1. Record Nr. UNINA9910568272703321 Autore **Negley Heather** Titolo The Salesforce consultant's guide: tools to implement or improve your client's Salesforce solution / / Heather Negley New York, NY:,: Apress,, [2022] Pubbl/distr/stampa ©2022 **ISBN** 1-4842-7960-3 Descrizione fisica 1 online resource (168 pages) : color illustrations Disciplina 658.812 Soggetti Customer relations - Management - Data processing Salesforce (Online service) Lingua di pubblicazione Inglese **Formato** Materiale a stampa Livello bibliografico Monografia

Intro -- Contents -- About the Author -- About the Technical Reviewer Nota di contenuto -- Acknowledgments -- Introduction -- Part I: Where to Start --

> Chapter 1: Introduction to the Salesforce Ecosystem -- The Salesforce Ecosystem -- The Platform -- Summary -- Resources -- Chapter 2: Salesforce Learning -- Mentoring -- Learning -- Free Learning --Trailhead -- Free Bootcamp Programs -- 100 Days of Trailhead -- Paid Learning -- Certifications -- Learning Communities -- Trailblazer Community Groups -- MVP Office Hours mypofficehours.info --Salesforce Saturdays -- Ohana Slack -- Military -- Salesforce Military -- Mervis -- Events -- Conferences -- Regional Events -- Summary --Resources -- Chapter 3: Salesforce Work Experience -- Job Experience -- Volunteer Work -- Volunteer Resources -- Catch a Fire -- Taproot Foundation -- VolunteerMatch -- Points of Light Engage -- Idealist --Recruiters -- Summary -- Resources -- Part II: Preparing for a Software Project -- Chapter 4: The Evolution of Software Development --Automation -- Software Development Lifecycle -- Waterfall --Acceleration of Change -- Agile -- Sprinting -- The Value of Continuous Feedback -- Summary -- Resources -- Chapter 5: Common Project Roles -- What Is a Consultant? -- What Is

the Difference Between Functional and Technical Roles? -- Roles --Project Managers, Scrum Masters -- Business Analyst, Business Architect -- Solution Architect -- Change Manager, Trainer -- Certified Technical Architect -- Data Architect -- Developer -- Women in Programming -- Quality Assurance Engineer -- More on Cucumber -- Role-Based Resources -- Summary -- Resources -- Chapter 6: Sales and Staffing -- Presales -- Types of Contracts -- How to Get Staffed on a Project -- On the Bench -- Centralized Staffing Model -- Decentralized Staffing Model -- Sales Handoff Internal Meeting Presentation.

The Background of the Company -- What Was Sold? -- The Timeline, Scope, and Budget -- The SOW -- What Are the Assumptions? -- Client Idiosyncrasies -- What Is the Dynamic Between Business and IT? --Introducing the Project Team to the Client -- Technology -- Summary -- Resources -- Part III: Stages of a Project -- Chapter 7: Ramp-Up --Travel -- How Much Will I Travel? -- Airport Hacks -- Travel Reimbursement -- Working from Home -- Utilization -- Know Your Role -- Summary -- Resources -- Chapter 8: Kickoff and Discovery --What Is Kickoff? -- Interpersonal Tips -- Understand Client Vision and Use Cases -- Project Methodology -- What Is Discovery? --Business Analysis -- Current State and Future State -- Process Flows --Writing User Stories -- Acceptance Criteria -- Team Cohesion --Summary -- Resources -- Chapter 9: Build, Test, Deploy -- Agile Meetings -- Backlog Refinement -- Definition of Ready -- Design --Dependencies -- Sprint Planning -- Definition of Done -- Sprinting --Daily Stand- Ups -- Identifying Risks and Issues -- Sprint Reviews --Demo Tips -- Retrospective -- Visuals -- Work Breakdown Structure --User Acceptance Testing -- Deployment -- Summary -- Resources --Part IV: Consulting Skills -- Chapter 10: Client Management -- What Are Soft Skills? -- Project Archetypes -- The Hydra -- Watch Out For --Strategies to Help -- The Echo Chamber -- Watch Out For -- Strategies to Help -- Swiss Cheese -- Watch Out For -- Strategies to Help -- The Explorer -- Watch Out For -- Strategies to Help -- The Rube Goldberg -- Watch Out For -- Strategies to Help -- High Horse -- Watch Out For -- Strategies to Help -- Stick in the Mud -- Watch Out For -- Strategies to Help -- Summary -- Resource -- Chapter 11: Communication --The Medium Is the Message -- Listening -- Speaking and Writing --Public Speaking -- Slack -- Summary -- Resource. Chapter 12: Emotional Intelligence -- What Is Emotional Intelligence? -- What Is an Emotion? -- Types of Emotional Turbulence on a Project -- Stormy Seas -- Perspective to Take -- Dumpster Fire -- Perspective to Take -- Burnt -- Perspective to Take -- Booted -- Perspective to Take -- Summary -- Resources -- Meditation Resources -- Kai's Recommendations for Managing Burnout -- Chapter 13: Critical Thinking and Problem-Solving Skills -- What Is Critical Thinking? --Gathering, Analyzing, Evaluating -- Watch Out For -- Bias --Differentiate an Opinion from a Fact -- Information Overload --Strategies to Help -- Time Management -- Synthesizing and Distilling -- Cognitive Biases -- Bike-Shedding Effect(Parkinson's Law of Triviality) -- Information Bias -- Irrational Escalation (Escalation of Commitment) -- Automation Bias -- Next in Line Effect -- Spacing Effect -- Semmelweis Reflex -- Summary -- Resources -- Appendix A:

## Sommario/riassunto

Break down the art and science of Salesforce consulting. This book will help you refine your consulting skills on the Salesforce platform. Author Heather Negley, a seasoned consultant who has completed over 30 Salesforce delivery projects in the past nine years, equips Salesforce professionals with detailed explanations on the stages of a project and the skills you need for each stage. You will learn the type of roles on a project, so that you can plan your career path. If you need help managing clients, this book teaches you how to effectively work with

Other Resources -- Index.

and advise people. You will go through the following main sections to round out your skills and service offerings: The best learning and community resources, including mentoring programs Tips on how to get job experience The evolution of software development Project roles The parts of a project Consulting skills The consulting skills section of the book breaks down each skill and explains the parts of the project to which you should apply your skills and real-world examples. Topics include client management, communication, emotional intelligence, critical thinking, and avoiding cognitive biases. What You Will Learn Identify patterns in your projects through archetype identification Watch out for specific risks common to project types Choose the best consulting tool from your toolbox, depending on the problem that you encounter Who This Book Is ForPeople who work as Salesforce administrators for their industry and want to make a move into consulting. It is an excellent choice for someone who is interested in project work and likes to work with people to help them make decisions.