Idlewild

Implementation Methodology
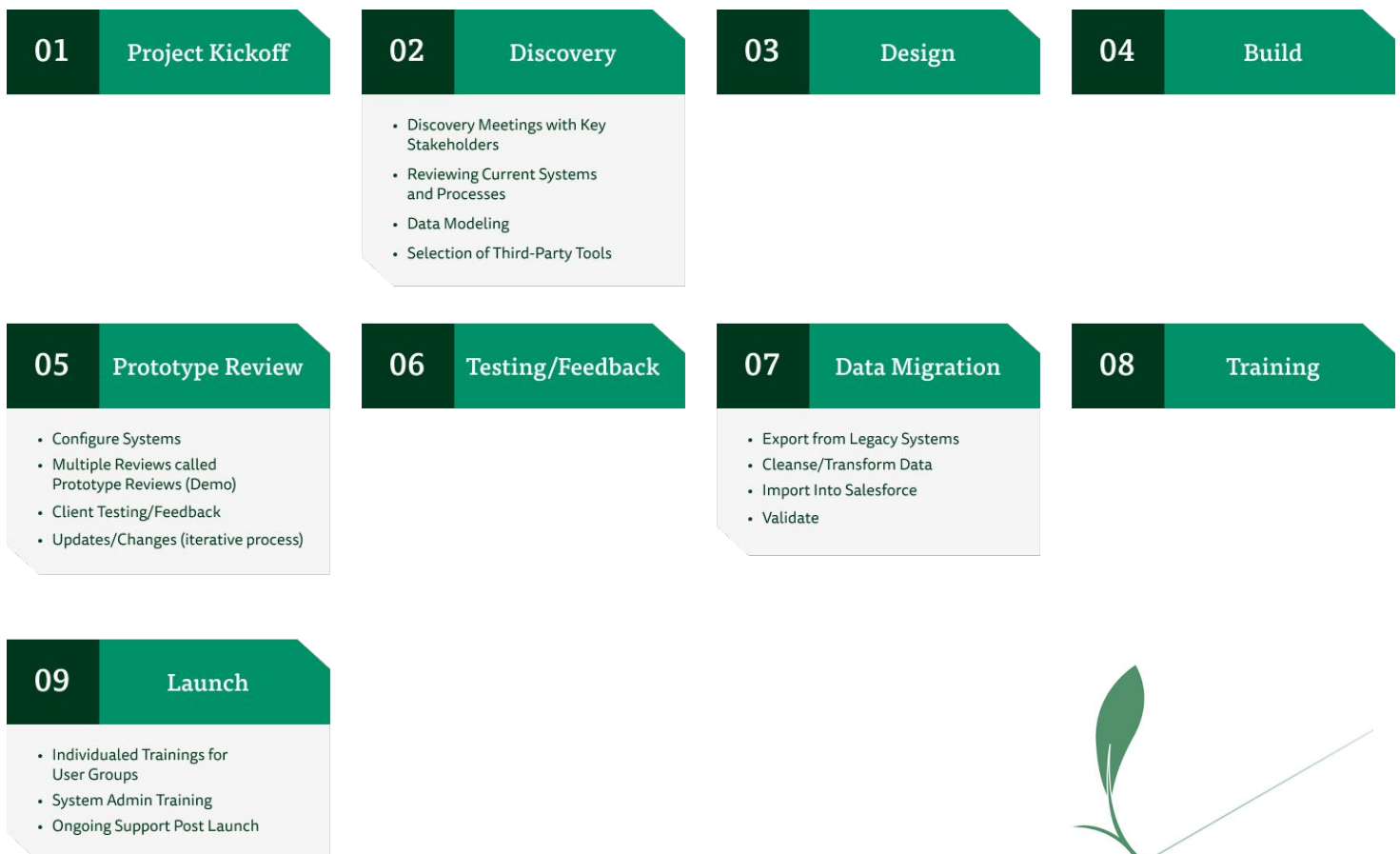
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Implementation Methodology

OUR APPROACH

We believe in the 'crawl-walk-run' approach to implementing Salesforce. This incremental approach allows for a more flexible, agile approach to software development that better adapts to client needs. For clients, this means more frequent calls and requests for 'immediate feedback', so that changes can be quickly implemented. It also means easier changes without changing scope.

Our project timeline

01 Project Kickoff

02 Discovery
- Discovery Meetings with Key Stakeholders
- Reviewing Current Systems and Processes
- Data Modeling
- Selection of Third-Party Tools

03 Design

04 Build

05 Prototype Review
- Configure Systems
- Multiple Reviews called Prototype Reviews (Demo)
- Client Testing/Feedback
- Updates/Changes (iterative process)

06 Testing/Feedback

07 Data Migration
- Export from Legacy Systems
- Cleanse/Transform Data
- Import Into Salesforce
- Validate

08 Training

09 Launch
- Individualed Trainings for User Groups
- System Admin Training
- Ongoing Support Post Launch

Project Management

Idlewild Partners will provide a dedicated Project Manager who will manage all phases of the project. This person will be responsible for:

- Developing the overall project plan, including timeline, deliverables, status, etc.

- Sending weekly status reports that include hours worked to date, any issues that need to be flagged/noted, updates to scope, changes in timelines, risks to budget/timeline, etc.

- Hosts regular (usually weekly) check ins with designated project leaders

Our expectations is that the client will provide a dedicated internal PM with capacity to manage internal deadlines, scheduling, and weekly calls. The PM will be expected to attend ALL meetings/calls around project deliverables for the duration of the project.

In addition to a dedicated PM, we recommend a dedicated "Project Lead" be identified from each of the teams/departments that will be impacted by the implementation. This is not always the senior level person on the team, but would be someone who has intimate knowledge of their team's business processes; in other words, the person 'in the weeds' of the system and the data.

Ideally, this person would be responsible for gathering the requested documents from their team (i.e., any excel files they use, other systems they track data in, their reports, etc.), coordinating schedules, thorough testing of the new system, attending all prototype reviews for their component of the platform, etc.

"Incredible insight into how to remove data silos and improve organizational efficiency."

Colin Shay
SEO

Discovery & Design

 "Discovery and Design" is the first phase of the project and will begin with a series of meetings with key stakeholders and individual users around their needs, pain points, wish lists, and business processes. This includes reviews of existing platforms/systems/databases, excel files that house data, etc.

Based on the business processes analysis, we conduct a series of design tasks including object data modeling, security needs, and the requirements around extending functionality using third-party tools. Deliverables from this phase could include (determined by the complexity of the solution):

- Requirements Matrix

- Vendor Analysis

- Solution recommendations for each requirement

- Design Specs + Low-Fidelity Wireframes

- Review of existing systems and files

- Data Dictionary

- ERD (Entity Relationship Diagram)

- Data Assessment for Migration Estimates

"Idlewild knows what we do and provides solutions that are right for our business, not what's trendy or what's best for their bottom line. As a small non-profit, we don't get lost — our business is just as important to them as bigger orgs."

Shanna Gumaer
PROJECT MORRY
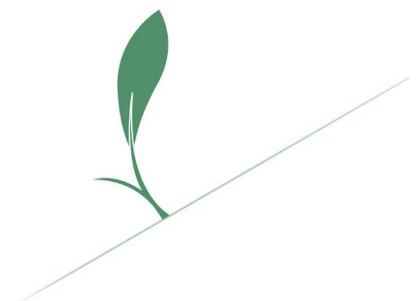
Vendor Analysis/Third-Party Tools

When the native features of Salesforce don't meet a client's need, we look to third-party tools to extend the Salesforce platform.

Through the requirements gathering, we'll identify requirements that would be best met through the use of a third-party tool. This deliverable includes itemizing and prioritizing the requirements, identifying existing products/vendors, and making recommendations. Some common third-party tools needed are:

- Online Donation/Payment Processing

- Online Forms (Applications, Surveys, etc.)

- Mass Email Marketing

- Gmail or Outlook Sync

- Mail Merge and Document Generation (e-Sign)

"Idlewild has really helped us to improve our Salesforce systems to meet our organizational needs and take things to the next level. For the first time, we feel like we finally got a good hold on the potential of Salesforce and are getting more out of it."

Luis Medina
EDIBLE SCHOOLYARD NYC

Configuration and Prototype Reviews

Configuration to build out your data model by adding custom fields and objects, modifying page layouts, and creating record types. We'll use advanced configuration capabilities such as workflow rules, security, validation rules, and formula fields to flesh out your business processes, improve usability, automate steps, and enforce your own business logic.

These are the common 'out of the box' 'advanced configuration' methods we use

Workflow Rules - A workflow rule sets workflow actions into motion when its designated conditions are met. You can configure workflow actions to execute immediately when a record meets the conditions in your workflow rule, or set time triggers that execute the workflow actions on a specific day.

Security Settings - Settings that determine whether fields are hidden, visible, read only, or editable for users. A permission is a setting that allows a user to perform certain functions in Salesforce. Permissions can be enabled in permission sets and profiles. Examples of permissions include the "Edit" permission on a custom object and the "Modify All Data" permission.

Validation Rule - A rule that prevents a record from being saved if it does not meet the standards that are specified.

Formula Fields - A type of custom field. Formula fields automatically calculate their values based on the values of merge fields, expressions, or other values.

For each department/team, we will conduct Prototype Review meetings to demo the tool as we develop it. This provides an opportunity for Users to provide feedback throughout the process for 'agile' development.

Salesforce Glossary of Terms - https://help.salesforce.com/articleView?id=sf.glossary.htm&type=5

"Idlewild does a better job than other firms I've worked with at both understanding our needs and clearly communicating possible solutions."

Ryan Pukos
GRAND CENTRAL PARTNERSHIP

Data Migration

During Discovery we'll identify the various data sources (excel, legacy databases, etc.) that need to be imported into Salesforce. This is often the most time consuming (expensive) aspect of a project. Cleaning and transforming data to map to Salesforce, including merging duplicates, etc., can require a significant amount of time. The effort level will vary based on the legacy source file(s), cleanliness of the data, and the updates to the data files to prepare the data for import. Often clients will take on a bulk of the 'cleaning' to reduce overall project costs.

This multi-step process typically includes:

- Initial extract of all data sources (this includes extractions of legacy systems such as Salesforce)

- Data mapping and "migration rules"

- Review of mapping rules with Client for approval

- Final extract of all data sources

- Executive of Migration Rules, including Data Transformation

- Import into Salesforce

- Data validation with client

- Deduping and clean-up post migration

Once we receive the Final extract of all data sources for migration the legacy systems will be Read Only. There will be a period of time between the Final Extract and the Training when Users will not be able to enter data into their old systems or the new systems.

We always strive to limit this 'down time' as much as possible by importing the data over the weekend. However, depending on the estimate for the data migration, it may be necessary to have users capture data in excel or other interim solutions.

"Idlewild has an incredibly personal and insightful approach that makes it feel more human than most competitors."

Ariella Assouline
IT GETS BETTER

Training

IDW will work with each client to develop a custom training agenda for the various User Groups in Salesforce. Our training is tailored to the specific business processes of our clients.

Some variations in training might include:

- In-Person vs. Virtual Training (Zoom)

- 'Train the Trainer' (we train a 'Power User' and they train their team) or we can train all user groups directly

Our experience tells us that the most effective training is hands-on, where the users are able to click in the system, following along with the trainer. This usually requires a computer lab or for each user to have a laptop in a conference room. However, this is not a requirement and we can work to design a training for you.

"They make you feel like you're friends, even when you haven't met in person. That just makes Salesforce more approachable."
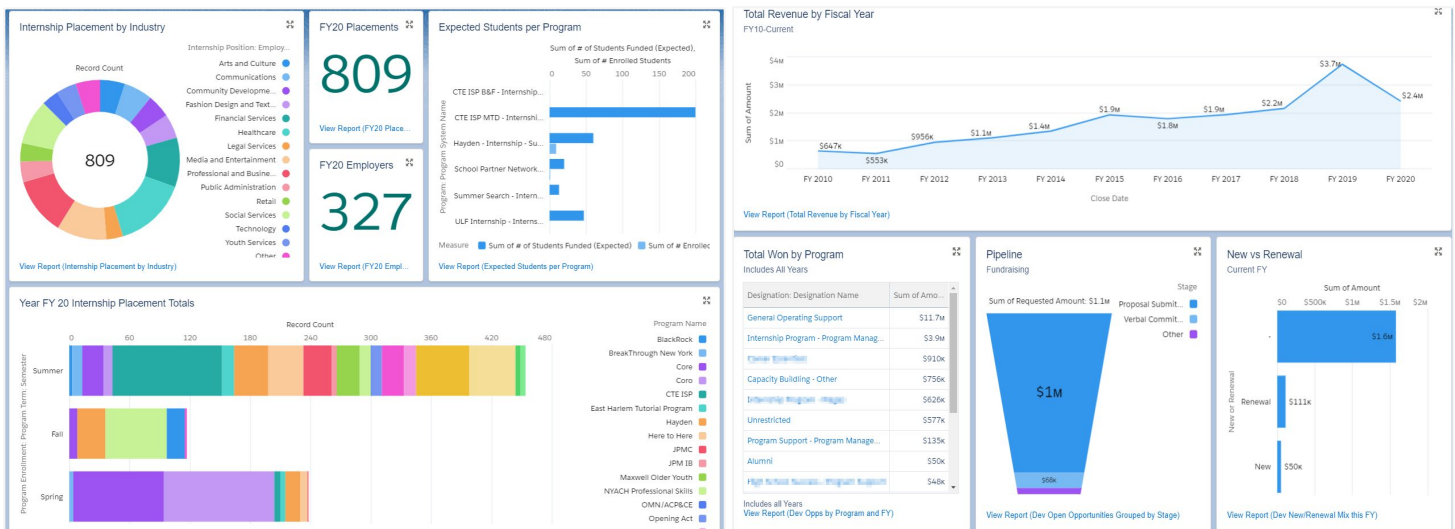
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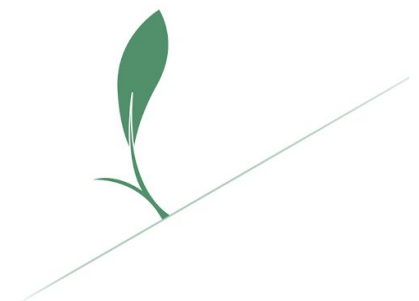
Reports/Dashboards

Once the database has been configured, we can build a series of Dashboards and Reports for analysis and monitoring of Salesforce data based on reporting requirements outlined during the Discovery phase.

"You have truly transformed our data management and processes. I can't imagine ever going back to where we came from."

Kerry Barrett
PONY POWER THERAPIES

Post Implementation Support

The majority of our clients will go from a Project to a Service Contract. The Service Contract will provide ongoing support and maintenance based on each client's needs. We allow a very flexible support model that can be modified from month to month. The same team that worked on your implementation will be involved in the ongoing support.

This support can be used for a variety of Salesforce related support needs such as:

- Additional training

- Reports/Dashboards

- Configuration

- Third-Party tools

"They don't sell a Ferrari when we need a Chevy. They sell the Chevy because they understand what we actually need."

Katherine
GROWTH FOR GOOD

Idlewild

Get In Touch

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