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Partner Summit 2021

3 golden rules to deliver a better ROI from Salesforce

IAN GOTTS : Elements.cloud
@iangotts ian@elements.cloud

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SCAN ME

Forward-Looking Statements

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The risks and uncertainties referred to above include -- but are not limited to -- risks associated with the effect of general economic and market conditions; the impact of geopolitical events, natural disasters and actual or threatened public health emergencies, such as the ongoing Coronavirus pandemic; the impact of foreign currency exchange rate and interest rate fluctuations on our results; our business strategy and our plan to build our business, including our strategy to be the leading provider of enterprise cloud computing applications and platforms; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; the competitive nature of the market in which we participate; our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our service performance and security, including the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate potential security breaches; the expenses associated with our data centers and third-party infrastructure providers; additional data center capacity; real estate and office facilities space; our operating results and cash flows; new services and product features, including any efforts to expand our services beyond the CRM market; our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to realize the benefits from strategic partnerships, joint ventures and investments; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to execute our business plans; our ability to successfully integrate acquired businesses and technologies; our ability to continue to grow unearned revenue and remaining performance obligation; our ability to protect our intellectual property rights; our ability to develop our brands; our reliance on third-party hardware, software and platform providers; our dependency on the development and maintenance of the infrastructure of the Internet; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of the transfer and the value of such transferred intellectual property; the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; factors relatedto our outstanding debt, revolving credit facility and loan associated with 50 Fremont; compliance with our debt covenants and lease obligations; current and potential litigation involving us; and the impact of climate change.

Further information on these and other factors that could affect the company's financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company's website at.

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3 GOLDEN RULES

Subtitle placeholder

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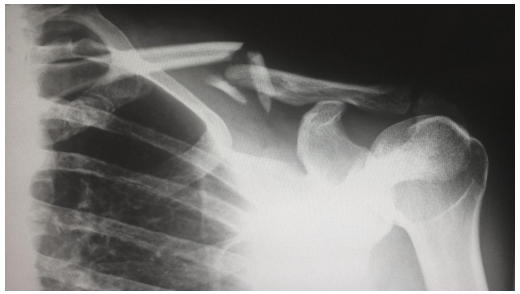
BUSINESS ANALYSIS

Build the right things, first time

80% reduced rework
25% process improvement

X-RAY VISION OF ORG CONFIG

Better visibility of impact of changes



50% of org discovery time
Release changes **daily**

AUTOMATED DOCUMENTATION

Make it easy
There is no “LATER”

50% of impact analysis time
Tech debt **controlled**

BUSINESS ANALYSIS: UPN

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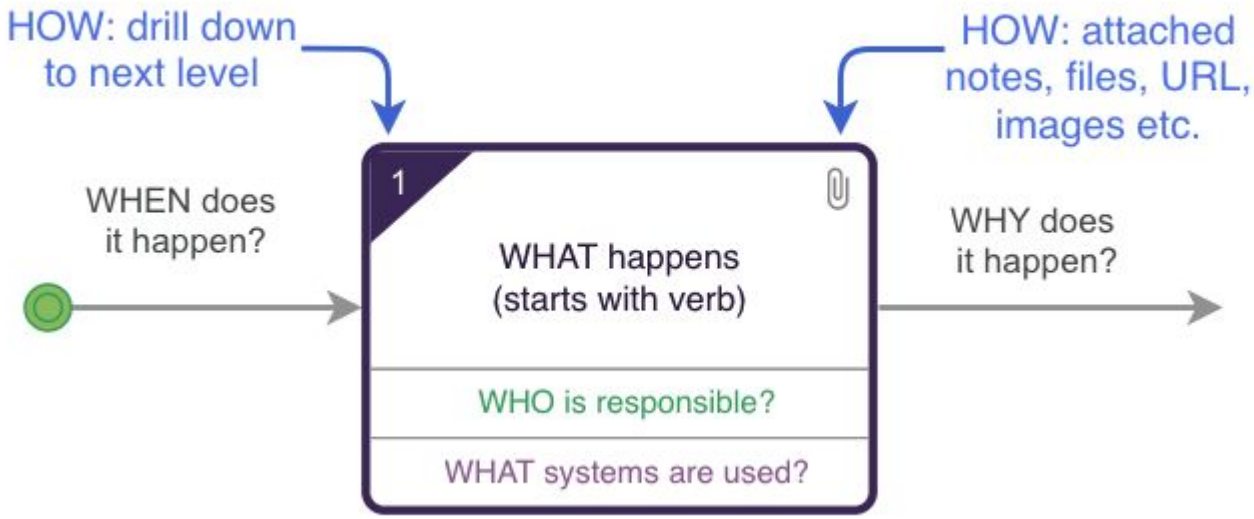
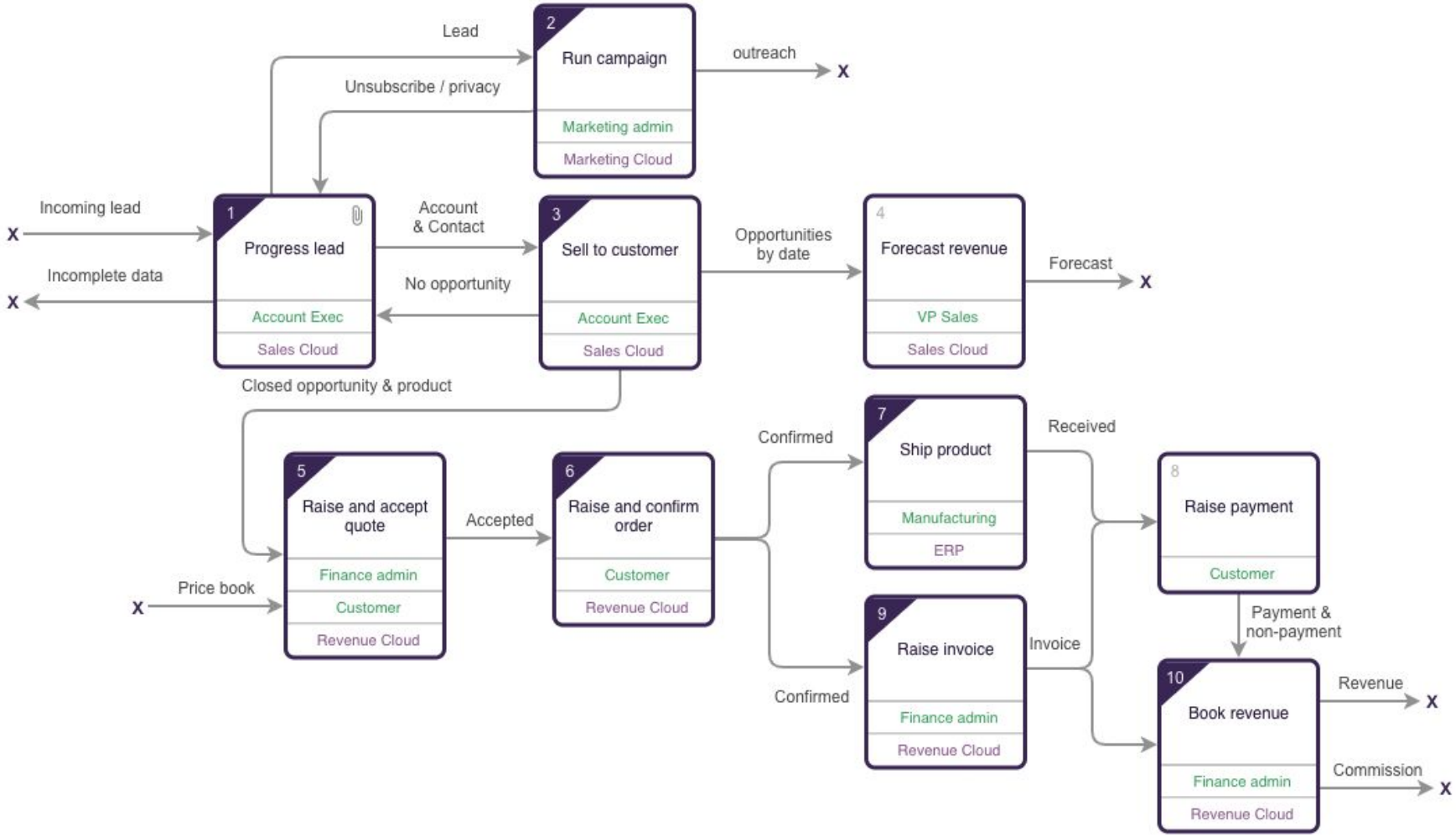
Business Analysis training: PLC, Trailhead & Certification (WIP)

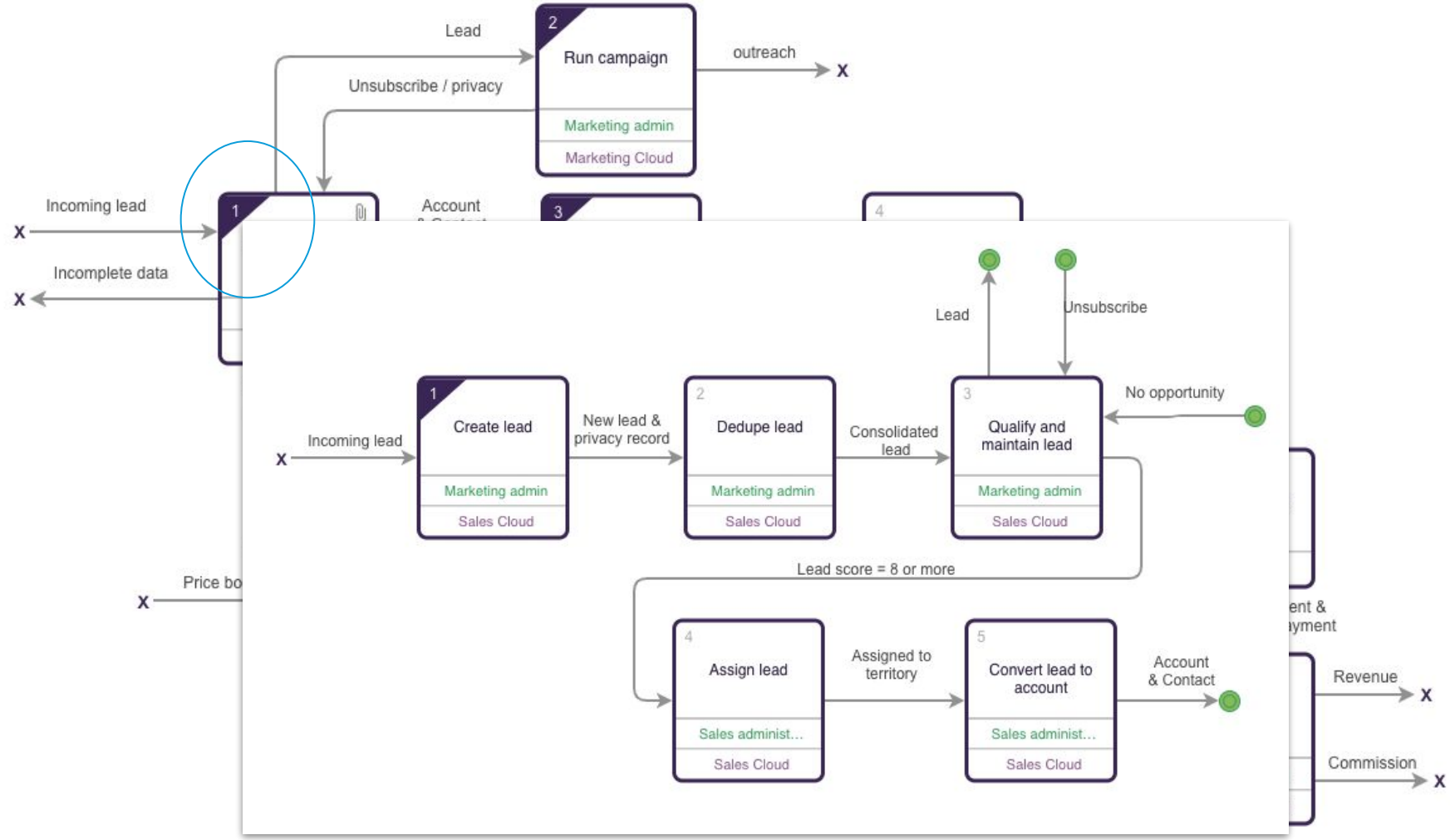
UPN standard



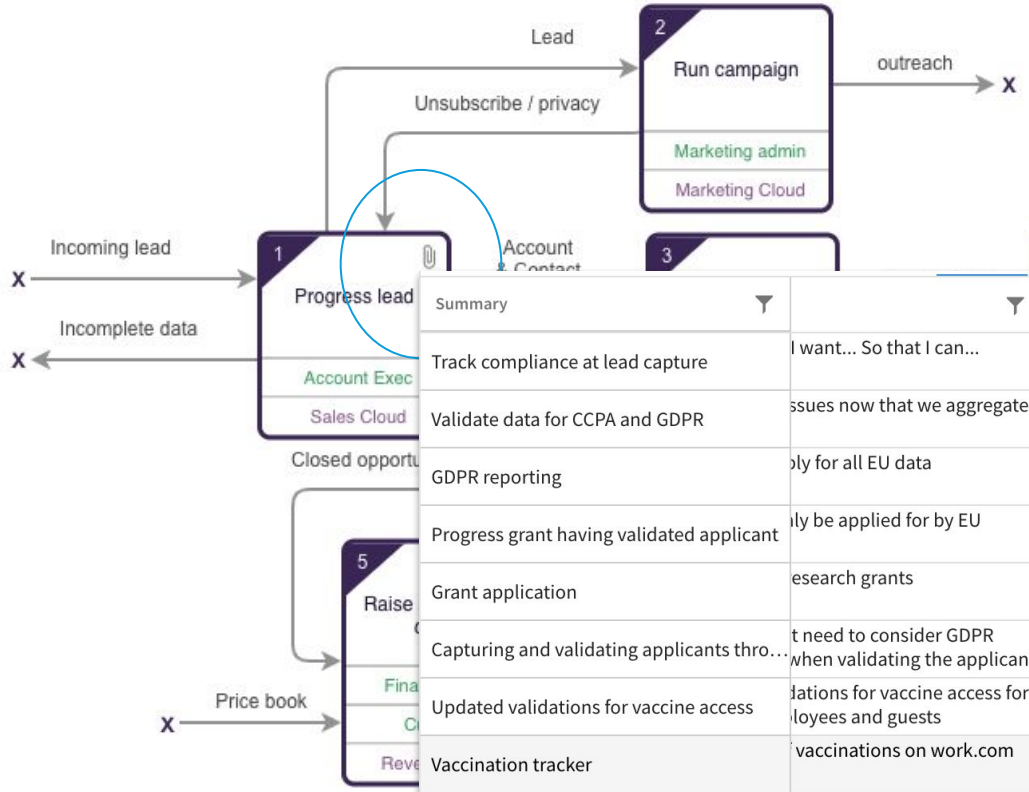
BUSINESS ANALYSIS: UPN



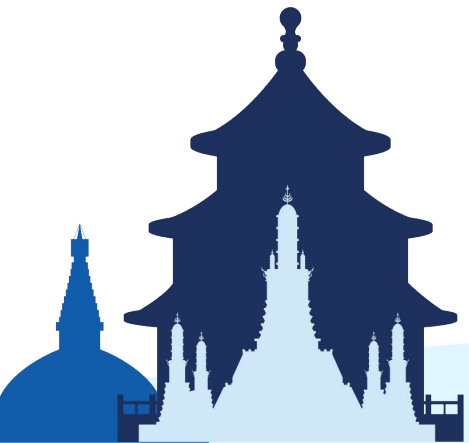
UPN: DRILL DOWN

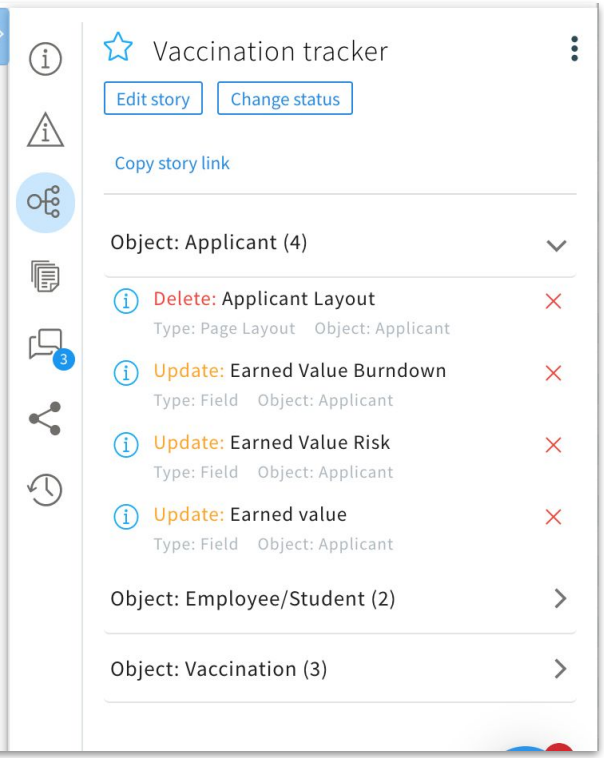


UPN: LINKS TO REQUIREMENTS / USER STORIES

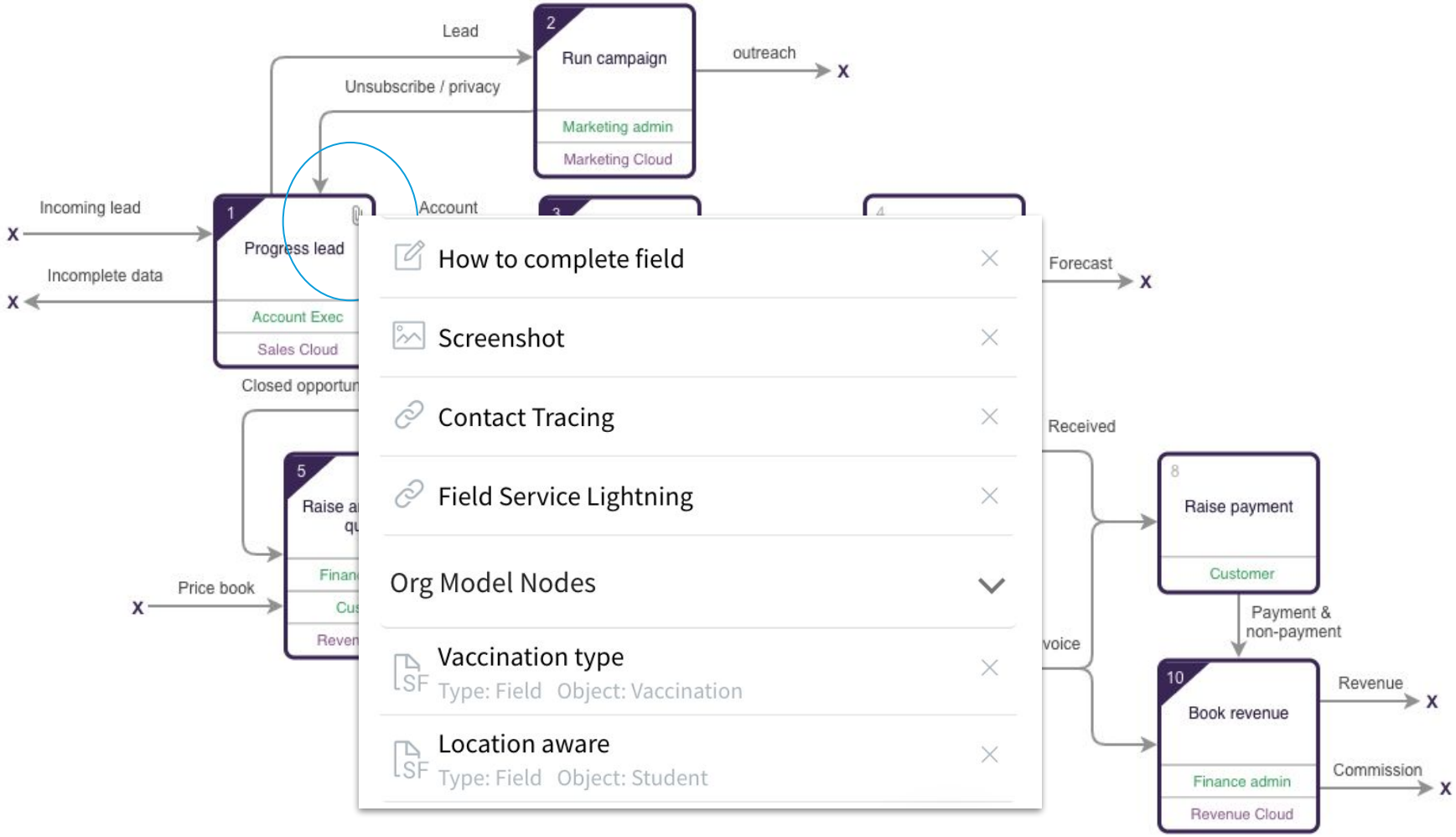


Summary		Status	Risk
Track compliance at lead capture	I want... So that I can...	In design	High
Validate data for CCPA and GDPR	ssues now that we aggregate	In design	High
GDPR reporting	ly for all EU data	In design	Unassessed
Progress grant having validated applicant	ly be applied for by EU	Being impl…	Medium
Grant application	esearch grants	Ready for i…	High
Capturing and validating applicants thro…	t need to consider GDPR when validating the applicant	Ready for i…	Medium
Updated validations for vaccine access	dations for vaccine access for loyees and guests	In design	Unassessed
Vaccination tracker	vaccinations on work.com	In design	Unassessed

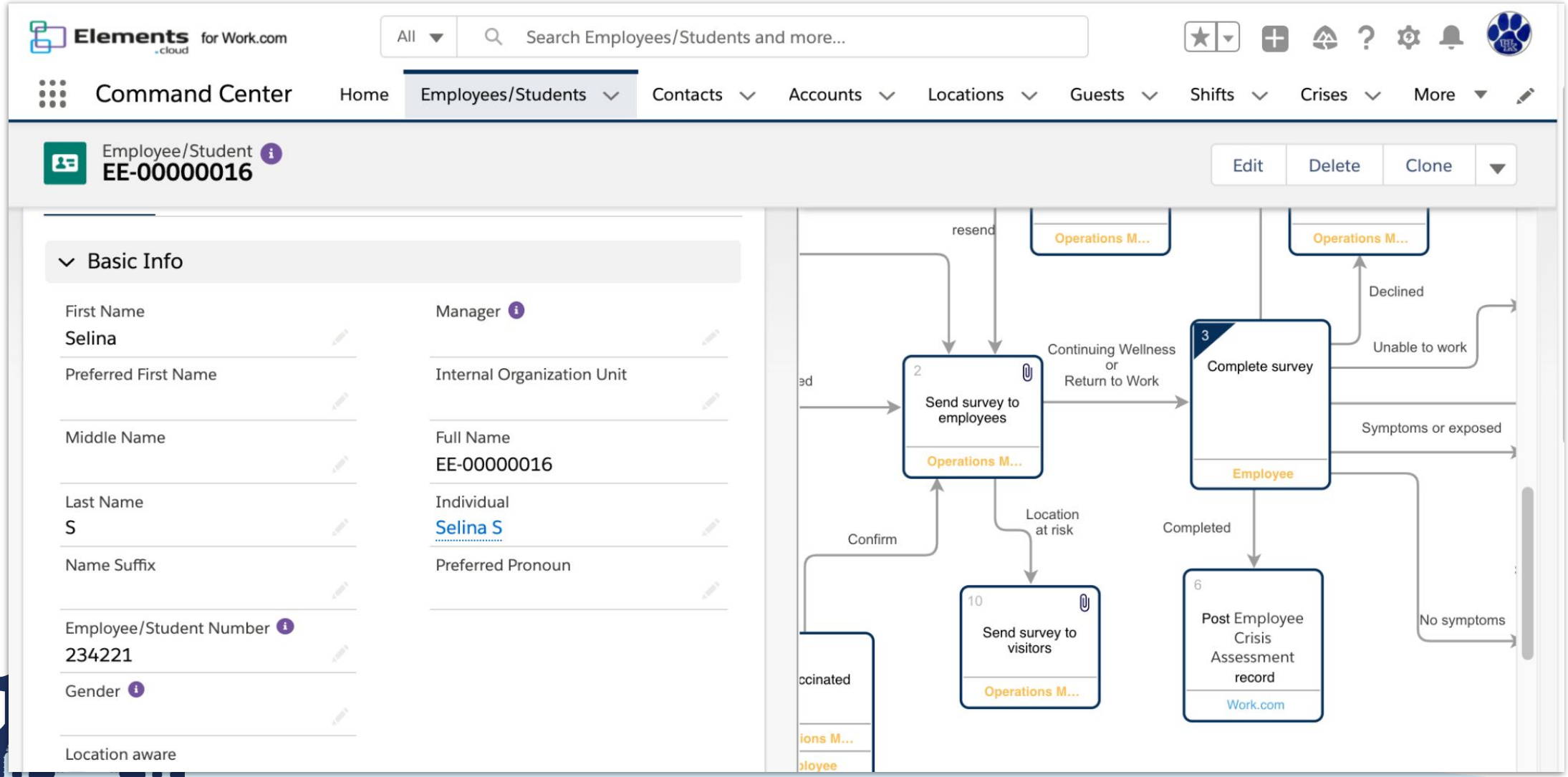




UPN: LINKS TO DOC / TRAINING / METADATA



UPN: EMBED AS IN-APP TRAINING



X-RAY VISION: ORG CONFIG / IMPACT ANALYSIS

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WITHOUT ORG ANALYSIS

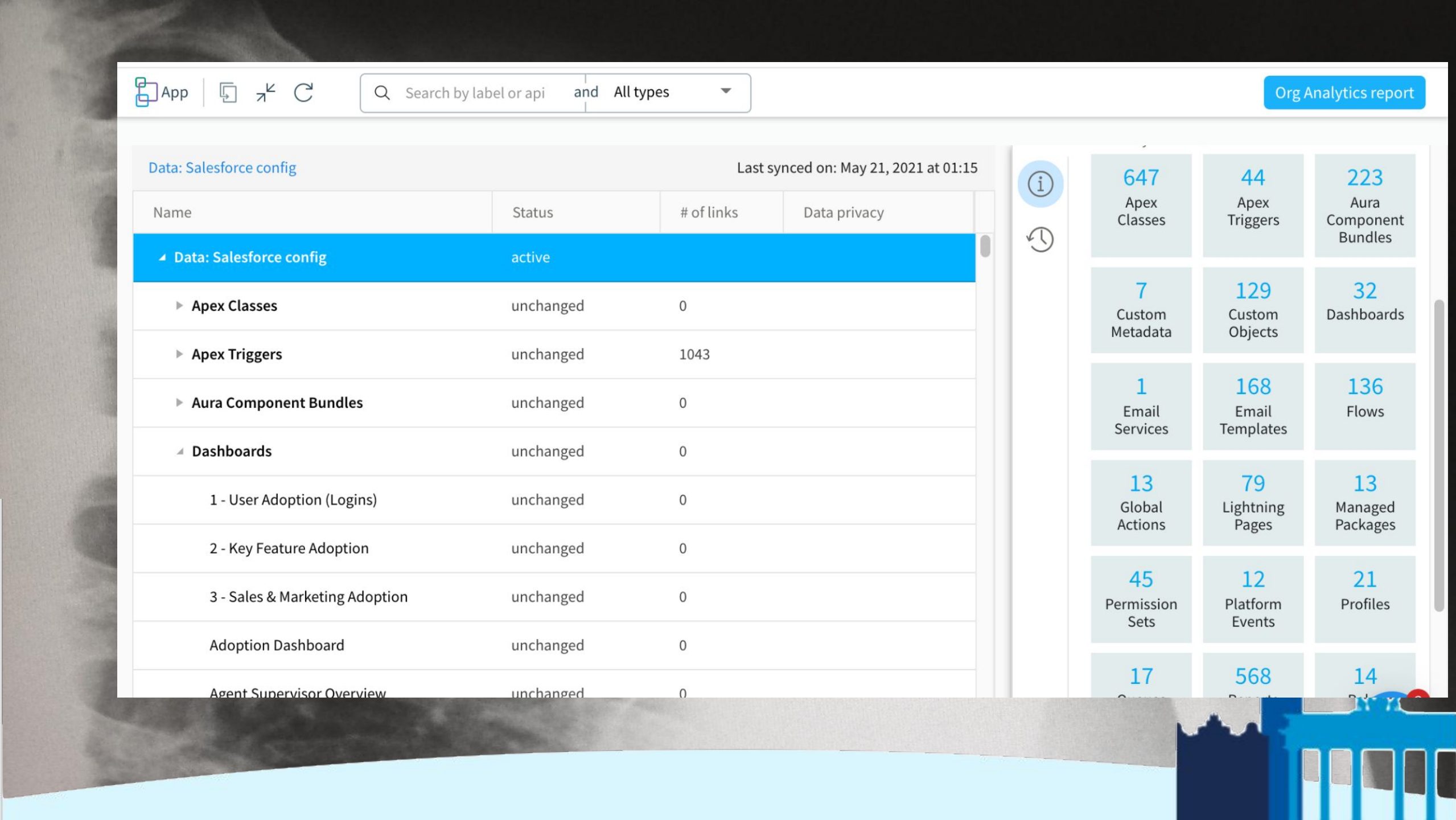
Run fast and fall often.
Walk slow and stay safe.

WITH ORG ANALYSIS

Run fast and fall often
Walk slow and stay safe.

"10 Lessons from analyzing 7 Billion Metadata items"

- Scale and complexity increases risk
- Org Analysis requires automation
- Tech debt kills agility


App
Search by label or api
and
All types
Org Analytics report
Data: Salesforce config
Last synced on: May 21, 2021 at 01:15
Name
Status
# of links
Data privacy
Data: Salesforce config
active
Apex Classes
unchanged
0
Apex Triggers
unchanged
1043
Aura Component Bundles
unchanged
0
Dashboards
unchanged
0
1 - User Adoption (Logins)
unchanged
0
2 - Key Feature Adoption
unchanged
0
3 - Sales & Marketing Adoption
unchanged
0
Adoption Dashboard
unchanged
0
Agent Supervisor Overview
unchanged
0
647
Apex Classes
44
Apex Triggers
223
Aura Component Bundles
7
Custom Metadata
129
Custom Objects
32
Dashboards
1
Email Services
168
Email Templates
136
Flows
13
Global Actions
79
Lightning Pages
13
Managed Packages
45
Permission Sets
12
Platform Events
21
Profiles
17
568
14

Data: Salesforce config

Last synced on: May 21, 2021 at 01:15

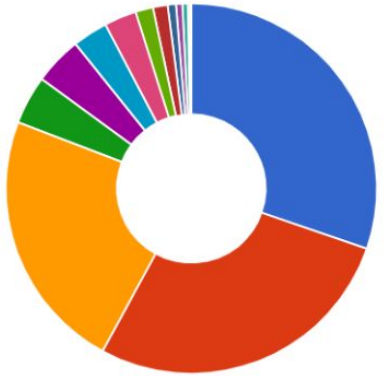
Name	Status	# of links	Data privacy
Opportunity	unchanged	63	
Approval Processes	unchanged	0	
Buttons, Links, and Actions	unchanged	0	
Compact Layouts	unchanged	0	
Email Alerts	unchanged	0	
Field Sets	unchanged	0	
Fields	unchanged	0	
% Spend (C) *Shows the tota…*	unchanged	3	Unassessed
Account ID (S)	unchanged	4	Unassessed

Root nodes per page: 500

1 - 19 of 19

15	Record Types
5	Sales Processes
2	Sharing Rules
14	Validation Rules
0	Workflow Field Updates
2	Workflow Rules

Record count



All records		1 956
Initial Opportunity	30.27%	592
Initial Unlimited Op…	27.66%	5
Renewal Opportunity	22.9%	
Add On Opportunity	4.24%	83

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Salesforce Org Analytics

EXPORT TO PDF

Table of contents

My Org - quick overview
- Org summary for core and managed packages
- Org summary trends for core and managed packages

Org Documentation for standard and custom objects
- Descriptions filled
- Description filled status over time
- Objects and related items
- Objects
- Custom fields by object
- Field updates by object
- Process builder workflows by object
- Record types by objects
- Validation rules by object
- Workflow rules by object

Org Size and Usage
- % filled for all fields in Object
- Records by object
- Custom fields by object with impact analysis
- Process builder flows in objects
- Reports generated through time
- Email templates used through time

% filled for all fields in Object (based on last 10 000 records)

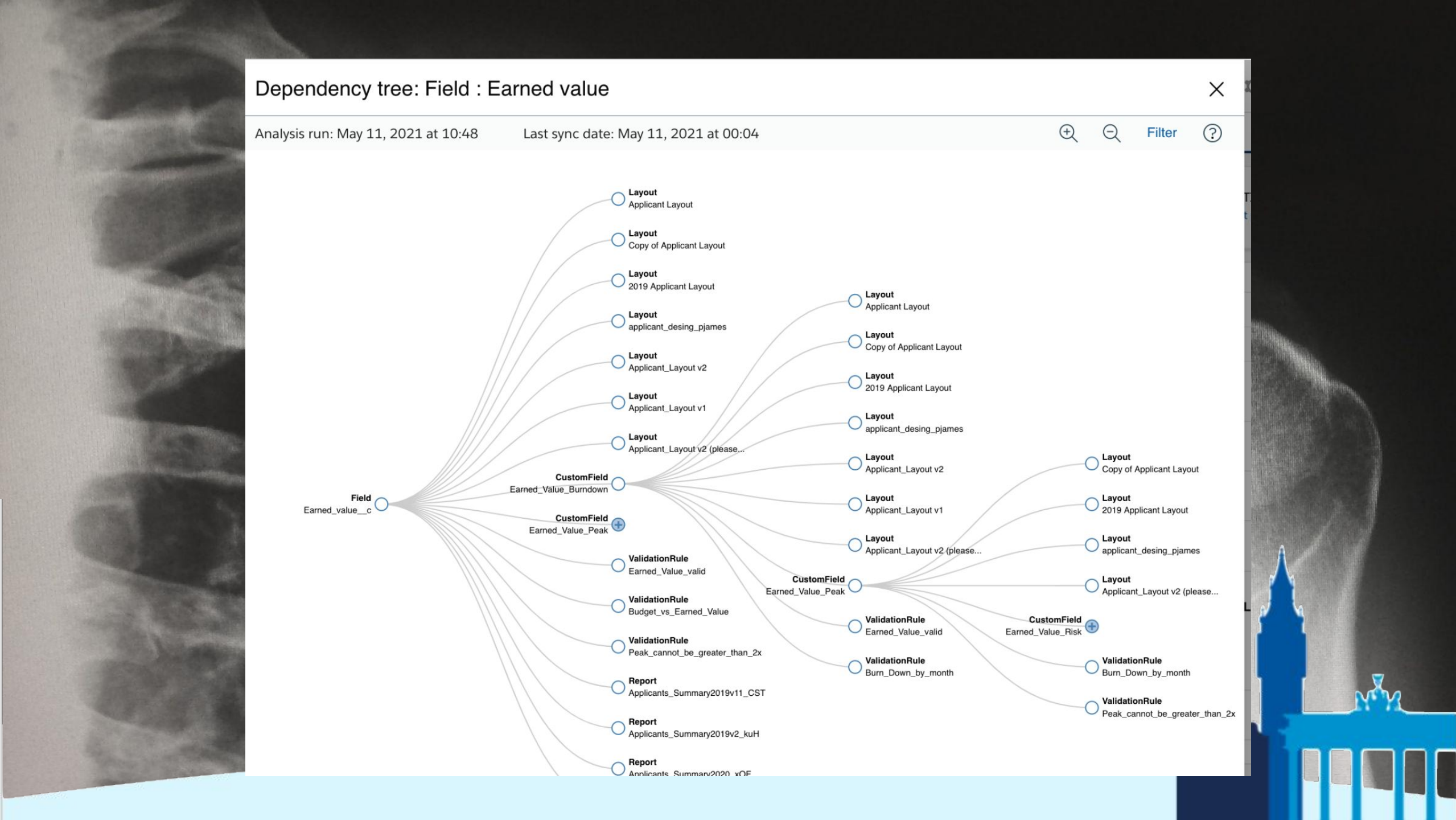
Want to understand how to use this data? Click here to learn more

Object type: Custom

Sort: Alphabetically

Colors represent % population of fields per object in the last 10 000 records

0 %filled | Below 25% | Below 50% | Below 75% | Above 75%


Dependency tree: Field : Earned value
Analysis run: May 11, 2021 at 10:48
Last sync date: May 11, 2021 at 00:04
Filter
Field
Earned_value__c
Layout
Applicant Layout
Layout
Copy of Applicant Layout
Layout
2019 Applicant Layout
Layout
applicant_desing_pjames
Layout
Applicant_Layout v2
Layout
Applicant_Layout v1
Layout
Applicant_Layout v2 (please...
CustomField
Earned_Value_Burndown
CustomField
Earned_Value_Peak
ValidationRule
Earned_Value_valid
ValidationRule
Budget_vs_Earned_Value
ValidationRule
Peak_cannot_be_greater_than_2x
Report
Applicants_Summary2019v11_CST
Report
Applicants_Summary2019v2_kuH
Report
Applicants_Summary2020_xOE
Layout
Applicant Layout
Layout
Copy of Applicant Layout
Layout
2019 Applicant Layout
Layout
applicant_desing_pjames
Layout
Applicant_Layout v2
Layout
Applicant_Layout v1
Layout
Applicant_Layout v2 (please...
CustomField
Earned_Value_Peak
ValidationRule
Earned_Value_valid
ValidationRule
Burn_Down_by_month
Layout
Copy of Applicant Layout
Layout
2019 Applicant Layout
Layout
applicant_desing_pjames
Layout
Applicant_Layout v2 (please...
CustomField
Earned_Value_Risk
ValidationRule
Burn_Down_by_month
ValidationRule
Peak_cannot_be_greater_than_2x

4 TYPES OF ORG DOCUMENTATION

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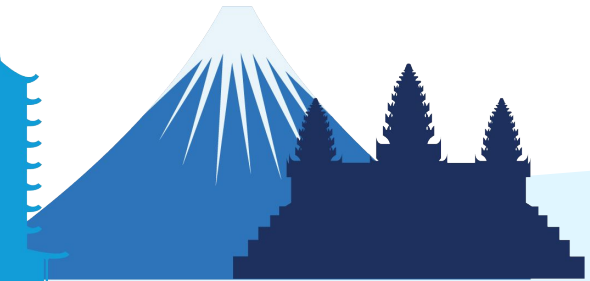
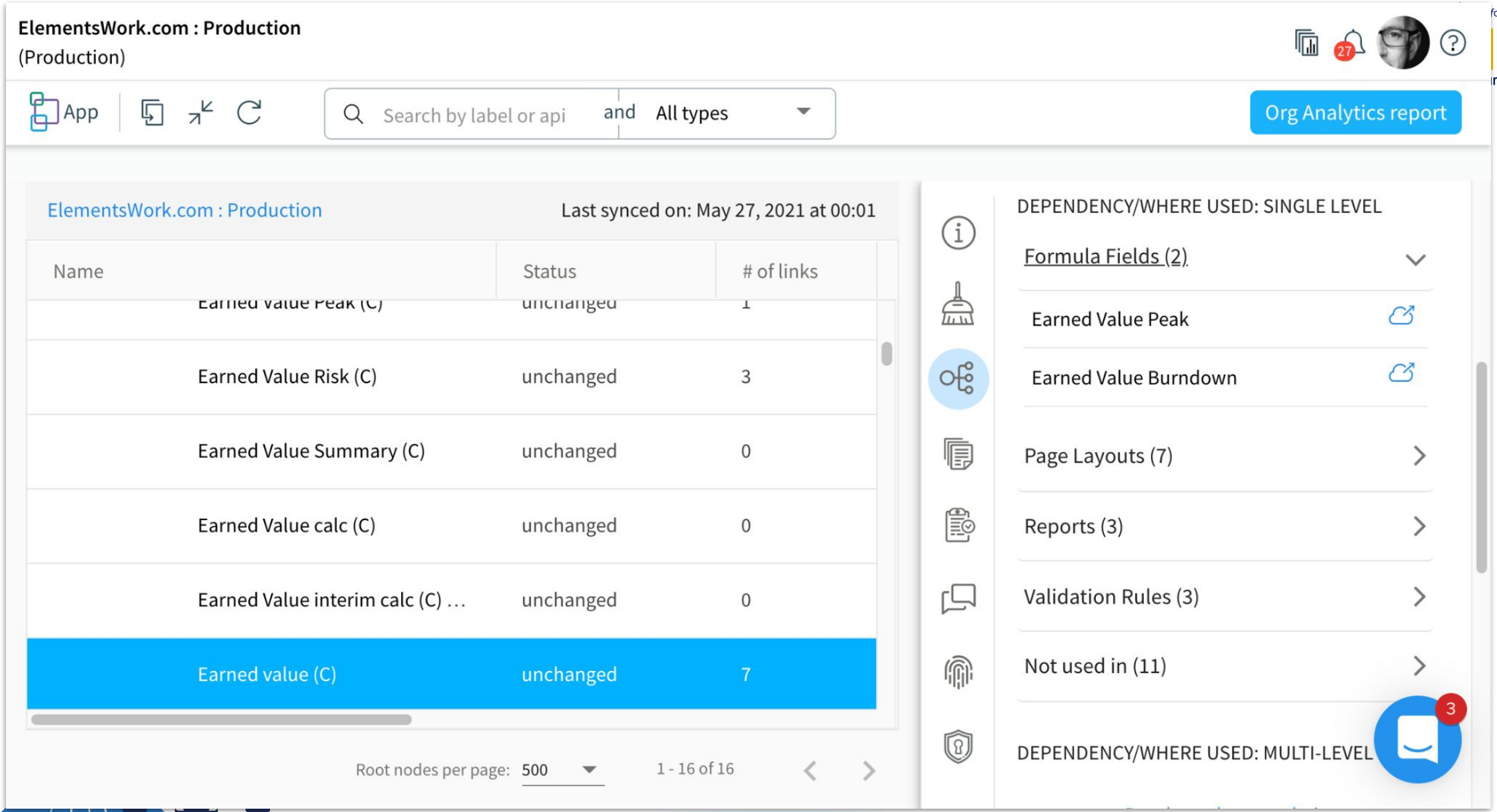
EASY: Org sync and analysis (automated)

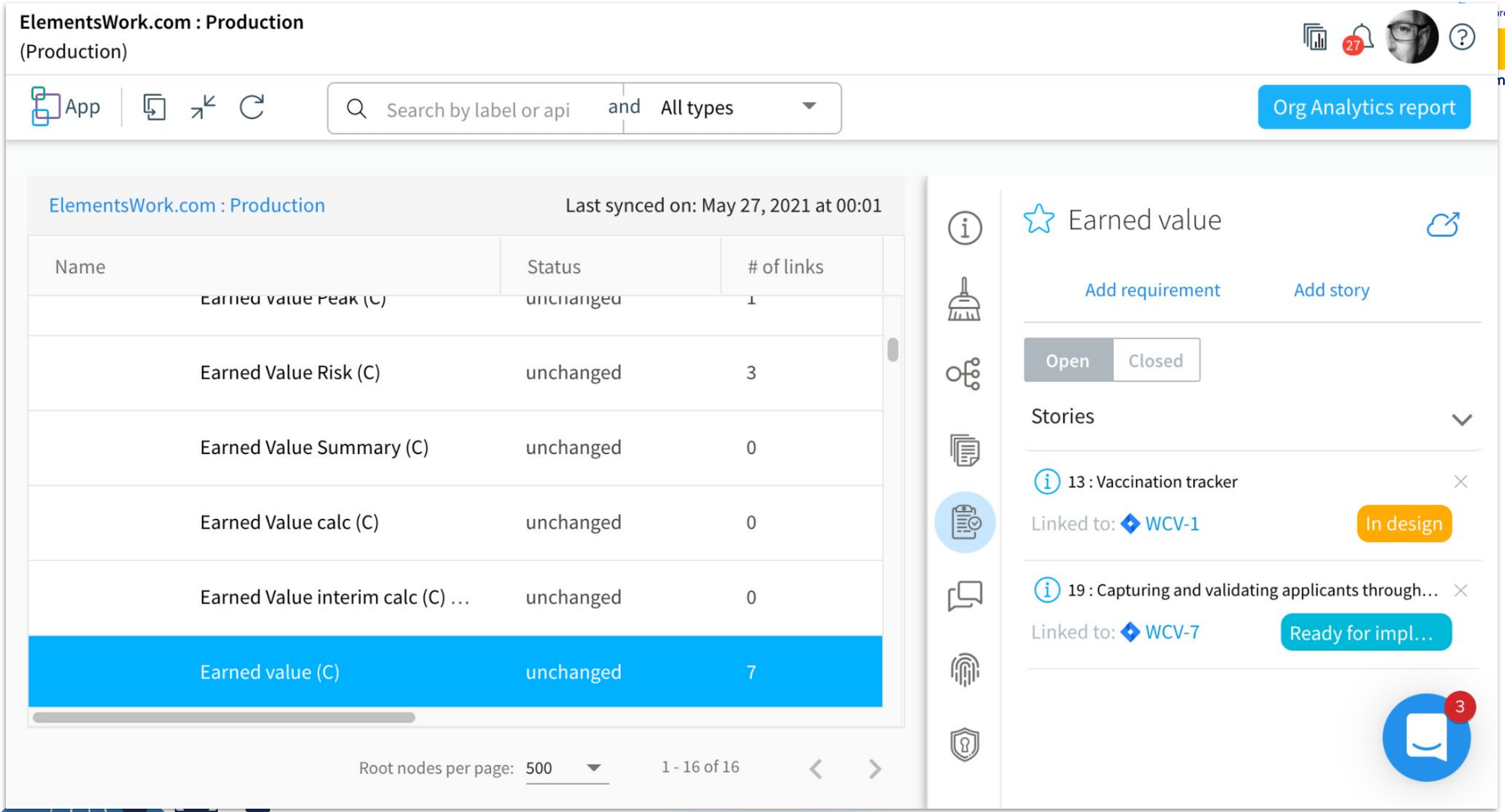
EASY: Import pre-built process and config (SI & ISV IP)

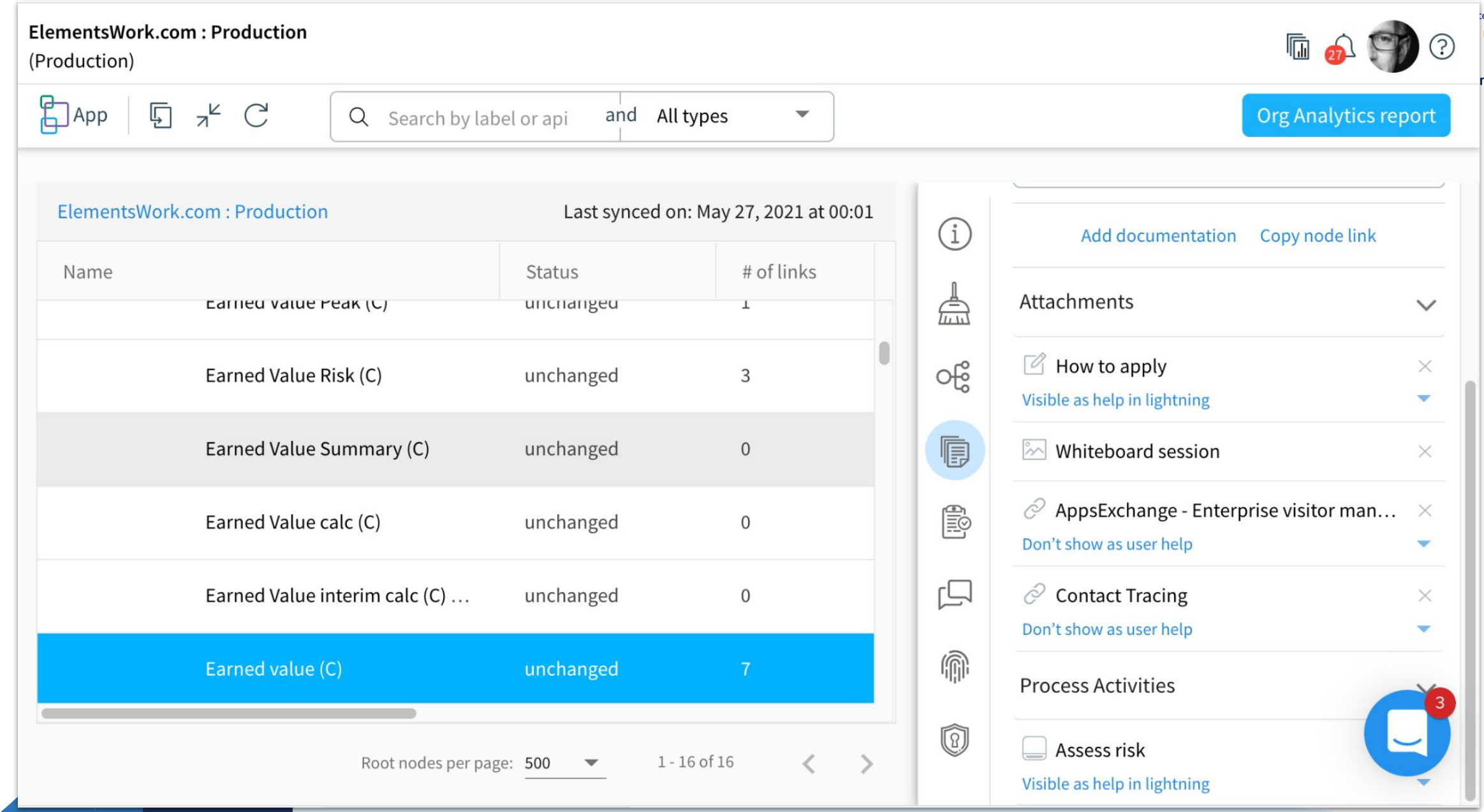
MEDIUM: Link requirements, user stories and processes

HARD: Manual org config (text / Siri, screenshots, URL links)




ElementsWork.com : Production
(Production)
27
App
Search by label or api
and
All types
Org Analytics report
ElementsWork.com : Production
Last synced on: May 27, 2021 at 00:01
Name
Status
# of links
Earned Value Peak (C)
unchanged
1
Earned Value Risk (C)
unchanged
3
Earned Value Summary (C)
unchanged
0
Earned Value calc (C)
unchanged
0
Earned Value interim calc (C) …
unchanged
0
Earned value (C)
unchanged
7
Root nodes per page:
500
1 - 16 of 16
DEPENDENCY/WHERE USED: SINGLE LEVEL
Formula Fields (2)
Earned Value Peak
Earned Value Burndown
Page Layouts (7)
Reports (3)
Validation Rules (3)
Not used in (11)
DEPENDENCY/WHERE USED: MULTI-LEVEL
3


ElementsWork.com : Production
(Production)
27
App
Search by label or api
and
All types
Org Analytics report
ElementsWork.com : Production
Last synced on: May 27, 2021 at 00:01
Name
Status
# of links
Earned Value Peak (C)
unchanged
1
Earned Value Risk (C)
unchanged
3
Earned Value Summary (C)
unchanged
0
Earned Value calc (C)
unchanged
0
Earned Value interim calc (C) …
unchanged
0
Earned value (C)
unchanged
7
Root nodes per page:
500
1 - 16 of 16
Earned value
Add requirement
Add story
Open
Closed
Stories
13 : Vaccination tracker
Linked to: WCV-1
In design
19 : Capturing and validating applicants through…
Linked to: WCV-7
Ready for impl…
3


ElementsWork.com : Production
(Production)
27
App
Search by label or api
and
All types
Org Analytics report
ElementsWork.com : Production
Last synced on: May 27, 2021 at 00:01
Name
Status
# of links
Earned Value Risk (C)
unchanged
3
Earned Value Summary (C)
unchanged
0
Earned Value calc (C)
unchanged
0
Earned Value interim calc (C) …
unchanged
0
Earned value (C)
unchanged
7
Root nodes per page:
500
1 - 16 of 16
Add documentation
Copy node link
Attachments
How to apply
Visible as help in lightning
Whiteboard session
AppsExchange - Enterprise visitor man…
Don't show as user help
Contact Tracing
Don't show as user help
Process Activities
Assess risk
Visible as help in lightning
3

KEY TAKEAWAYS

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Salesforce is now strategic

Complexity of orgs can kill agility and increases risk

Org scale means automated analysis is critical

Analysis and documentation is critical, not afterthought

"Salesforce cannot be managed by spreadsheets and hope"

ACHIEVABLE NEXT STEPS

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Actions

Witness the power of UPN to engage clients

Embed Org discovery / analysis into every engagement

Include Org documentation as a paid deliverable

Resources

Business Process Mapping course (Partner Learning Camp) bit.ly/BPMSF

Org Discovery Process bit.ly/orgdiscovery

10 Lessons from analyzing 7 Billion metadata items bit.ly/billionSF

3 Golden Rules article bit.ly/goldenSF

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Thank you