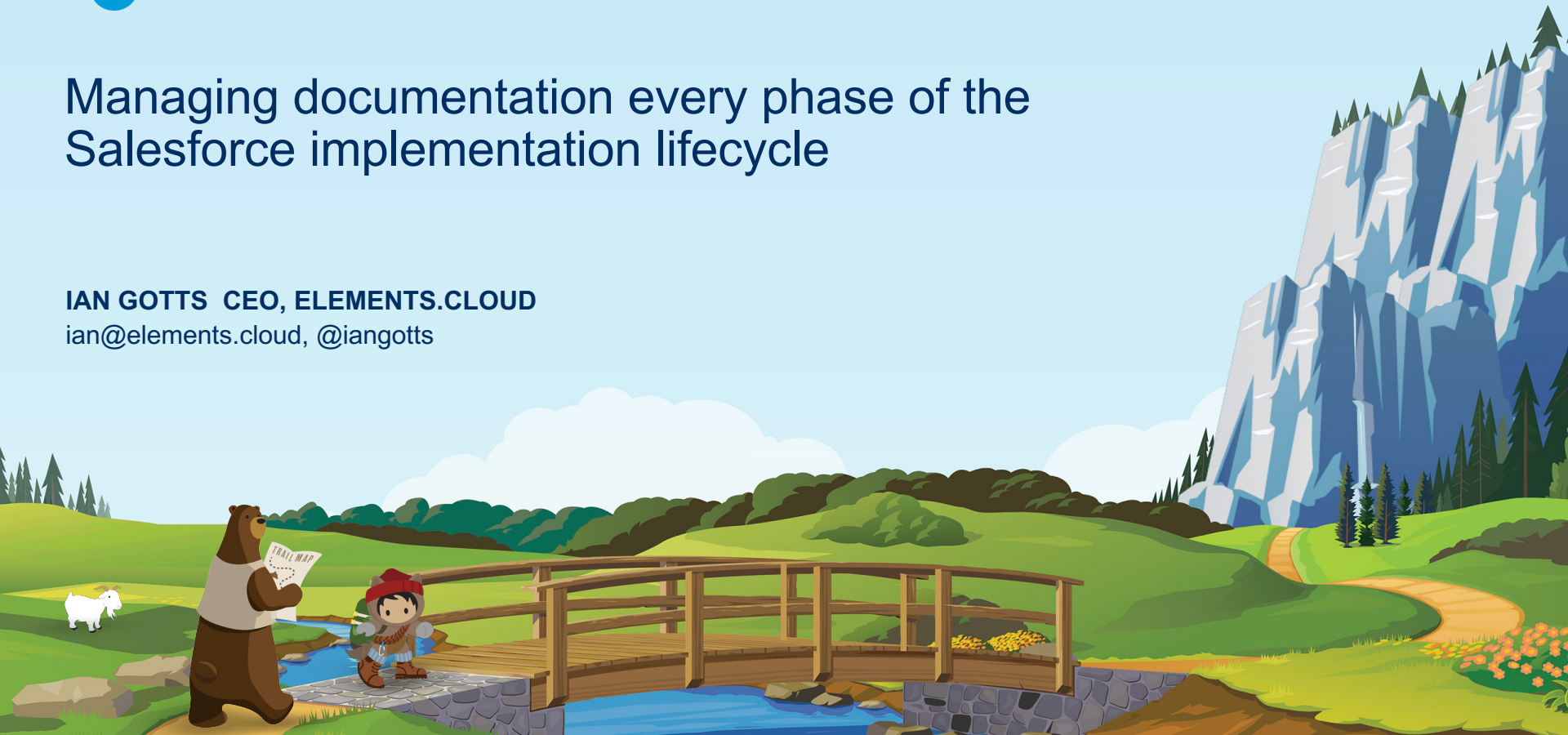
Managing documentation every phase of the Salesforce implementation lifecycle

IAN GOTTS CEO, ELEMENTS.CLOUD
ian@elements.cloud, @iangotts



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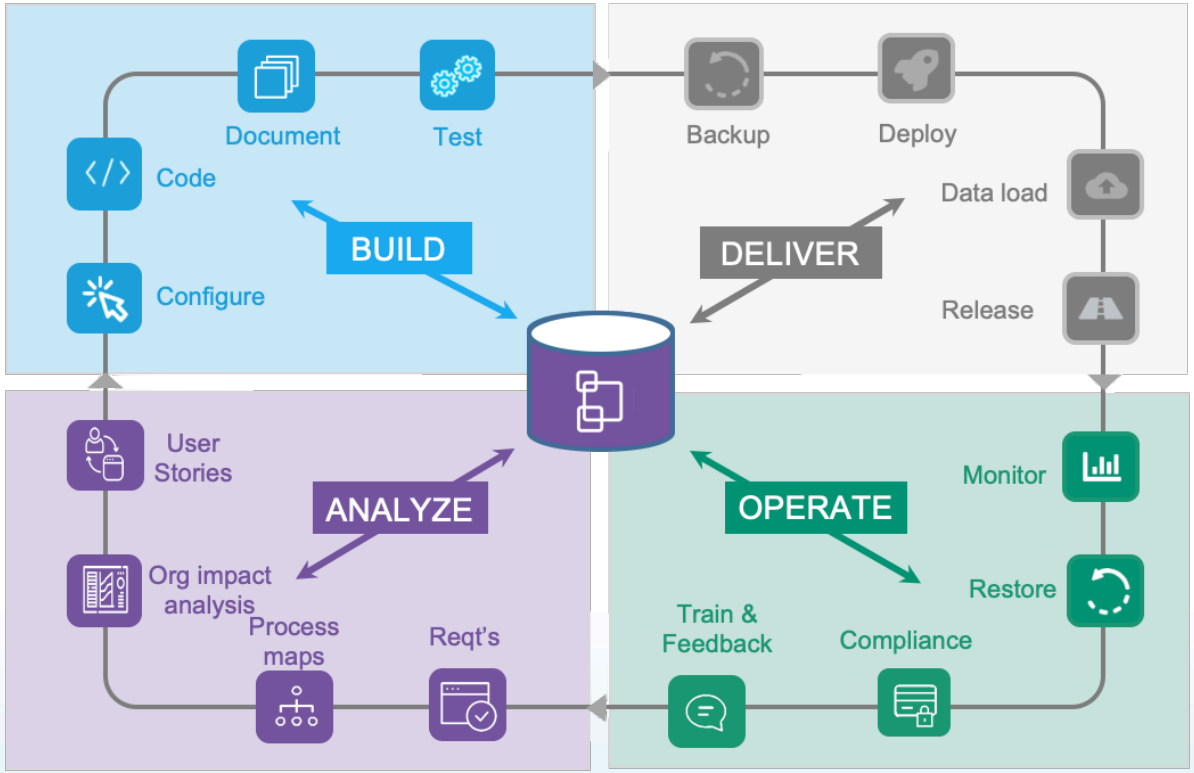
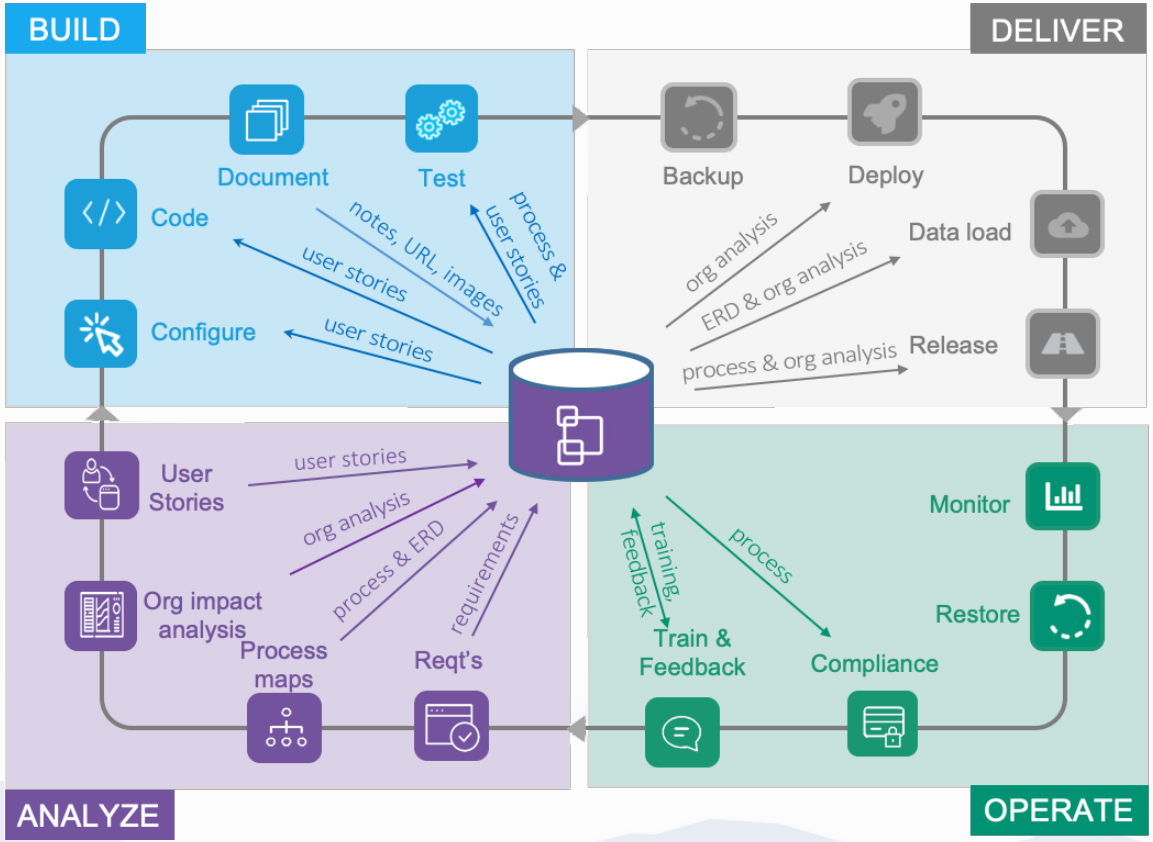
Implementation Lifecycle

Adoption
Agility
Trust



Metadata dictionary: documentation creation & reuse



Documentation creation/reuse

Submit feedback

Feedback

SOW
Suggestions
Random wishes
A few gems

Capture requirements

Raw requirements

Validated and new requirements

Map processes & ERD

Final requirements

Fix tech debt

Optimization identified

Write user stories

User stories

Perform risk analysis

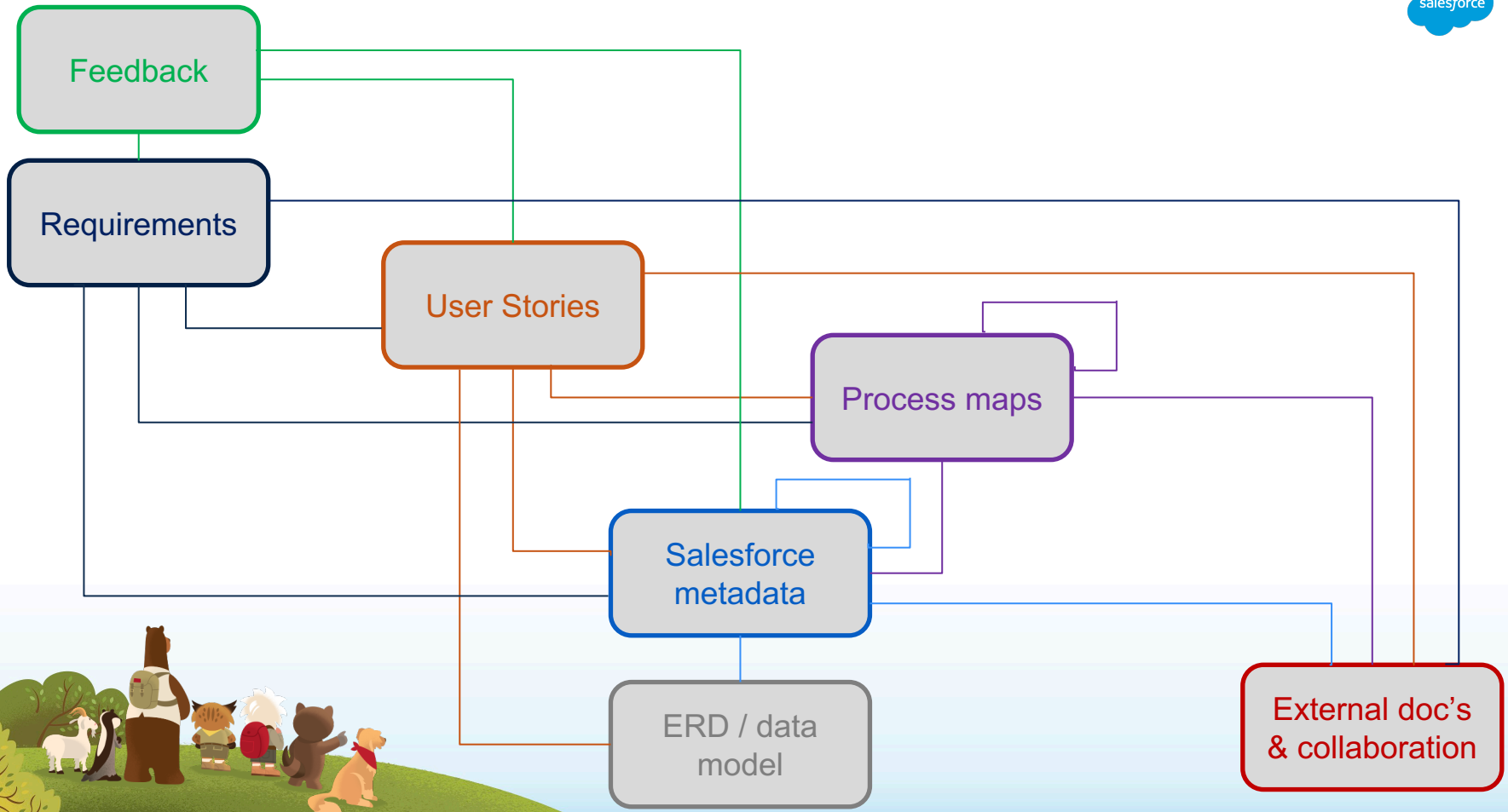
Risk analysis

User stories

Configure, code & test

Documentation
Help docs

Documentation interrelationships [it's complicated]



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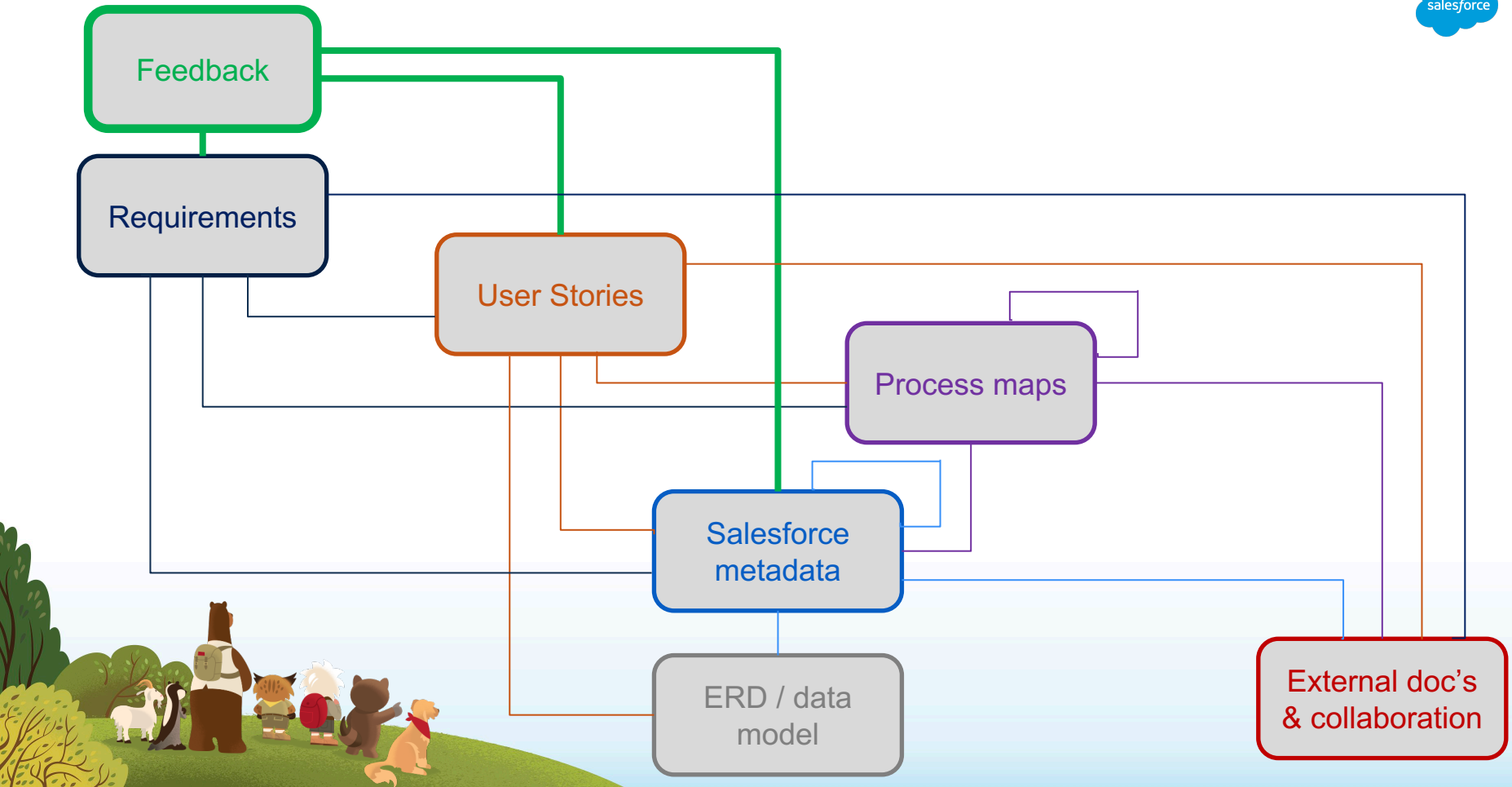

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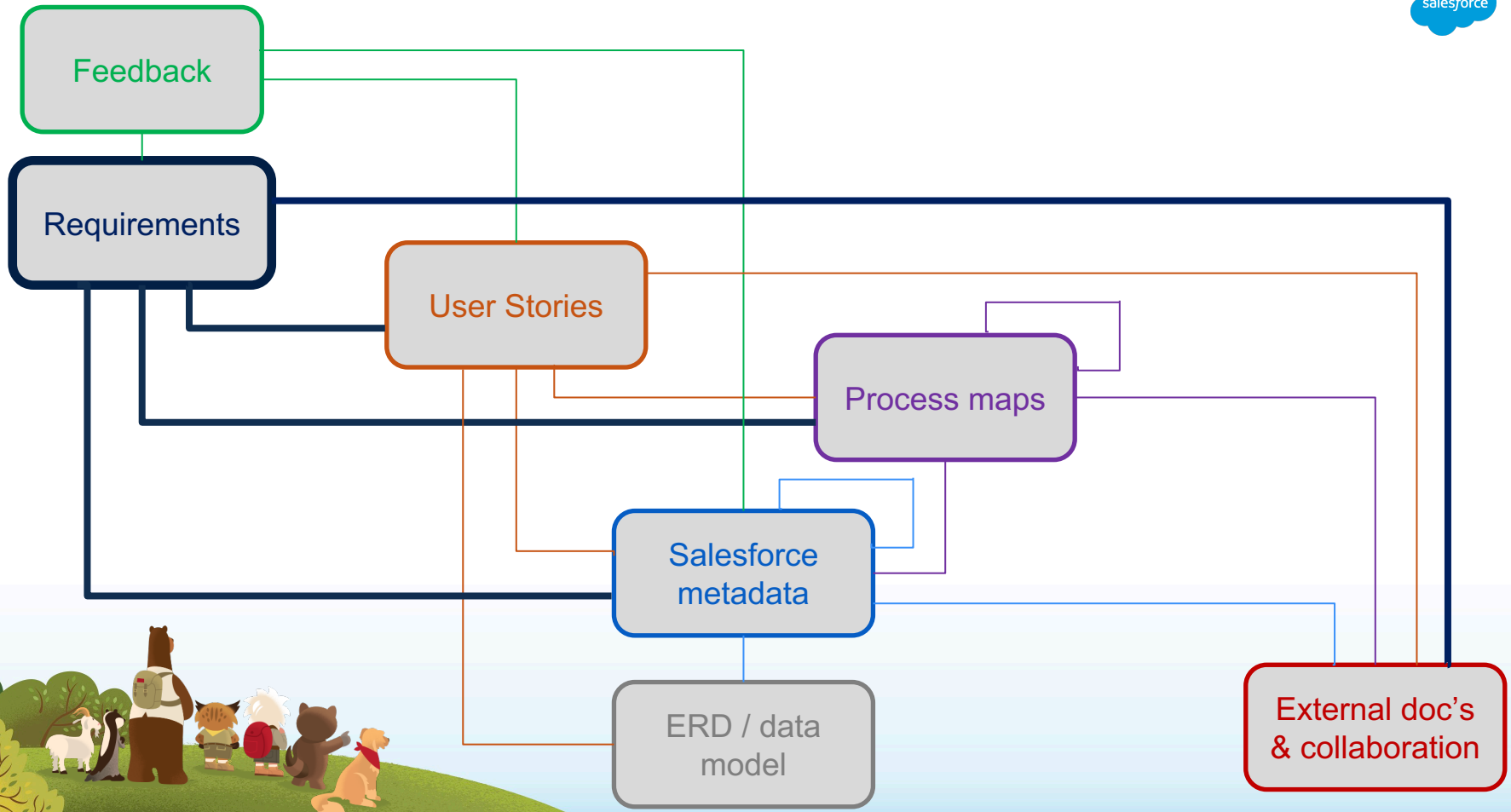

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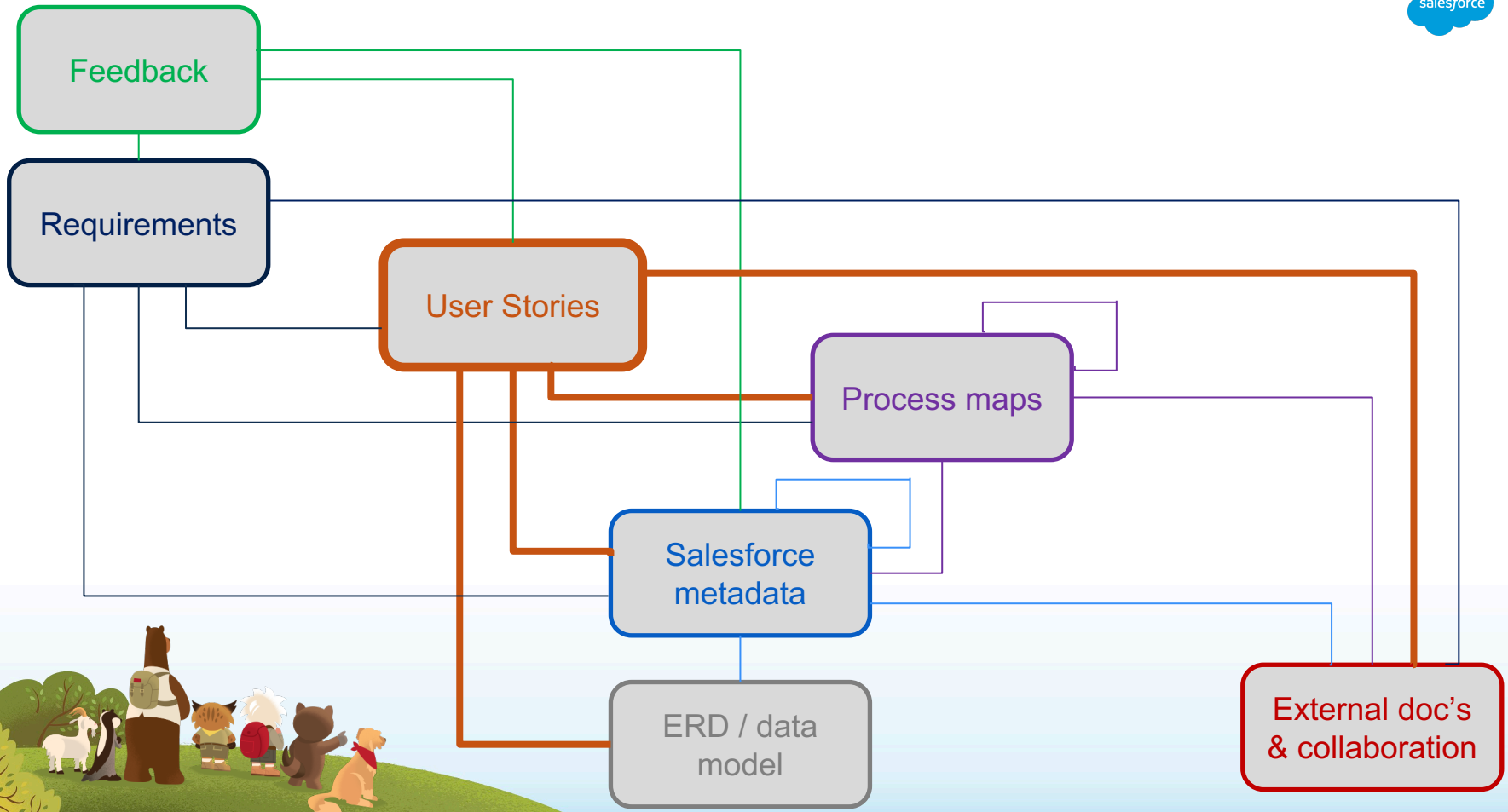

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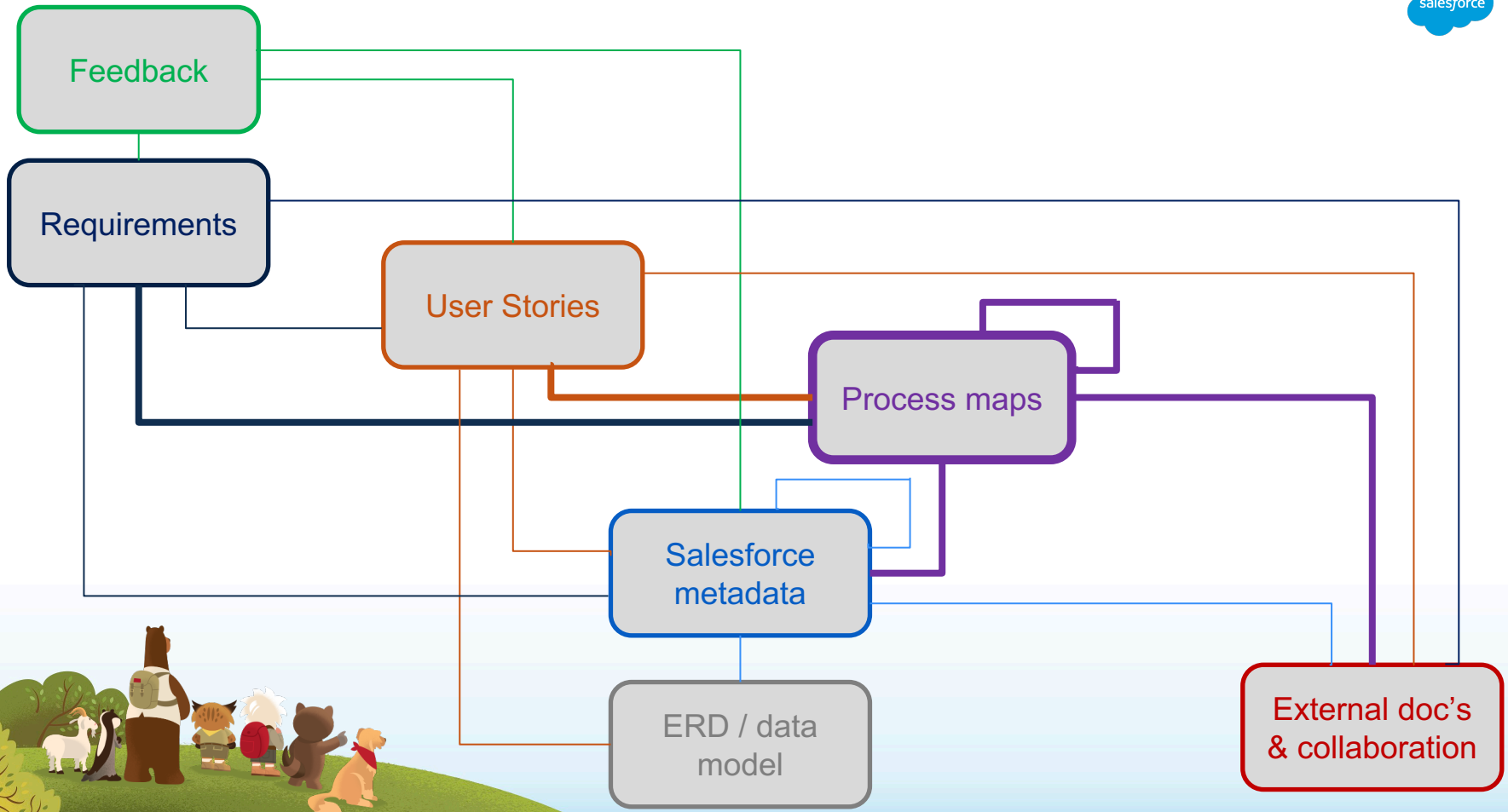

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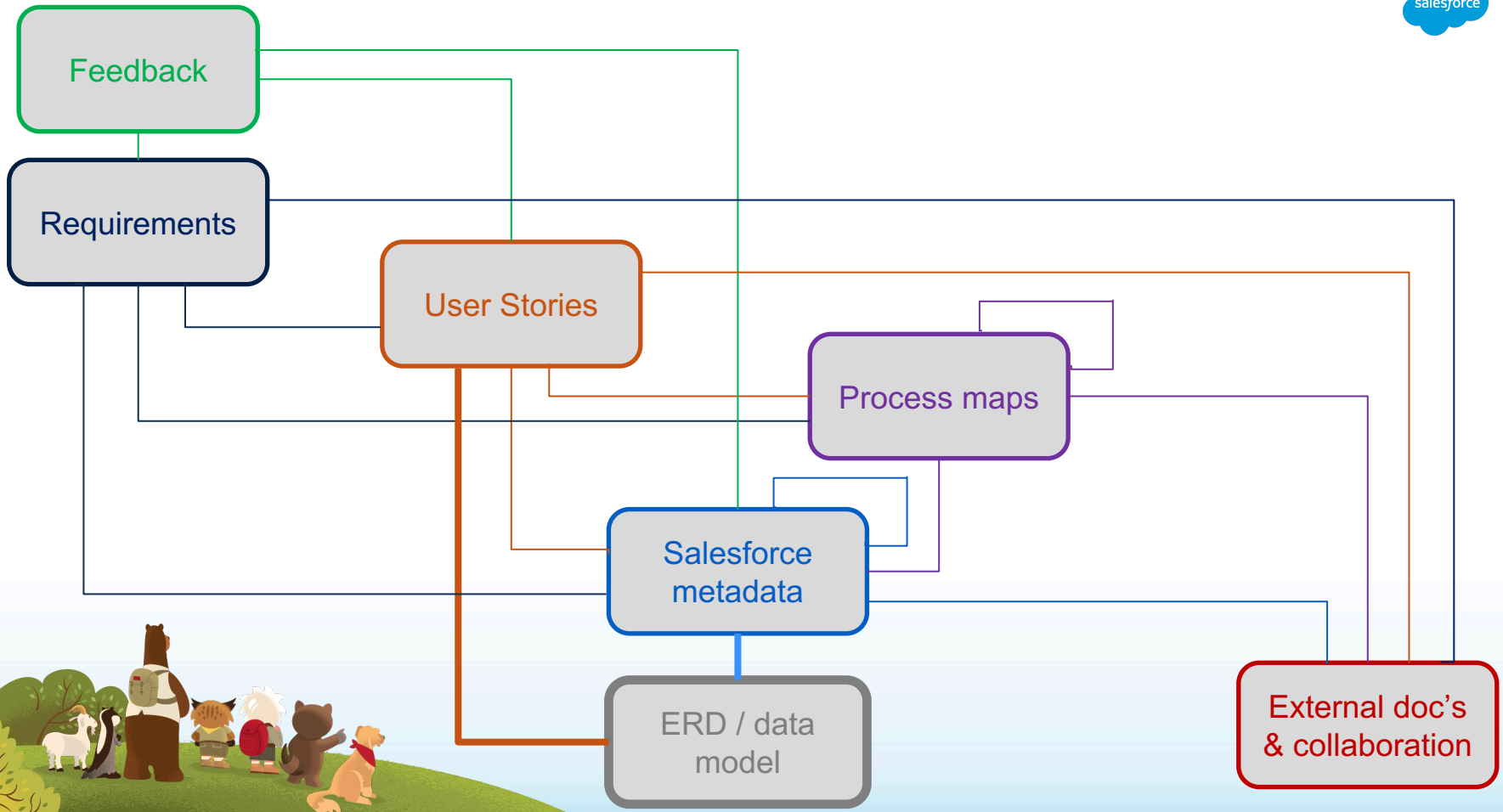

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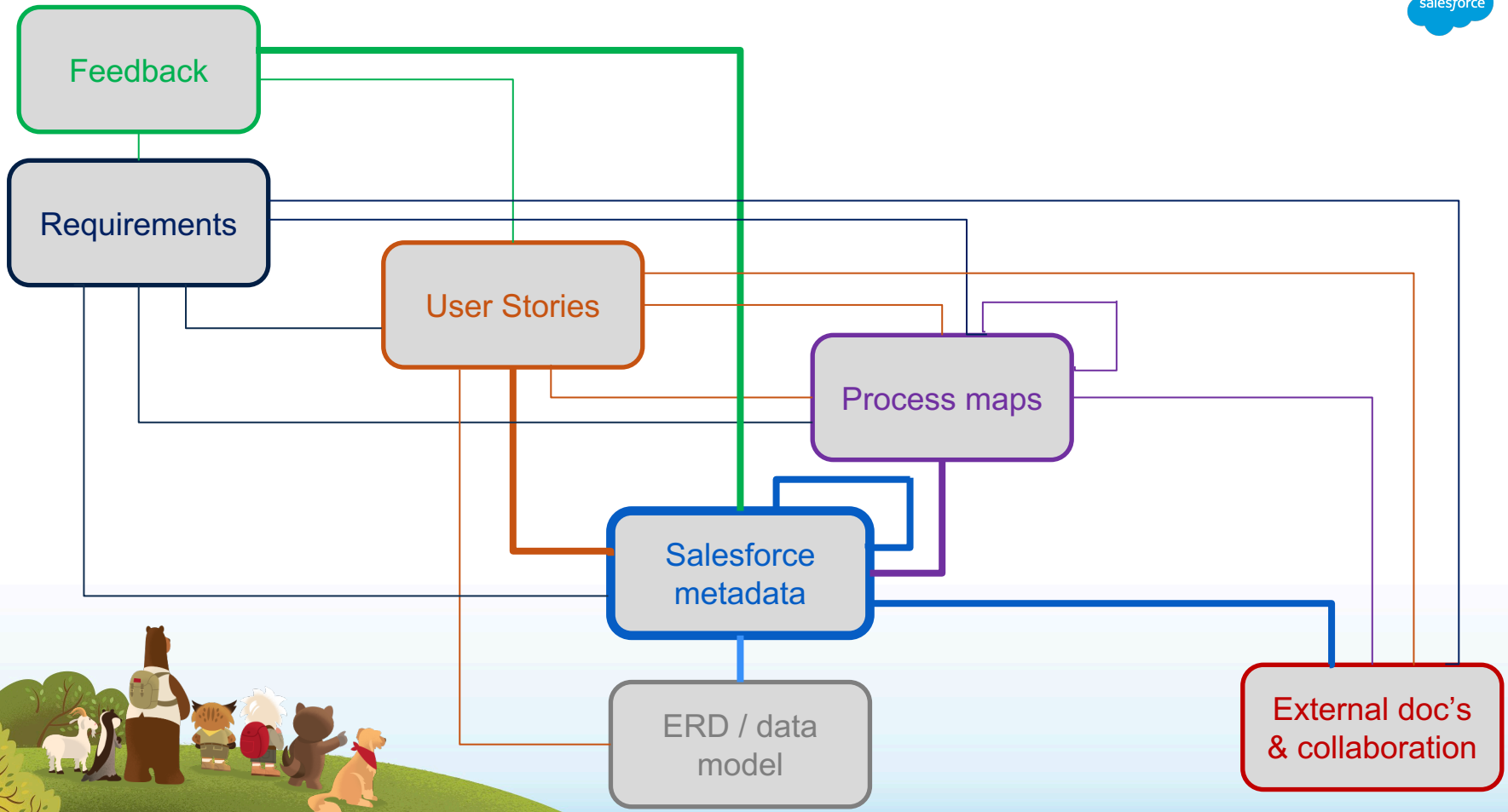


Documentation interrelationships [it's complicated]

Feedback

Requirements

User Stories

Process maps

Salesforce metadata

ERD / data model

External doc's & collaboration

Documentation interrelationships [it's complicated]

Feedback

Requirements

User Stories

Process maps

Salesforce metadata

ERD / data model

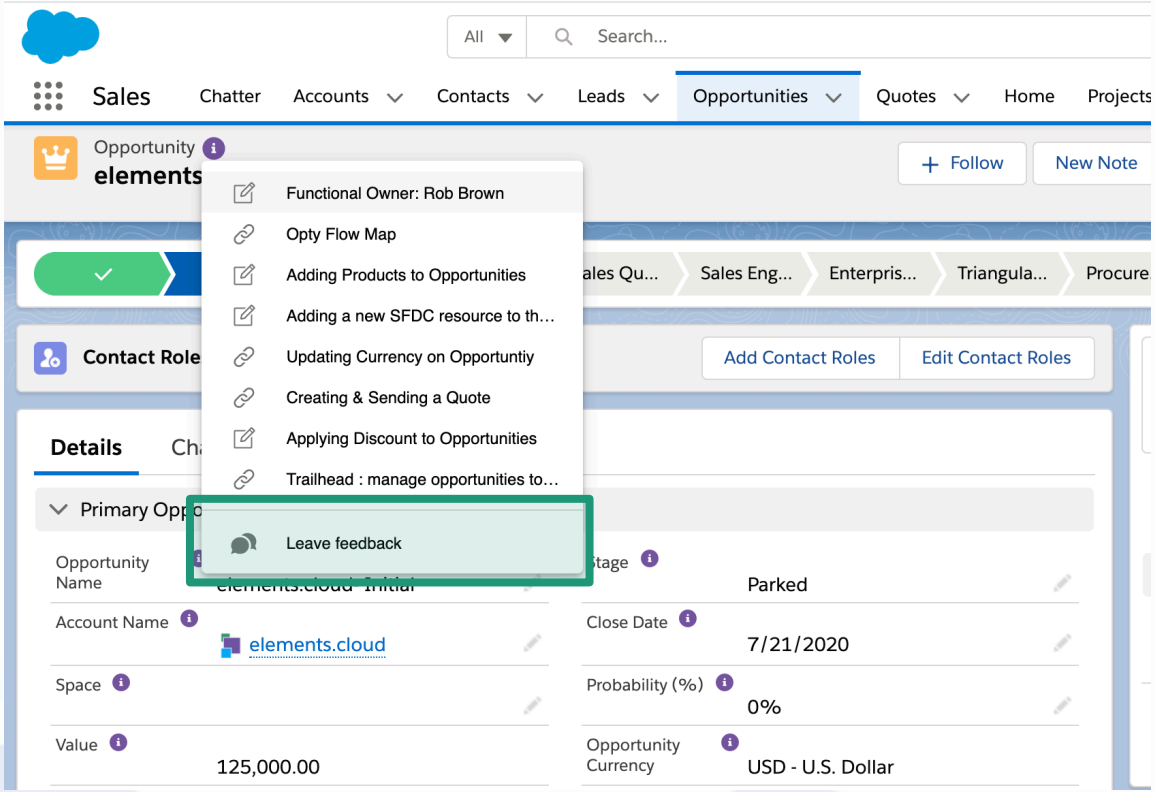
External doc's & collaboration

Content centrally managed

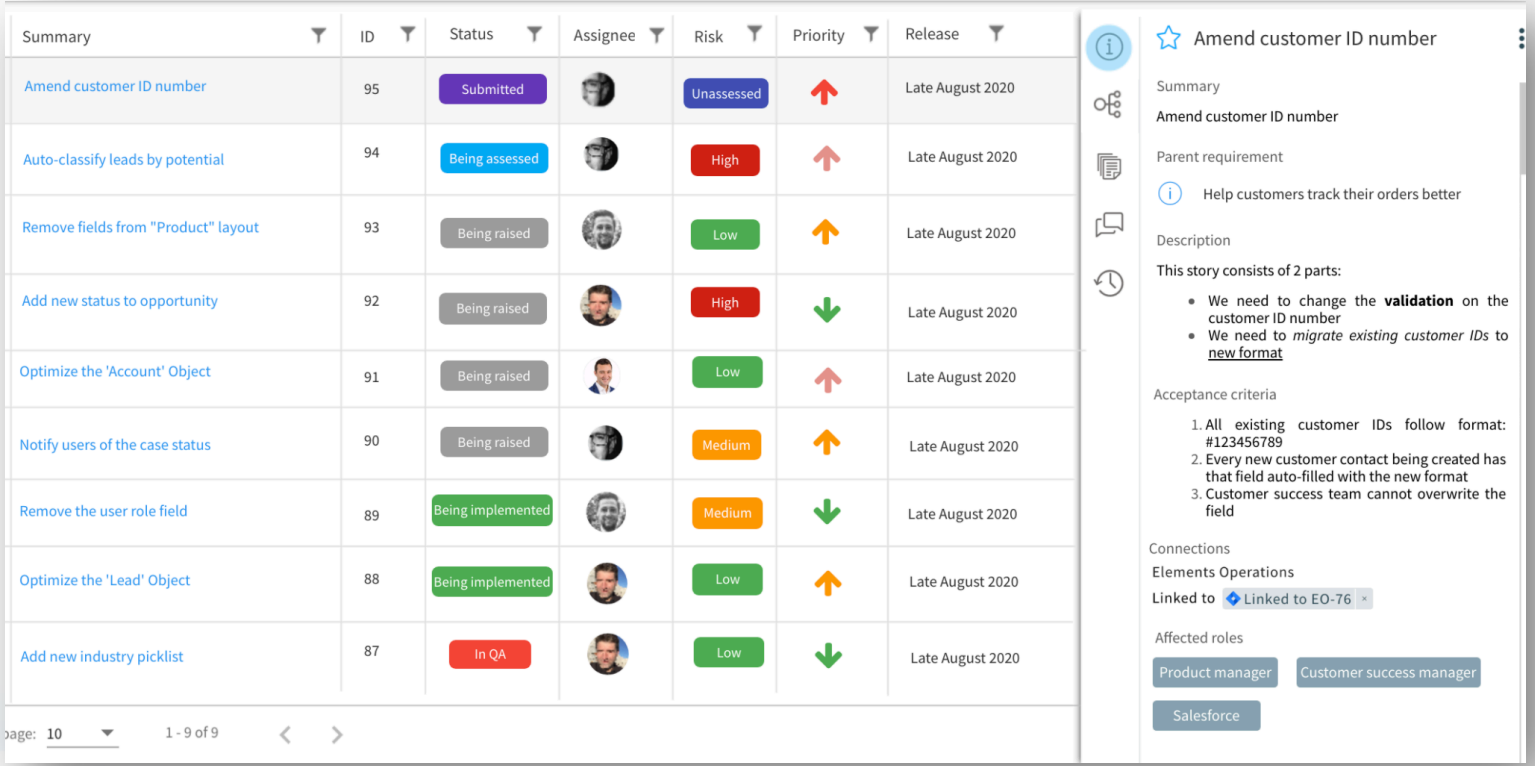
Relationships maintained

Version controlled

Capturing end user feedback / optimization

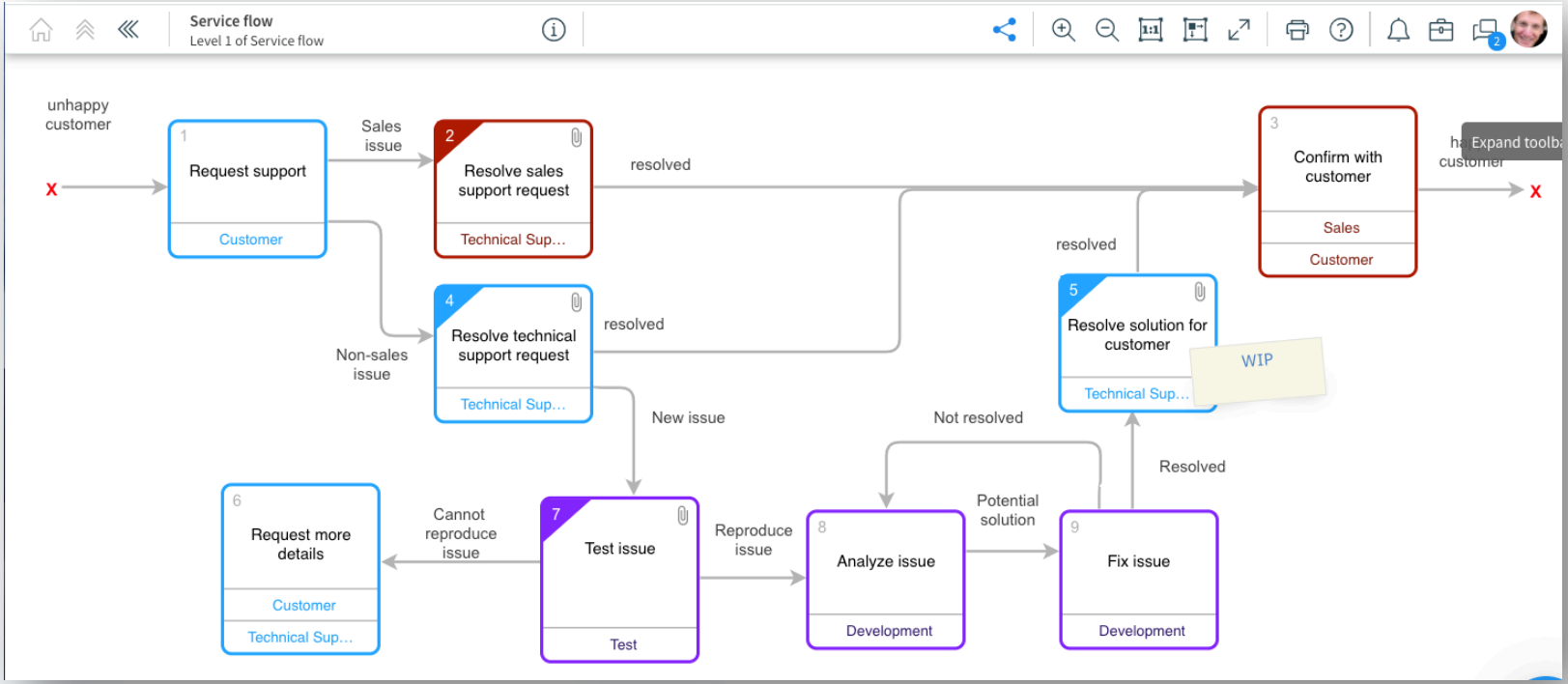


Manage requirements centrally

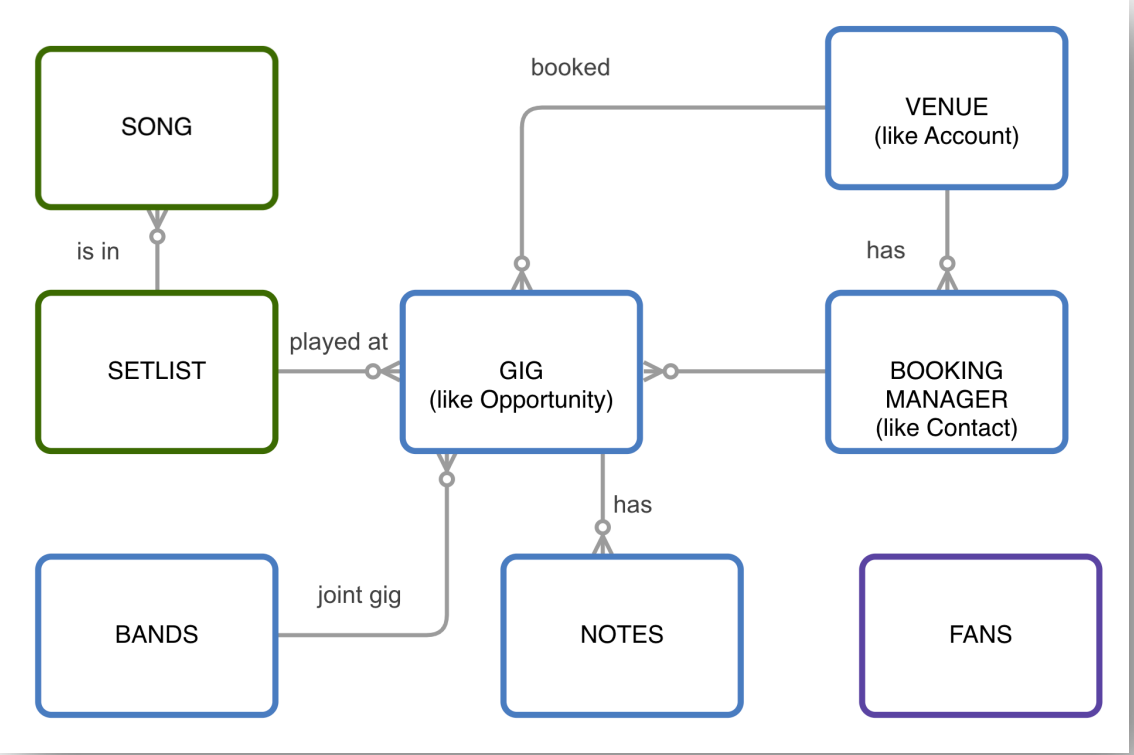


Summary	ID	Status	Assignee	Risk	Priority	Release
Amend customer ID number	95	Submitted		Unassessed		Late August 2020
Auto-classify leads by potential	94	Being assessed		High		Late August 2020
Remove fields from "Product" layout	93	Being raised		Low		Late August 2020
Add new status to opportunity	92	Being raised		High		Late August 2020
Optimize the 'Account' Object	91	Being raised		Low		Late August 2020
Notify users of the case status	90	Being raised		Medium		Late August 2020
Remove the user role field	89	Being implemented		Medium		Late August 2020
Optimize the 'Lead' Object	88	Being implemented		Low		Late August 2020
Add new industry picklist	87	In QA		Low		Late August 2020

Validate requirements with business process diagrams



Update ERD / data model



User story

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

User story and risk analysis

User Story standard format

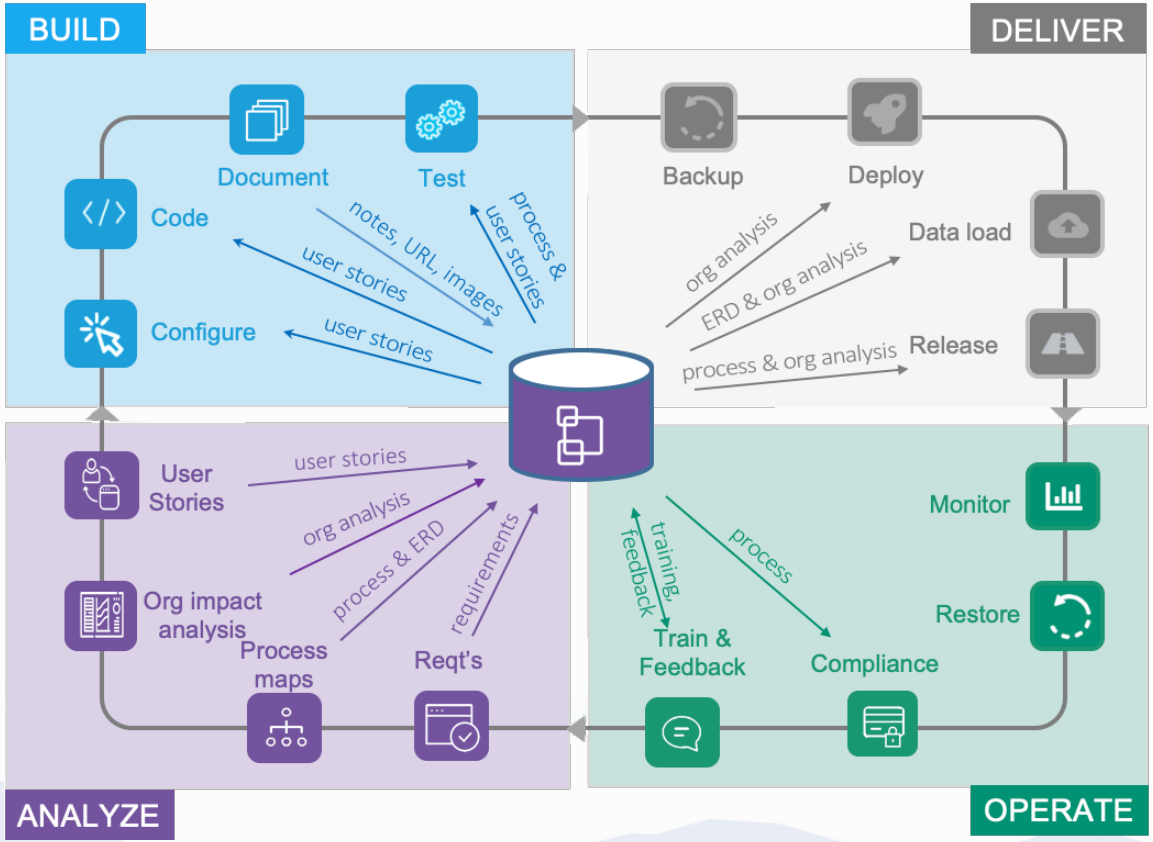
AS A ……. Sales user

I WANT TO …… Add an opportunity not US $

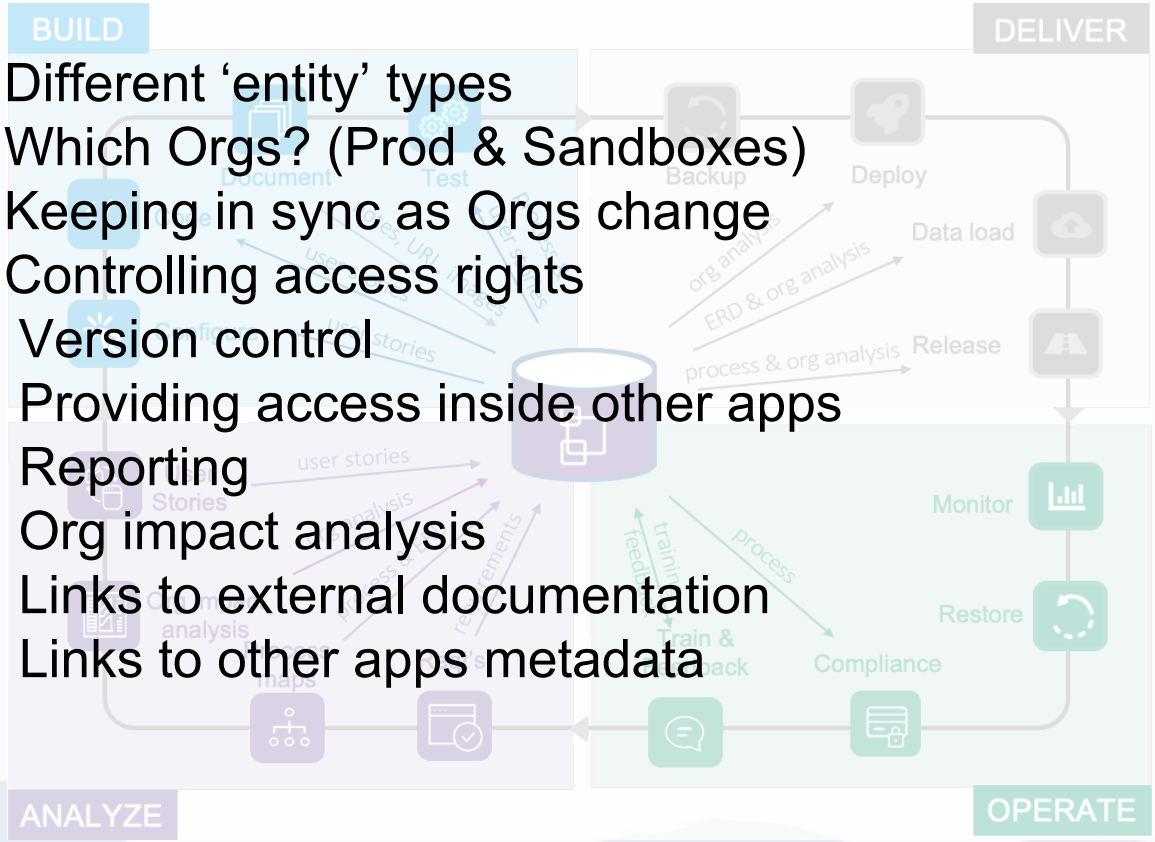
SO THAT I CAN …… Sell to non-US customers

RISK LEVEL High / Medium / Low

Metadata dictionary: documentation creation & reuse



10 reasons why GoogleDocs is not good enough



1. Different ‘entity’ types
2. Which Orgs? (Prod & Sandboxes)
3. Keeping in sync as Orgs change
4. Controlling access rights
5. Version control
6. Providing access inside other apps
7. Reporting
8. Org impact analysis
9. Links to external documentation
10. Links to other apps metadata

Takeaways

- ☑ Fundamental to managing lifecycle
- ☑ Power is in aggregation of content
- ☑ Using GoogleDoc/Office unrealistic

Resources

Success Community: Business Analyst
Training: train.elements.cloud
Contact: ian@elements.cloud @iangotts