



7 WAYS PROJECT MANAGEMENT SUPPORTS SALESFORCE SUCCESS

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In the IT business, there are strategies, processes and actions that are the difference between success and, um, less success. For a Salesforce implementation, this differentiation often is intelligent and sophisticated project management.

IT implementations come in all sizes, from the smallest application rollout to the biggest global program overhaul. And, it's important to know that, while the number of people and technical tools you need depends on the scope of the operation, Project Management does not – it is a scalable instrument that provides underlying methods and deliverables for every size project.

Here are seven ways Project Management supports a successful Salesforce implementation:



01

Establishes Integrity

If you've earned a Project Management Professional (PMP) certification, or if you've read "Project Management Body of Knowledge" (PMBOK), you know the principles that set the table for any implementation. But let's start with a review of them so we start with the same knowledge.

Before any requirements are gathered or mapping tables are exchanged, project management establishes principles of **Responsibility, Respect, Fairness and Honesty**.

These principles apply whether your industry is healthcare, robotics or sports. Every project has a technical side and a human side. By installing a good Project Management program, you bring in a set of social principles that support the human side, normalize the scene, provide structure and create a safe environment for business transactions. When you're making make-or-break financial decisions, you need integrity on the other side of the table.

At ForeFront, our Project Management Office hires based on these tenets. And it's no wonder that our PM experts are sought-after by our client implementation teams – they bring a myriad of tools and tactics that will help bring projects to successful completion.

These principles run deeper than any spreadsheet, and they fill what many business transactions demand: integrity. It's important to take the time to get to know your Project Manager and walk through the four principles to find a partner who can be trusted, and who will manage your project started the right way.

02

Provides a Core Plan

The heart of Project Management exists within a plan – and it doesn't matter if it's a Smartsheet, MS Project document, Excel spreadsheet, simple Gantt chart or one of the many products you find on the marketplace. Tracking to a timeline with a list of milestones is necessary. Without even the most rudimentary plan, projects face the prospect of a free-fall from beginning to end, proving the adage that "failing to plan is planning to fail." The basic starting point of a project map, in some shape or form, is essential and non-negotiable.

Expanding on the root plan brings you to the Agile toolset, which is particularly handy when implementing something as diverse and customizable as Salesforce. By dividing the project into measurable Sprints and the user stories within them, your Project Manager fleshes out the traditional timeline and makes the implementation more three-dimensional.

These Sprints aren't manufactured out of thin air. They are outlined in your initial meetings, and they're colored in through discovery and refinement calls. And you can go with them as is, or tailor them to suit the needs of your organization, capabilities, team and goals.

With depth added to the length and breadth of scope, the project comes to life. "Land and expand" comes into play as the initial Sprints gain solid footing and generate feedback and pivot points. User Acceptance Testing (UAT) periods help measure progress

while allowing both teams to iterate and improve. Jira boards encompass the truth of the implementation by holding agreed-upon success criteria, solutions and a Work Breakdown Structure (WBS) that can be used to hold the team accountable through the end of the project (and beyond).

Without the framework of Project Management, the tools fall by the wayside, tasks are completed "as necessary," and the valuable Salesforce capabilities often are left unexplored and unused. With all that Salesforce provides, it's essential to take the time to plan and track.

03

Sets Detailed Expectations

One of the unwritten and often underappreciated tenets of good Project Management is the ability to set expectations. It starts with the first one-to-one call. This is where the human connection starts. And here, a frank discussion between the Project Manager and client's team leader provides the foundation for a solid relationship and the project's success.

This high-level, informal discussion covers topics such as communication styles, tracking methods, team meeting preferences and how time zone implications will play out. The goal is to cover what need not be covered during a kick-off or full team call. The result is a professional bond between the two managers and an environment of trust.

Shortly thereafter, with the kick-off call, the detailed Project Plan comes together, along with the Communication Plan and Jira training. This step establishes how we will work with the client, how we will discuss and document, and how we will collaborate throughout the project. The seeds planted during that initial one-to-one call now take

root in the project teams. It is up to the Project Manager to make sure that growth is permitted and nurtured – there will be collaborative responsibilities to ensure that occurs.

By creating structure in the Sales phase and early interactions of the project, the ground rules require no re-negotiation or interpretation later in the project, and the client will know how much is expected of them and when. (Refinement sessions and success criteria are developed as the project progresses.)

An SME who understands the amount of work to be done, will be prepared, and will be able to maneuver appropriately to put in the necessary time when it is required.

What's more, early exposure to tools like Jira, and time spent gaining familiarity with underlying concepts and procedures inherent to the Agile implementation, is golden.

The face value of project parameters is worth the time investment. The hidden value is transparency.

04

Creates Transparency

When expectations are set in the technical side of the equation, there is procedural familiarity. The Statement of Work (SOW) is transformed from bullet points and tables into a functional plan that can be finessed into a work routine. It's not rocket science – it's just creating a streamlined view.

But there often is ambiguity about more sensitive matters such as scope creep, timeline shifts, change orders and the raising of risks and issues. These are the areas that live outside of the SOW. For some, these are not easy to discuss, and we must look at the root of why that may be uncomfortable. And that comes down to timing.

These potential issues are possible in any implementation, and Salesforce projects aren't immune to them. In fact, ForeFront's Agile implementations of Salesforce often bring about new client capabilities and ideas for expansion. As a result, there can be conversations about ways to grow the project in scope or length.



With those discussions comes the related issue of cost increases. Project Management alerts the team to talk about these issues early on. By covering how and when these topics may resurface, and how to deal with them with immediacy, the atmosphere is de-pressurized. You and your Project Manager have facilitated change management by shedding light on the gray areas early, and by agreeing to work with transparency.

Without effective Project Management and the foundation it provides, conversations happen between disconnected parties, each without knowledge that the other possesses, and the playing field is constantly uneven. Some discussions never happen because it's easier to avoid an uncomfortable topic.

Project Management provides a safe space for tough conversations. With the set of principles, processes and expectations that come with the mutual Project Manager relationship, a comfortable directness is forged. With openness established, discussing budgets, risks and issues comes with ease as both parties operate with honest transparency.

05

Provides Project Layer Coordination

Salesforce implementations start with a core configuration, and they can gain complexity when customizations are introduced. ForeFront Solution Architects and Developers are just a small subset of the experts who constantly are working with clients to anticipate needs and make the most of their Salesforce usage. As a result, user stories can be wide-ranging, and the Jira board may start to stack up with Sprints full of tasks. We've already discussed the nature of scope and how it can be flexed or re-negotiated to allow

for growth, so we've taken care of the conversation-starting element. Your project may get more complicated, but there's no reason to panic.

Salesforce also can harbor imported data from other programs, and data migration often provides organizations an instant infusion of years of important facts and figures. Often, several years (or even generations) of data have been held in binders, spreadsheets, in file cabinets or, with luck, digital repositories. For some organizations, it is essential to bring portions of, or the entirety of, this data into the Salesforce pool of information. It's another element of work, but it can be maintained with process and patience.

Salesforce also plays well with other platforms, so that when simple data migration isn't enough, integrations can be mapped and connected. Is there an enterprise management, logistics, operations or finance program that you've been using? Would a long-term integration provide comfort, ease of use and accuracy? Integrations are commonplace in ForeFront implementations, and they can provide another level of dynamic functionality. But they also add a layer of complexity.

Project Management is the control tower that coordinates project elements and people. No project manager runs each element alone. Rather, the structure of Project Management incorporates the PM, Solution Architect, Business Analyst, Integration Specialist, Developers and configuration experts. Together, through Project Management tools and connections, they weave base configuration, customizations, migrations and integrations into a cohesive solution. The hub provided by Project Management makes this possible.

06

Enables Project Reporting Across All Levels

For many project managers, one of the most exciting and rewarding job functions is project reporting. It may not offer the delights of a full-team kickoff call. And it may not punctuate an implementation quite like the go-live celebration. But it's the transcript of the project.

There are many things to pay attention to during the project timeline – and a focus on the collaborative refining, success criteria, UAT periods and training is important. So, a good reporting structure often goes unnoticed. That's OK.

Our Project Management team utilizes multiple reporting systems and outputs to keep core teams and executives updated and informed. Scrum calls bring together the teams for project highlights, accomplishments and potential roadblocks. A 15- or 30-minute call once or twice a week

keeps the lines of communication open and allows stakeholders to attend to the needs on the immediate horizon. Risks and issues are brought into a constructive conversation so that mitigations are in place, while delays and setbacks are minimized.

Governance meetings also can be effective reporting structures because high-level stakeholders and sponsors can gather for progress measurement. Here, reporting opens itself to executive course correction and support, turning data into direction throughout the project.

Weekly status reports are ForeFront hallmarks. Financial status, timeline progress and a list of active and resolved risks and issues are conveyed with a no-nonsense approach that provides a comprehensive and concise snapshot of the core aspects of the project. Data delivered in status meetings and reports illuminates and informs – and Project Management provides the vehicle and driver to help you cross the finish line.



Builds a Bridge to the Future

Salesforce isn't the only thing that can expand and grow, and we know that business needs will evolve, too. Project Management supplies a culture for sustained growth, a long-term memory of steps taken and a forward-thinking vision of proactive account management. After all, the hard work and energy expended into the initial implementation should not be lost. As valuable artifacts, they can lengthen their utility by becoming a bridge to our next interactions.

Jira boards hold the tasks and facts, and are kept as archival elements. At ForeFront, "If it isn't in Jira, it doesn't exist." This history is a gold mine when we perform retrospective analyses before we take next steps forward. One project can immediately lead into another or provide a starting block for client growth, only to be added upon in the future. And teams will shift and change while technologies and technological requirements change.

Project Management is similar to Salesforce itself – it is scalable for expansion yet supported by underlying premises that promote a consistent experience. Ultimately, Project Management is a great solution for the "here and now" – and is the connection to tomorrow.

The value of Project Management lies in these seven concepts. Everything starts with the basic principles of Project Management: responsibility, respect, fairness and honesty. The core plan comes next, and is the backbone of traditional and progressive Project Management skillsets. Expectations and transparency mean there is minimal guesswork and maximum comfort and communication. Project coordination stabilizes the multi-faceted nature of large-scale implementations while delivering tactical and timely statistics and storylines. Good reporting and effective team communication keep everyone at every level informed and aware. And, perhaps most important, Project Management builds a bridge to the future as you prepare to utilize the ever-expanding offerings of Salesforce.

SALESFORCE EXPERTISE AND INTEGRATION EXCELLENCE

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Our strong experience and deep knowledge of the Salesforce multi-cloud platforms give us the ability to solve complex challenges in the manufacturing, automotive, energy, healthcare/life sciences, consumer packaged goods, media, and technology/software industries.

With offices across the United States and Europe, we work every day to keep our market-leading client companies *at the forefront*.

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