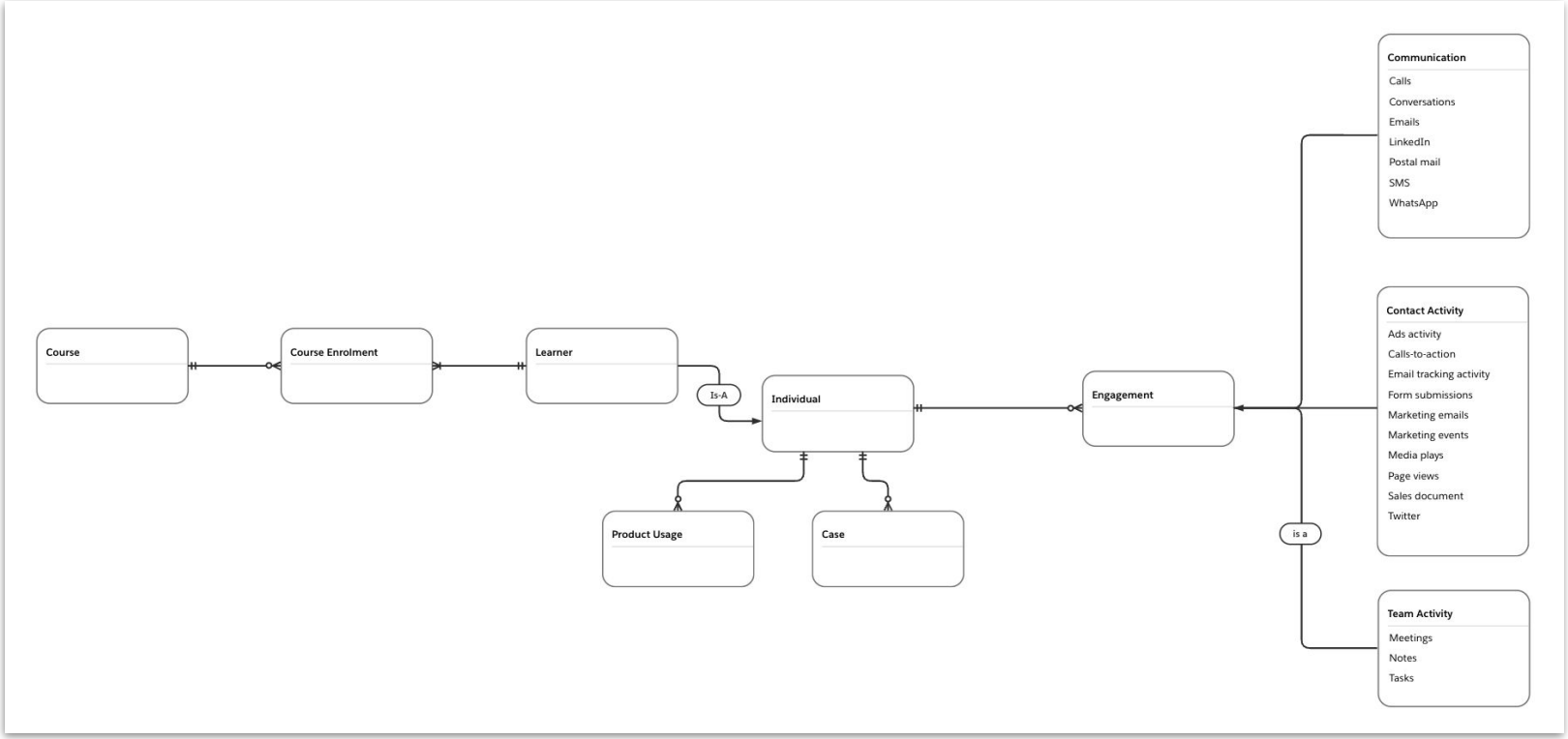
Capture the Use Cases as Requirements



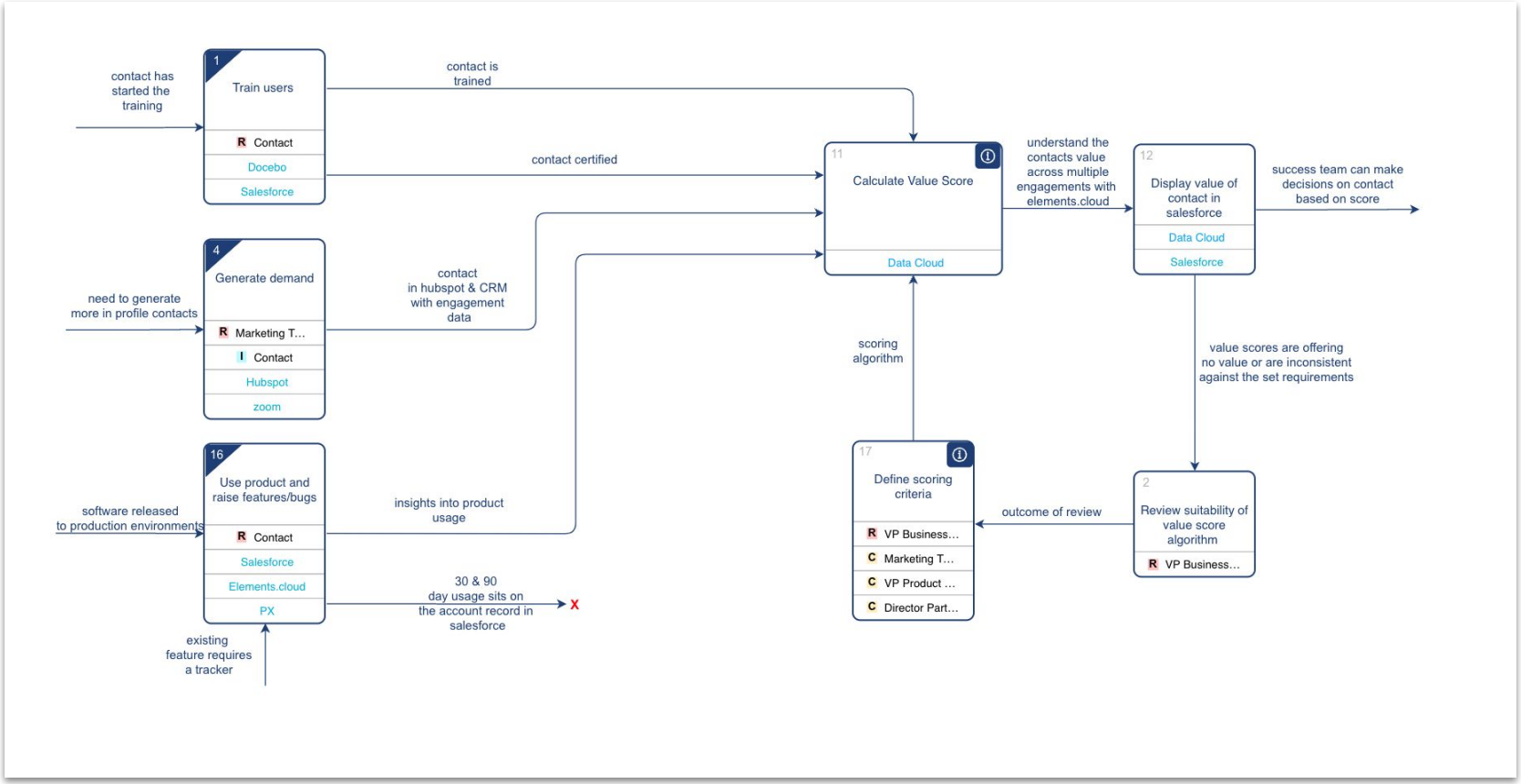
Azure DevOps

Jira Software

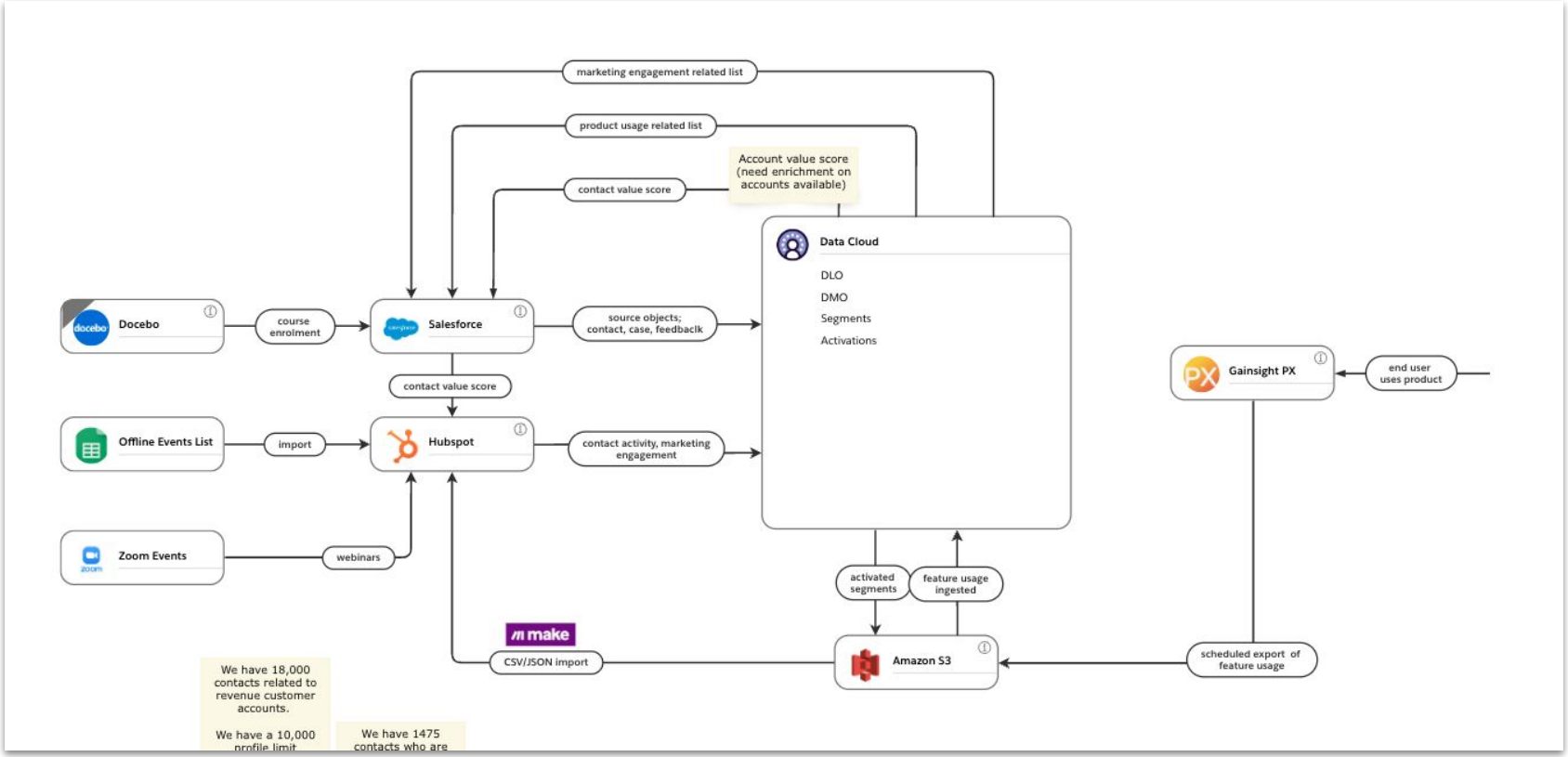
Create a Logical ERD for each Use Case



Create an End to End process for each Use Case



Create the Context DFD



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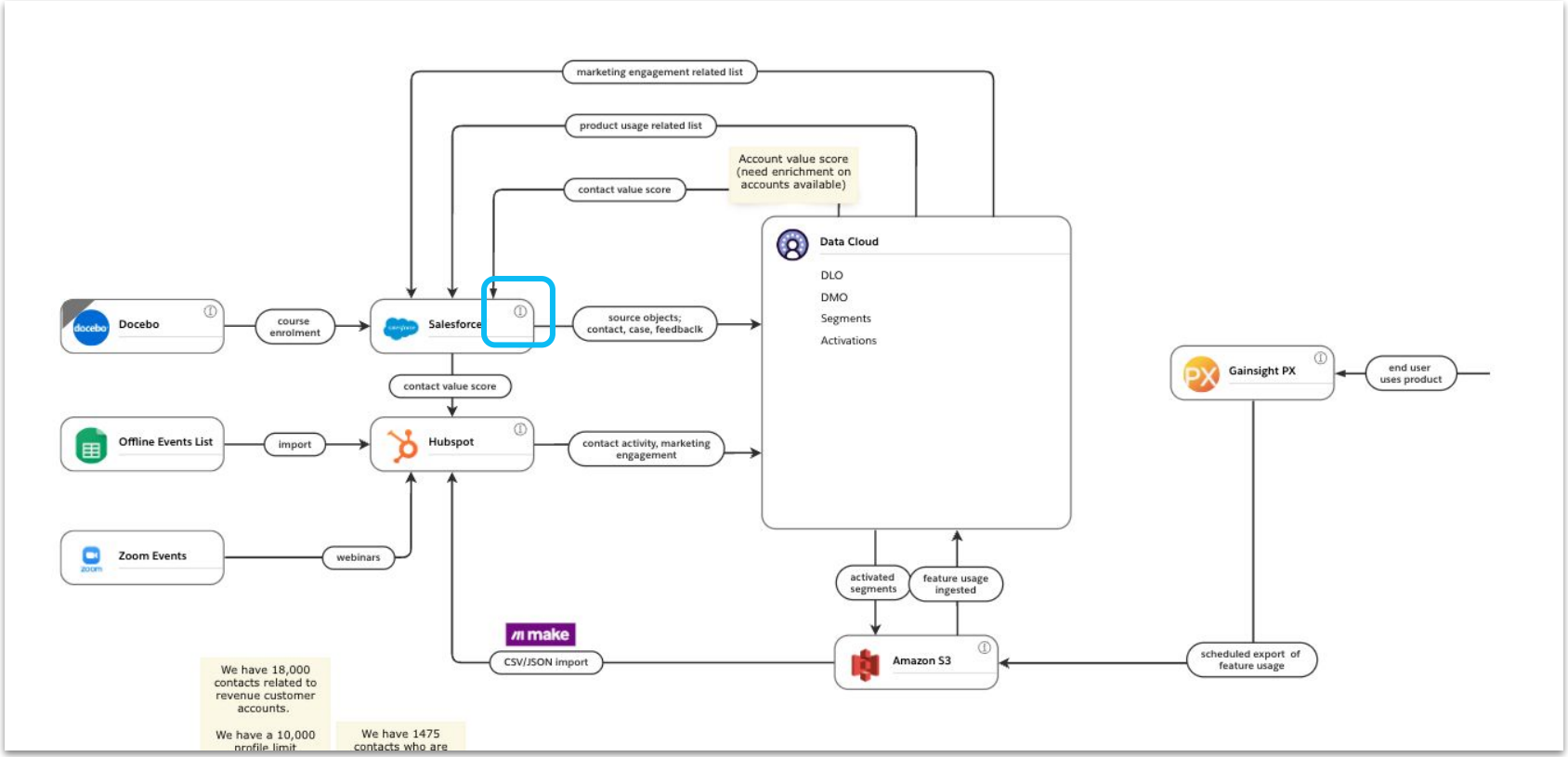

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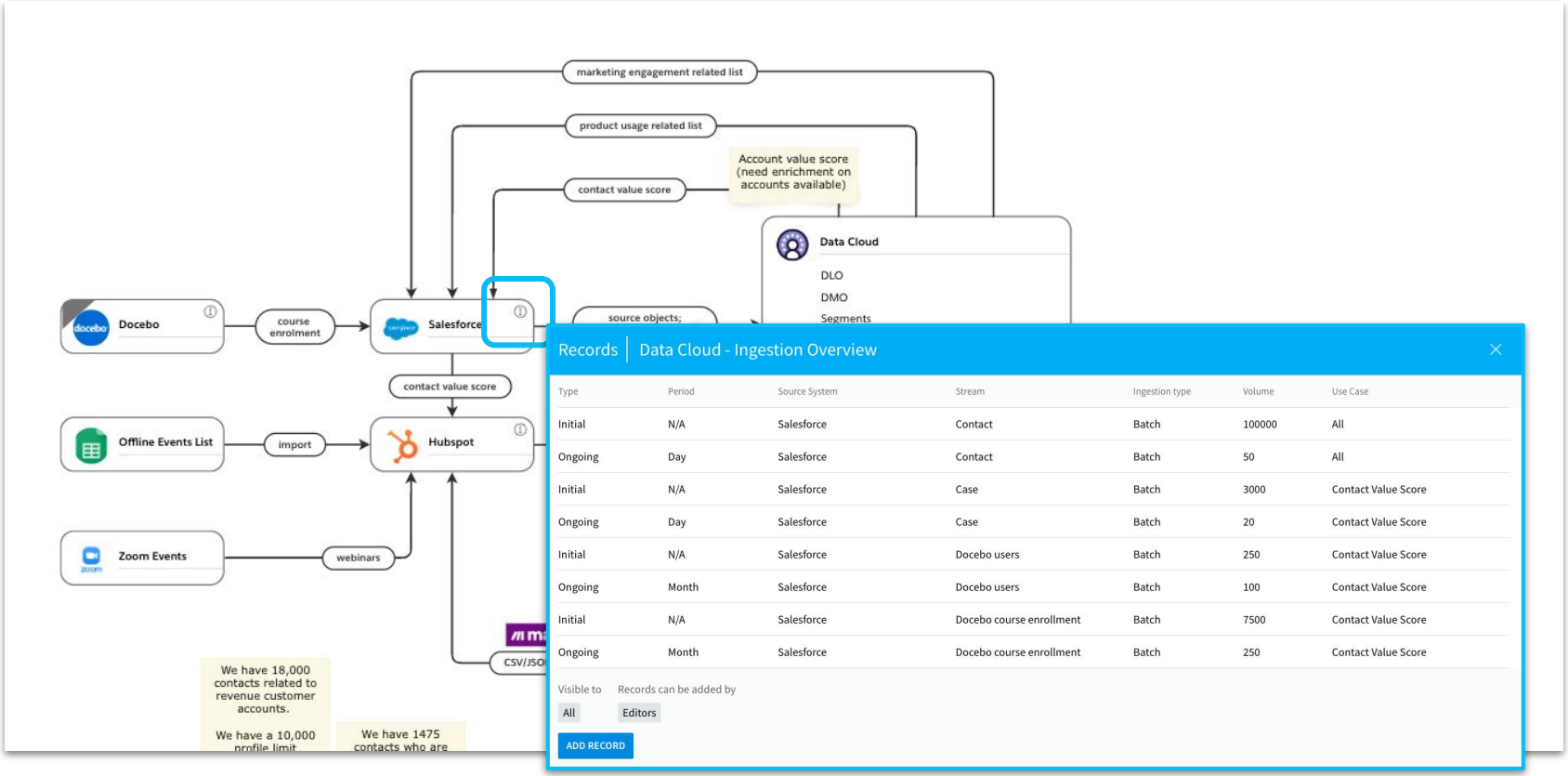


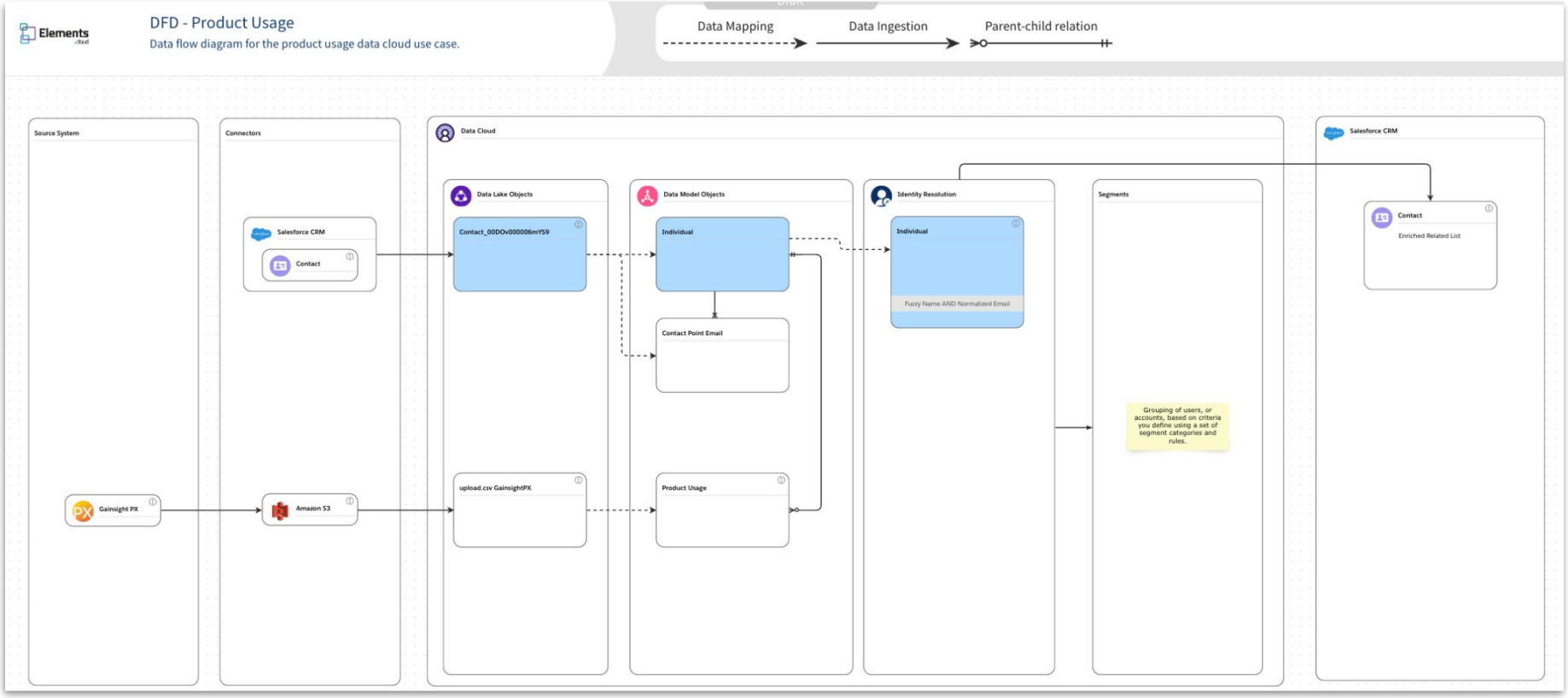
Records | Data Cloud - Ingestion Overview

Type	Period	Source System	Stream	Ingestion type	Volume	Use Case
Initial	N/A	Salesforce	Contact	Batch	100000	All
Ongoing	Day	Salesforce	Contact	Batch	50	All
Initial	N/A	Salesforce	Case	Batch	3000	Contact Value Score
Ongoing	Day	Salesforce	Case	Batch	20	Contact Value Score
Initial	N/A	Salesforce	Docebo users	Batch	250	Contact Value Score
Ongoing	Month	Salesforce	Docebo users	Batch	100	Contact Value Score
Initial	N/A	Salesforce	Docebo course enrollment	Batch	7500	Contact Value Score
Ongoing	Month	Salesforce	Docebo course enrollment	Batch	250	Contact Value Score

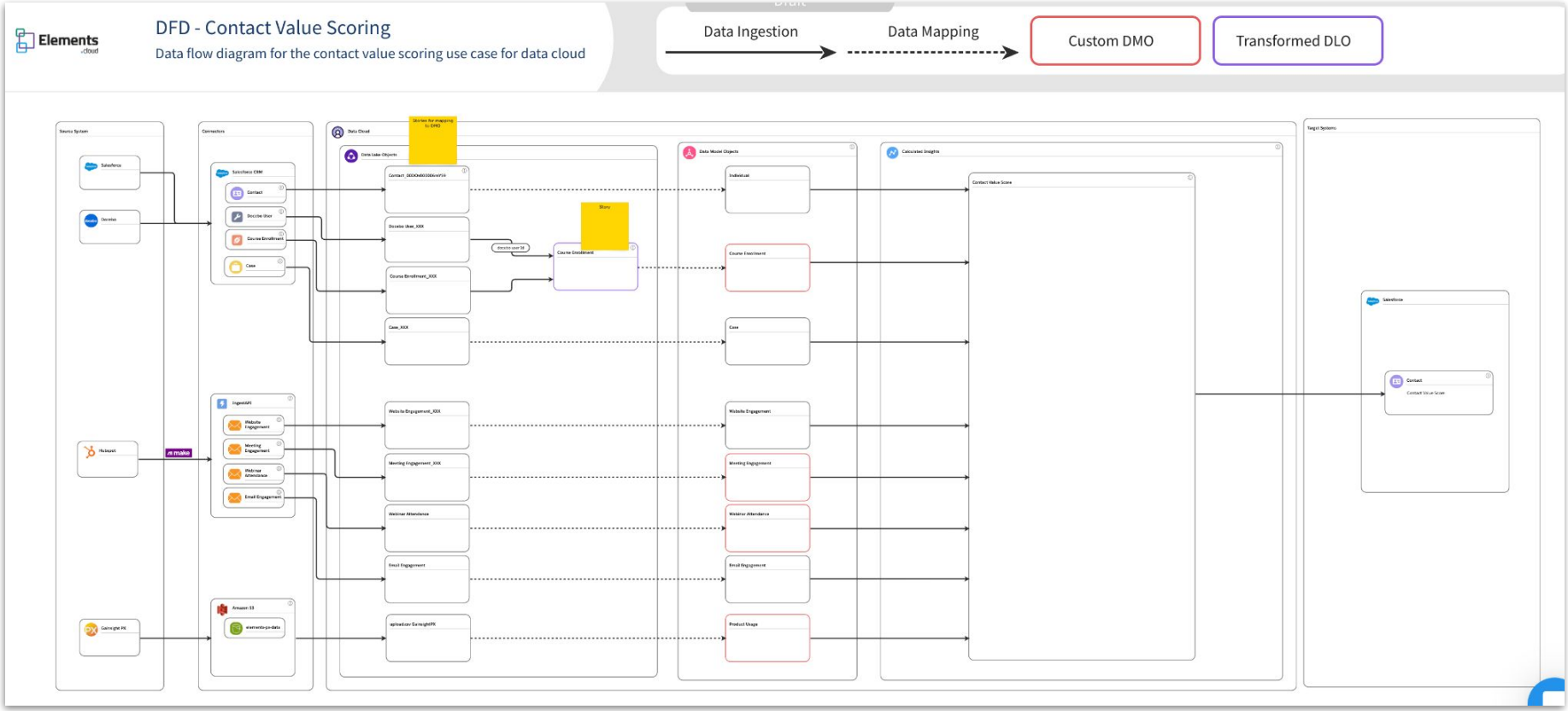
Visible to: All
Records can be added by: Editors

ADD RECORD

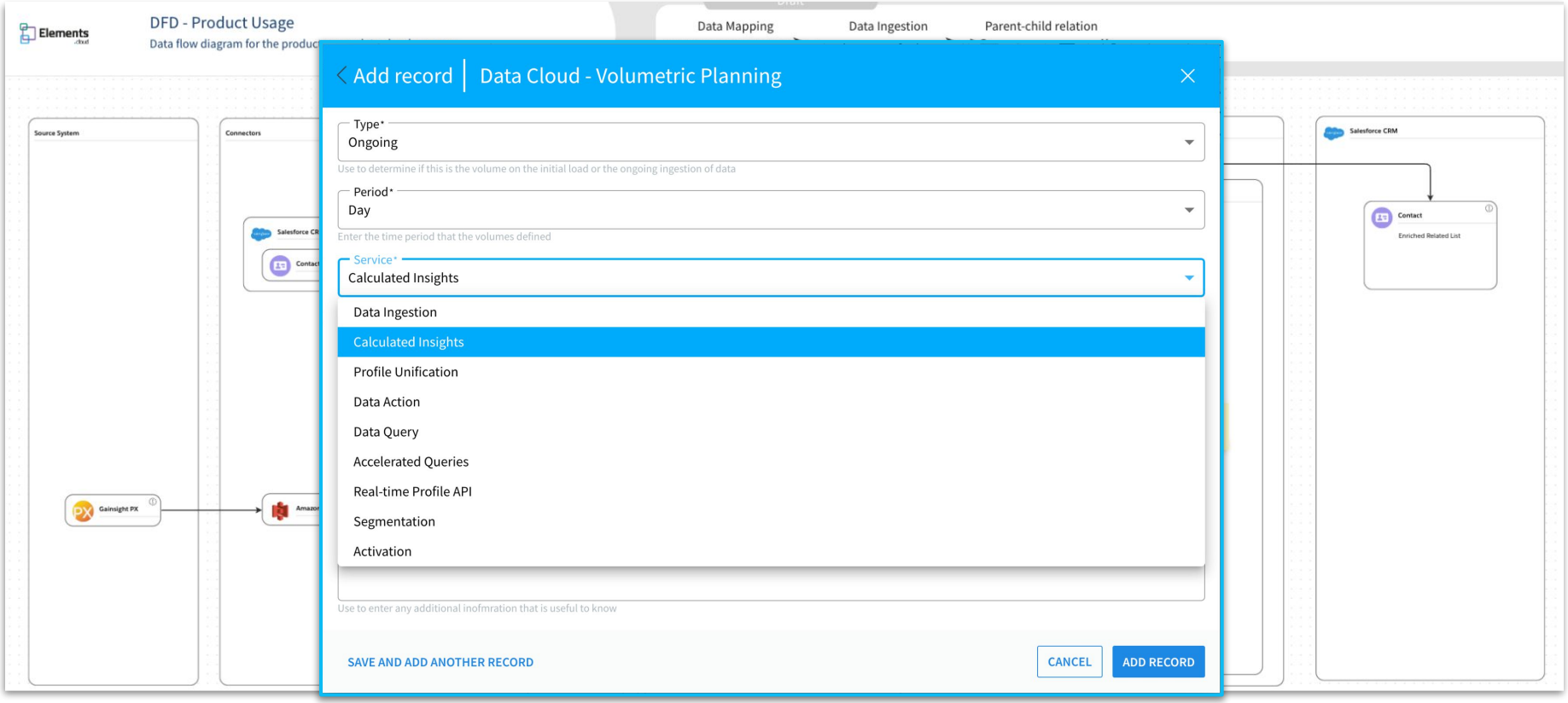
Create the Detailed DFD for each Use Case



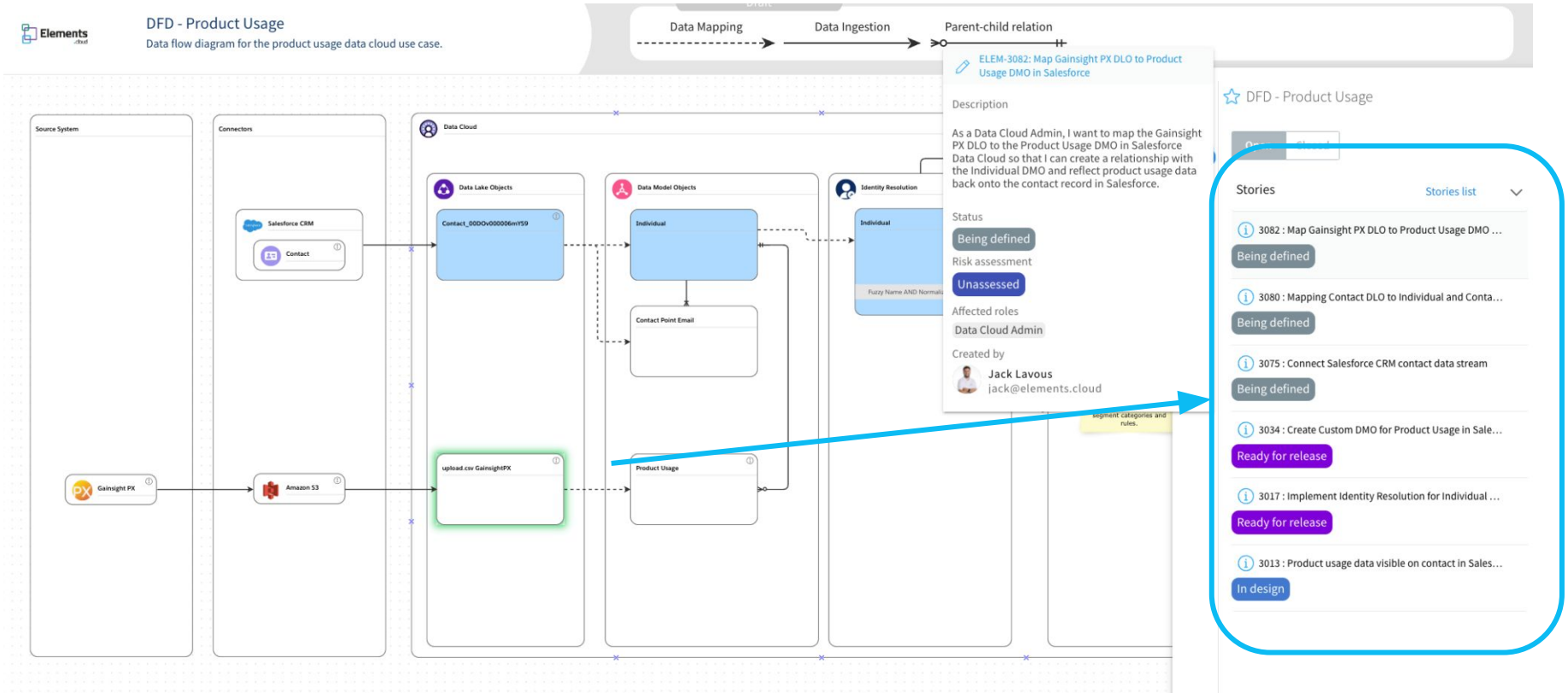
Create the Detailed DFD - use case 2



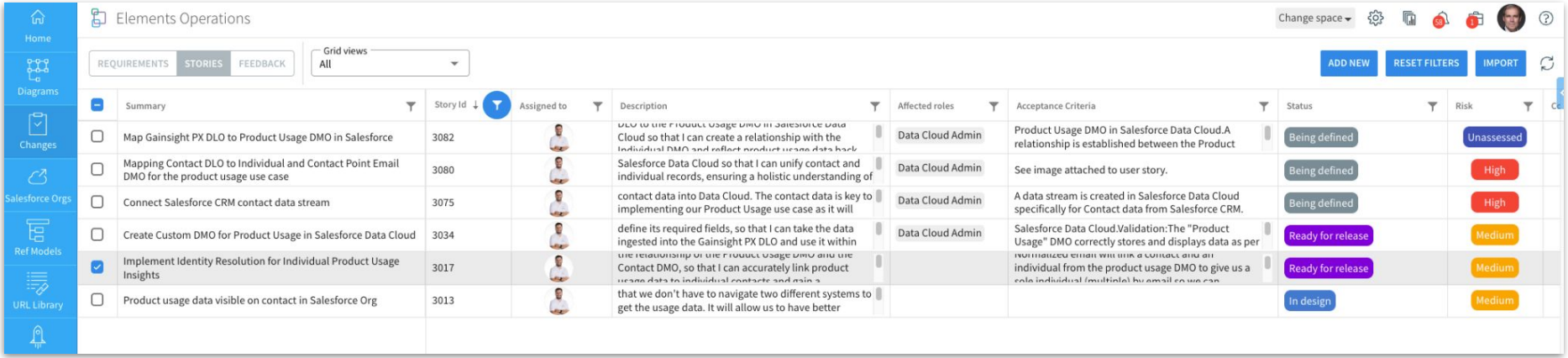
Add detailed Data Source volumetrics



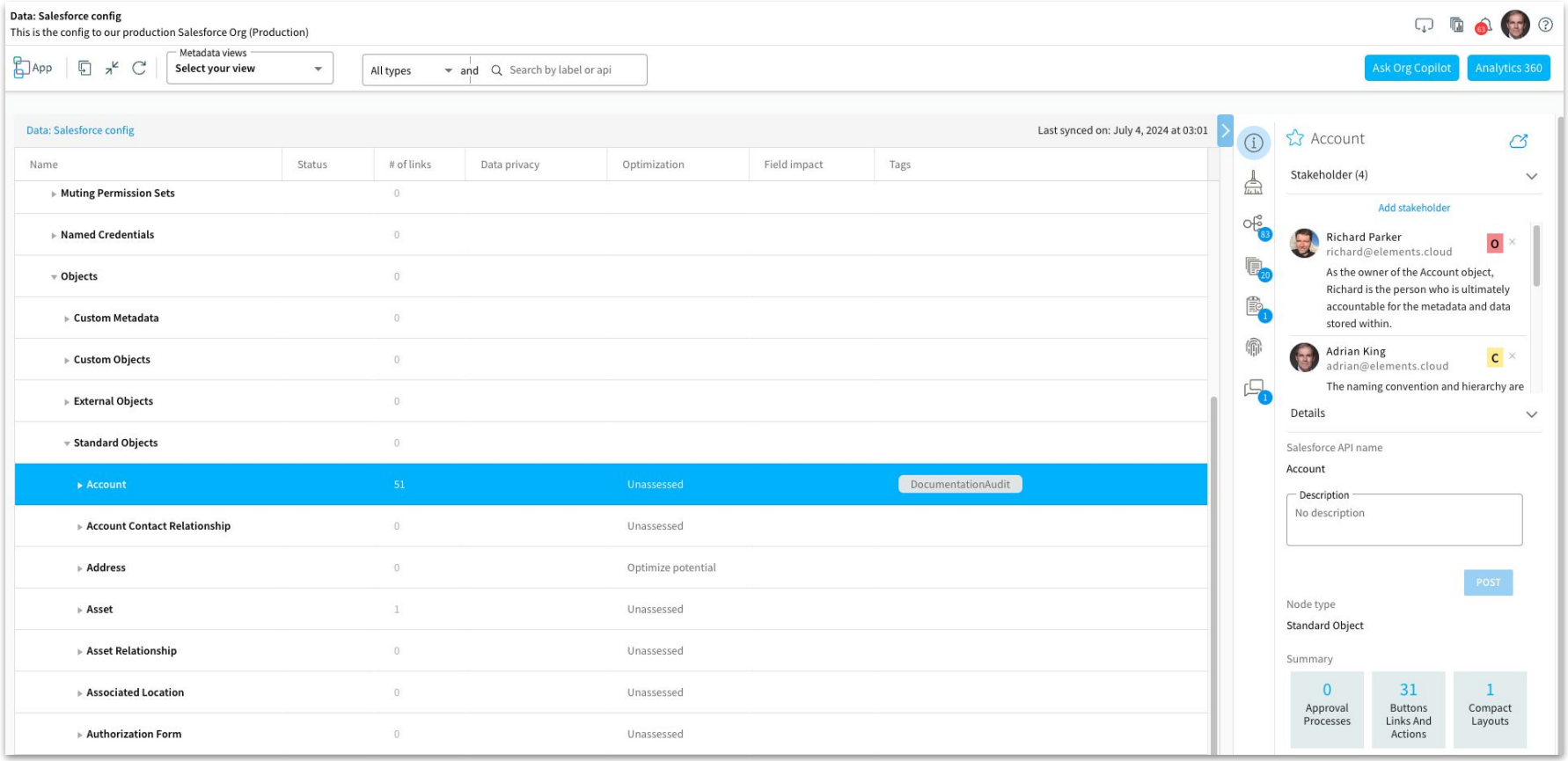
Create User Stories from Detailed DFD



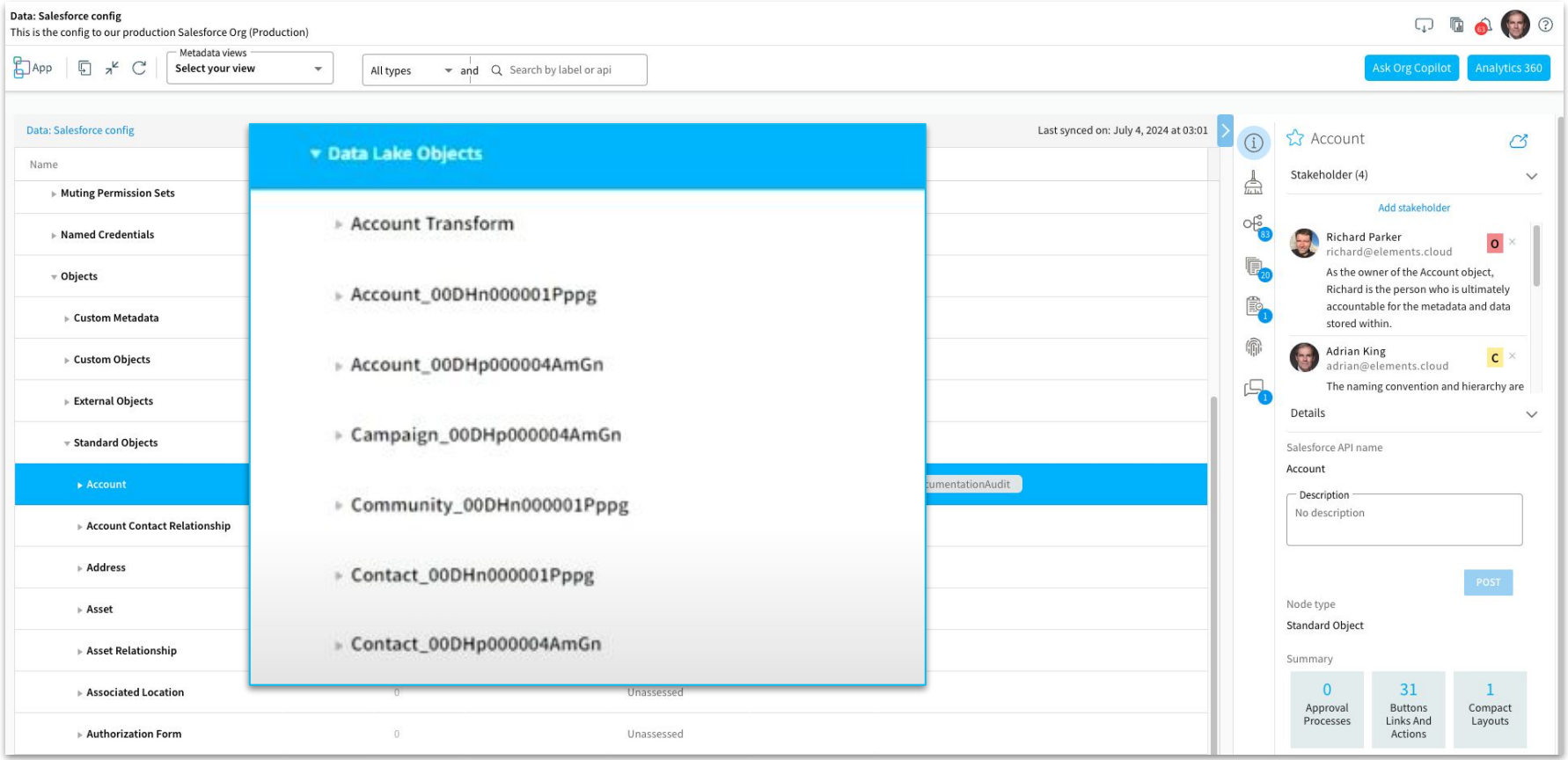
User Stories for required for Use Case



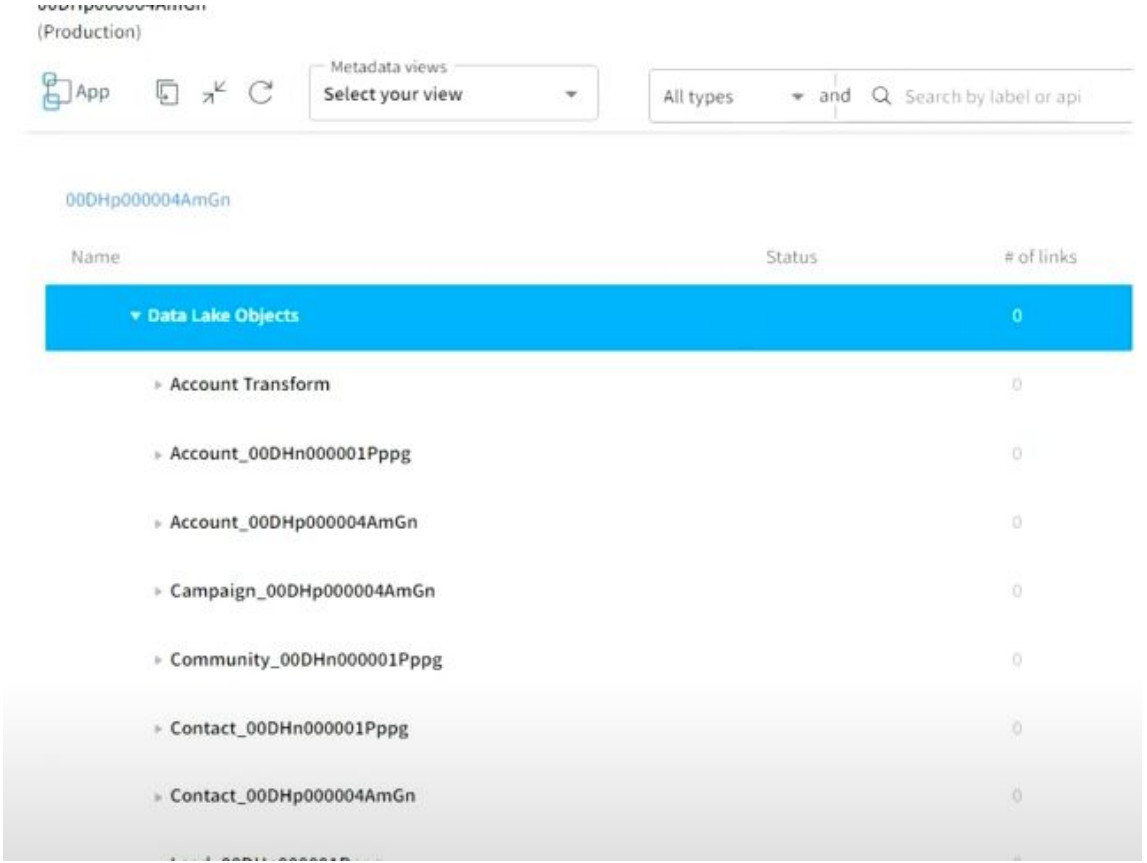
Org metadata dictionary



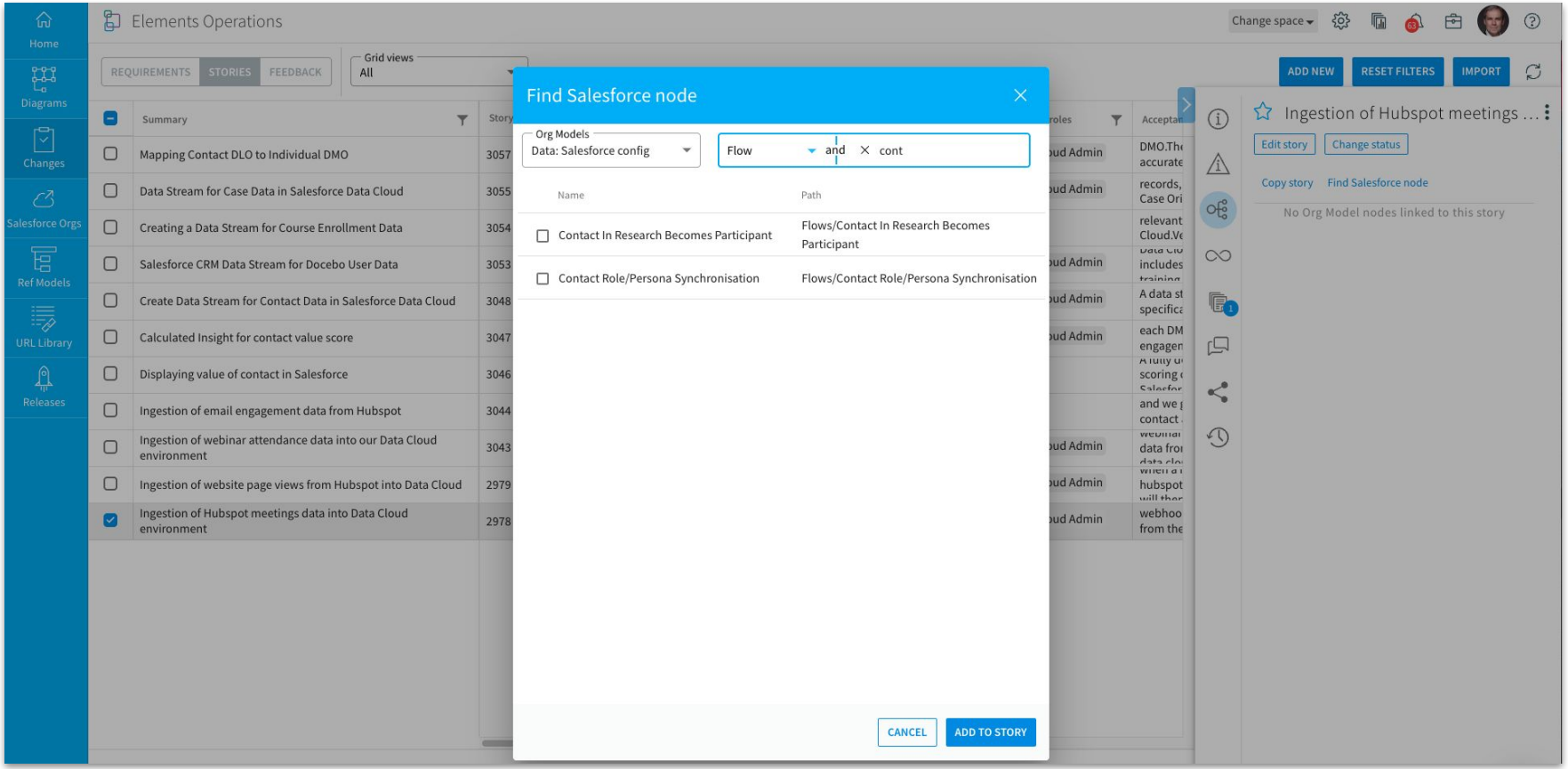
Org metadata extended for Data Cloud objects



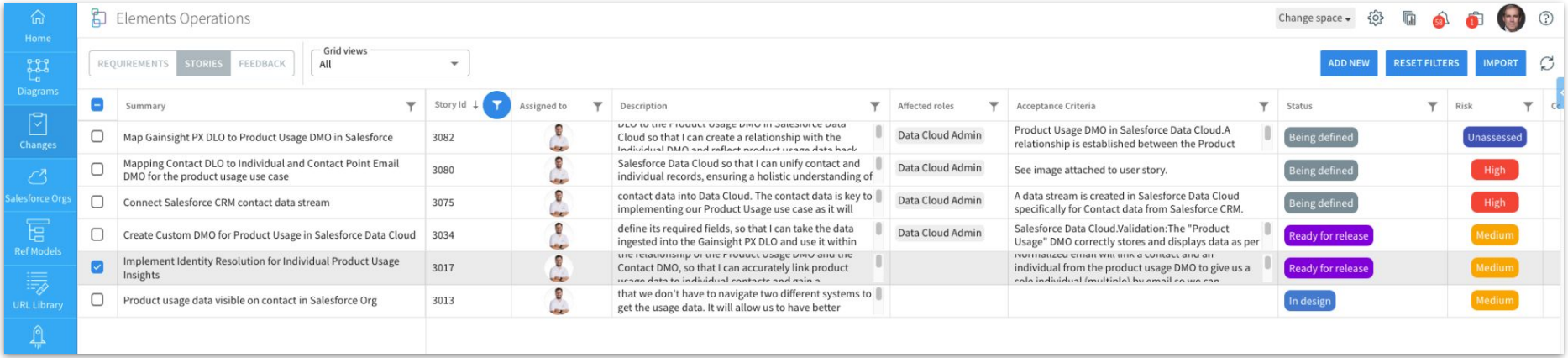
Extended to support the Data Cloud metadata



Link metadata to the User Stories



Link existing metadata to User Stories



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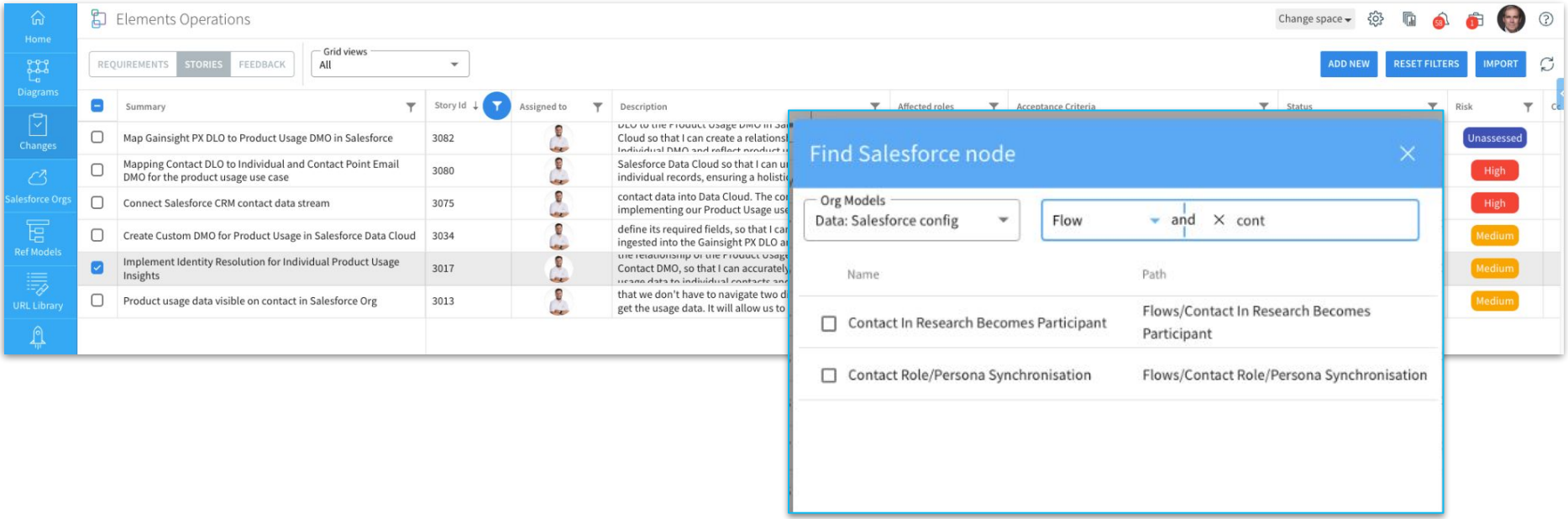
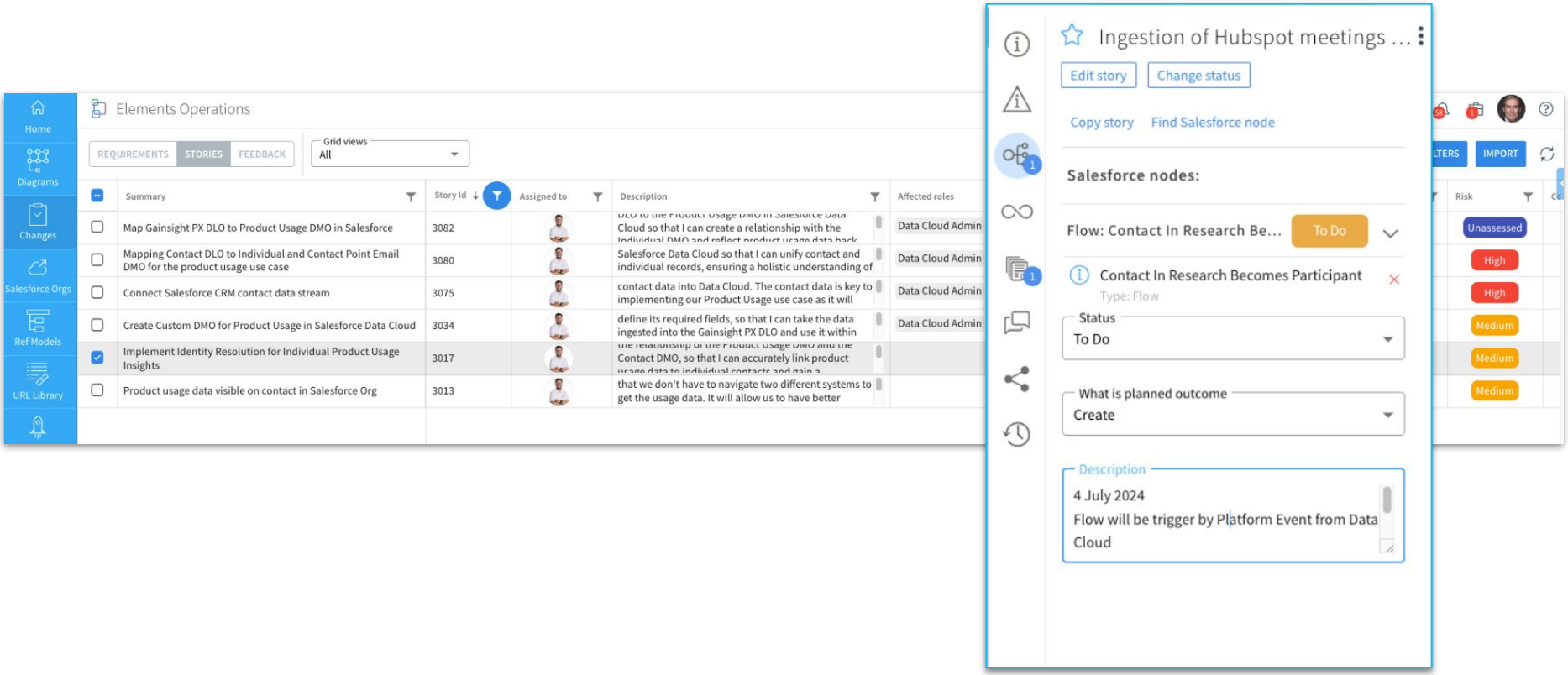
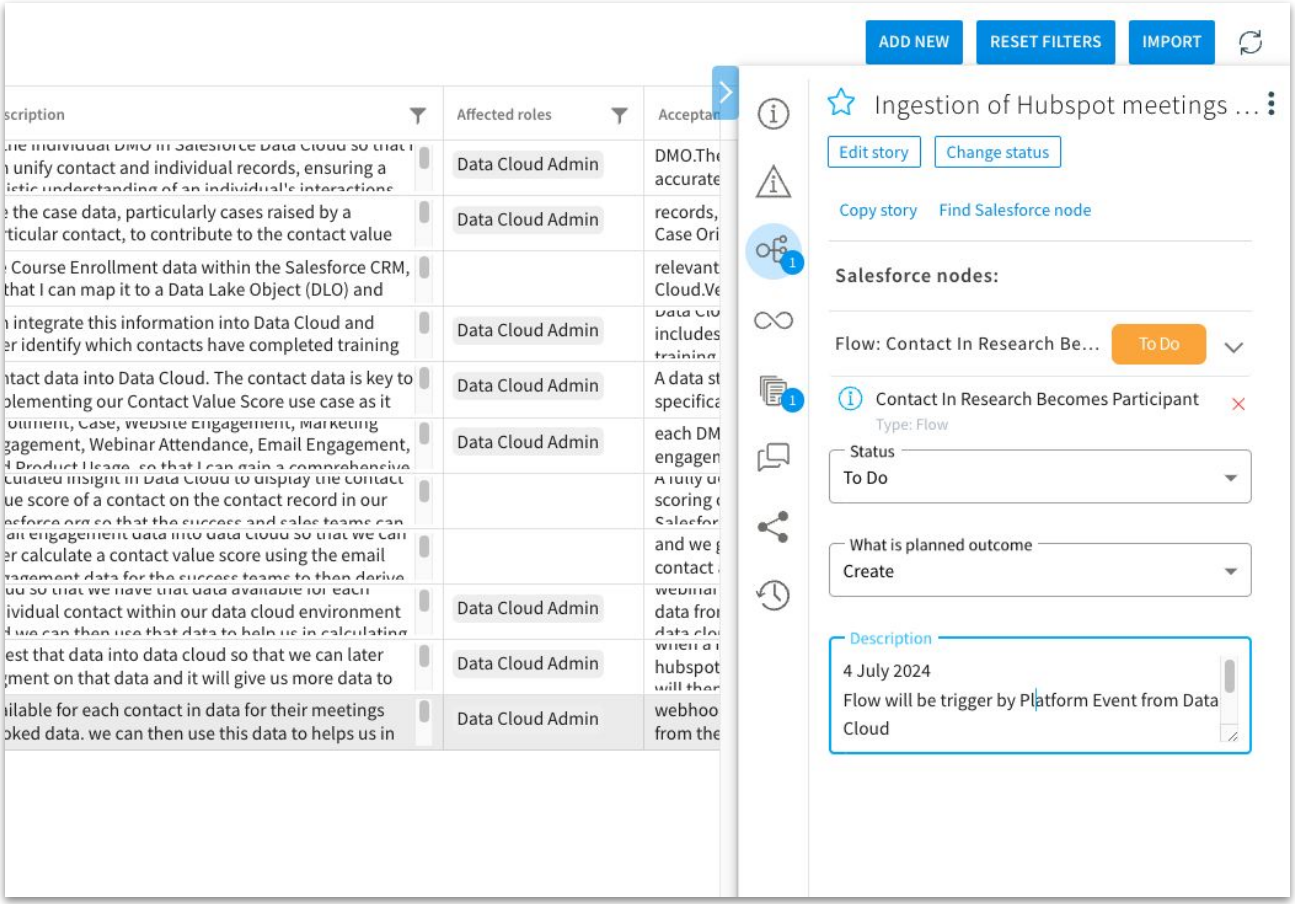


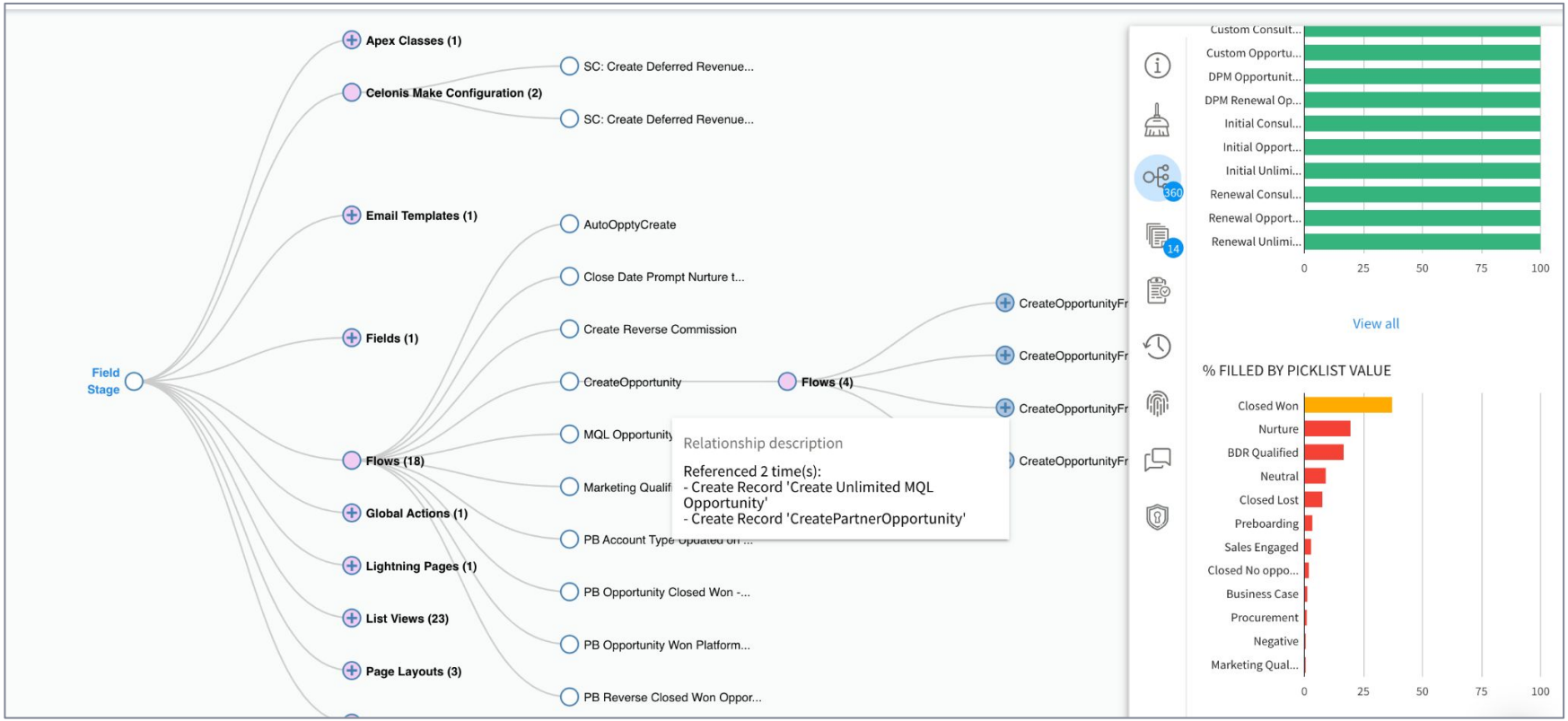
Link proposed metadata to User Stories



Create metadata linked to the User Story



Visualize dependencies including Data Cloud



“

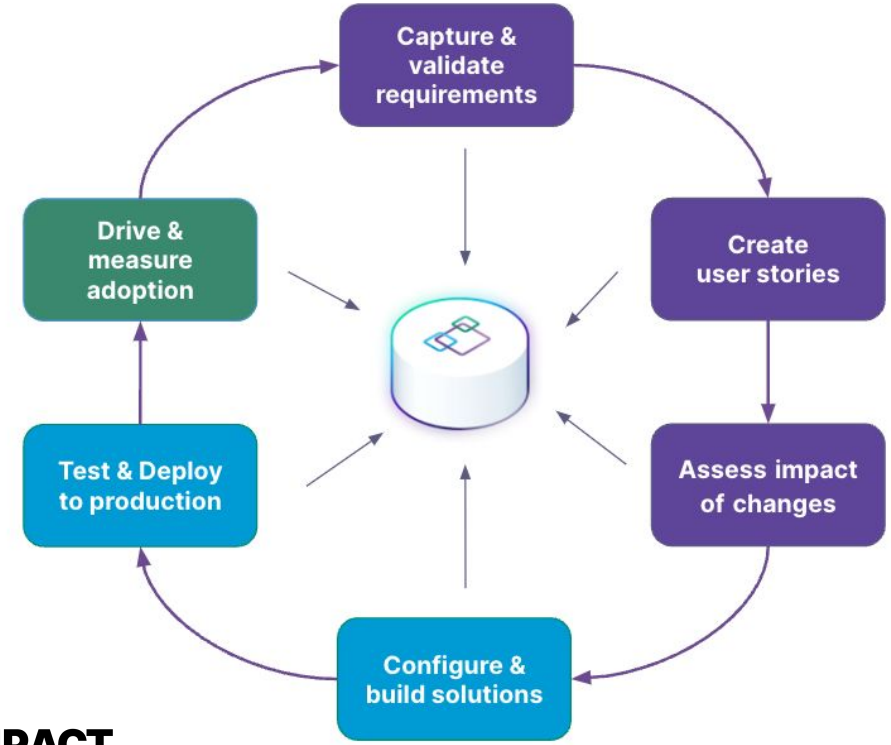
We saw more than 1,000 new Data Cloud purchases in the quarter. That's the second quarter in a row where we saw Data Cloud with more than...

Marc Benioff
Chair and CEO, Salesforce

Data Cloud is a step change

IMPACT

Implementation is the standard lifecycle



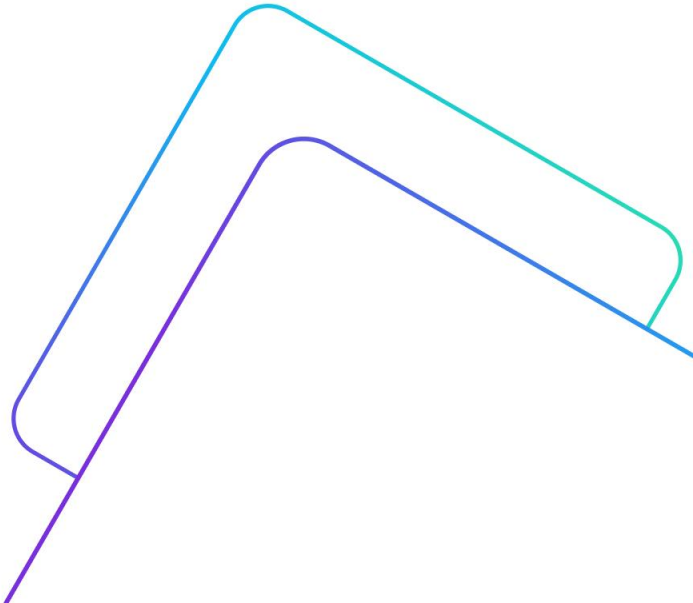
80% - 20%

IMPACT

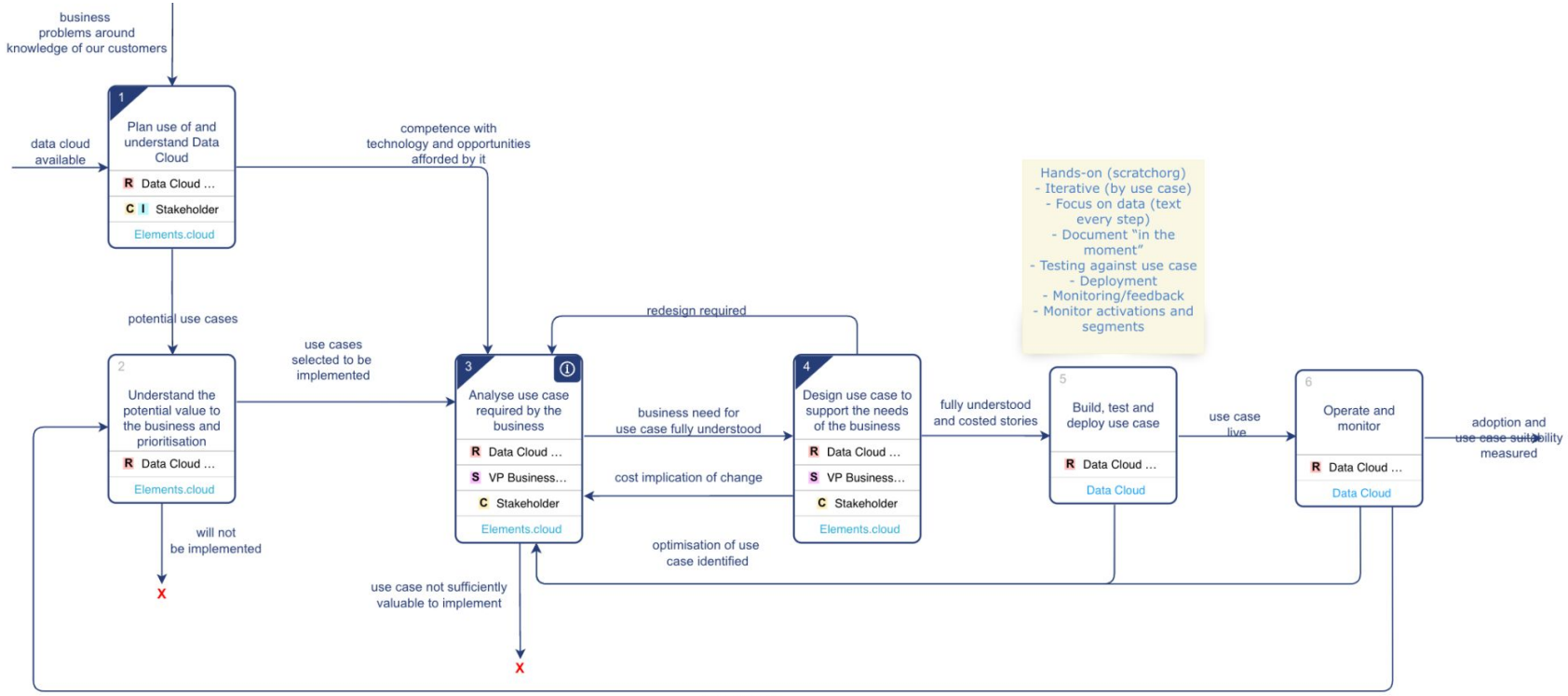
Focus on the use case

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

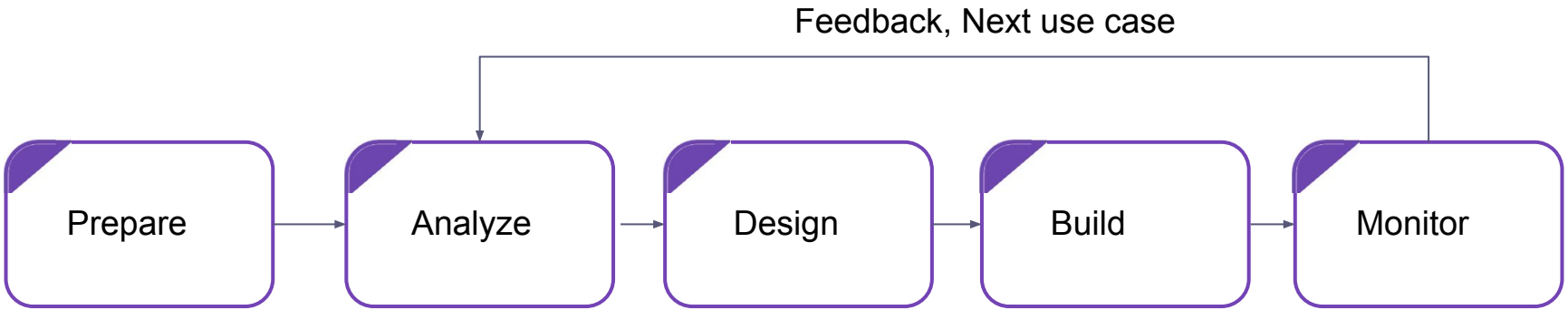
It is all about what you can do with actionable unified data.



Implementation methodology



Implementation methodology



Readiness
Education
Organisation
Project/COE

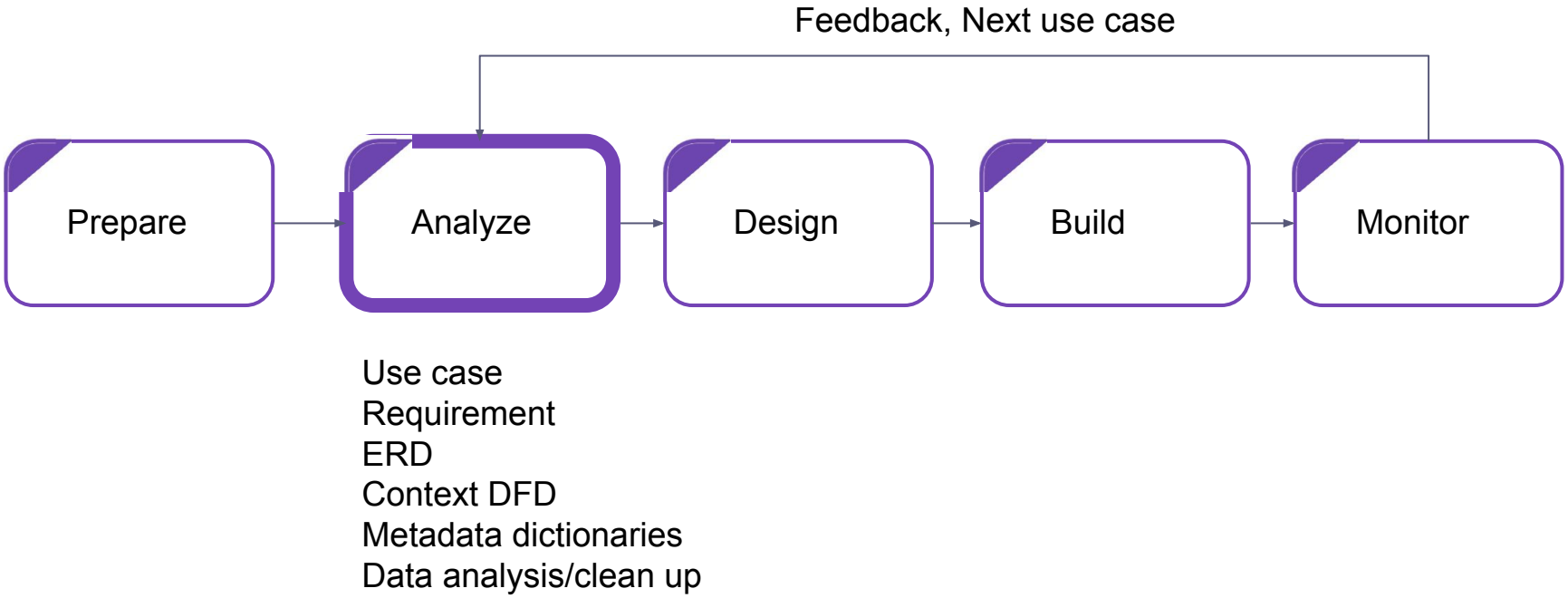
Use case
Requirement
ERD
Context DFD
Metadata dictionaries
Data analysis/clean up

Detailed DFD/ERD
Metadata dictionaries
User stories

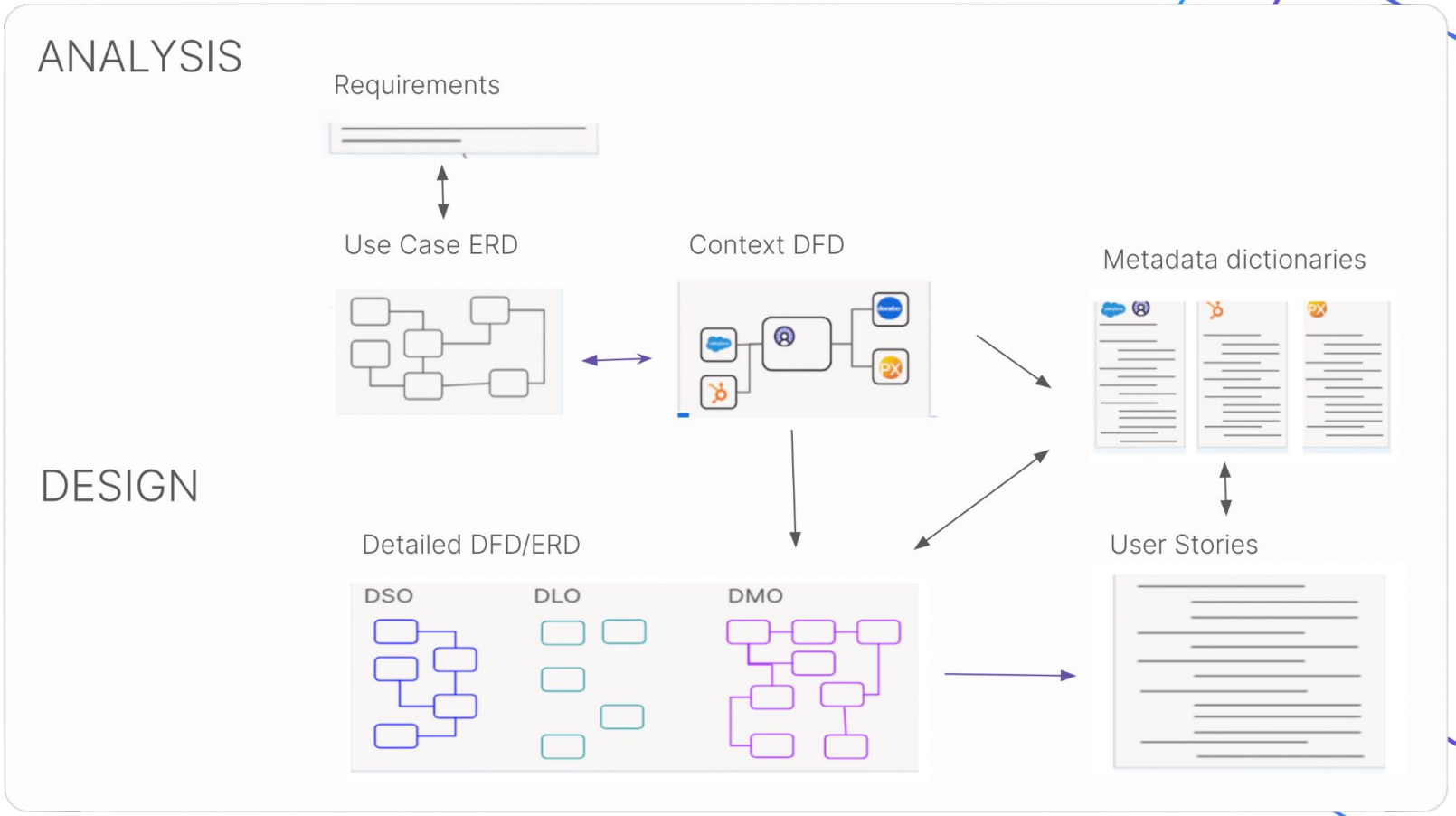
Data Cloud
Other changes

Success
Feedback
Cost

Implementation methodology



Planning documentation

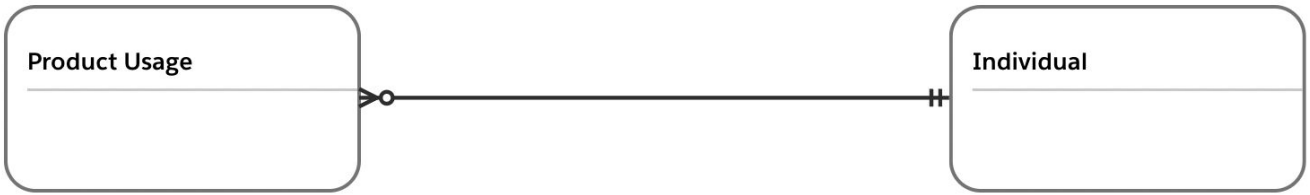


Requirements: Our internal use cases

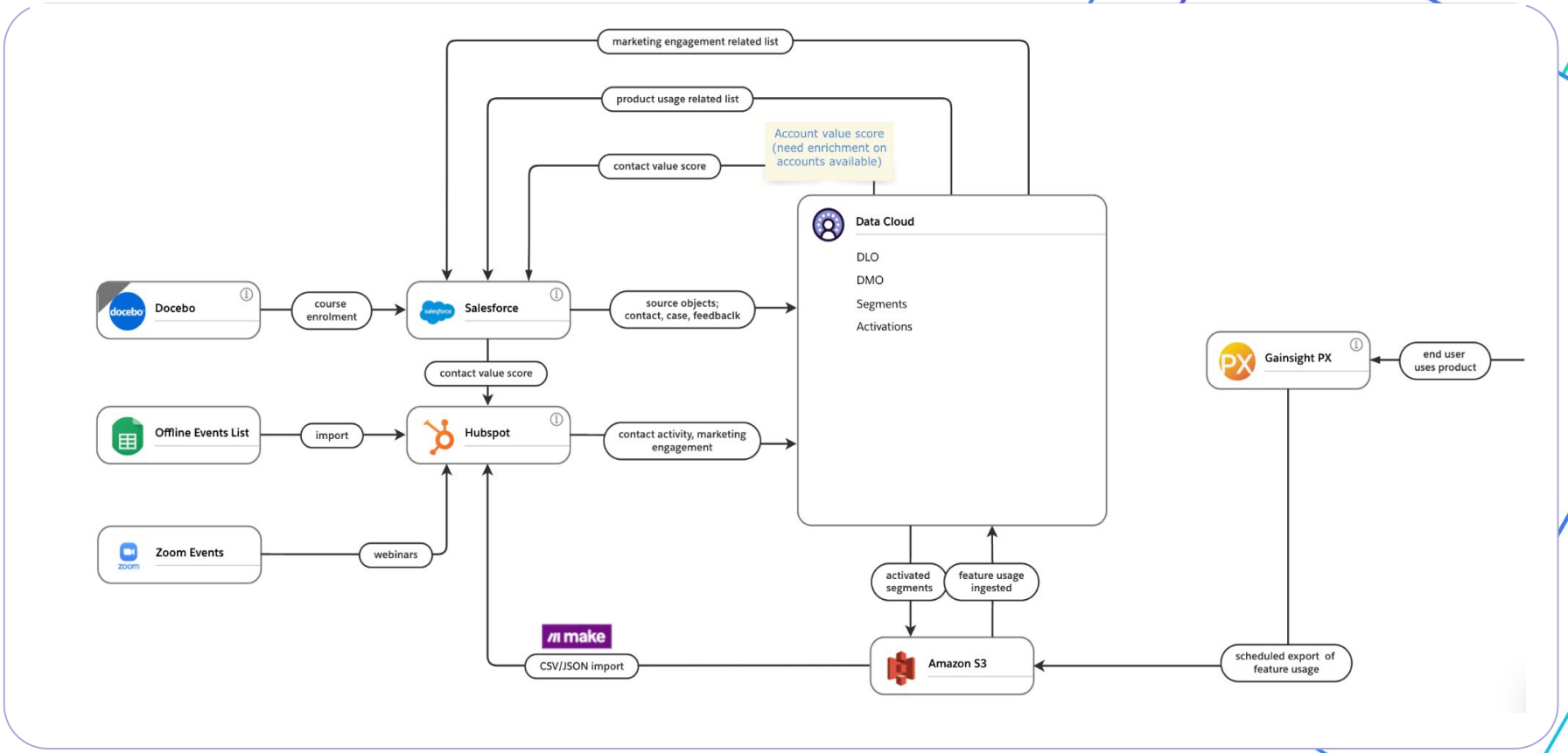
1. Engage contacts who have been on a product webinar and have:
    a. Used that feature in Elements in the next 15 days.
    b. Not used that feature in the next 15 days.
2. Calculate an engagement score for a contact and make it visible in SF
3. **Display detailed product usage data directly in the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

IMPACT

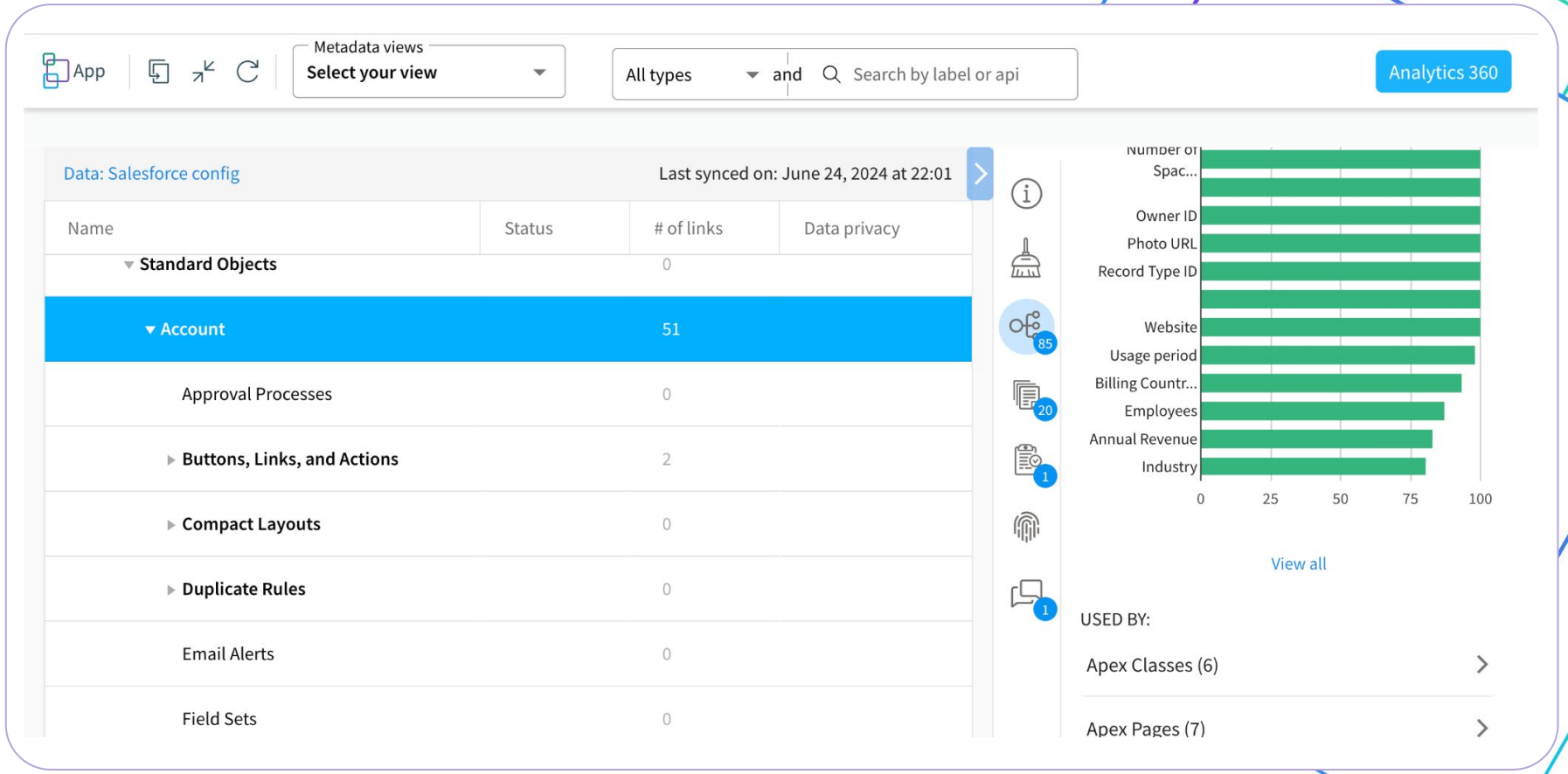
Use Case ERD: each use case (Entity Relationship Diagram)



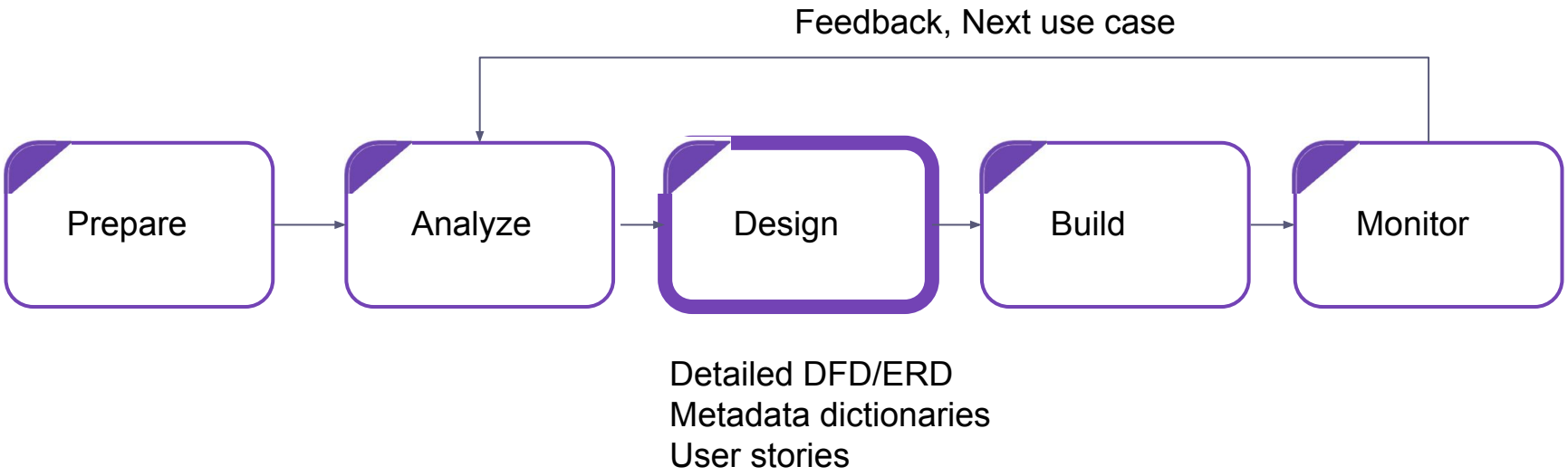
Context DFD
(Data Flow Diagram)



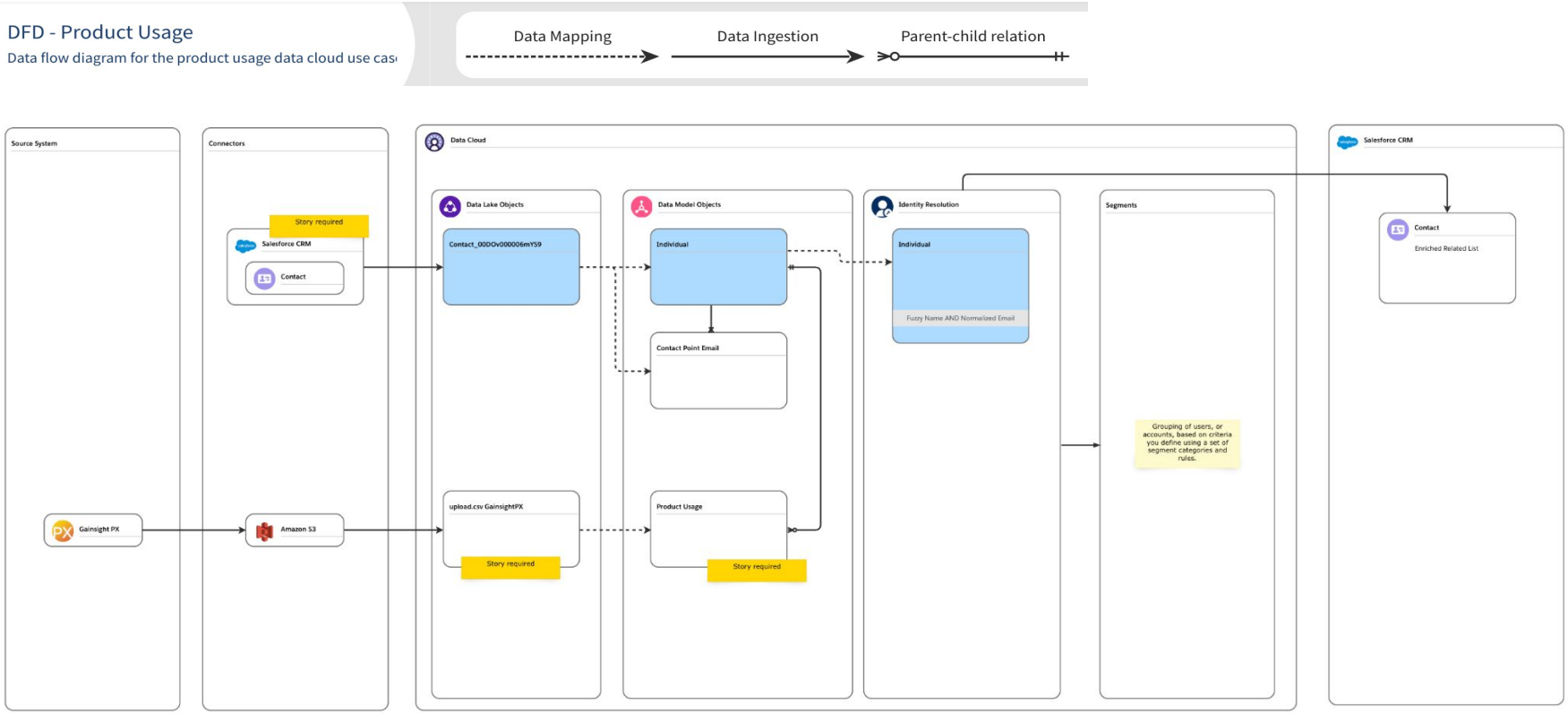
Metadata dictionaries

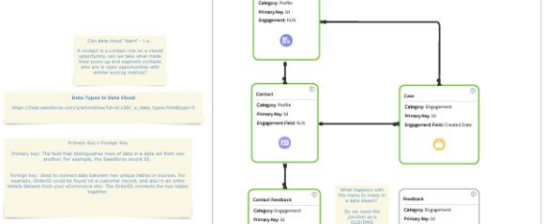


Implementation methodology

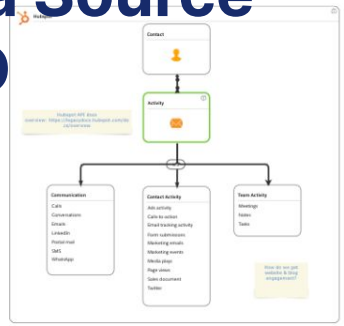


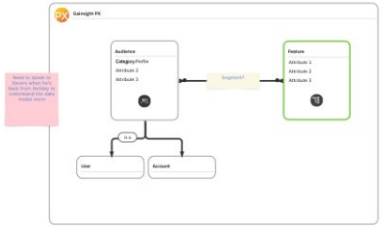
Detailed DFD/ERD: each use case



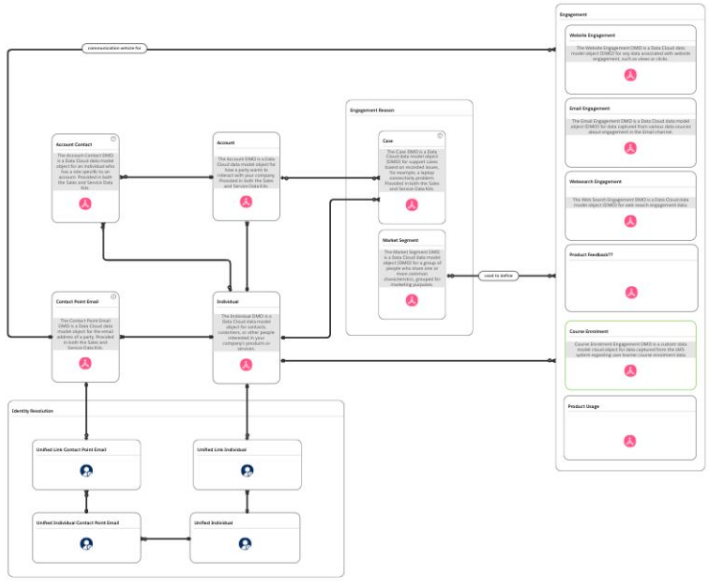


Data Source
DSO



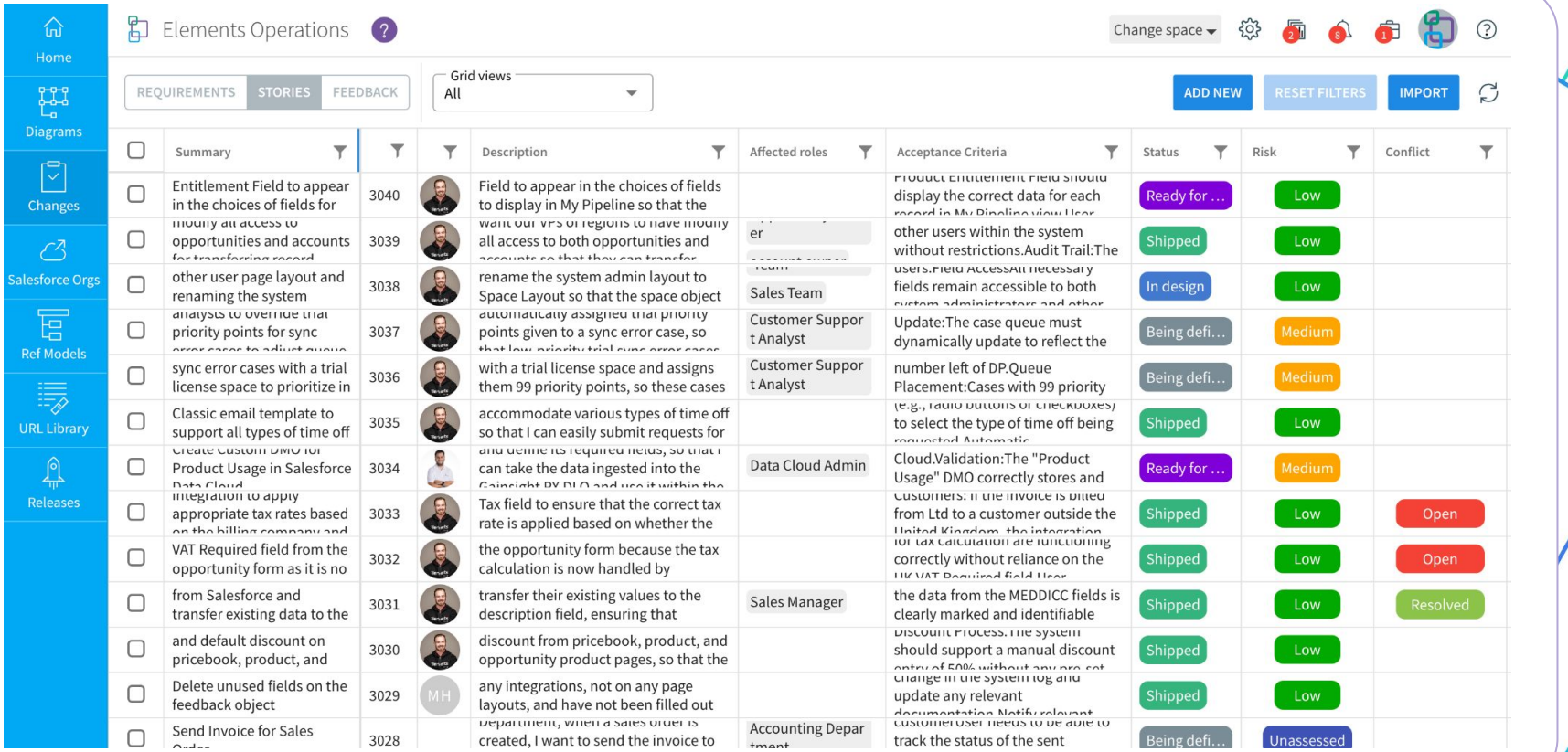


Data Lake
DLO



Data Model
DMO

User Stories: 1st use case



Five key takeaways

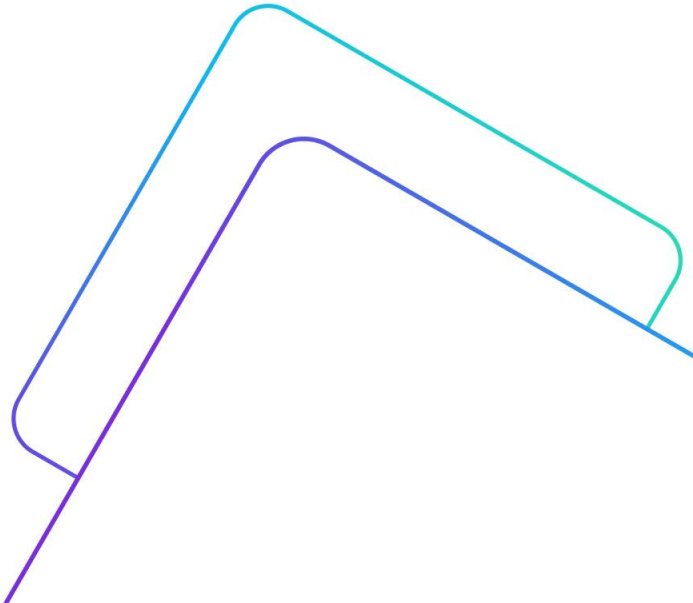
1. Data Cloud is a step change

2. It’s all about the use case

3. Consumption based cost model

4. Apply 80/20

5. Data Cloud is the future



IMPACT

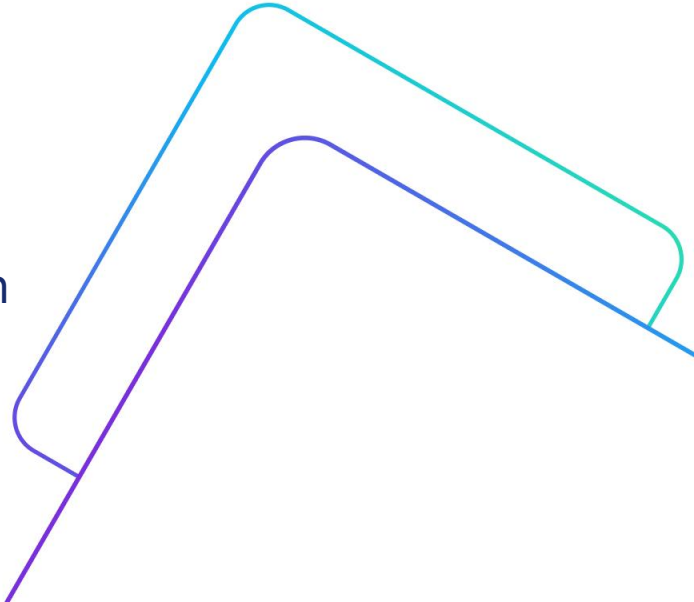
1. Data Cloud is step change

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.



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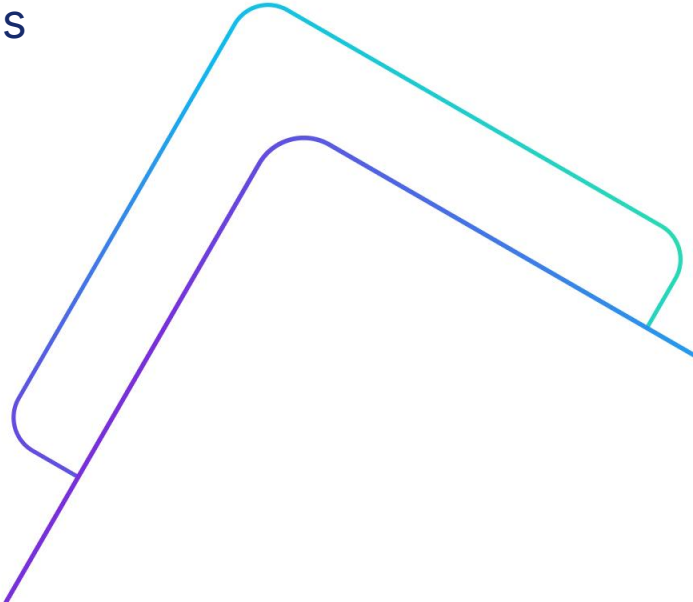
2. It’s all about the use case

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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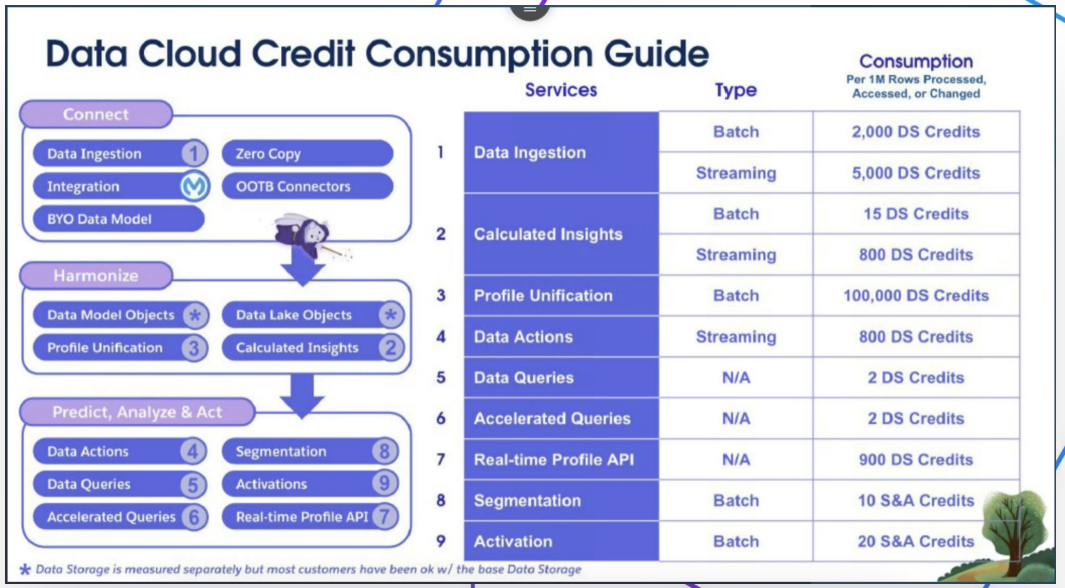
3. Consumption based cost model

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?



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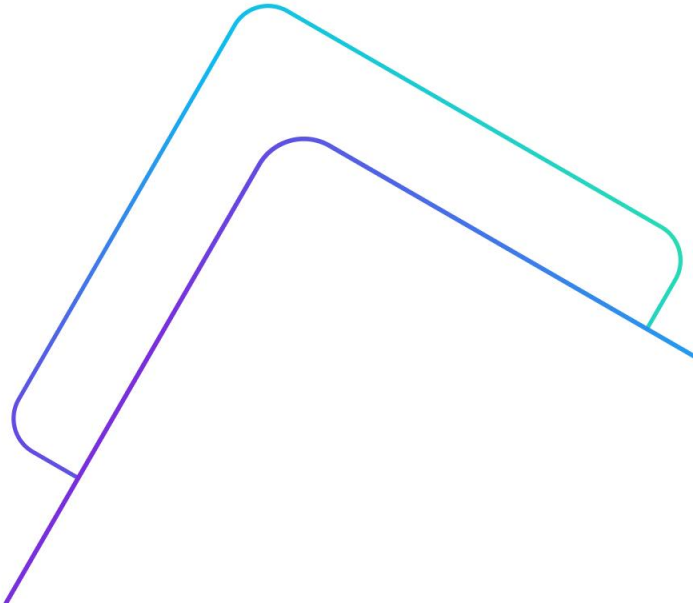
4. Apply 80/20

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

Spend 20% of your time on implementation



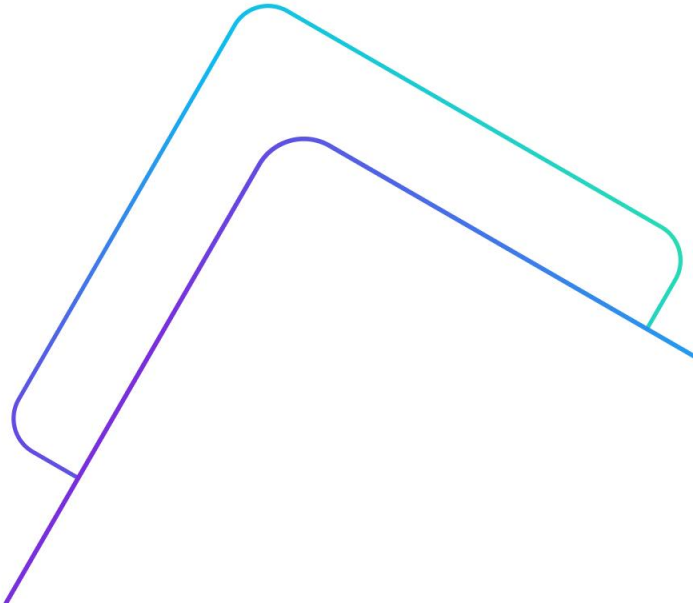
IMPACT

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



IMPACT

Panel Session

Richard Parker

Founder, CCO

Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM

/richardparkergeneva

Panelists

Sam Wadhwani
Chief Technical Architect
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