

Wifi:  
WVC Guest Network  
(no password needed)

# Snowforce

SKI. LEARN. EXPERIENCE.

OrgConfessions #funny #notfunny

# OrgConfessions #funny #notfunny



IAN GOTTS : Founder & CEO  
Elements.cloud  
@iangotts



Get this slide deck: [awesomeadmin.com](http://awesomeadmin.com)

# ROOT CAUSE ANALYSIS

750+ confessions  
OrgConfessions.com

BUSINESS ANALYSIS



ARCHITECTURE



DOCUMENTATION



DEVOPS



PERMISSIONS



TRAINING



# SKILLS & TOOLS GAP



Managed dev cycle

IMPLEMENTATION MATURITY

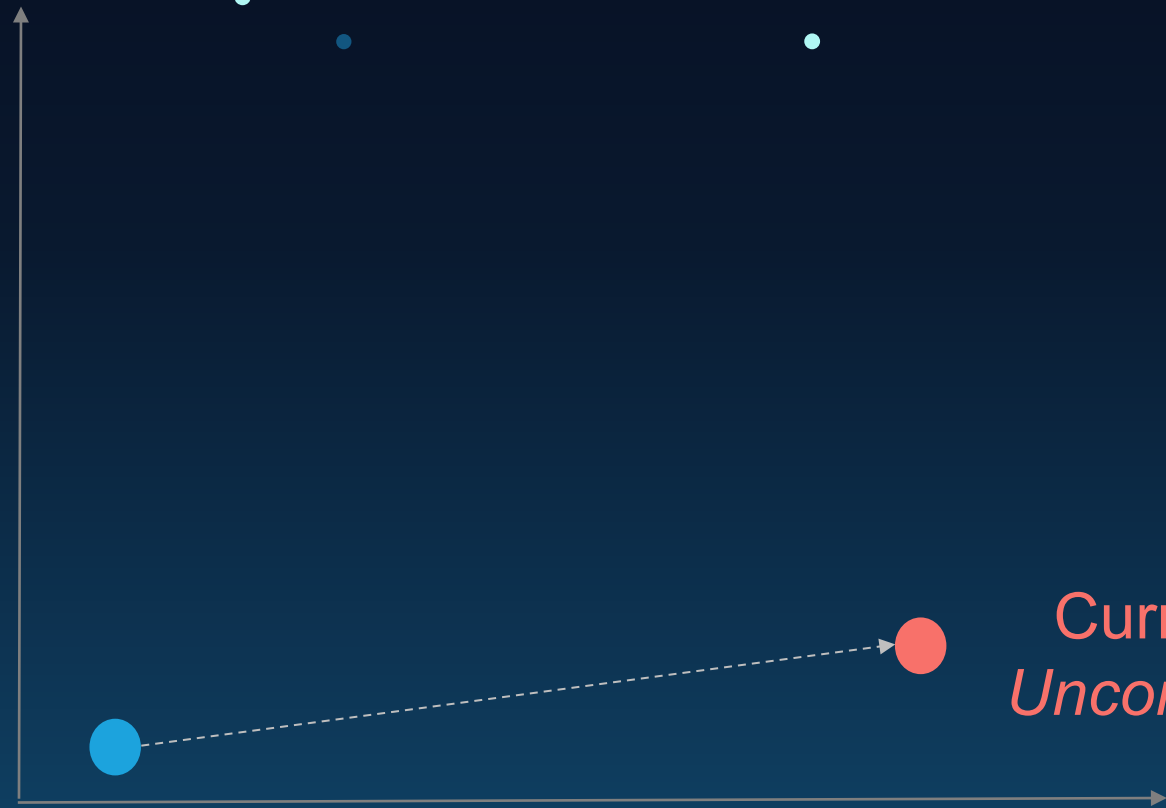
Citizen Developer  
“Accidental Admin”  
“Imposter Syndrome”

TACTICAL CRM  
1999

SALESFORCE CAPABILITY

STRATEGIC PLATFORM  
2020

Current position  
*Uncontrolled Agility*



# SKILLS & TOOLS GAP

- Managed dev cycle

IMPLEMENTATION  
MATURITY

Citizen  
Developer  
“Accidental Admin”  
“Imposter Syndrome”

TACTICAL  
CRM  
1999

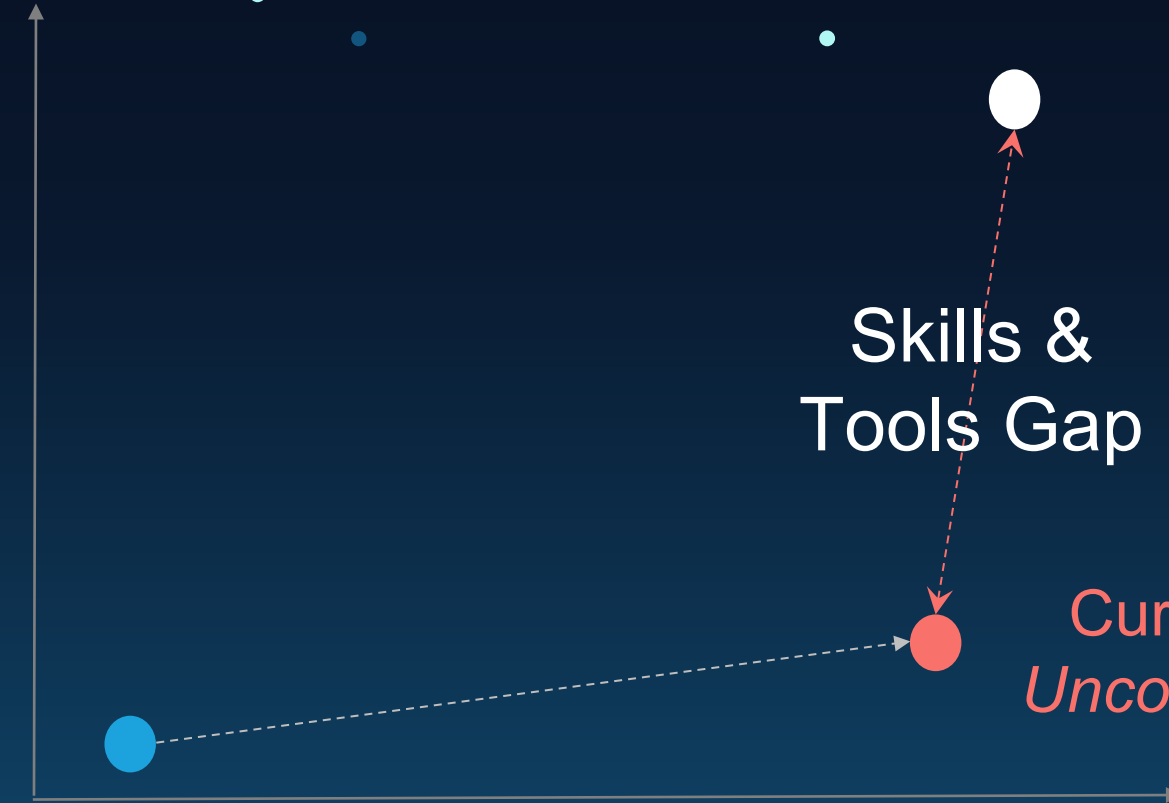
SALESFORCE  
CAPABILITY

STRATEGIC  
PLATFORM  
2020

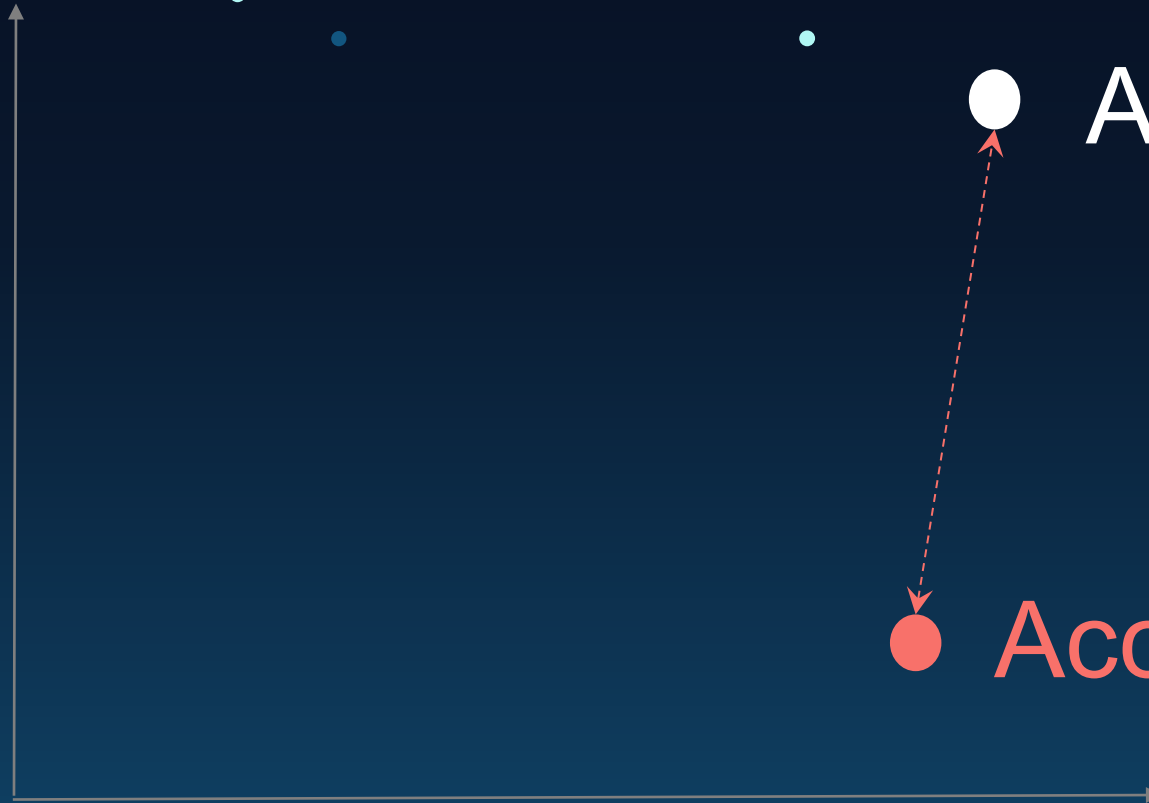
Target state  
*Agile &  
Compliant*

Skills &  
Tools Gap

Current position  
*Uncontrolled Agility*



# SKILLS & TOOLS GAP



AwesomeAdmin

AccidentalAdmin

# IMPLEMENTATION METHODOLOGY

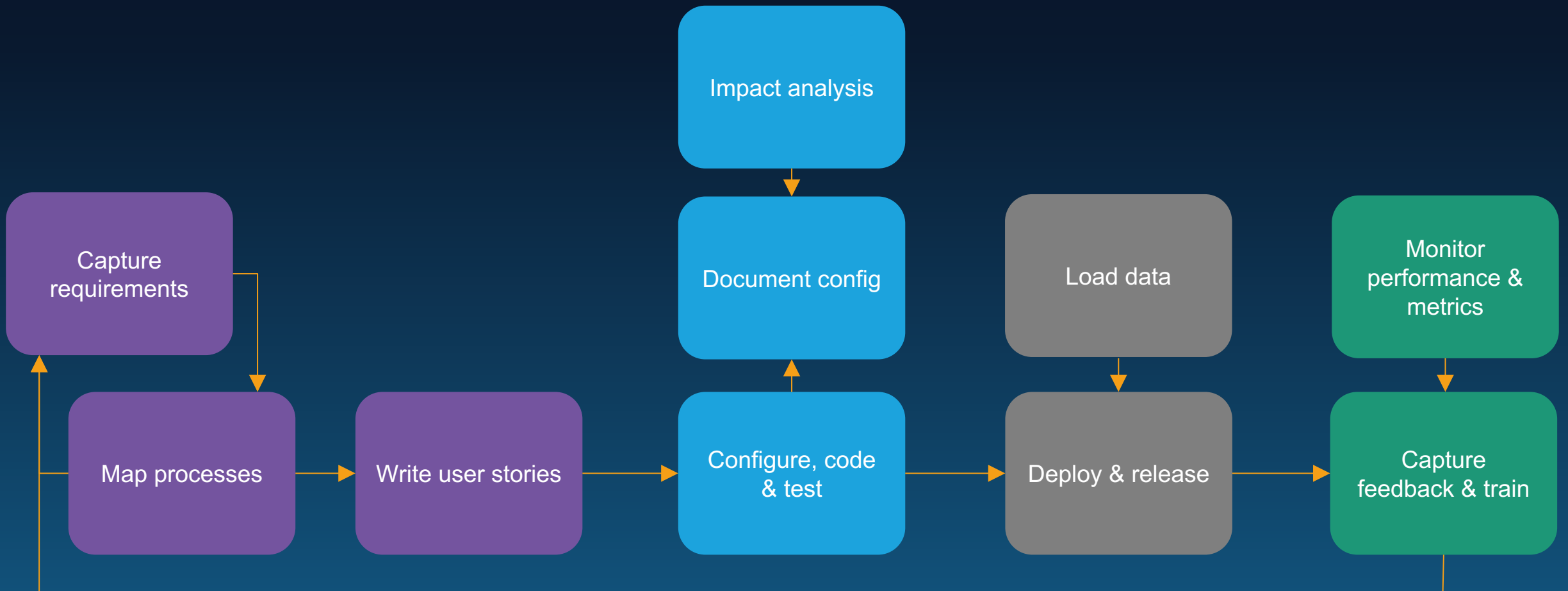


ANALYZE

BUILD

DELIVER

OPERATE



# #BUSINESS ANALYSIS

## ANALYZE

## BUILD

## DELIVER

## OPERATE

Impact analysis

Document config

Configure, code  
& test

Load data

Deploy & release

Monitor  
performance &  
metrics

Capture  
feedback & train

Capture  
requirements


Map processes

Write user stories



# #BUSINESS ANALYSIS

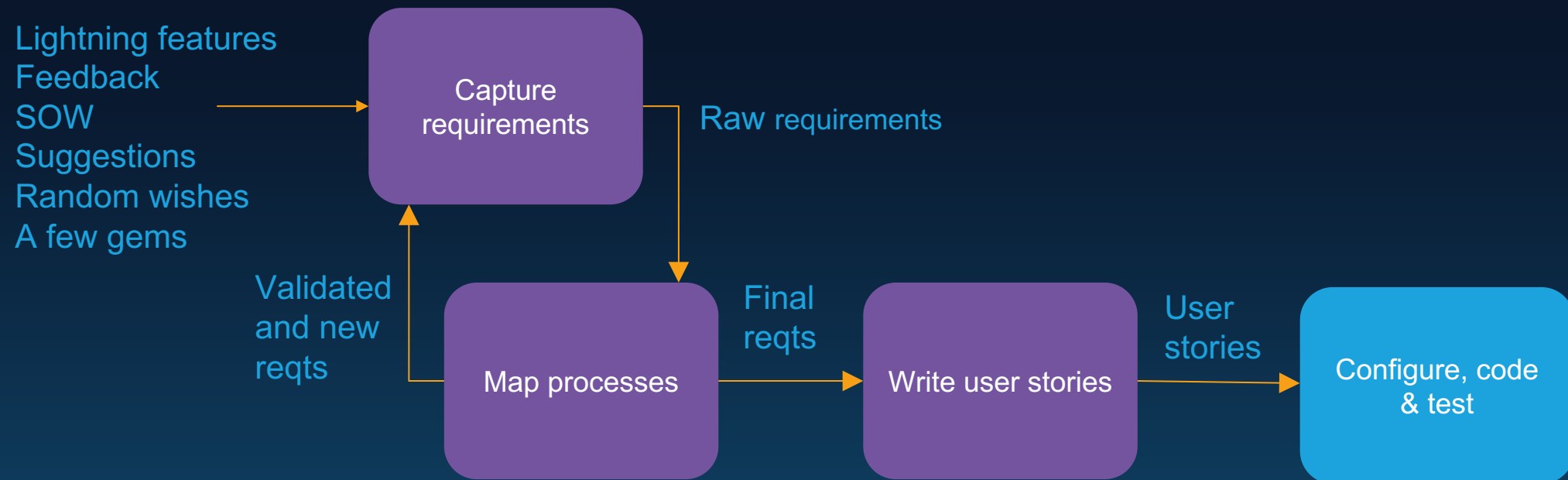
Lightning features  
Feedback  
SOW  
Suggestions  
Random wishes  
A few gems



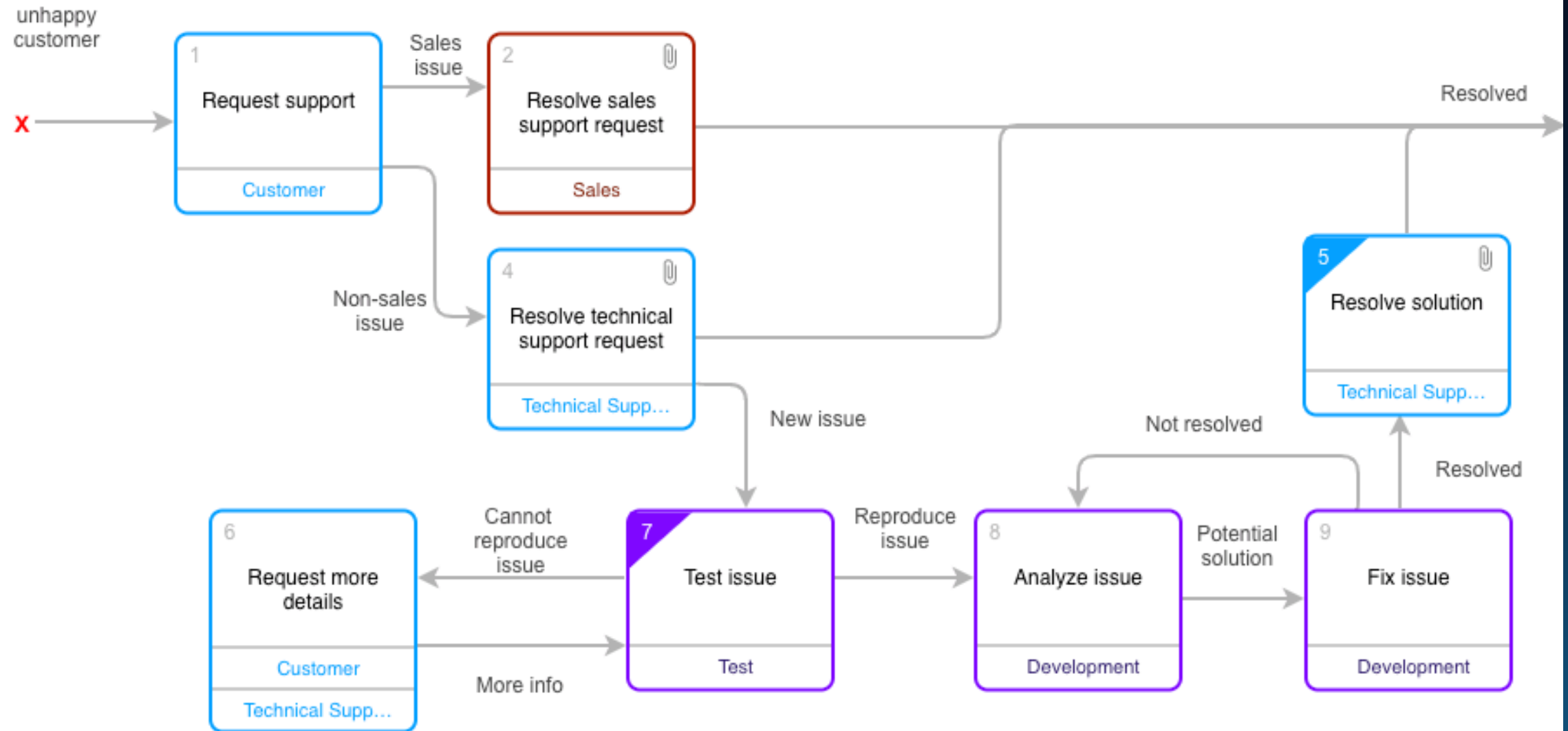
```
graph LR; A[Lightning features<br/>Feedback<br/>SOW<br/>Suggestions<br/>Random wishes<br/>A few gems] --> B[Configure, code<br/>& test];
```

Configure, code  
& test

# #BUSINESS ANALYSIS



# #BUSINESS ANALYSIS



# #BUSINESS ANALYSIS

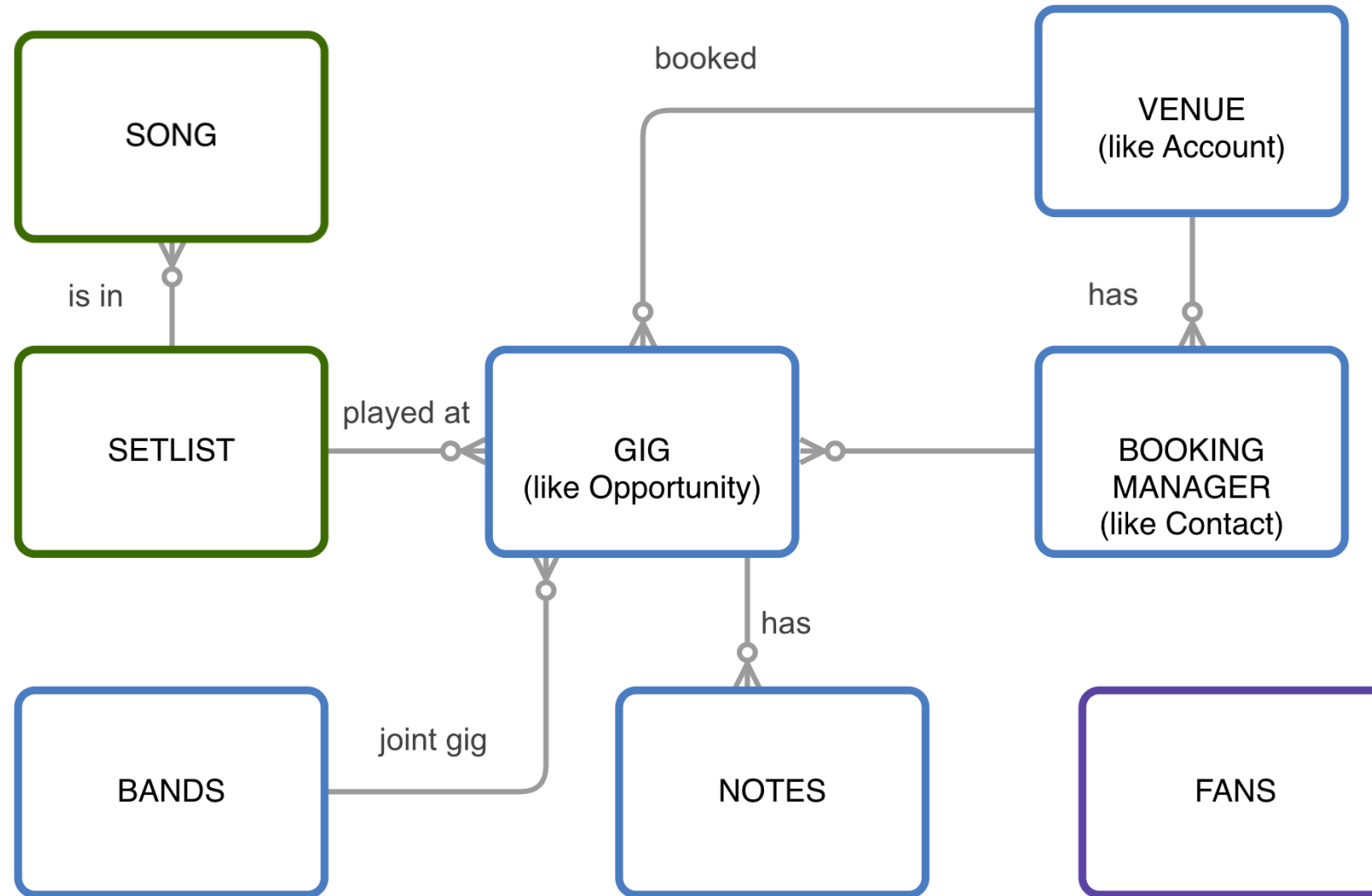
User Story standard format

AS A ..... Sales user

I WANT TO ..... Add an opportunity not US \$

SO THAT I CAN ..... Sell to non-US customers

# #ARCHITECTURE



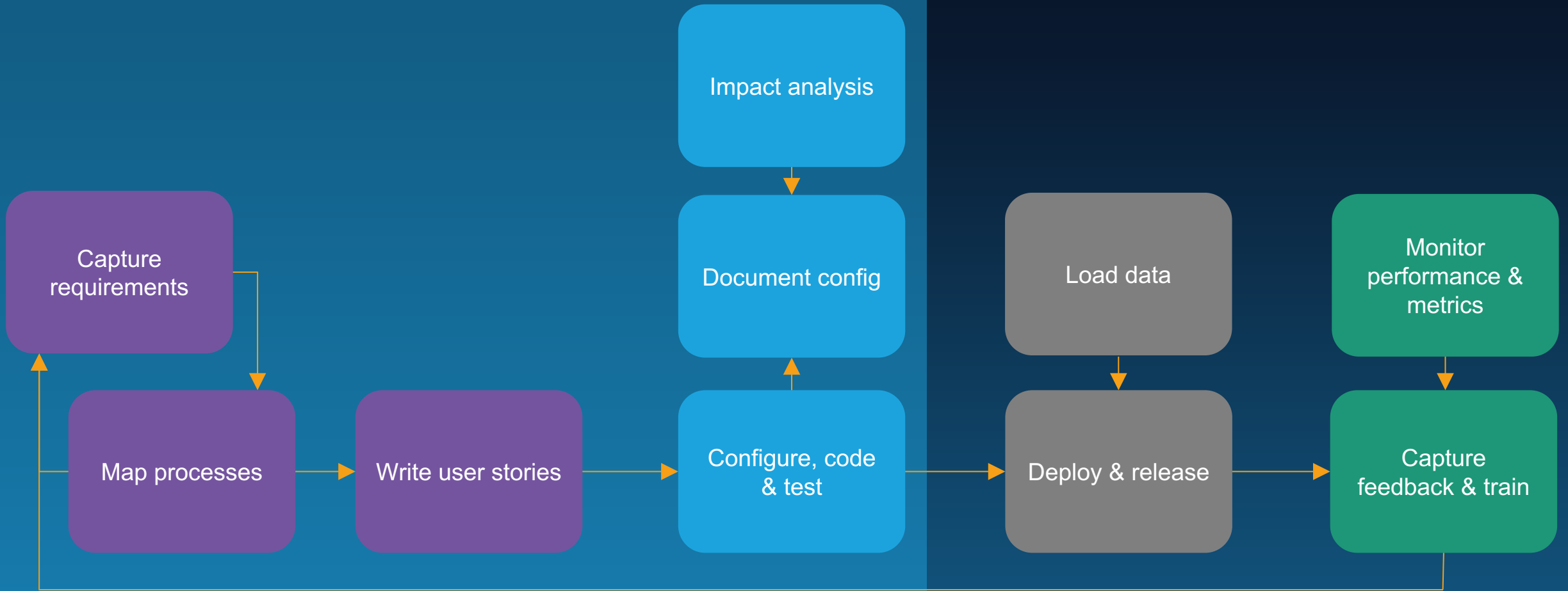
# #DOCUMENTATION

## ANALYZE

## BUILD

## DELIVER

## OPERATE



# #DOCUMENTATION

## Metadata Dictionary

Salesforce ProductionLast synced on: October 25, 2019 at 00:55

Name	Status	# of links	GDPR Status	Field impact
Salesforce Production	active			
Email Templates	unchanged	2		
Global Actions	unchanged	6		
Lightning Pages	unchanged	0		
Managed Packages	unchanged	0		
Objects	unchanged	1		
Custom Objects	unchanged	1		
Project Marketing projects . Link ...	unchanged	11		
Sub project	unchanged	7		
Standard Objects	unchanged	0		
Permission Sets	unchanged	0		

Root nodes per page: 5001 - 18 of 18

Project

< DETAILS DOCUMENTATION USAGE FE >

Partial sync from Salesforce

Salesforce API name  
Project\_tracker\_\_c

Node type  
Custom Object

Summary

0  
Approval Processes

8  
Buttons Links And Actions

0  
Compact Layouts

124  
Custom Fields

0  
Field Sets

2  
List Views

5  
Page Layouts

4  
Process Builder Workflows

7  
Record Types

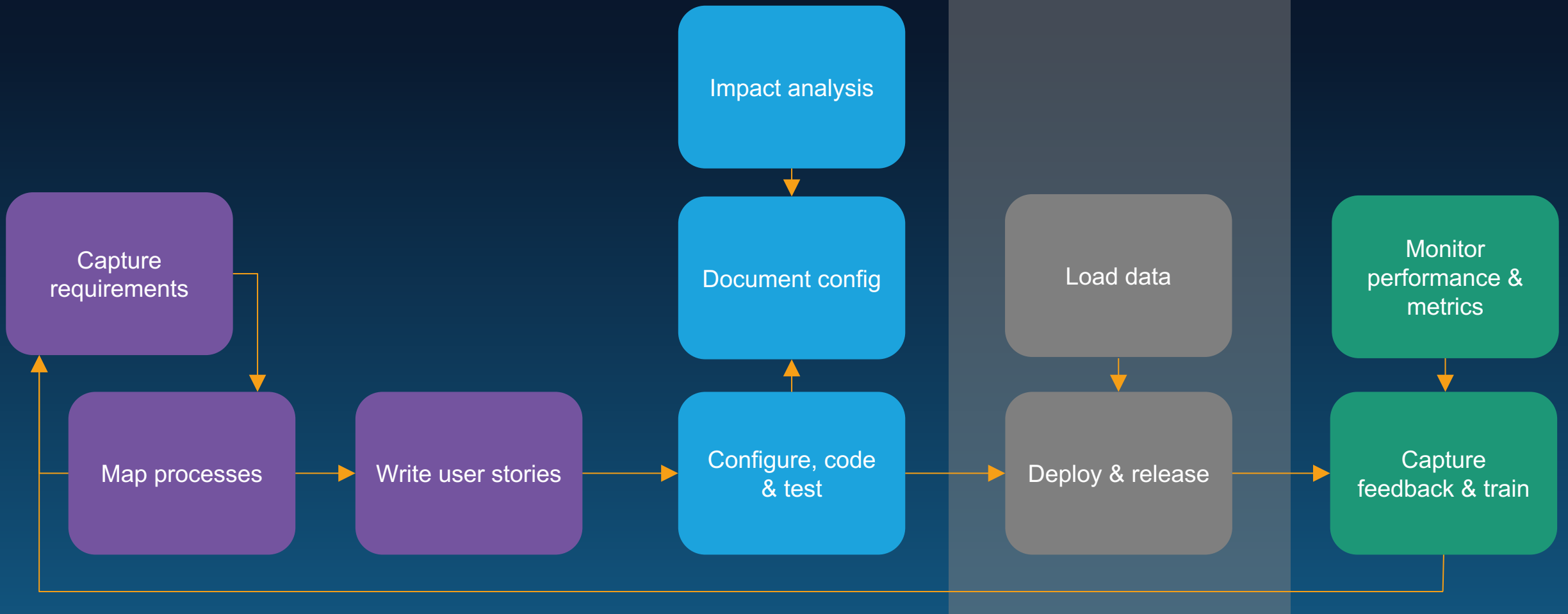
# #DEVOPS

## ANALYZE

## BUILD

## DELIVER

## OPERATE





# #DEVOPS



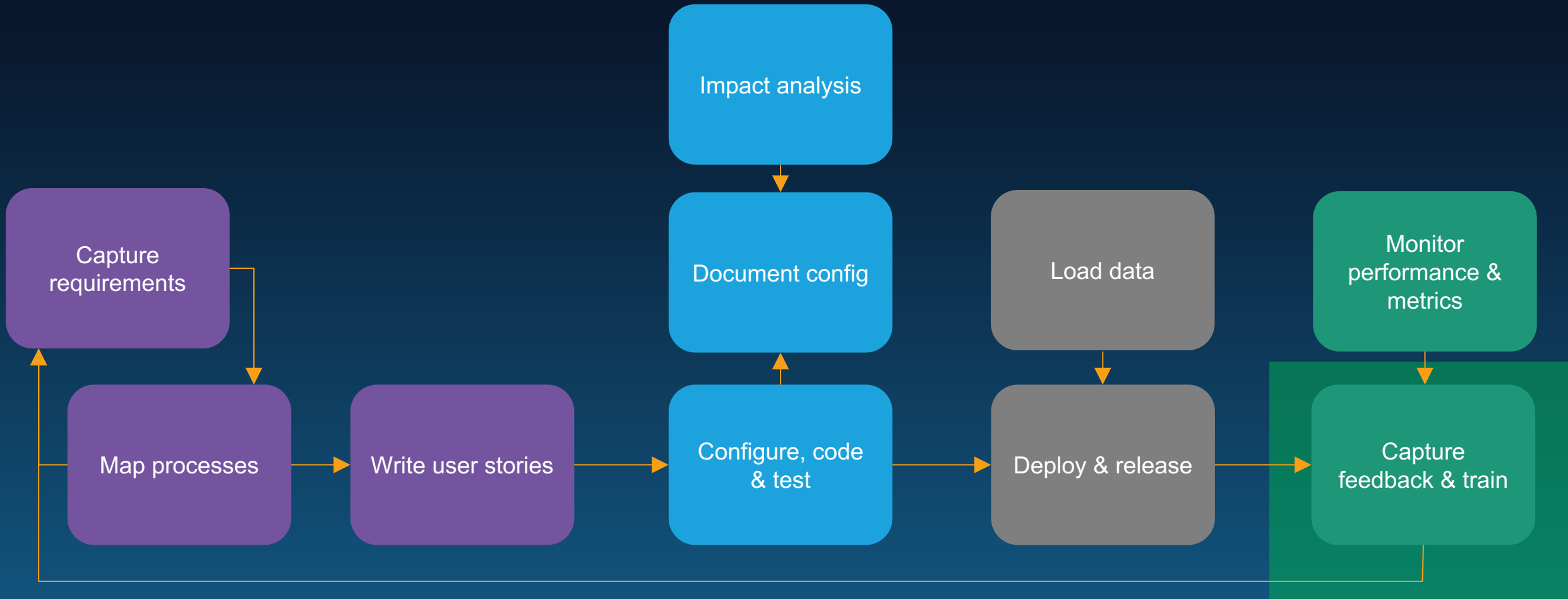
# #TRAINING

ANALYZE

BUILD

DELIVER

OPERATE



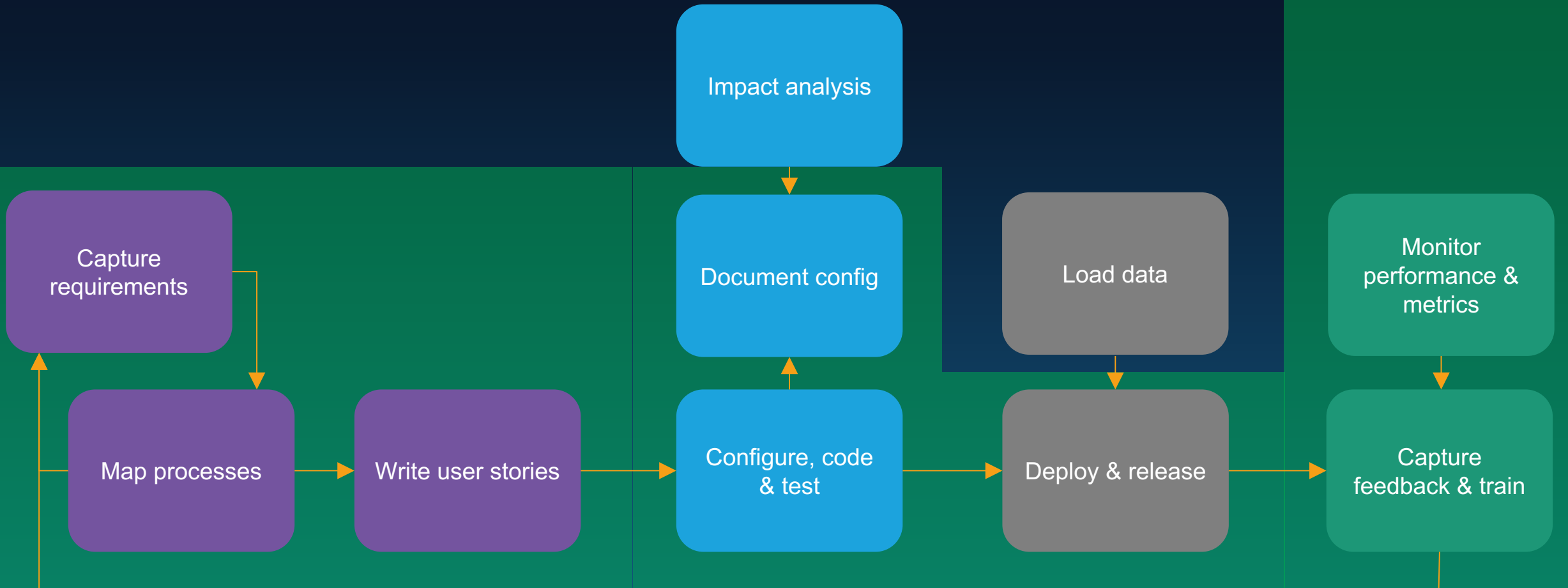
# #USERADOPTION

ANALYZE

BUILD

DELIVER

OPERATE



# LEARNT SKILLS

750+ OrgConfessions

[trailhead.salesforce.com](https://trailhead.salesforce.com)  
[train.elements.cloud](https://train.elements.cloud)

BUSINESS ANALYSIS



ARCHITECTURE



DOCUMENTATION



DEVOPS



PERMISSIONS



TRAINING



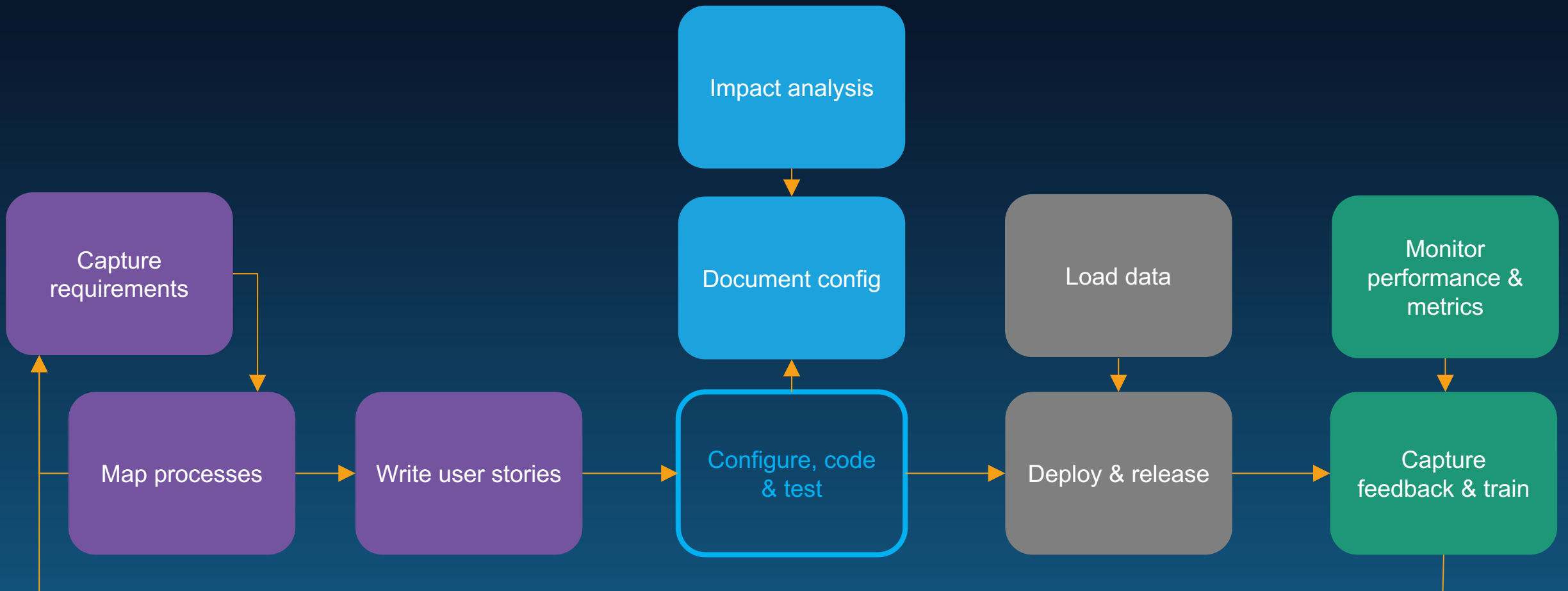
# TOOLS: “FREE IS NOT FREE”

ANALYZE

BUILD

DELIVER

OPERATE



# #TAKECONTROL

Don't let your org control you

# Questions?

ian@elements.cloud

@iangotts

slides: awesomeadmin.com

# #TAKECONTROL

Don't let your org control you





# THANK YOU!

IAN GOTTS

[ian@elements.cloud](mailto:ian@elements.cloud)

[@iangotts](#)

Slides: [awesomeadmin.com](https://awesomeadmin.com)

*Snowforce*

SKI. LEARN. EXPERIENCE.

# SLIDES FOR Q&A



# OrgConfessions.com

## #169

User did the MyDomain Trailhead in Production. So our Prod login was changed to kittiesarecute.my.salesforce.com It took a tech call escalated to Salesforce Tier 3 support to undo.

# OrgConfessions.com

## #707

I deleted one custom field that blew up 40+ reports, 3 dashboards, and two weeks of my life.

# TRAINING



Trailhead – ALM: [bit.ly/ALMtraining](https://bit.ly/ALMtraining)  
Lifecycle: [train.elements.cloud](https://train.elements.cloud)