

CIO PLAYBOOK

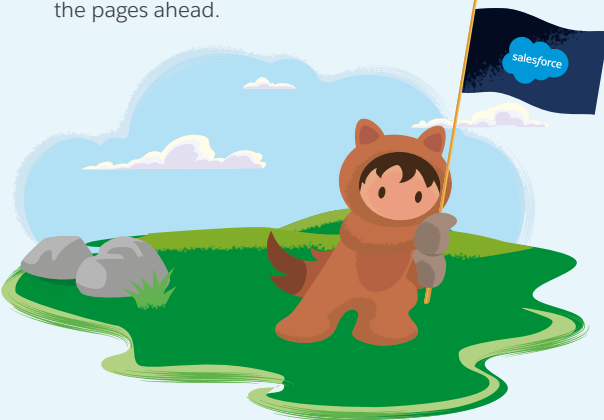
How Salesforce's IT team use Salesforce to improve innovation, productivity and culture



Meet Astro

Your Guide for Salesforce

Astro and friends love showing Trailblazers like you around Salesforce and its many business solutions. Follow along as they guide you through the tips and resources in the pages ahead.



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Introduction

Like any start-up trying to get a big idea off the ground, Salesforce started out small, in a tiny apartment in San Francisco with servers running out of the closet. And while we've grown and changed a lot in the 21 years since then – we're now 55,000 employees (and growing!) – one thing has stayed the same: we rely on Salesforce technology to drive our business forward and empower both our people and our culture.

We're running Salesforce on Salesforce at a massive scale, using our products across all functions of the business. This not only helps to drive a culture of innovation and better products but also – and most importantly – results in a great experience for our employees and customers alike.

That's why we put together this playbook. Whether you're undergoing a digital transformation or just looking for a few ideas to try, this playbook offers a behind-the-scenes look at how we use Salesforce to create a culture that supports the evolving needs of our people and processes.

This playbook is a set of principles that work for us and could benefit your organisation as well. The principles start with the importance of people and how to empower them through technology to deliver their best work. We'll discuss the evolving nature of IT and how it and the business function can innovate for the future state. You'll see how the technology that employees use every day can have a dramatic effect on how a business performs.

We'll talk about the importance of building better, not longer, meetings and how to empower smaller teams to deliver faster. You'll learn about the importance of small wins as a stepping stone to greater successes and how you can operationalise your organisation's core values. And whether it's better to build or buy the tech to do just that.

Then we'll touch on the new hybrid world and how to embrace it – how the IT function spans and collaborates across the whole of the business to deliver synergy. And finally we offer some thoughts on how to put all that together.

In short, we'll lift the hood on how we use Salesforce to create a culture to support the evolving needs of our business and processes.



INTERVIEW



Meet Salesforce CIO Jo-ann Olsovsky

When Jo-ann joined the company in 2018, her challenge was not only to support everyday operations and our worldwide workforce but to enable innovation at speed to power our future. In this Q&A, she explains the steps she took.

How has IT evolved to help Salesforce manage its growth?

The onboarding process at Salesforce is a mix of learning and culture content tailored to each individual and delivered at the right time. As we're hiring thousands of employees every year, my team turned to our own marketing platform, Marketing Cloud, to automate the onboarding process. We've built a more personalised and data-driven journey comprising emails, SMS or push notifications to help new employees get up to speed.

How has IT changed as business needs change?

We spend more time playing offence, not defence: delivering products, delivering functionality, delivering things that mean something to the business so we can make forward progress.

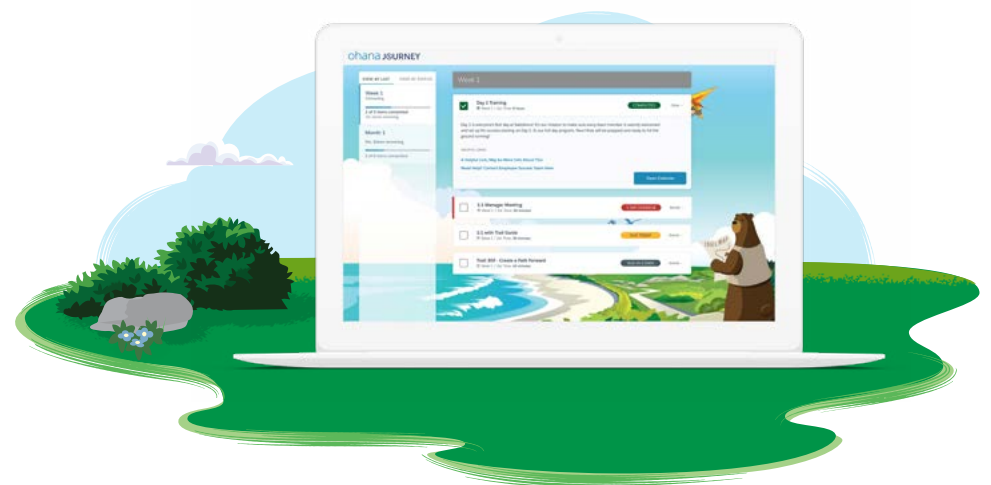
How do you encourage innovation?

I like the common-sense method – I might be an intelligent person, but I don't know everything, so I try to surround myself with people who do. That means building an internal talent base of great people. If I look at

my IT teams, we have a tremendous amount of talent, so I leverage the strength and power of that. It's important to remember that one person doesn't need to solve everything and you don't need to reinvent the wheel every time. That's why I have an open-door policy – I encourage people to bring me their ideas, and I listen to their suggestions with an open mind. This helps to create a free flow of ideas and innovative thinking.

Describe how your team is positioning Salesforce for the next chapter

We are assessing all foundational products that we use; we're looking at where we need to do additional automation, where there's additional functionality that can be implemented, where we might have gaps, where a product might be redundant, or where we can leverage more efficiency from a systems architecture perspective.



STEP 1:

Think People First, Tech Second



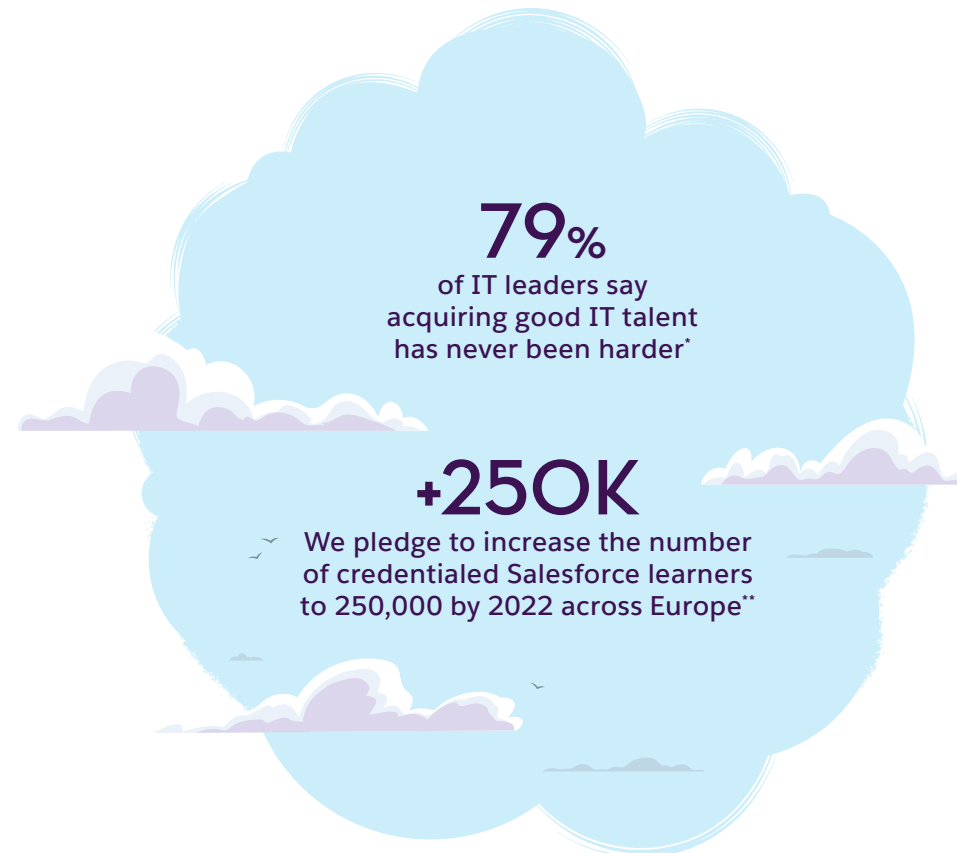
Hiring Workers with In-Demand Tech Skills Is More Important Than Ever - But It's Also Getting Harder

Businesses increasingly need their IT teams to work faster and smarter. That said, Salesforce Research found that more than three in four IT leaders struggle to acquire talent. In fact, 79% of you say that acquiring the right talent has never been more difficult.

So it's clear that society is experiencing a tech skills shortage. One way to counteract this is for companies to create a culture of learning among their employees, future-proofing their workforce.

Here at Salesforce, our Trailhead learning platform empowers our employees to take control of their own training and develop the skill set they'll need in the future, and in March 2019 we released myTrailhead to enable our customers to customise the platform with their own content.

By supporting the upskilling and reskilling of employees and fostering a culture of continuous learning, it's possible to position your company to be ready to overcome the skills shortage and unlock its growth potential.



*Source: [Salesforce, 2019, Enterprise Technology Trends](#)

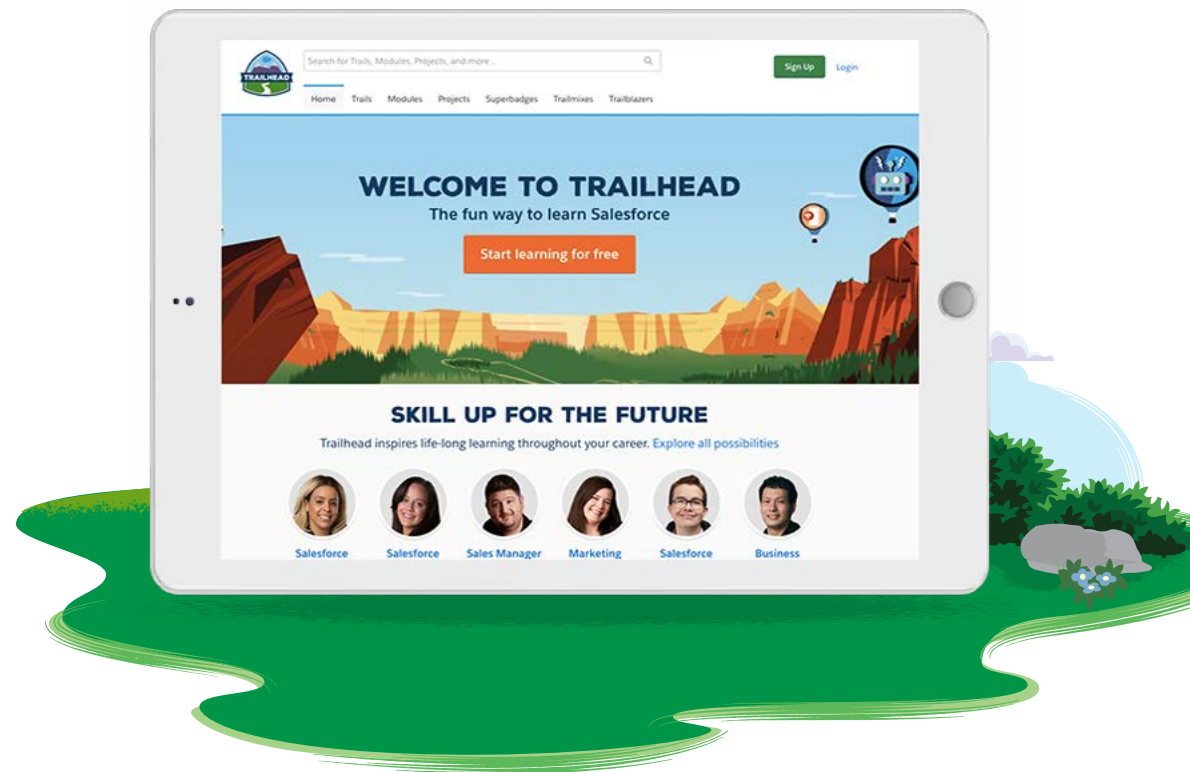
**Source: www.salesforce.com/uk/blog/2019/05/tackling-the-skills-gap-head-on-with-training-for-all.html

How Salesforce Uses Trailhead to Enable and Empower Employees

“How can we make learning Salesforce easier, more accessible, more hands-on, more engaging and more fun?”

That was the question that sparked the idea for Trailhead, our self-paced gamified learning platform that can be accessed by anyone, whenever and wherever they want. Initially aimed at developers and administrators, the platform’s content has been expanded for business users, sales, marketing and more.

The goal? To transform how people in all roles and at all levels learn and use Salesforce and develop in-demand skills by simplifying the learning experience. Content is delivered in short bite-sized chunks called units, and a collection of modules on the same topic is built into Trails. At the end of each unit, knowledge is tested via a multiple-choice quiz or a hands-on challenge in a real Salesforce environment, where points and badges can be earned.



STEP 1: THINK PEOPLE FIRST, TECH SECOND

Trailhead has truly transformed the learning experience and culture at Salesforce. Here are the four key use cases of the platform in action:

1 Onboarding new employees

Salesforce brings in more than 6,000 new employees a year, and Trailhead is a fundamental part of our onboarding process. Our new hires from all over the globe participate in a weekly boot camp that's heavily complemented by the Trailhead experience – before our new hires even walk in the door at Salesforce they are engaging with Trailhead to ensure they hit the ground running. We assign them a Trailmix called 'Day 1 & Beyond' that includes everything a new hire would need to know to become oriented into Salesforce.

2 Culture

We keep our culture strong by being incredibly intentional about our values, our behaviours and the experiences we deliver – and Trailhead helps us scale the learning and values that are central to that. We want all our employees to feel as though they're sitting around the same table, sharing the same values. We have an entire Trail dedicated to "Becoming Salesforce" and it includes modules on giving back, equality and customer success.

In most cases, our employees are proactively engaging with Trailhead – that's the beauty of gamification! Once someone earns one badge, they keep coming back to earn more. It's because the Trailhead learning experience is all about the user: employees choose the place, time and topic, and Trailhead provides an interactive learning model that's fun.

3 Product readiness

Salesforce puts out three new releases every year so it's incumbent not only on our customers but also on our employees to stay up to speed on every launch. Trailhead keeps pace with innovation at Salesforce: every time we update a product or release something new, we update the content on the platform.

4 Leadership development

We promote a lot from within and have a lot of first-time managers as well as more experienced leaders. All of our people managers are required to complete the 'Manage the Salesforce Way' Trail which covers everything from how to conduct an interview or a 1-on-1, how to hire and promote inclusively, how to coach and give feedback, to how to manage remote employees.



STEP 2:

Get Out in Front



STEP 2: GET OUT IN FRONT

The Days of the IT Department Operating in the Background Are Over

According to CIO Magazine's [State of the CIO report](#), 77% of IT leaders say their team needs to be intertwined with the rest of the business, partnering with other departments to both unify and accelerate customer-experience efforts.

It makes sense: fewer silos and more cross-functional alignment means the entire business is working towards mutually agreed KPIs and objectives. But that level of collaboration requires IT leaders and departments to get out front and begin to guide business strategy and execution.

That means moving from being the sole proprietor of how organisations develop and use technology to serving as flexible partners across the enterprise. So, redefining the IT function's overall intent and vision is the first step.



Source: CIO magazine, 2019, State of the CIO

How Our IT Team Drives the Business Forward

It's clear that CIOs are now playing a bigger role than ever before. Here at Salesforce, our own CIO, Jo-ann Olsovsky, is often asked to help enable, innovate and transform the business.

“What we're here to do is to team up with internal business partners to transform the way we do business internally. Because that, by its very nature, transforms how we interact with our external customers”
Jo-ann said on an episode of the [IT Visionaries podcast](#).

As companies increasingly adopt customer-centric business models, IT departments are at a crossroads, moving beyond operational concerns to contribute not only to product and service creation but also to business strategy and customer experience. CIOs and other IT leaders are poised to play a pivotal role in this change.

Thanks to the cloud, CIOs and IT teams no longer have to spend a majority of their time on infrastructure issues. Instead, they're helping to grow the business. That's why at Salesforce we rebranded our IT department as Business Technology, which lets everyone know its purpose is to grow the business through technology – not to be a maintenance function.

As Jo-ann put it, “Having a great business partnership internally is paramount to everybody's success; IT can't deliver independently and business partners can't deliver independently – we have to work together to jointly solve issues.”



Having a great business partnership internally is paramount to everybody's success.



JO-ANN OLSOVSKY
CIO SALESFORCE



Here Are Three Things Our IT Team Does to Drive Business Strategy



Understand each department

To break down silos and understand the challenges that different departments are trying to deal with, IT leaders and their teams must sit side by side with them as they're doing their jobs. Listen and observe what they need and how they function. Understand where gaps, pain points or opportunities might exist. When IT can see where internal business partners are coming from and understand what they're trying to accomplish, they can apply technology to help the business get to where it needs to go.



Listen for opportunities

No matter how well you think your organisation performs, there is always room for improvement. Sales, service and marketing departments are increasingly turning to IT to help improve the customer experience. That's why it's important for IT to be in the room with an open ear, listening for opportunities to create new capabilities that will support customers and drive business success.



Take the lead

Ideas without action are simply dreams. That's why IT leaders and teams must increasingly take the lead and spearhead technology-driven change across their organisations. They need to be agile, fast and flexible enough to get ahead of ever-changing business demands, yet create a culture of experimentation where everyone is empowered to innovate and problem-solve.

STEP 2: GET OUT IN FRONT

How Technology Can Encourage Everyone to Contribute to Company Success

In an organisation of over 55,000 employees, the only way we can achieve our goals and get to where we want to be is if we are all on the same page, moving in the same direction. And true organisational change requires empowerment and participation at all levels and in every department, including Business Technology.

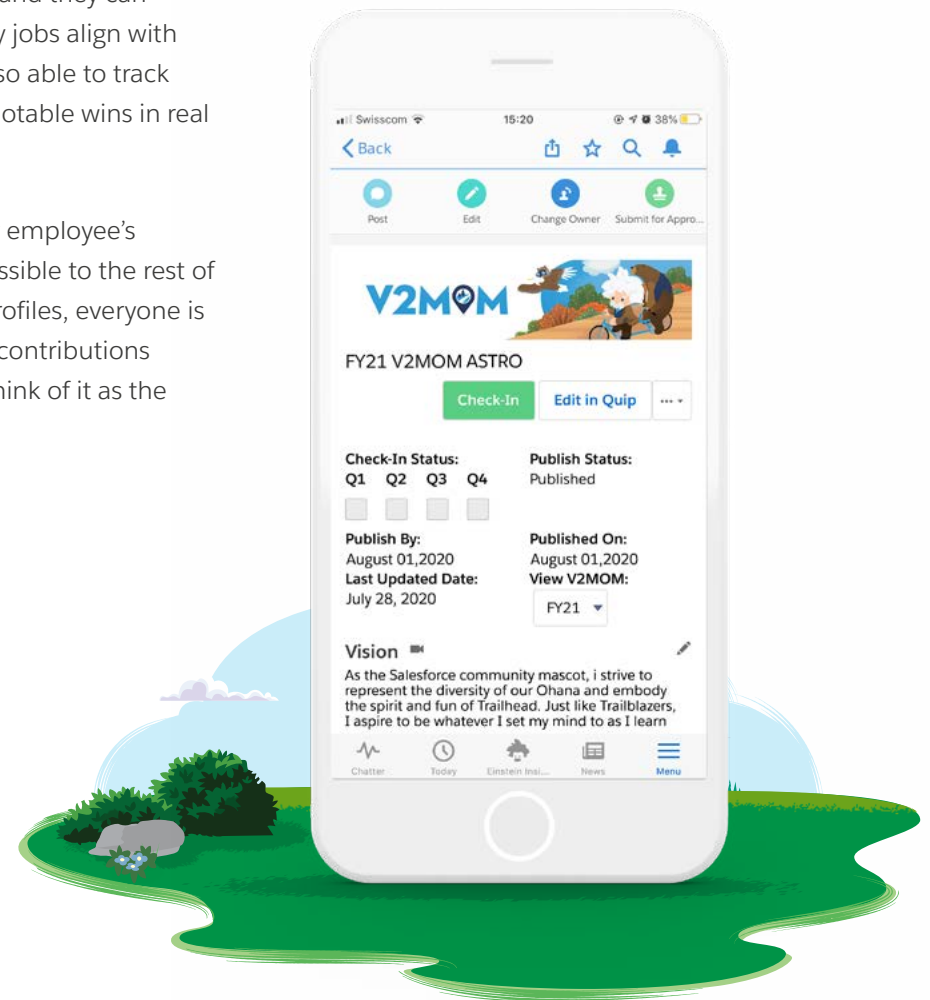
That's why the V2MOM – which stands for Vision, Values, Methods, Obstacles and Measures – has been woven into the fabric of Salesforce right from the start. It's a top-down and bottom-up approach to defining our vision that everyone in the company participates in and provides feedback on. But we took that transparency to a whole new level when we built the V2MOM app.

Enabling complete transparency through technology

Our Employee Success team partnered with Business Technology to develop a mobile-friendly, easy-to-use V2MOM app built on the Salesforce Platform. It allows for complete alignment, constant communication and iteration, and high visibility – key elements of a successful V2MOM.

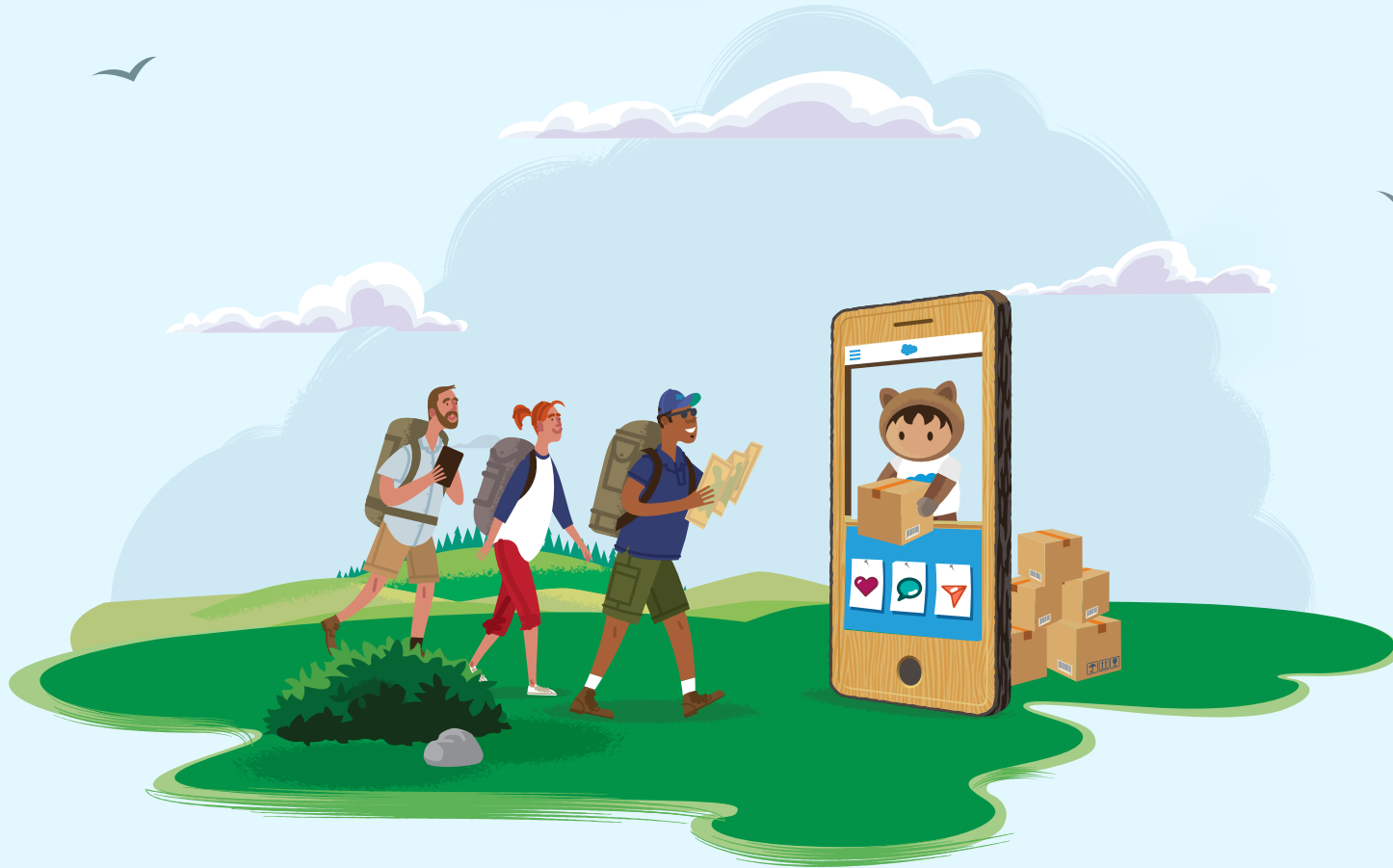
For IT leaders and their teams, the collaborative nature of the app gives them more autonomy in the business-planning process and they can clearly see how their day-to-day jobs align with the corporate vision. They're also able to track their progress and document notable wins in real time within the app.

Not to mention, because every employee's V2MOM is published and accessible to the rest of the company on our Chatter profiles, everyone is aligned and can see how their contributions affect our success. We like to think of it as the glue that binds us together.



STEP 3:

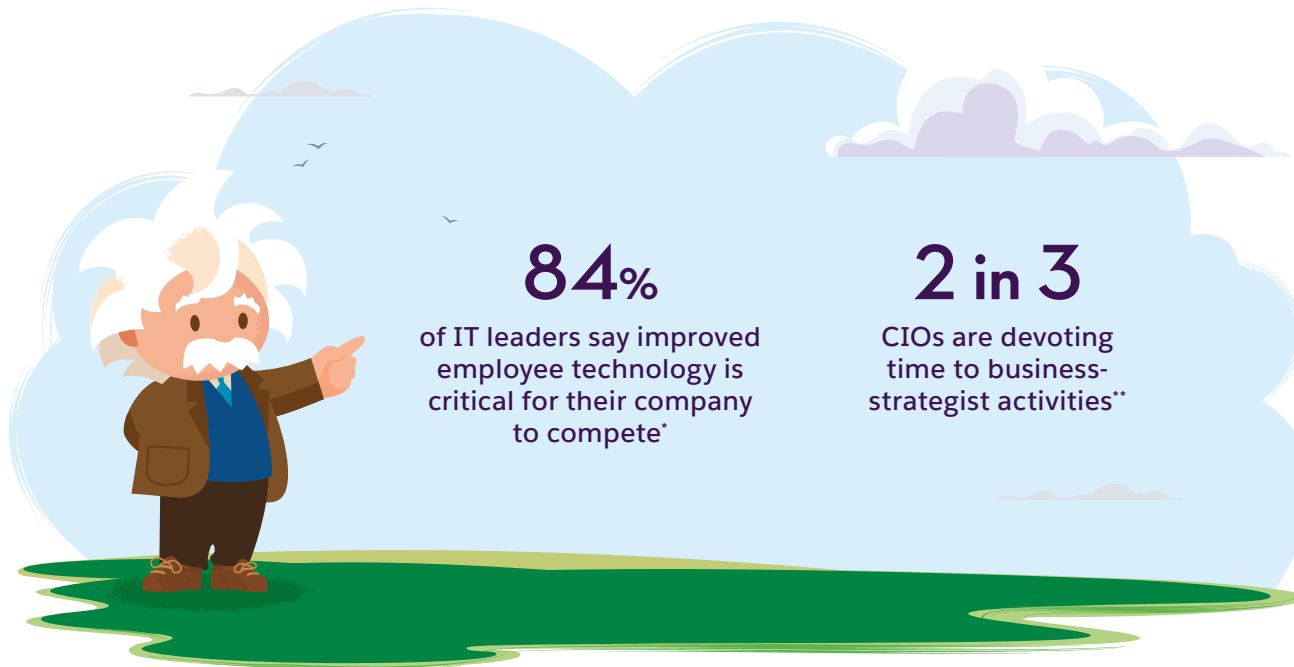
Move from CapEx to OpEx



More and More Companies Are Turning to IT to Drive Innovation and Growth

Just look at how the role of the CIO has evolved. These days CIOs are responsible for driving revenue and innovation: 89% of IT leaders say they are more involved in leading digital transformation initiatives compared to their business counterparts, according to [2020 State of the CIO research](#).

You could say that CIOs and IT departments are change agents, coming up with new and more efficient processes and solutions to help bring a competitive edge to the business.



*Source: Salesforce, 2019, Enterprise Technology Trends

**Source: CIO magazine, 2019, State of the CIO

How Salesforce Delivers a Better Employee Experience from Day 1

We knew we needed to step up our onboarding game to ensure the new-hire experience would be first-rate from the first day and that we could use our own technology to help everyone get up to speed and settle in.

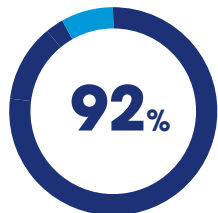
Investing in seamless employee experiences

Enter New Hire Wizard, an integrated app that combines MuleSoft, the Salesforce Platform and Marketing Cloud, connecting our back-end systems and unlocking previously siloed data to provide HR with a 360-degree view of employees.

The app helps streamline new employee provisioning and onboarding, so managers can focus on welcoming and building a relationship with a new hire, instead of logistical tasks. And because it's accessible on desktop or mobile, usage is an impressive 96%.

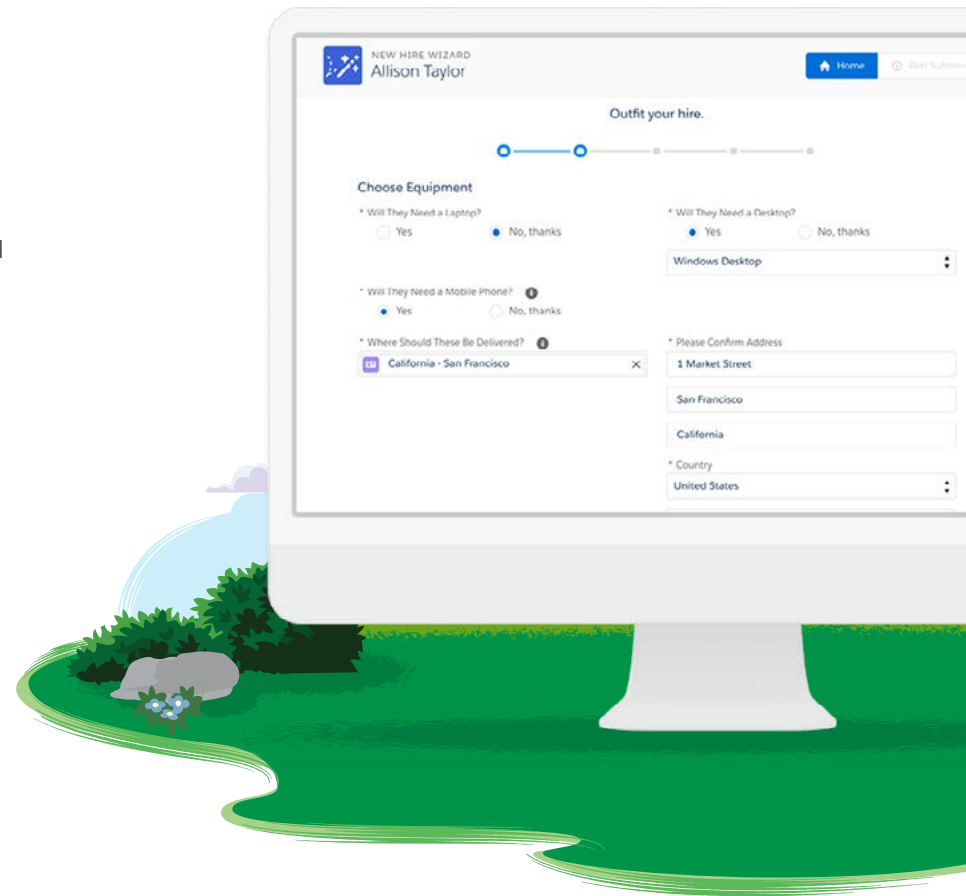
Where we are today

Our culture has been at the heart of our success in attracting, engaging and retaining the talent that fuels our growth and social impact. Since launching New Hire Wizard in 2019, we improved our Day 1 rating to 4.6 out of 5. Most importantly, because the app is powered by APIs and integrations, developers can discover and reuse employee data to save time on future projects instead of rewriting custom code. This has cut the delivery time of new HR projects by seven months!



The rating we've received from new hires on their Day 1 training since launching New Hire Wizard in 2019

Source: Salesforce, 2019



STEP 4:

Play More Offence than Defence



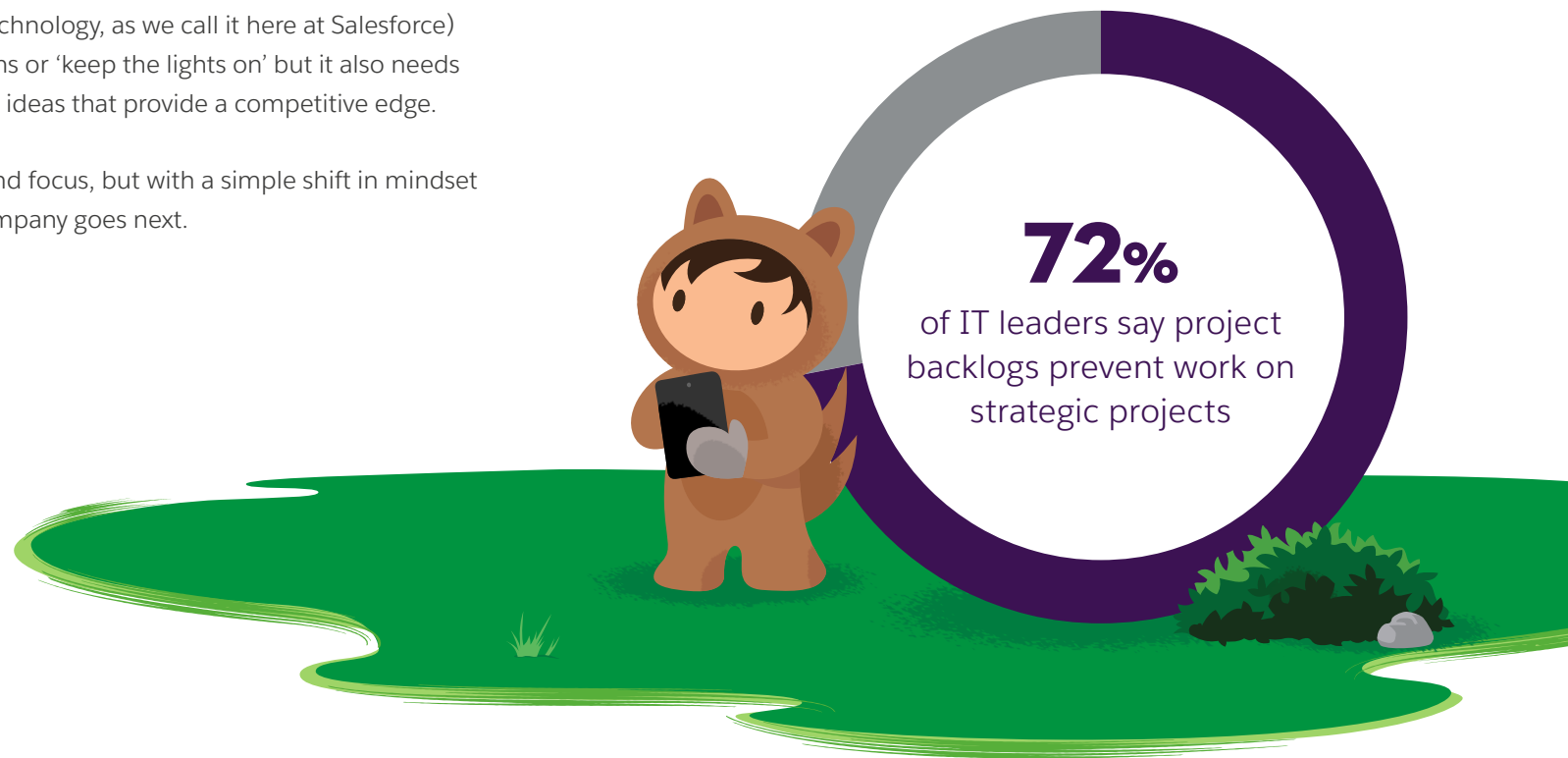
STEP 4: PLAY MORE OFFENCE THAN DEFENCE

Leading organisations are turning to their IT departments to play a key role in helping to drive business growth.

And yet, as reported in our [Enterprise Technology Trends](#) research, 72% of IT leaders say that project backlogs prevent work on strategic projects.

It's a classic catch-22 situation – and trust us, we've been there too! Not only does IT (or Business Technology, as we call it here at Salesforce) need to maintain existing systems or 'keep the lights on' but it also needs to innovate and implement new ideas that provide a competitive edge.

Finding balance requires time and focus, but with a simple shift in mindset IT can help drive where your company goes next.



Source: Salesforce, 2019, Enterprise Technology Trends



Srinivas Nadendla
Director, Systems Specialist

How to Run IT as a Lever for Business Growth

In today's digitally driven world, IT leaders and their teams are constantly looking for what's next on the technological horizon, while keeping an eye on business strategy and architecture. Here are two of our key players who do double duty and drive growth for our business.

Meet the one who keeps it together

Srinivas Nadendla, Director, Systems Specialist

My team and I are responsible for keeping one of the biggest Salesforce orgs in the world, Org62 (which is what we call our internal instance of Salesforce), up and running all the time, addressing user requests or queries and cleaning technical debt. That could be anything from citizen development code to a feature that's no longer in use but still consuming resources.

I would say that 30% of my team's time is spent keeping the lights on and 70% is spent innovating, thinking about how we can build smarter tools to proactively detect challenges or gear up for future needs.

That's why cleaning technical debt in Org62 is a huge focus for us. As the business scales, it's essential that our internal system can support that growth. That means making room to build more functionality on the system, taking advantage of improved technology and making sure that the processes are efficient and secure so we can adapt quickly to business changes.

We're not delivering value for just one business group. This is a multifaceted project that spans across all users throughout sales, service, marketing, finance, legal, employee success – everywhere.



STEP 4: PLAY MORE OFFENCE THAN DEFENCE

Meet the one who keeps it moving forward

Venktesh Maudgalya, Director of Product Management – Enterprise Integration

We're a cloud-first company. We use our ecosystem, our products, our platform – but while the vast majority of our systems are sitting in the cloud, we do leverage some partner products. And all of these systems need to talk to each other.

That's where my team comes in. I lead the product management team for enterprise integration within Business Technology. We're responsible for integrating all the systems, apps and devices that we use internally to drive world-class experiences for our employees. We do this with MuleSoft, our integration platform that enables us to connect these systems with an API-led approach. This helps us to move with speed and agility so we can deliver quickly on any complex integration project that comes our way.

We work closely with all business departments to determine and develop the architecture and capabilities that are needed to support the organisation as it scales and grows.

As an example, we use an HR system from Workday, and the employee headcount information maintained within it is also needed in our financial system. My team integrated these two systems so that they behave as one, enabling HR and Finance to maintain a consistent real-time view of the data in both systems.

Because we're a cloud-first organisation, we have a minimal footprint from an infrastructure standpoint. This frees up the majority of our resources and time to tackle business problems, drive efficiency and reduce costs wherever possible.

Much of the work my team does is innovation-based and iterative. We follow an agile mindset and approach application projects from a scrum-team perspective. This provides us with a flexible framework to find out what works and what doesn't and make changes accordingly. We work in two-week sprints. At the end of those two weeks, we have delivered a tangible piece of work and then move on to the next sprint.



Venktesh Maudgalya
Director of Product Management
– Enterprise Integration



How We Built Better Meetings

Our customers come first, always. We're obsessed with their success and passionate about helping them reach new heights.

One place this is plain to see is our executive briefings at the Salesforce Innovation Center. These are multi-day meetings when leaders from across Salesforce collaborate with cross-functional executives from the world's top companies to develop a vision for how we can work together.

These meetings require a huge amount of time, coordination and organisation – so much so that in the past the customer experience would sometimes take a back seat to the preparation. To live up to our own standards and surpass customer expectations, we knew we needed to find a better way to ensure these meetings were impactful and flawless. So we turned to our own technology to build an app that would do just that.

Creating a streamlined solution for end-to-end meeting management

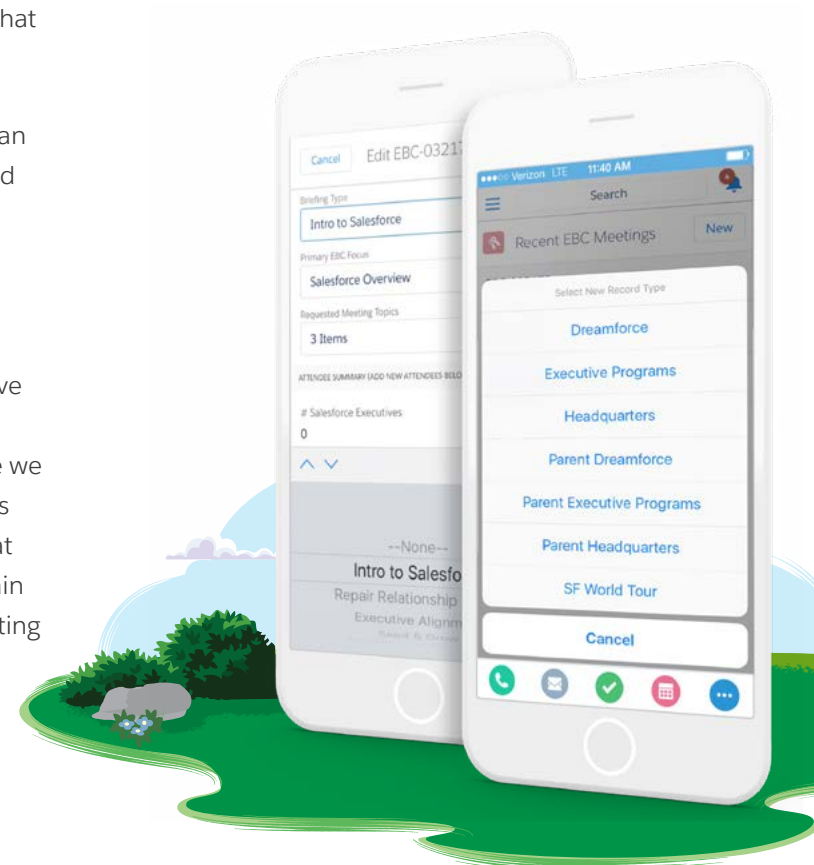
Two developers and one QA engineer created the Executive Briefing app in just 12 weeks.

Because it's built on top of the Salesforce Platform, the app automatically pulls all customer information into the meeting record, removing the need for account executives to manually enter this data and linking each meeting to an opportunity. Plus, it lets salespeople request meetings, communicate key customer details and track impact. This ensures that everyone involved is informed and prepared, and can focus on what matters most: the customer!

Not to mention, since Quip is integrated, we can bring everything full circle by staying connected during the meeting, with the Quip doc linked right to the Executive Briefing meeting record.

Where we are today

From planning through execution, the Executive Briefing app offers a first-class experience for employees and customers alike. Not only have we eliminated logistical headaches but employees also have a 360-degree view of the customer at their fingertips, including key players, goals, pain points and contract value. And improved meeting metrics mean we can prioritise and allocate resources. It's a win-win for all involved.



STEP 5:

Train for the Marathon, Not the Sprint



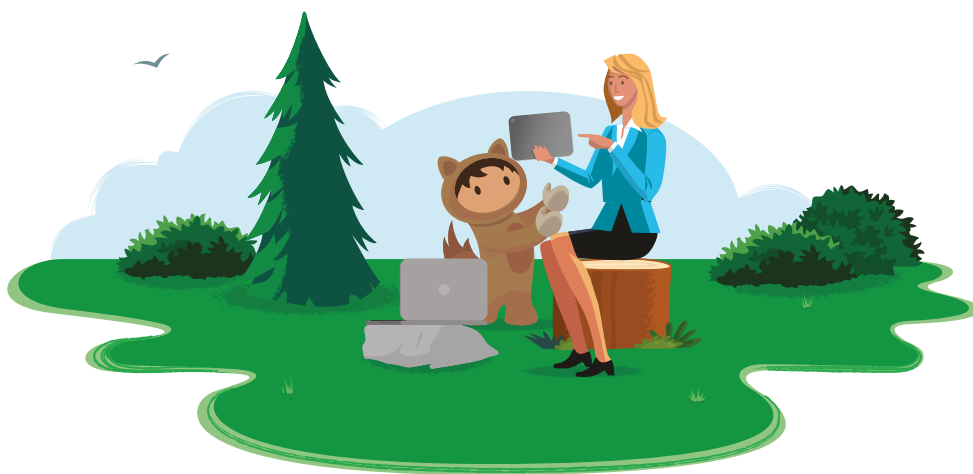
There Are No One-Size-Fits-All Solutions

But small wins can be a great starting point.

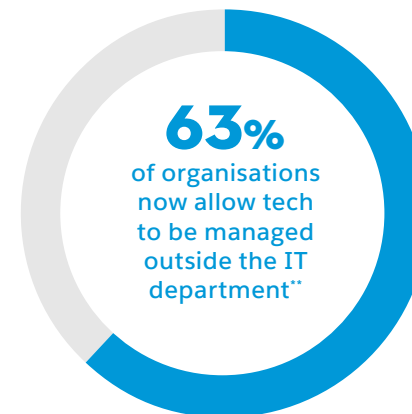
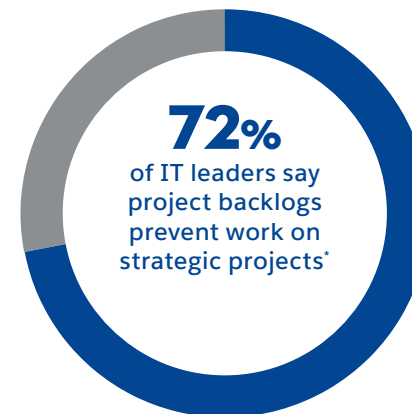
As a CIO or IT leader, there are three types of people you'll encounter when you try to drive change in your organisation: those who want it, those who don't, and those who are on the fence. By starting small, achieving quick wins and showing success early, you can build trust and more people will get with the programme.

Then go bigger. And go again.

It's all about building on a series of small wins to reach a bigger goal. Rather than trying to change everything at once and then not delivering for years or costing millions, start small.



Find a solution that fits the problem



*Source: Salesforce, 2019, Enterprise Technology Trends

**Source: Harvey Nash/KPMG, 2019, CIO survey

How to Build a Better Intranet the Salesforce Way

There comes a time when a solution has served its purpose – this is usually when it starts to create more problems than it solves.

For Salesforce’s intranet, that time came when we realised that our employees couldn’t find the information they needed when they needed it – and when they did, it was either outdated or irrelevant to their geographic location. In addition to this, the IT team was struggling to keep up with an overwhelming number of support tickets. And as many as half were left unanswered because they never made it to the right person.

We knew there had to be a better way and that we could use our own technology to create new and improved ways of working.

Reimagining the employee user experience

Three developers created Concierge, a mobile-friendly intranet app, using the Salesforce Platform and Heroku.

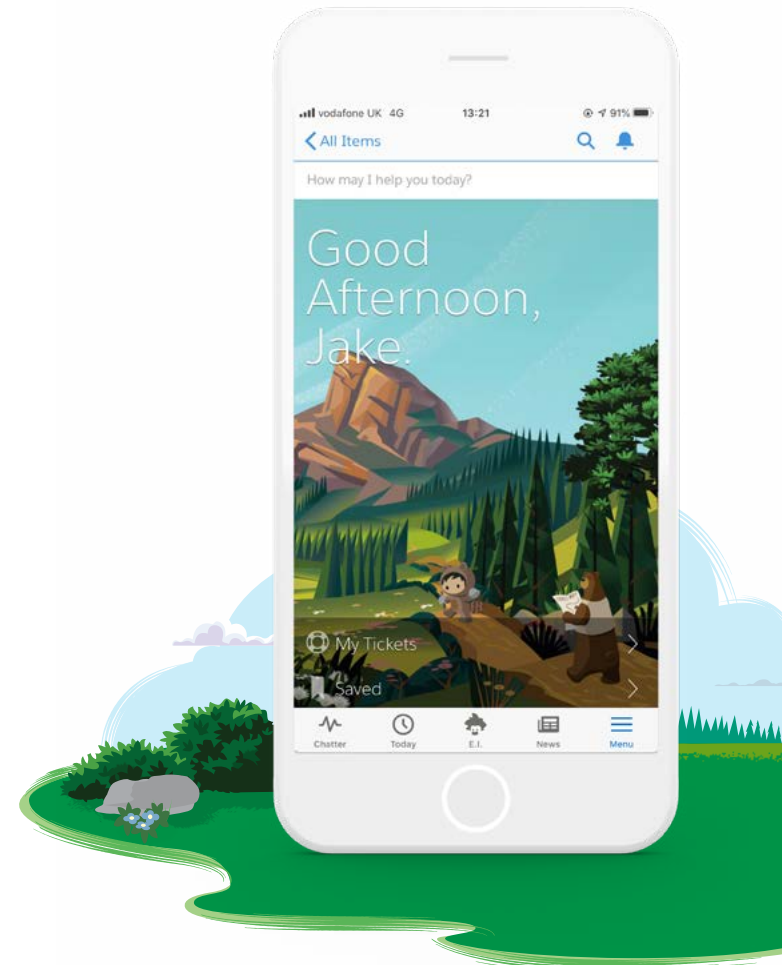
They started by going back to basics: the point of an intranet is to provide employees with what they need when they need it. So we consolidated

and overhauled data from earlier systems to make content easier to find. Then the developers designed Concierge to be predictive and searchable, greeting users with a simple prompt: “How may I help you today?” By combining self-service and help-desk functionality in one place, employees can easily find answers via support articles.

The support ticket process improved too: tickets are now routed to the proper queue, and employees can track their progress and status. And to make sure everyone can access the information they need while on the go, we made the entire experience available on the Salesforce mobile app.

Where we are today

A project like an intranet overhaul might seem daunting at first or that it needs a huge budget or massive team but by starting small we were able to build trust within the organisation. Concierge launched in 2015, first on mobile and then on desktop. Today it manages half of all Salesforce IT service requests and serves over 55,000 employees. IT case volume is down 40%, and issues are resolved 40% faster.



STEP 6:

Mirror Your Company Vision and Values



STEP 6: MIRROR YOUR COMPANY VISION AND VALUES

Here at Salesforce, we've spent 21 years building a purpose-driven company that our employees, customers and partner ecosystem can be proud of.

Salesforce culture is guided by our core values of trust, customer success, innovation and equality. It cements who we are and what we stand for as a community of people pursuing a shared mission – and it influences how work gets done.

We know that Business Technology is truly succeeding when it's seamlessly bringing the company's vision and values to life through the technology it develops. When you help employees link what they do every day to your company's vision and values, amazing things happen.



How We Operationalise Our Core Values

At Salesforce, our culture comes shining through in every experience we deliver. That's because our core values are the driving force behind everything we do every day. And each one of us is personally responsible in holding each other accountable for delivering on them.

Here are a few key ways we operationalise our values every day:

1 Be transparent (trust)

Everyone is empowered to speak up and share ideas to drive change, whether that's internally on Chatter or externally in our Trailblazer community where everyone can join in the conversation. We livestream our executive management meetings because employees need to know where we are going, how we plan to get there and what their share of the task will be. We are also huge believers in employee feedback, conducting surveys multiple times a year and sharing the results with Salesforce Einstein Analytics and Tableau, our analytics platform.

2 Be strategic (customer success)

We give every employee a voice in our company V2MOM (vision, values, methods, obstacles and measures), which provides total clarity on what everyone is working on and why. When all employees can clearly see how their day-to-day jobs align with the corporate vision, they can understand how they contribute to customer success and what's expected of them to achieve the company's goals.

3 Be innovative (innovation)

Thinking differently is in our DNA and employee innovation within Business Technology (and throughout the entire organisation) is always encouraged. As CIO Jo-ann Olsovsky once said, "Keep an open door, keep an open mind, encourage people to bring you their ideas and listen to what they are." We're always challenging the status quo, and we're no strangers to pulling cross-functional teams together – it's amazing what ideas surface when you see what's happening from another person's perspective.

4 Be diverse (equality)

By leveraging Futureforce for our next generation of employees, we're enabling interns and new graduates from universities all around the world to drive our future success. Their fresh perspective, openness to learning and eagerness to get the job done are some of the many ways they're making a tangible impact on real projects that affect how our business runs.

Diversity is such a strongly held value for Salesforce that we have recently merged our Equality and Recruiting initiatives. Tony Prophet has been promoted to the newly created Chief Equality and Recruiting Officer role and is tasked with leading the drive to ensure that equality is deeply and permanently embedded in all our recruiting efforts. Brent Hyder, our Chief People Officer, said of the move, "Equality is a core value at Salesforce, and a cornerstone of our culture. Bringing Equality and Recruiting together creates a unique opportunity for us to lead with our values and build a workplace that reflects our society."

Leveraging Technology to Enable Our 1-1-1 Model

Giving back has been at the heart of Salesforce since our founding. Through our 1-1-1 philanthropy model (1% of equity, profit and employees' time), we have given more than \$310 million in grants, donated products to more than 45,000 non-profits and educators, and our people have logged over 5 million hours of community service.

But as our Ohana – a Hawaiian word for family – grew around the world, so did our philanthropic efforts. We knew we needed to leverage our technology to measure impact, scale the programme and help our people to practise the philanthropy we preach.

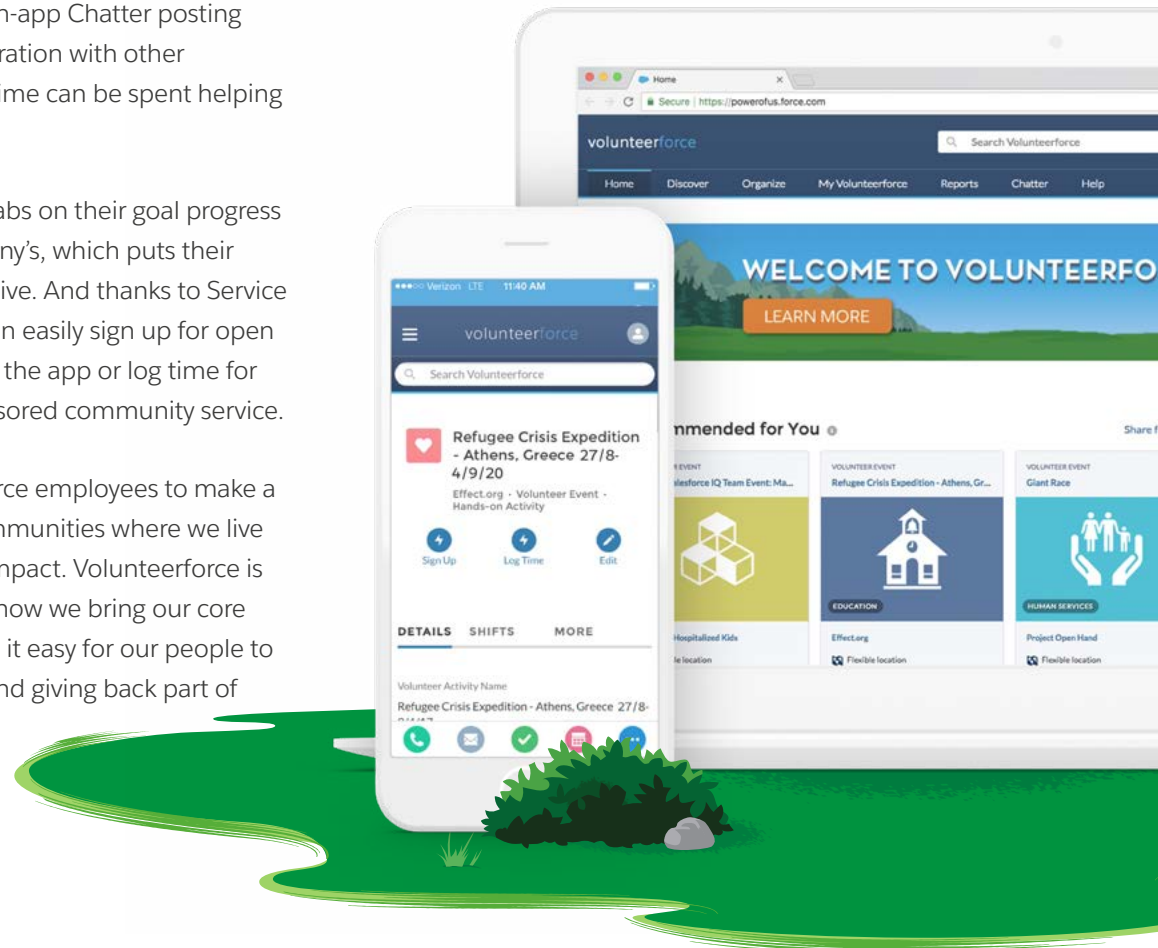
The app that helps us change the world

We turned to the Salesforce Platform to create Volunteerforce. The app is available on desktop and mobile and empowers our people worldwide to find meaningful volunteering and giving opportunities.

Employees can search based on their location, preferences and history, receive personalised recommendations, suggest suitable organisations and events or request donations. And our in-app Chatter posting enables easy collaboration with other volunteers so more time can be spent helping than organising.

They can also keep tabs on their goal progress as well as the company's, which puts their impact into perspective. And thanks to Service Cloud, employees can easily sign up for open volunteer shifts from the app or log time for non-Salesforce-sponsored community service.

Empowering Salesforce employees to make a difference in the communities where we live and work has a big impact. Volunteerforce is just one example of how we bring our core values to life, making it easy for our people to make volunteering and giving back part of their day-to-day lives.



STEP 7:

Build vs Buy? That Is the Question



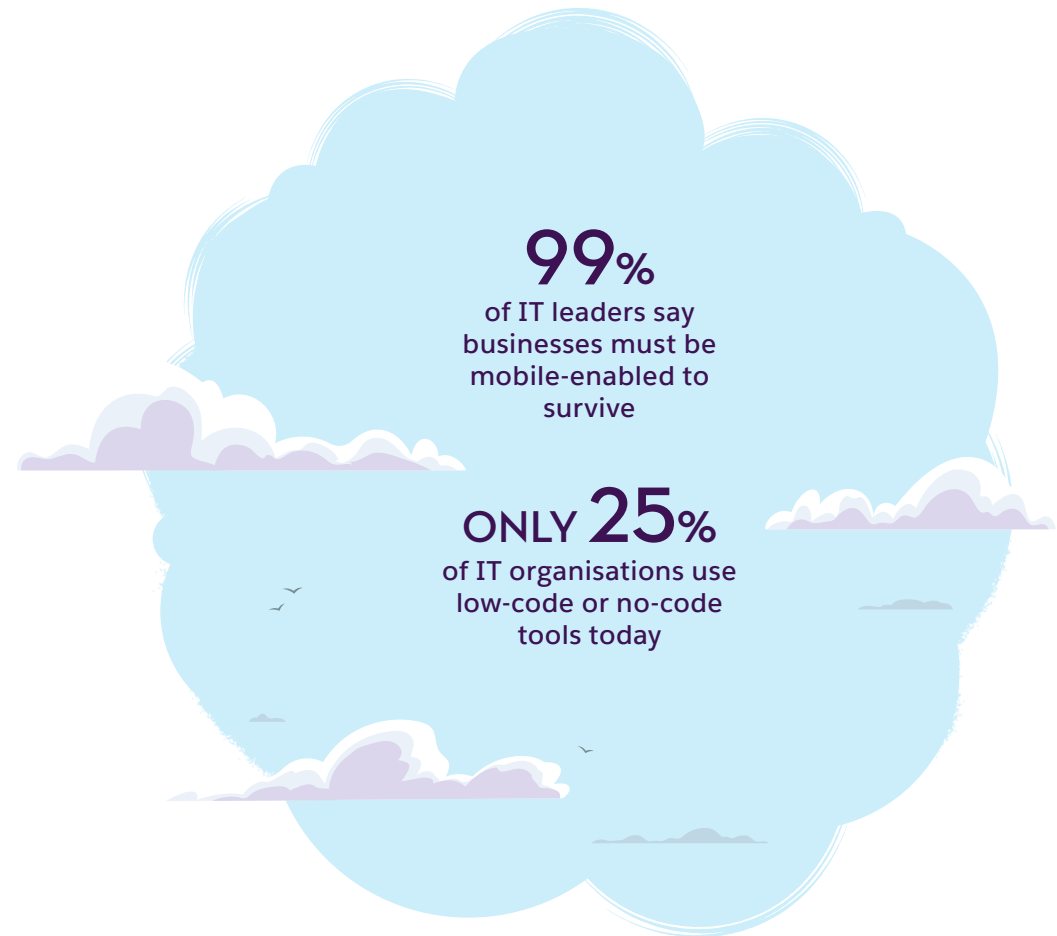
STEP 7: BUILD VS BUY? THAT IS THE QUESTION

Speed and agility are the ultimate tools in business.

But when it comes to product development, even the most talented IT teams don't always have the time to quickly build something in-house from scratch. That's when it becomes less of a question of "Can we do it?" and more of a matter of "Should we do it?"

The build vs buy decision is never an easy one, but it doesn't have to be so black and white. Innovation can often come from reusing what's worked before or having the flexibility to customise applications to fit your unique needs.

With the Salesforce Platform, you can do both: buy applications with core functionality and innovative technologies already built-in, and then tailor them to suit.



Source: Salesforce, 2019, Enterprise Technology Trends



Grace Burgio
Product Manager

How Salesforce Builds Apps on the Salesforce Platform

IT leaders and teams share a common goal: to improve business processes and increase efficiency through technology. And one way to achieve this is by delivering a connected employee experience, enabling people to find what they need, when they need it.

At Salesforce, we use the Salesforce Platform to build useful apps that transform the employee experience. Here, Product Manager Grace Burgio describes two different apps built on the Platform to solve everyday business challenges and improve employee engagement.

Enabling single sign-on with Aloha

As a ‘born-in-the-cloud’ company, every application that Salesforce employees use requires a unique login, and once upon a time everyone had to remember dozens of passwords. But as Salesforce grew, our Business Technology team found themselves bombarded with password-reset requests, which had a huge impact on everyone’s productivity. Aloha (which customers know as Salesforce Identity) was built on the Salesforce Platform to provide employees with a single sign-on solution to access every app and website from any device,

eliminating the time-draining task of remembering all those passwords and making all our workdays run a lot smoother. Meanwhile, two-factor authentication adds another layer of security, so even if an employee loses their password, we won’t lose control of our applications.

To put the time savings into perspective, Aloha’s launch saved us \$1 million by giving each employee an extra 15 minutes in their workday. By simplifying access to all apps (200 and counting!) from a central location, we increased productivity and reduced help-desk calls. On a safety and security level, a lower password reuse rate improved our ability to prevent data hacks and breaches.

Building the best org chart for our business

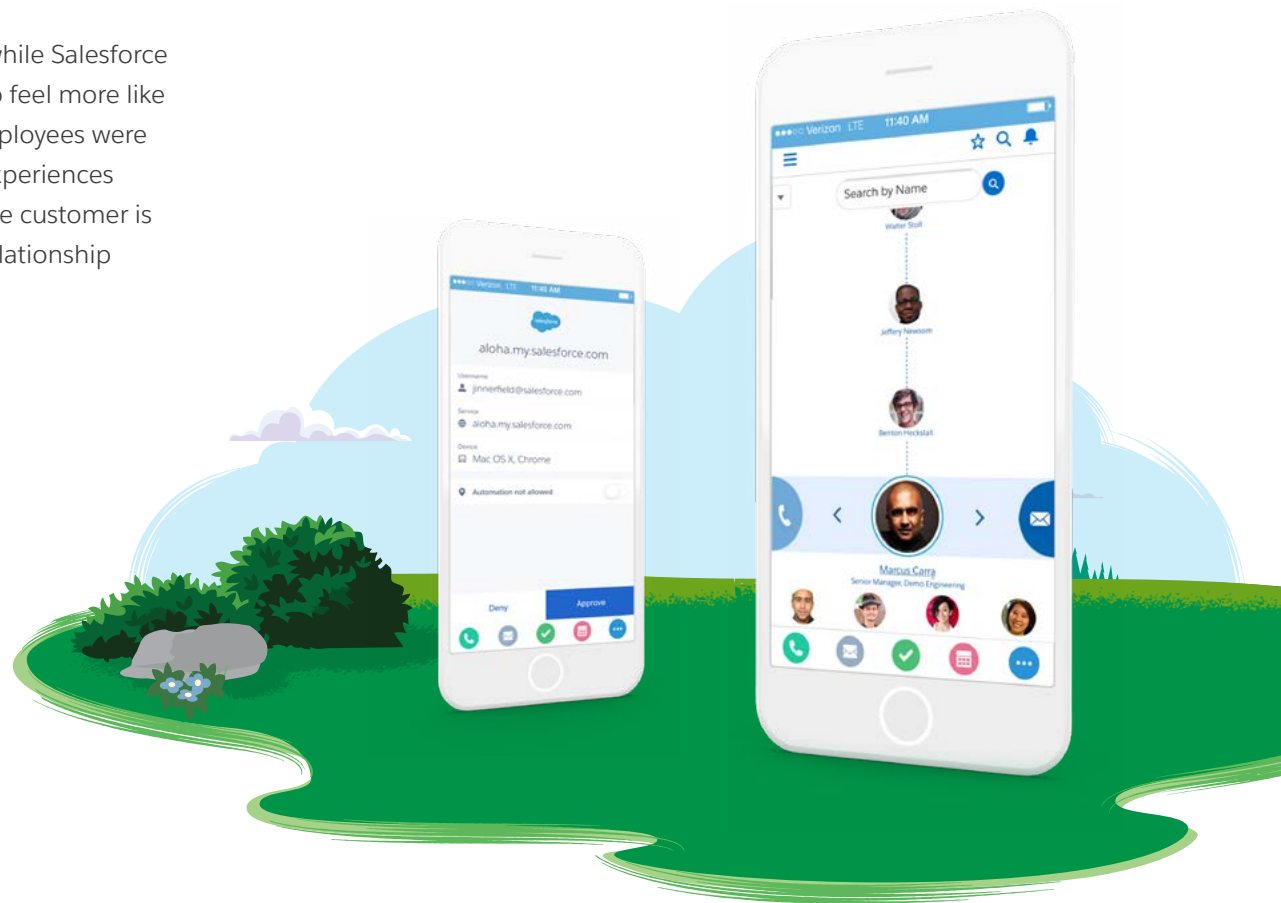
There are over 55,000 employees at Salesforce, and while our culture of Ohana (the Hawaiian word for family) means that we work collaboratively to make the world a better place, it’s not always immediately clear what the reporting relationships or chains of command are within the organisation.



STEP 7: BUILD VS BUY? THAT IS THE QUESTION

That's where the idea for Org Chart came from. Combining Canvas, the Salesforce Platform and Heroku, the app took just six months to build. It enables our people to easily view the manager, peers and reportees of any Salesforce employee, reducing the time spent digging for those details, and it is intuitive enough to help everyone do their jobs better. For new hires in particular, it can be a lifesaver, helping them to learn names and titles and better understand where they fit in.

Traditional organisational charts can feel quite sterile. And while Salesforce does have a complex infrastructure, we wanted Org Chart to feel more like a family tree and provide the same user experience that employees were used to on their personal, everyday apps. Great customer experiences are the bread and butter of our business. But in this case, the customer is the employee, and Org Chart is all about deepening their relationship to the company.



STEP 8:

Help Out Everywhere

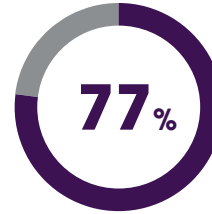


STEP 8: HELP OUT EVERYWHERE

Cooperation is a given. For Business Technology to really fulfill its potential, it has to enable and assist all teams to succeed.

It's about aligning around a shared vision while having a deep understanding of everyone's role in a project with the goal of creating an excellent customer experience.

Today, IT is woven into the fabric of the business. That's why we rebranded our IT department as Business Technology – because it's part of every function in Salesforce, from employee engagement and recruitment to finance and sales. It's the central nervous system helping to drive business success.



77% of IT leaders say that IT functions as an extension of business units, not a separate function

Source: Salesforce, 2017, State of IT





Clara Sanchez-Noda
VP of Business Analysis
and Architecture



Collaboration in Action

As VP of Business Analysis and Architecture at Salesforce, Clara Sanchez-Noda and her team support our sales organisation. In this Q&A, she explains how they work together with Business Technology to enable our salespeople to perform at their absolute best.

What's your team's role within Salesforce?

We focus on understanding and optimising our sales organisation's business processes. For instance, if somebody in the sales organisation requests a new feature, functionality or tool enhancement, we validate what they're asking for and work with Business Technology to figure out the best approach to take.

At what point does Business Technology get involved with your team?

The engagement with Business Technology varies depending on the complexity of a project and what we're trying to address. Typically, once our team has mapped the process and listed requirements, Business Technology will come

in to review what's been put together. But we will generally gauge what the steps are and at what point to engage the right people.

Can you share an example?

We won't necessarily loop Business Technology into discussions around figuring out what process looks like, but sometimes there are projects that call for a deeper understanding of the day-to-day of a user. In those cases, a business analyst from my team along with a business-systems analyst from Business Technology will shadow the user to understand what it is they're doing and why they are experiencing a pain point.

At the same time, we get tons of requests from the business around things that they think they want to do or need to do. My business process expert is key in helping us vet and validate these requests – sometimes it just requires a process improvement, not necessarily a technology improvement. That helps ensure that the rest of my team and Business Technology are used in the most productive and efficient way.

STEP 8: HELP OUT EVERYWHERE

What's the value of including Business Technology in every facet of the organisation?

One of the benefits is that they understand our infrastructure. They understand what projects are happening in finance, in employee success or in marketing that could overlap with something we're thinking about in sales, which reduces redundant work and accelerates development. They help us make sure that we're not working in silos so we're all working towards the same goal. And they know what we can and can't do, what can and can't be customised. They help us make sure that we're not the ones prescribing a solution – we're focused on what the sales organisation needs, what the requirements are, and then they're the experts when it comes to the solution.



Improving Sales Productivity with Technology

At Salesforce, we aim to impress our customers through our service, while perfecting the experiences they have with us. But with key accounts and prospects, our sales teams first have to impress with presentations that jump off the page and stunning demos designed by solutions engineers (SEs).

Our SEs play a key role behind the scenes in all of our major deals. But as sales opportunities increased, so did the number of requests from the growing sales team. And the SEs found themselves spending more time coding custom demo environments than they did with customers.

Needless to say, we turned to our technology and built the SE Assist app. Here, SEs can request specialised creative or technical assistance to build the incredible custom demos that have helped to fuel our growth.

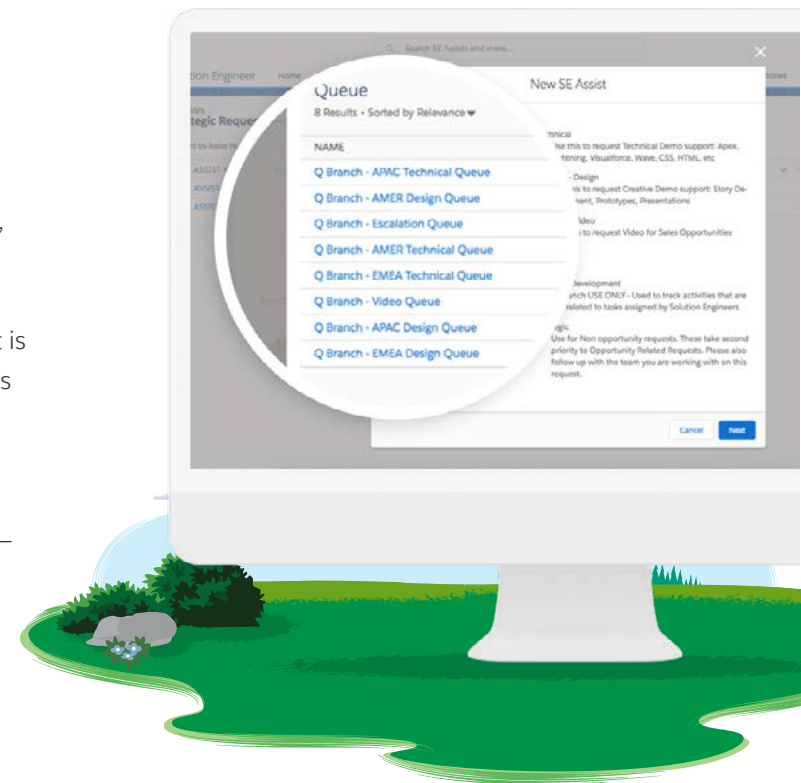
Building an app that makes more time for what matters

SE Assist is a custom object created on the Salesforce Platform with unique record types and

page layouts for everything from coding and video production requests to mobile application design. Once the SE enters a request, custom workflows route it to the appropriate queue based on geographic location, skill set and existing workload. Whoever is involved in the project can then collaborate on Chatter, add Quip documents or share files. And because it was built using the Delegated Admin feature, admins can grant permission to others to add fields and formulas or change layouts as required.

Where we are today

Routing every request to the right person at the right time has saved our teams countless hours, enabled rapid prototyping and exponentially increased productivity, freeing up time to win bigger deals. Not to mention, because SE Assist is built on the Salesforce Platform, every request is linked to a sales opportunity and unlocks a treasure trove of data. We can see what type of code was used to build the demo, how much time it took and what product was showcased – all of which goes a long way towards pinpointing future growth opportunities.



STEP 9:

Embrace Your Hybrid World



STEP 9: EMBRACE YOUR HYBRID WORLD

Organisations often rely on several cloud and on-premises applications and systems to keep the show on the road. Connecting them all quickly and efficiently is the key to gaining a competitive edge.

But, according to MuleSoft's [2020 Connectivity Benchmark Report](#), while organisations use 900 applications on average, only 28% of those typically connect or integrate. This means that it's almost impossible to understand how all of the parts work together.

We've been there. We're a cloud-first company, and we use our own products and platform to run our business, but we also leverage our partner ecosystem as well as other best-of-breed SaaS vendors.

That's why we've been a long-time customer of MuleSoft, an integration platform that connects SaaS and enterprise applications in the cloud and on-premises. Not only has it connected all of our software and data, but it's also helped us deliver better outcomes, faster – and we know we're not alone.

So, in 2018, we brought MuleSoft into the Salesforce family so that we could provide that same capability to our customers. No IT department has an unlimited budget, and speed wins in business; with MuleSoft's API-led approach, companies can focus on connectivity and reuse and innovate faster.

900
apps used in the average
organisation

85%
say integration challenges slow their
digital transformation progress

82%
of businesses hold IT accountable
for delivering connected customer
experiences

92%
of organisations plan to or will
digitally transform in the next year

Source: MuleSoft, 2020 Connectivity Benchmark Report



Chandransu Choudhury
Chief Architect, Business
Technology



How We Improved Connectivity with MuleSoft

We embarked on our own digital transformation back in 2012 and as part of that we did an ERP implementation – a major upgrade that required a close look at our ecosystem. We realised there were tons of point-to-point integrations that weren't agile, required a lot of maintenance and, given where Salesforce was heading at that time, would not be scalable.

When your infrastructure only has a few components, point-to-point integration can seem like a simple way to connect everything together. But we had hundreds of solutions, systems and applications in place – our own products as well as some partner products – and all those point-to-point integrations were an operational burden on our Business Technology teams.

We knew that all these disparate technologies and their data needed to interact well together and that connecting them would be key to gaining a competitive edge. At the same time,

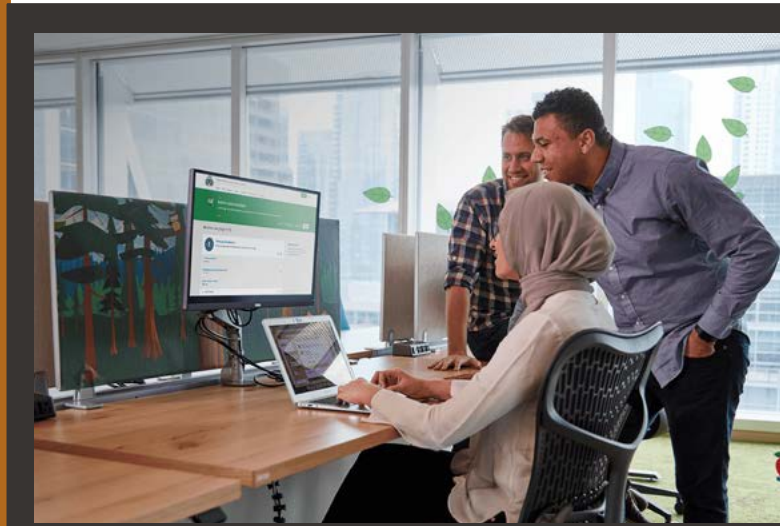
we didn't necessarily want tightly coupled integrations in case we needed to go back and fix one thing without causing a problem elsewhere.

So, keeping that in mind, and looking at our environment, we took a two-pronged approach that supported both API delivery and pub/sub messaging while also providing all-hours access to critical business data. We had to define an economical structure so we could extract the common business metadata and then make them available for a source of specific data points.

We considered three on-premises vendors and four cloud providers, evaluating them against more than 70 different criteria, and ultimately we chose MuleSoft because it was the best in terms of its product vision and capabilities.

When we talk about Business Technology or IT-managed systems, our stakeholders include our internal user base – sales, service, marketing

STEP 9: EMBRACE YOUR HYBRID WORLD



and so on – as well as customer-facing communities and portals. For instance, if you're an attendee of Dreamforce and use the Salesforce Events app, all the data that you see sits in one or more systems within the Salesforce ecosystem. And there's an entire integration behind the scenes that the user would never know about.

It would be ideal if you could have one application that does everything. But the reality is that the modern enterprise environment requires many cloud solutions, applications and on-premises legacy system. These need a connective tissue that enables disparate technologies to work together efficiently. MuleSoft is that connective tissue.



Why a Company-Wide Strategy Is Critical During Digital Transformation

Getting integration right is critical to the success of digital transformation programmes. Here's the problem: 85% of organisations admit that integration challenges stall their digital-transformation efforts. This not only impacts revenue and speed to market but also affects customer experiences.

That's according to MuleSoft's [2020 Connectivity Benchmark Report](#) – and having undergone our own digital transformation, we can attest to that need for integration.

We knew an API-led approach would be crucial to future-proof our business. But we also knew the initiative would fail if we couldn't get everyone aligned, looking at the bigger picture and understanding everyone's role within it. Without that, the widespread operational change we were aiming for would be nothing but a pipe dream.

How we enabled this operational shift

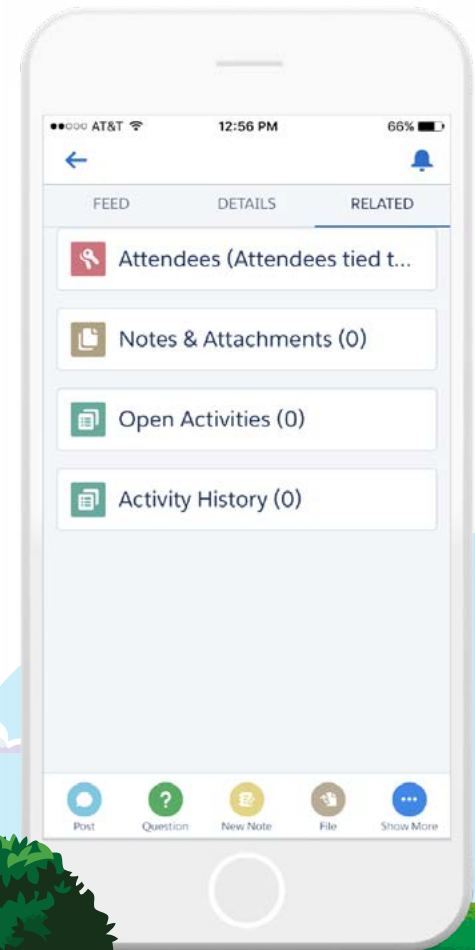
When we set out on our API-led approach to integration with MuleSoft, implementing a Centre for Enablement (C4E) was an important first step. While a traditional centre of excellence (Salesforce has a lot) features the expertise required

to set the standards and consistencies that will help to ensure success, our C4E was a cross-functional team of eight individuals from different departments who advocated for the adoption of MuleSoft.

The team charted a road map and cherry-picked best practices and standards, pinpointing KPIs to measure success and hosting workshops and training sessions. Once the wider organisation got to grips with MuleSoft's API-led approach to connectivity, the C4E team advised a phased roll-out to enable a smoother transition and more meaningful adoption.

Where we are today

Ultimately, our C4E enabled the speed and agility we needed to make the move to MuleSoft happen. In addition to reducing the time it takes to develop new integrations from four months to two weeks, our developers can focus on projects that drive real business value because they aren't spending time on repetitive manual tasks. Not to mention, we also improved the consistency and accuracy of data across all our systems, which has enhanced the accuracy and efficiency of our processes.



STEP 10:

Putting IT All Together



STEP 10: PUTTING IT ALL TOGETHER

Digital Transformation Doesn't Happen Overnight

The best way to reposition IT as a lever for growth is to do it one step at a time, breaking down what would otherwise be a massive project into bite-size changes across the business.

That's what we've shared in this playbook: a step-by-step breakdown of some of the key ways our Business Technology group uses Salesforce technology and creates a culture to drive innovation and growth. We hope it will serve as a helpful reference to you on your own digital transformation journey.

And when you add your own experience to ours, that journey you're on is going to take you to some amazing destinations.

Now go blaze your trail!





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