

Achieve Application Velocity by Leveraging the Salesforce Agile Accelerator

A White Paper

By Donald R. Hammons, MBA – VP Cloud Strategy – KPI Partners, Inc.
and
Frank Simmons – Client Executive – KPI Partners, Inc.

Abstract

Top performing enterprises need application velocity. Exploitation of upper right quadrant cloud platforms (e.g. Salesforce App Cloud), require fast moving application migration and innovation in order to drive business results. As such, companies can obtain a competitive advantage when leveraging the social, mobile, and strategic benefits of Agile development methodologies, the Salesforce App Cloud, and the Salesforce Labs Agile Accelerator AppExchange package. This paper highlights how to take a best practice (i.e. Agile development) and integrate Agile into your enterprise. The focus of the paper includes considerations and benefits of the Agile investment to business and information technology team(s).

The Challenge

Enterprises with Salesforce investments have an ongoing challenge. The challenge is to implement efficient processes which deliver ongoing support and enhancements to the Salesforce investment while enabling application sponsors to prioritize development objectives, align ROI considerations, and link development to the strategic roadmap. Key challenges to implementation of efficient processes are the ability to deliver application velocity transparency and facilitate rapid risk identification/mitigation. In conjunction with considerations such as social, mobile, partner(s), external entity eco-systems, the Salesforce enterprise sponsors are under increasing pressure to deliver rapid value to the enterprise.

Strategic Considerations

The two major considerations are enterprise alignment and Agile deployment best practices.

In terms of enterprise alignment, the following factors are key to success.

1. Business and IT Executive level commitment to the Agile strategy and tool. This commitment should be communicated by executives to all the key stakeholders. Communications should emphasize anticipated Agile investment enterprise benefits as well as expectations regarding management/individual contributor support.
2. The next area is training. Too many companies “speak Agile” but do not “walk Agile”. In order to “walk Agile”, Agile training and Agile tool training is key. A typical enterprise should have (at minimum) two Agile/Agile tool power users from both the business and IT organizations. Training should be a requirement for any key stakeholder that participates in the Agile process (no exceptions).
3. Finally, a key best practice is to “stay the course”. All communications of Salesforce business/IT enhancements should be based on the content in the Agile tool. Communication updates should occur monthly for core team members and quarterly for executive team members.

In terms of deployment best practices, the following considerations apply to large enterprises:

- (a) The best approach to drive ‘business engagement’. Under this consideration, the aim of the sponsor is to create an environment whereby new implementation priorities, optimization and enhancement targets for Salesforce can be captured, by process and on a global basis
- (b) The mechanisms to be used in ranking inbound enhancement or project queues specific to qualitative (user adoption) considerations and applicable to quantitative return on investment considerations for sanctioned work packages in the queue
- (c) How to best ‘map’ approved enhancements or projects into a velocity based and agile sprint framework so that commitments back to the business, based on in the input queue, can be enabled
- (d) How to evaluate post implementation performance, user adoption and how to best convey to the added value that has been delivered to the business through execution of the intake and optimization model.

Meeting the Challenge

In order to address the challenges outlined in this white paper and considering the strategic imperatives applicable to the role of enterprise sponsors of the Salesforce.com platform, a look at the benefits of Agile Accelerator represents an opportunity for executive sponsors, IT application teams and business unit leaders to create a cohesive approach to global Salesforce optimization for the enterprise.

Agile Accelerator – An Introduction

Regardless of development methodology (Waterfall, Agile or Hybrid) most teams have struggled with consolidating project information from disparate systems and tools such as, project management, emails, spreadsheets, bug tracking, and card walls. Agile Accelerator collapses these disparate sources to a single system of engagement and record for the entire project team and executive sponsors that drives transparency and efficiency.

The key components of the Salesforce platform that drive productivity for any team are:

- a. As a Cloud platform it's a central place for the whole team to record shared information not limited by location, device (mobile), or time zone.
- b. Units of work are organized and stored as related records (Sales Opportunities, Support Cases, IT Feature Requests/User Stories)
- c. Customizable integrated reports and dashboards provide actionable analytical insights.
- d. The integrated collaboration tool, Chatter, provides persistent text-based communication directly linked to multiple records/work units, reports, dashboards and documents.

Let's take a closer look by considering how different personas engage with and benefit from the Agile Accelerator.

Project Managers

- Run meetings from the tool, not emailed PDFs or printed reports, it is more likely than not that as soon as a report, it becomes stale.
- Automate assignment workflows by skill set
- Meeting action items get created as tasks in the tool so their status and level of effort can be tracked.
- Track project velocity and sprint burn-down with built in reports and dashboards, deliver via links to executive sponsors to provide the freshest data.
- Provide customers access to the tool with Salesforce Communities for closer collaboration.

Business Analysts

- Create user stories as Work records and assign level of effort/story points for sprint planning

- Leverage standard reports for sprint planning and prioritization
- Run story review/readout, and sprint planning meetings with customers from the tool, capture edits in real time.
- Collaborate with team members as well as internal and external customers via reports and Chatter, recording approvals and revisions right on the story record.

Developers

- Track updates to requirements in real time. Revision dialogue is maintained on the Work record, eliminating confusion.
- Track sprint velocity in real time to provide transparency and set expectations with other team members.

Deployment Managers

- Organize releases with Builds to group Work items.
- Integrate Agile Accelerator with GITHUB hub to manage version control (beta)

QA Managers

- Maintain test scripts, results, bugs and fixes linked to user stories
- Global visibility of test assignments and progress with reports and dashboards.

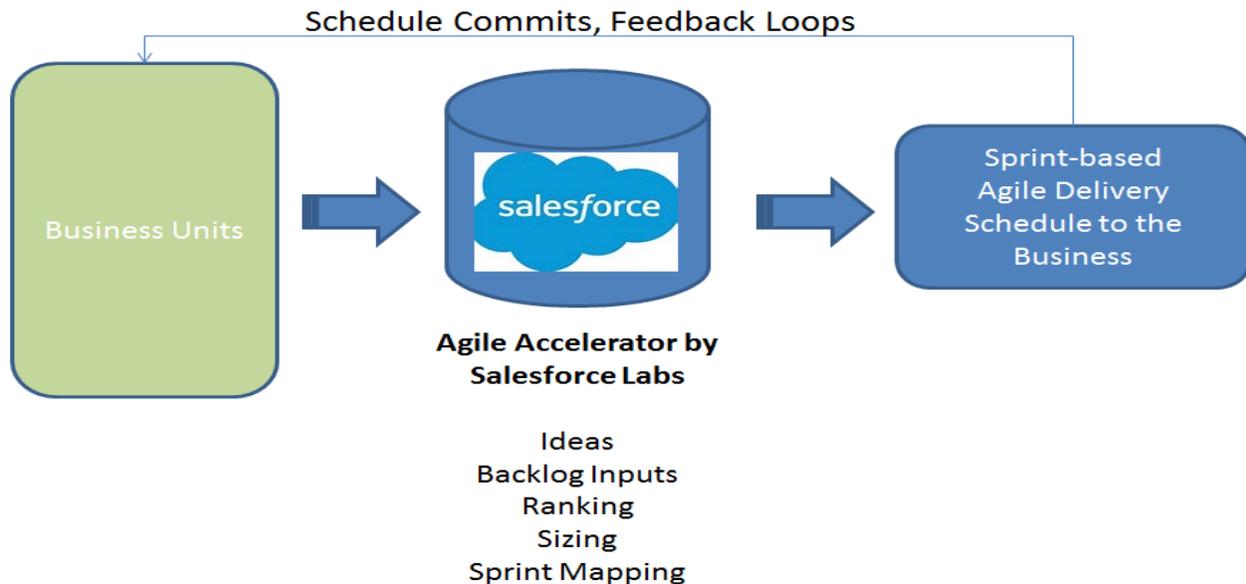
Requirements Intake and Backlog Management

Best practices for Salesforce optimization include enterprise-wide thought leadership capture as a component to prioritizing net new Salesforce enhancements based on individual geographical and/or business unit needs. While various tools and processes exist to support the capture of inputs for the Salesforce.com development backlog, fundamental processes include a high level of engagement between Information Technology and Apps Teams who own the Salesforce Roadmap within the enterprise and corresponding business unit leaders and user communities whose aim is to drive velocity and process optimization within the enterprise ecosystem.

At its core, the process for capturing backlog or enhancement recommendations from the business requires a significant degree of human touch between IT and the Business and under best practice models, this interaction is supported by collaboration and content management tools such as Agile Accelerator from the Salesforce AppExchange. Fundamentally, a three-fold process is necessary for enterprises to leverage best practices which are summarized as:

1. Creation of a business requirements or 'idea capture' mechanism whereby the Business Unit leadership and sponsors of the Salesforce Platform are empowered to make suggestions for the future development or enhancement queue. Under this approach, access to tools such as Salesforce's Ideas object (native) or Agile Accelerator can provide a needed cloud tool-based mechanism to drive such inputs from the business.
2. Transparency within the backlog in terms of how the suggested enhancements and/or backlog use-case and user stories are being ranked in terms of roadmap alignment and organizational priorities and the resulting architecture-level 'sizing' of the individual work packages for sprint mapping. Under this scenario, the business teams have already made the 'inputs' into the backlog from Step 1 above and now seek to understand where their backlog item ranks in conjunction with other business-driven backlog inputs, how it's sized in terms of potential development complexity and adoption, and if sanctioned – where in the overall sprint schedule the specific use-case or enhancement request sits in terms of production release and general availability.
3. The final phase is validation from the IT and Apps Teams during deployment which may require business team interactions during QA and User Acceptance Testing (UAT) windows within the sprint schedule. Post Production release support is then a final step to ensure the business is (a) satisfied with the release and (b) driving the necessary business level user adoption strategies to ensure high impact and ROI of the recently released enhancement. Tools such as Agile Accelerator can be a strong catalyst for the achievement of the intake process, transparency during enhancement queue or project rankings, and full visibility to the sprint schedule applicable to the release of the enhancement from the backlog. Figure 1 below provides a visual applicable to this process:

Figure 1 – Backlog Planning and Execution – Engagement Model



Summary

Enterprises that have invested in the Salesforce platform need to establish agile and rapid delivery capabilities to keep pace with changing business landscapes and the pace of platform evolution. The Agile Accelerator, from Salesforce Labs, provides a framework that engages the wide variety of internal and external stakeholders necessary for successful requirements acquisition and delivery. Because the Agile accelerator is native to the Salesforce platform, teams also benefit from low friction communication via Chatter collaboration, Salesforce1 mobile capabilities and the transparency of standard and customizable reports and dashboards.

The business benefits of employing an Agile framework in support of Salesforce platform maturity are significant. Through rapid adoption of the Agile models including personnel, processes and tools such as Agile Accelerator, organizations chart a course for capturing the collective thought leadership of the organization while in parallel offering a rapid and systemic framework for the execution of the highest value-add components applicable to Salesforce optimization across the enterprise eco-system. Beyond Salesforce, this Agile model combined with personnel, process and tool maturity offers additional benefits to business and IT leaders as cloud platform adoption across the enterprise IT stack becomes prevalent. The most successful sponsors of such applications will benefit from this type of organizational change management and agility.

About the Authors



Donald R. Hammons

California, USA



Donald R Hammons, MBA is a cloud entrepreneur and career technologist. As a U.S. Navy telecommunications expert, Don won the 1997 Naval Communications Atlantic Sailor of the Year award for his work in driving IT innovation and process improvements for the Atlantic Fleet Telecom Command. In his civilian career, Don has been a frequent contributor to the PM World Journal, he holds the MBA in Program Management and International Business from the University of Texas at Dallas and he currently resides in the Silicon Valley where he holds several key information technology positions including the Founder/CEO position for Perigee360, Inc. Don also serves as Vice President of Cloud Strategy for KPI Partners, Inc. and is an Advisory Board Member for San Francisco start-up mxHERO - a Mail2Cloud platform technology. He can be contacted at donald.hammons@gmail.com.



Frank Simmons

Massachusetts, USA



Frank Simmons is Salesforce.com certified professional with over 23 years proven business consulting and project management accomplishments in IT, manufacturing, real estate, and government agencies. He is a strong advisor to executive management providing organizational leadership in the area of enterprise cloud adoption and platform rollouts supporting global organizations with multiple business units. At KPI Partners, Inc. as a Client Executive, Frank supports sales enablement and delivery for KPI's cloud-enabled customer base. Frank resides in Boston, Mass. Frank can be contacted at frank.simmons@kpipartners.com