# SANDYX

## IMPLEMENTATION APPROACH

Sandyx Implementation Approach
for Salesforce CRM Solutions

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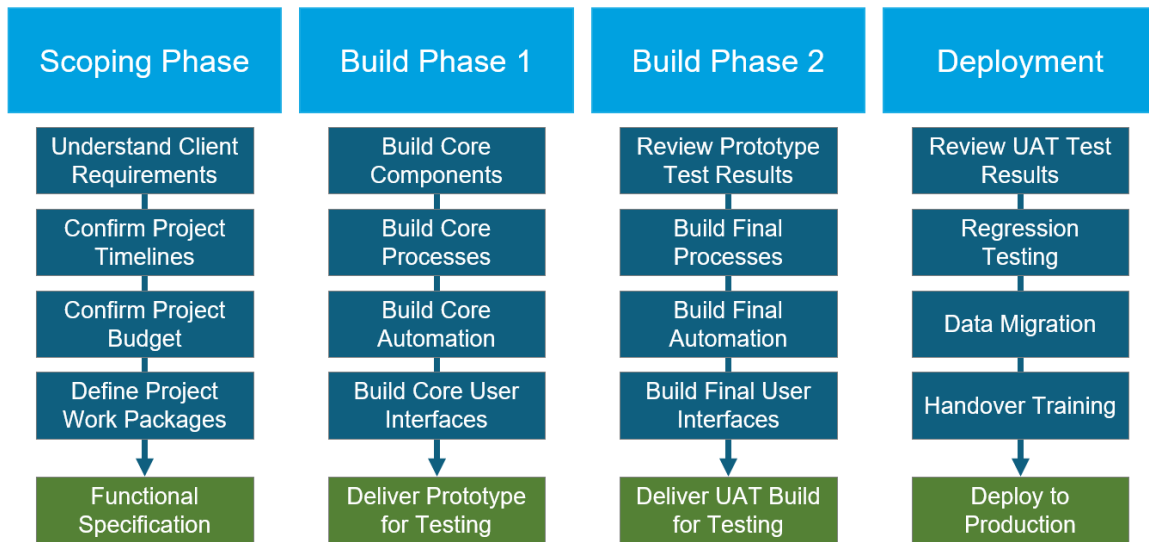
# 1. Sandyx Implementation Approach

Sandyx have developed an implementation approach specifically for the delivery of Salesforce projects. The approach can be applied across a whole project, or to a distinct phase of a larger implementation. The approach is summarised in the diagram below.

| Scoping Phase | Build Phase 1 | Build Phase 2 | Deployment |
|---|---|---|---|
| Understand Client Requirements | Build Core Components | Review Prototype Test Results | Review UAT Test Results |
| Confirm Project Timelines | Build Core Processes | Build Final Processes | Regression Testing |
| Confirm Project Budget | Build Core Automation | Build Final Automation | Data Migration |
| Define Project Work Packages | Build Core User Interfaces | Build Final User Interfaces | Handover Training |
| Functional Specification | Deliver Prototype for Testing | Deliver UAT Build for Testing | Deploy to Production |

## 1.1. Scoping Phase

The Scoping Phase of the project establishes the full set of customer requirements to a detailed level and identifies all the individual work packages that the development team will need to deliver these.

The workshop should be attended by key client personnel who have knowledge of any existing systems that are being replaced or enhanced, as well as any stakeholders and users who understand the expected deliverables of the new solution. When the Salesforce solution is being integrated with other business systems, then the subject matter experts for those systems should also be involved.

A high level project plan will also be created which identifies the key project milestones and their associated timelines. It will also give the client an indication of when key client resources are needed and for how long. Client involvement is encouraged in every stage of the project, in order to help deliver a successful solution.

Note: Following the Scoping Phase, Sandyx typically require about one week to finalise the design of the system and allocate the most appropriate development resource to the project.

## 1.2.  Build Phase 1

Build Phase 1 (also referred to as B1 phase) sees the development team working on the individual work packages that were defined in the Scoping Phase. All the work package are defined and added to our software configuration management tool, Jira.

The main deliverable from B1 is the system prototype. The prototype shows:

- All the main architecture elements, including custom database tables

- The primary user flows, use cases and processes, including the primary system automation that supports these

- Branding, colouring and the primary user interfaces, including screen layouts

- We aim to make the prototype available to the client as soon as possible. The benefits of this include:

    - Early feedback from end user test groups to ensure that the developing solution reflects their requirements and expectations

    - The ability to make minor changes to the requirements during the early part of the development to reflect feedback from the point above

    - Increased confidence from stakeholders that the solution meets the requirements and expectations

    - Confidence from the end user test groups that the solution will provide the benefits they expect, which can be passed onto the wider future user community

## 1.3.  Build Phase 2

The completion of B1 phase and the delivery of a working prototype ensures that Build Phase 2 (also referred to as B2 phase) can continue at a robust pace in the knowledge that there is full commitment to the planned functionality and expected demand on client resources.

The main purpose of B2 is to deliver a fully functional solution, meeting all the client's requirements, for User Acceptance Testing. B2 delivers more of the fine-grain detail into the system. B2 also delivers any required integration functionality with external third party systems.

Any adjustments or changes that were identified during B1 client testing will be built into the B2 work packages. Sandyx use a separate Jira Kanban board for B2 activities.

Following delivery of all the B2 work packages and a successful final review by the client, the project moves to the final stage.

## 1.4.  Client UAT and Deployment

Still in the development environment, but now working with the final set of functionality, the client undertakes a period of User Acceptance Testing (UAT). The length of UAT and the tests carried out in UAT are completely up to the client, but Sandyx will be on hand throughout the process to assist.

The limitations of the block diagram above, means that the parallel nature of many of the activities in UAT and Deployment are not reflected properly. User training, either train-the-trainer or end user training can be conducted before, during and after UAT, to help the users get the most benefit from the system.

During UAT, feedback from the client user testing teams can be used by Sandyx to make minor changes to the system to better reflect the real-world use cases that may not have been considered during scoping and prototype.

When UAT is complete and signed off, Sandyx will deploy from the development environment into the production environment and will assist the client with any data migration activities needed. In most cases data migration, especially data cleansing, is the responsibility of the client but Sandyx will provide data import templates that will make the process easier.

Following deployment of the system into the Production environment, all changes will need to be managed by the change request process and depending on the size and scope of the change required, may be subject to an additional charge from Sandyx.

## 1.5.   Implementation Timeline

Each client implementation is different and this includes the delivery timelines associated with the project. However, a typical Salesforce implementation project may look something like this in terms of timelines and deliverables:

1.  Scoping Workshop to be completed within 5 working days of receipt of Purchase Order.

2.  Delivery of Prototype solution to client, for testing, 20-25 working days after Workshop.

3.  Client testing and sign-off of Prototype.

4.  Delivery of UAT Build to client, for testing, 30-40 working days after prototype sign-off. This is heavily dependent on the level of customisation, and its complexity, identified in the delivery requirements.

5.  Client testing and sign-off of UAT Build.

6.  Deployment into Production, for testing, 5 days after UAT Build sign-off. This is dependent on the number of changes requested by the client following UAT testing.

7.  Client testing and sign-off of Production release.

8.  If Sandyx are conducting Data Migration activities, the timescale and delivery of this will be planned and agreed during the development phase.

This timeline is shown in the Gantt chart below.

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