

THE ENABLEMENT PROCESS

The end-to-end system implementation process to ensure your investment in Salesforce moves the business forward
-and-

Why your team will love your partnership with Artichoke

salesforce

PARTNER

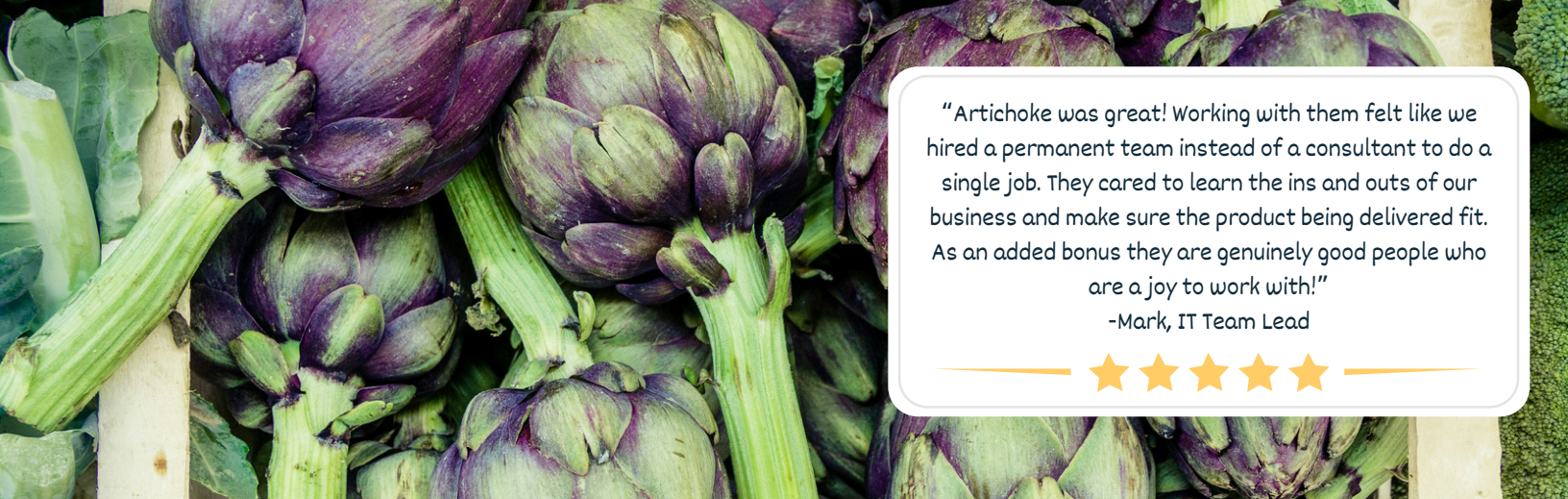




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“Artichoke was great! Working with them felt like we hired a permanent team instead of a consultant to do a single job. They cared to learn the ins and outs of our business and make sure the product being delivered fit. As an added bonus they are genuinely good people who are a joy to work with!”

-Mark, IT Team Lead



INTRO: GETTING TO THE HEART OF THE SOLUTION

This short eBook previews what a partnership with Artichoke Consulting looks like on your next Salesforce project, and why we believe your team will love the end result.

We call our implementation approach “Enablement”. Enablement is tailored to maximize ROI on the transition to a new system or processes by minimizing the pain of the change involved. The Artichoke team has spent years fine tuning this approach and leveraging it to exceed customer expectations.

This eBook lays out the Enablement process with text and visuals, beginning with a quality discovery, and building upon the discovery deliverables through build and test to work towards a successful and fully adopted go-live, maximizing the impact of all time spent on documentation.

Enablement is broken into three parts, The Base, The Heart, and The Bloom. These buckets roll-up the traditional discovery, demo, test, and deploy project model. For those curious, the Enablement approach embraces the core tenets of the Agile Methodology.

We have presented on Enablement at several conferences, and have an accompanying recorded session to this eBook [here](#), and the final page includes a link to sample deliverables. We hope you enjoy!

-Team Artichoke





THE BASE

DISCOVERY AND ROADMAPPING

"[Artichoke] was great to work with. Asked great questions to understand complex processes and provide solutions."

-Tyson, Account Manager





THE BASE

DISCOVERY AND ROADMAPMING

Enablement begins with discovery, our chance to find out everything we need to align Salesforce solutions directly to our client's business goals.

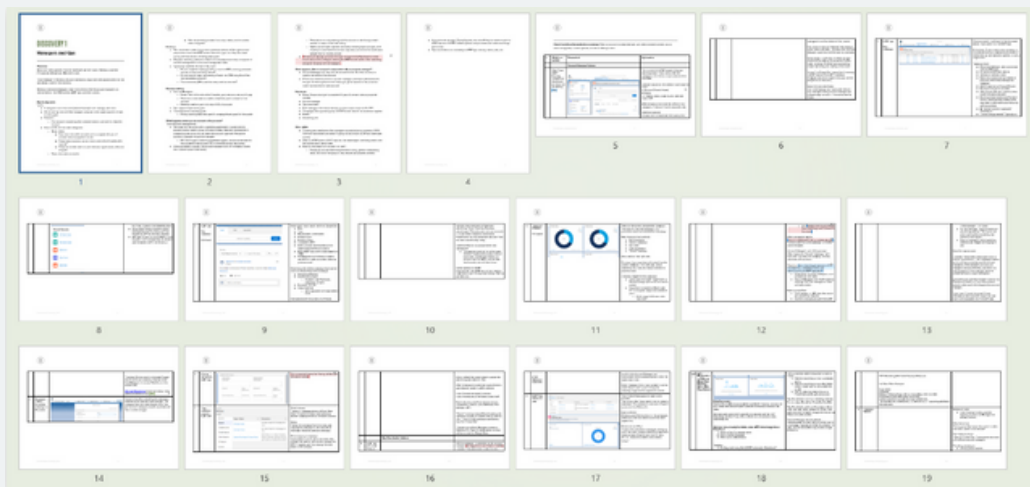
The goal of discovery sessions is to fill our development toolkit with a full context of ideas and insights from end-users, including current state processes and systems, company language and lingo, current workarounds and pain points, and future state goals. This is likely familiar to you.

We run discovery sessions for all end user groups impacted by the project. In these sessions the end user groups explain:

1. What do you do?
2. How do you do it?
3. When and how do you communicate with others?
4. What are your pain points and hopes for the future?

By capturing this information, with accompanying current state screenshots, we are 100% informed on business processes and goals for the future.

How Enablement differs: We document discovery sessions in granular detail, with side-by-side text from the conversation with accompanying screenshots of the end users processes. This documentation provides a 360-degree understanding of what's working, what isn't, and where we want to go from here. The detail is captured down to the field level.

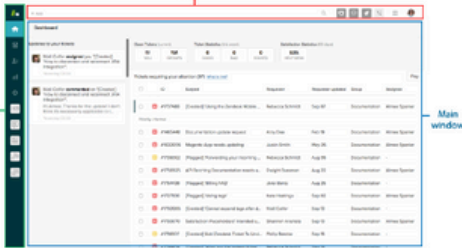


Here is a zoomed out view of all the information captured in a 60 minute discovery session. This can then be turned into requirements.



THE BASE

DISCOVERY AND ROADMAPING

#	What's on screen	Screenshot	Explanation
Current Customer Service System [ZenDesk]			
1	Customer Service Homepage	 <p>Customer Service reps find this page very useful and are not requesting changes</p>	<p>Customer service logs into Zendesk. This is the homepage.</p> <p>The homepage includes:</p> <ol style="list-style-type: none"> 1. Sidebar with links <ol style="list-style-type: none"> a. Home b. My Tickets c. Dashboards d. Knowledge Base e. Settings 2. Top Toolbar <ol style="list-style-type: none"> a. Search b. Quick Add (i.e. create new case) c. Login/out of Live Chat 3. Main Window <ol style="list-style-type: none"> a. Quick View Dashboard [row on top] <ol style="list-style-type: none"> i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login; similar to chatter <p><i>Pain point: all customer service users, including managers, see this same home page. Managers would like a higher-level view, i.e. how many cases open by rep and by type. Managers usually only have 3-5 tickets open in their own queue, so the list view does not need to take up so much of the screen.</i></p>
2	Inbound Phone Call	N/A	<p>Customer service receives an inbound phone call from a customer. Customer service manually searches in ZenDesk for the phone # on an existing account. If the phone # exists, they link the case to that account. If not, they create a new Account (creating a new Account is covered in business process document #2)</p> <p><i>Pain point: IVR is run outside of the system today. This is a potential upgrade for phase 2. Pros: automatically create cases and link to existing accounts</i></p>

Here is a zoomed in view on the level of detail captured for each step in a business process

Equipped with this level of detail, the Artichoke team is ready to make Salesforce development decisions to improve processes for end users, management, and other stakeholders.

Up next, you will see how the granular discovery documentation is leveraged through build, test, and deployment to keep the project on track and build confidence with stakeholders.

To wrap up discovery, we document requirements (tied back to the process documentation), and provide a project roadmap. We also begin working with client stakeholders and project sponsors to build scope and budget consensus at this time.

Where we are:

1. We are ready to start iterative development, using the same shared story
2. We “speak the language” of the client, eliminating communication debt

Pitfalls avoided:

1. By eliminating miscommunication at Discovery, we greatly reduce communication, process and technical debt later on
2. Armed with this level of detail, we will not need to re-ask stakeholders for the same information again



THE HEART

BUILD AND DEMO

"Artichoke is incredible to work with!
They make projects flow so smoothly and
quickly. Excellent communication and
speedy updates/response times. Can't
recommend highly enough!"

-Cris, Account Manager





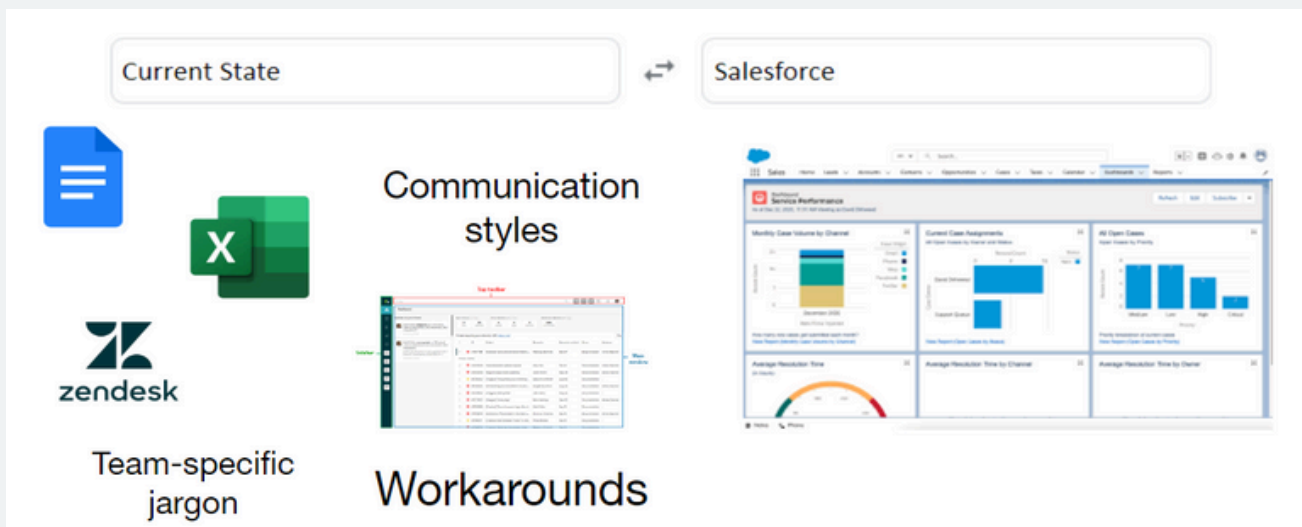
THE HEART

BUILD AND DEMO

After discovery, we shift focus to iterative build and demo.

To solution and build a process prototype in Salesforce, we leverage the discovery documentation to:

1. Translate essential existing processes into Salesforce
2. Consolidate disparate processes into the Salesforce workflow
3. Integrate Salesforce workflows with necessary third-party systems



To complete the build, we leverage standard Salesforce functionality where possible and customize where standard Salesforce falls short. The Artichoke team includes a full suite of certified technical architects, solution architects, developers, and configuration experts to work through this process.

How Enablement differs: Before we demo processes back to the client, we confirm our prototype against the granular discovery documentation to confirm the processes and pain points are resolved. Matching discovery documentation to our build is the seed of our training documentation.

When processes are built in Salesforce, we host live demos and invite end-users to log in for a test run. We confirm the prototype addresses their needs and is intuitive and easy to use. Any feedback from the demo is quickly addressed and the solution is kept up-to-date.



THE HEART

BUILD AND DEMO

How Enablement differs: In the demo, end users login to the system and walk through the process and give real-time feedback. Our deep understanding of end user processes (from discovery) allows us to have a very detailed conversation.

During the demo, we draw direct parallels between current state and future state processes. This includes what process steps are the same, what has changed, what has been improved, and why. Communicating with this detail confirms end users understand the solution and can provide valuable insight on potential improvements from a common baseline with the Artichoke team.

At this point in the project both the client and Artichoke team understand where we are going, and why.

#	What's on screen	Screenshot	Explanation
1	Customer Service homepage - Zendesk		Customer service logs into Zendesk. This is the homepage. The homepage includes: 1. Sidebar with links a. Home b. My Tickets c. Dashboards d. Knowledge Base e. Settings 2. Top Toolbar a. Search b. Quick Add (i.e. create new case) c. Logout of Live Chat 3. Main Window a. Quick View Dashboard (row on top) i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login, similar to chatter
	Customer Service homepage - Salesforce		The homepage includes: 1. Links see detail below a. Home b. My Tickets c. Dashboards d. Knowledge Base removed for phase 1 e. Settings removed for phase 1 2. Top Toolbar a. Search b. Quick Add to create new cases see detail below c. Logout of Live Chat removed for phase 1 3. Main Window a. Quick View Dashboard (row on top) i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login, similar to chatter Functionality in the tab dropdown includes: [1] My Tickets: click 'Cases' [1c] Dashboards [2] Quick Add: to create a case, click 'Cases' and 'New' Accounts and Contacts are new tabs on this screen

This is a sample of the demo documentation. The top screenshot is the homepage of a legacy system. The numbers correlate 1:1 to matching functionality in the new Salesforce process on the bottom screenshot.

Where we are:

1. We are iterating through build and demo until we reach broad agreement that the new solution works
2. Getting end users into the system is preparing for end user testing and adoption
3. By speaking directly to wants and needs from discover, we generate excitement, enthusiasm, and momentum towards go-live

Pitfalls avoided:

1. No wasted time. Deming from our detailed discovery ensures that every part of our prototype is purposeful
2. The client team 100% understands the solution
3. Any change request impact is much clearer



THE BLOOM

GO-LIVE AND USER ADOPTION

"Super organized and great user support. The result was a very quick adoption rate from our users and ease of implementation. Win/win for everyone!"
-Sabrina, System Administrator





THE BLOOM

GO-LIVE AND USER ADOPTION

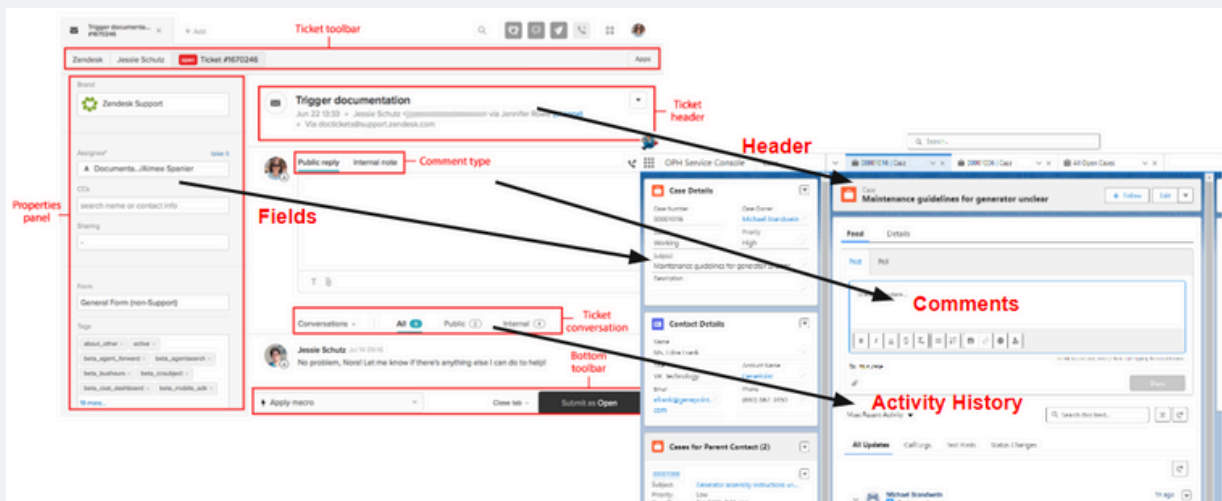
After we have reached consensus on the build, we move forward into user acceptance testing (UAT) and go-live. Enablement's UAT, and user training and adoption approach is unique among Salesforce implementation partners, ensuring end users of varying technical savvy are prepared for coming system and process changes on go-live day.

How Enablement Differs: This is where Enablement's consistency in deliverables, building on our discovery throughout the project, pays dividends.

Here's an outline of our UAT and user training process, with visuals of Enablement deliverables, for this phase of the project:

1-For UAT and training, use the same Salesforce environment the end users logged into during the demos. This prevents environment confusion.

2-Share role-based user guides that includes a detailed side-by-side view of pre-Salesforce processes (from Discovery), and the new Salesforce solution. This is the final version of documentation was created during build and reviewed during demos.



Each role, or type of user, has a guide specific to their job.



THE BLOOM

GO-LIVE AND USER ADOPTION

3-Partner with stakeholders and management to facilitate UAT and go-live that is tracked and moves at a reasonable pace. Hold training sessions as required

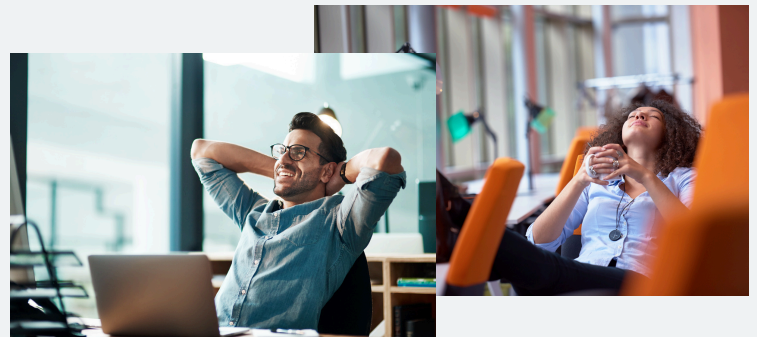
	Pass = Proficient								
	No = Pending								
	N/A = Not applicable for role								
		Job functions							
Role	Team Member	1	2	3	4	5	6	7	
Acct Mgr	Mary Lee	Pass	Pass	Pass	Pass	Pass	N/A	N/A	
Acct Mgr	Ted	Pass	Fail	Fail	Fail	Fail	N/A	N/A	
Acct Exec	Paulina	Pass	Pass	Pass	Pass	Fail	N/A	N/A	
Acct Exec	Tyler	Pass	Pass	Pass	Pass	Fail	N/A	N/A	
Acct Dir	Kyle	Pass	Fail	Pass	Pass	Pass	Pass	Pass	
VP Sales	Kyle	Pass	Fail	Pass	Pass	Pass	Pass	Pass	
CRO	Susan	Pass	N/A	N/A	N/A	N/A	Fail	N/A	
System Admin	Willow	Pass	Pass	Pass	Pass	Pass	Pass	Pass	
	Task								
	1	Accessing Salesforce, understanding the homepage, dashboards							
	2	Creating new Leads, converting Leads to Opportunities							
	3	Working through the Sales Process Opportunity path							

This is Enablement’s UAT tracker.

Each role has processes in Salesforce they must know for go-live. These processes are itemized and linked to a section in a user guide.

When a person successfully completes that section of the user guide in UAT, they mark that item as a ‘Pass’

When all end users and stakeholders are comfortable with UAT and training, we are ready for a fun, foundational, and pain-free go-live.



Where we are:

1. A successful go-live isn’t a stressful event, it’s a celebration!
2. New Salesforce users are well-equipped with role-specific user guides and have spent adequate time practicing in their new environment before go-live. Their most critical feedback has already been adopted.
3. Lower-priority feedback is organized and ready to phase in over time.

Pitfalls avoided:

1. Major breakdowns at Go-Live.



SAMPLE DELIVERABLES

Please use this [link to a public Google Drive](#) with sample deliverables for each phase in the Enablement process, including:

01_Project Planning and Estimate Sheet (**bonus item not covered in this eBook*)

02_Discovery Process Capture

03_Build (*sample for one requirement*)

04_User Guide and Demo Documentation

05_Go-Live Readiness (UAT) Tracker



THANK YOU FOR READING!



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