

Writing Good Salesforce Requirements

Define, simplify, succeed!



dreamOlé®

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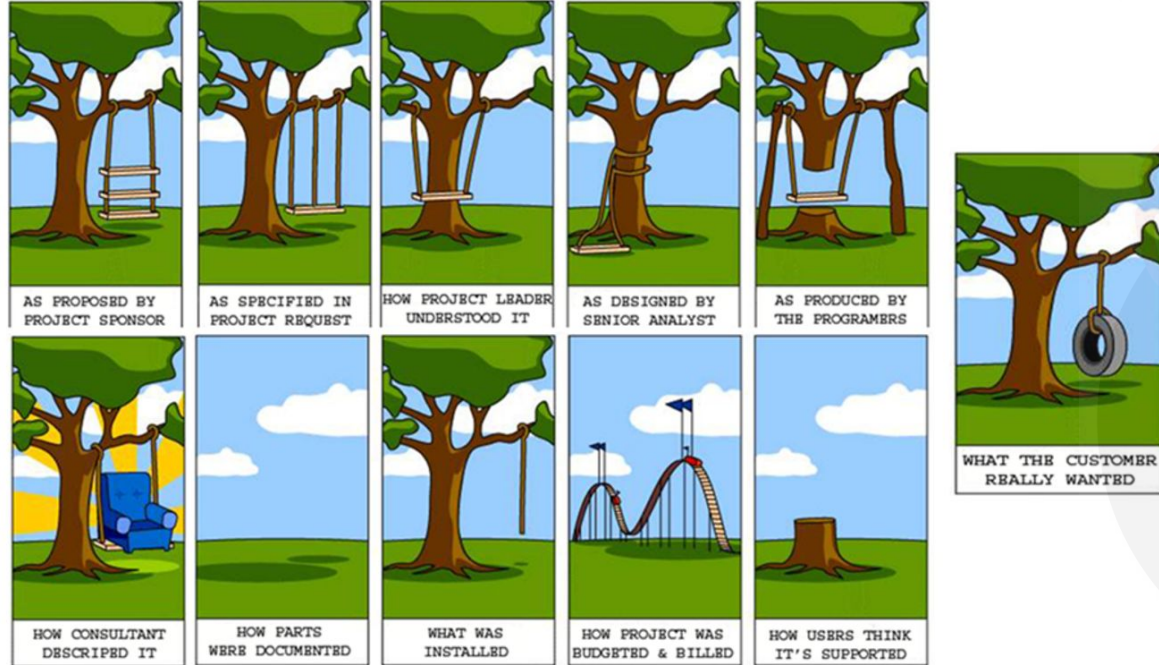
@smadyk

What are we doing here?

- Why do we need well defined requirements?
- The Requirement/Feature Lifecycle
 - Awareness, Refinement, Expectation Setting, Delivery.
 - Importance of priority
- User Stories
 - What are they?
 - How do they work? Do they even work?
 - What are the benefits?
- Tooling



Look Familiar?



So what's the need?

What challenges are we aiming to overcome?

- Shared, common understanding of requirements
- Understanding of business needs = justification (don't over engineer!)
- Shared accountability
- A shared definition of success!

Scenario: Sales Manager vs. Salesforce Admin Hero

Enter Sales Manager

Sales Manager:

Hey Salesforce guy! I've got some real work for you.

¿Qué?

We need to:

- a) **Start capturing renewal revenue in Salesforce.**
- b) **Sell our own tiered support packages with new hardware deals. We've fired our support partner.**

Pretty straight forward, right? We did this at my old company, so let me know when you're done!

No questions? Great, we're counting on you.



What just happened – what do we know?

- Sales manager has some new business requirements:
 - Manage renewals in Salesforce
 - Start selling a new type of support product on particular deals
- That's great! We encourage new ideas.
- Doesn't appreciate the complexity... so many possibilities.

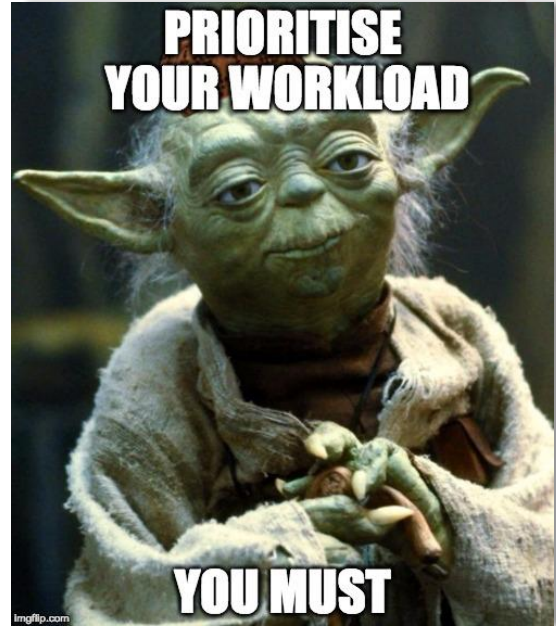
Do we have enough information to start working on these requirements?

NO... not even close. We need more information. We need to refine our requirements.



Key Learning Points

- Make Assumptions / Ask Questions
- Gather, then Refine.
- Who, What, Why?
- Prioritise your tasks
- Analyse Data (technical folk!)



Requirement Lifecycle

Icebox — The universe of known requirement. Needs refinement.

Backlog — Well understood requirements. Ready to be worked on.

In Progress — Self explanatory. Useful for visibility.

Done - Typically means development is done. Some ancillary tasks outstanding

Done Done - Tested, deployed, documented. Delivered.

This distinction is very important.

Be sure to have your own 'Definition of Done'

User Stories – What?

- Two components – Story & Acceptance Criteria
- Story captures the **who**, **what** and **why**

As a <type of user>, I want <some functionality>, so that <business goal>

- Acceptance Criteria

More granular conditions to be satisfied, evaluating to TRUE or FALSE



User Stories – Why?

- Shared understanding = shared accountability
- Less room for interpretation.
- Testing clarity & guidance
- True, True, True, True.
- Understanding of Done
- Are we done here, according to our definition of done?



Scenario: Enlightened Admin takes on Sales Manager

The Reckoning

Ok, I've got this. Let's go refine these requirements with the Sales Manager. I need to:

Requirement 1

- Make some assumptions, validate and ask questions.

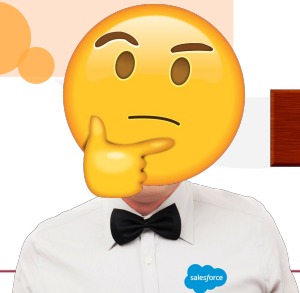
As a sales rep, I want to be able to select select support packages to sell on my opportunities, so that I can sell managed support in my deals.

- I've got this...
- A Renewal Opportunity is created when an Opp is closed won.
- The close date is today + 365.
- All products are cloned.
- Stage = "Negotiation"

Requirement 2

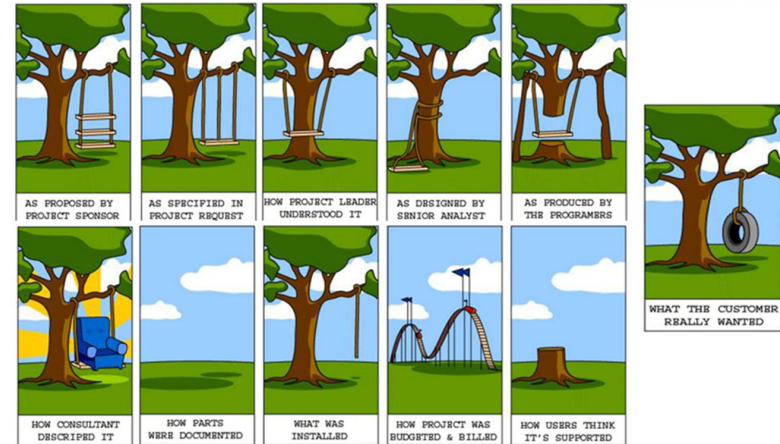
As a sales rep, I want to be able to select select support packages to sell on my opportunities, so that I can sell managed support in my deals.

- I should be able to select Gold, Platinum, or Bronze.
- If an Opportunity Amount $\geq 100,000$, a Gold or Platinum are required at Closed Won.



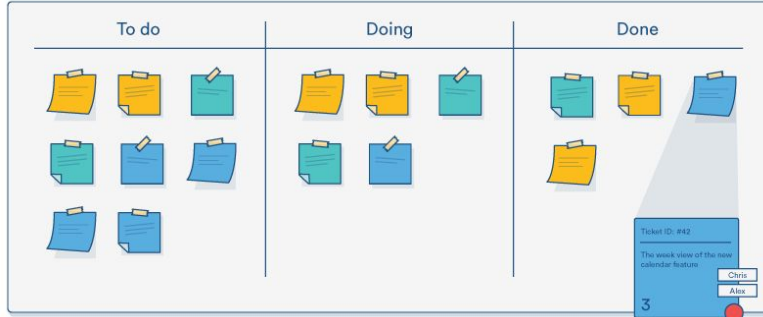
Further Learning Points

- Push Back on scope creep
- Keep it simple – minimum viable product.
- Share accountability.
- Focus on the business need.



Tools

Kanban Tools!



What now?

- Experiment with user stories
- Unclear on a requirement? Engage your stakeholder.
- Scrum Methodology.
- Sprints + sprint meetings
- Story Points
- Velocity
- fixed vs. variable project elements (time, money, quality, features)





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Q & A