CREATING A CENTER OF EXCELLENCE FOR YOUR SALESFORCE ORG
**What is a Center of Excellence and why do you need one?**

A Center of Excellence (CoE) is an employee-led, cross-functional group of people in your organization that come together to discuss and collaborate on large-scale concepts, granular ideas, tools, and solutions pertaining to a specific platform or business initiative. The mission of a CoE is to focus on creating, developing, and promoting proven practices and ideas that will help streamline processes and improve the quality of both worker and customer experiences.

Implementing a Salesforce CoE can improve agility amongst your teams, help you to better manage change in the organization, and ensure that everyone is on the same page when it comes to key business goals. It also allows you to enhance the value of your Salesforce investment by providing better access to subject matter experts across the org.

**A Salesforce CoE sets up a framework for:**

- Piloting new ideas.
- Collaborating and sharing proven practices.
- Receiving and responding to user feedback.
- Managing releases and responding to enhancement requests.
- Complying with governance and regulatory requirements.
- Tracking performance metrics.
- Driving consistent learning and communication practices.

**With a little guidance and a dedicated group of people who believe in the value of collaboration and knowledge-sharing, you can organically grow your CoE into a well-oiled and innovative machine.**
How to start and grow a Salesforce CoE

There is no perfect way to get a CoE started in your organization, and there is no set time frame for how long it should take to get it going or how fast it should grow. But with a little guidance and a dedicated group of people who believe in the value of collaboration and knowledge-sharing, you can organically grow your CoE into a well-oiled and innovative machine.

Determine which CoE model is right for you

There are different ways to organize your CoE, so it’s important to find the model that fits best with your organization and aligns with your goals. Here are 3 common models, along with their pros and cons:

**Centralized model** — This model uses a single point of governance, a single set of processes, and is focused on a single business unit.

- Pros: The centralized model makes efficient use of resources and, with a single focus, creates stronger accountability.
- Cons: One downfall of focusing on a single business unit is that it has a tendency to create silos, and can be more bureaucratic than other models.

**Decentralized model** — The decentralized model features a federated governance and focuses on multiple business units.

- Pros: Organizations that use this model tend to experience more agility than those that use a centralized model, while still seeing strong accountability.
- Cons: This model has poorer resource efficiency compared to the centralized model.

**Hybrid model** — This model covers multiple business units and focuses on the organization as a whole with common governance rules.

- Pros: This model lends to the highest resource efficiency and has the most transparent structure of all 3 models.
- Cons: Organizations that use this model will see less agility and may experience conflicting goals and expectations among members.
Create roles and responsibilities

How you structure your CoE depends on the unique needs of your organization, but there are some key roles you can implement when getting started. You can (and should) tweak them as needed as your CoE grows and more specific responsibilities are established. Here are some of the roles you will typically find in a Salesforce CoE:

*Executive Owner* — This person will be responsible and accountable for the overall program efforts and executing the strategic roadmap. They are responsible for things like:

- Coordinating efforts across multiple initiatives, including staffing.
- Managing escalations.
- Defining overall metrics to be tracked by the program.
- Ensuring initiatives map to metrics strategy.
**CoE Leader** — This person is responsible for the CoE’s overall business engagement and managing relationships with groups both inside and outside the organization. They are also responsible for things like:

- Establishing business standards and guidelines.
- Coordinating business resources.
- Managing business escalations and risk mitigation.

**Technical Architect** — If you’re already part of the Salesforce ecosystem, then you likely already have a Technical Architect; they own the technology solution and delivery of that solution to clients. As a key member of the CoE, they are responsible for things like:

- Translating requirements into a technical solution.
- Gathering and articulating non-functional requirements.
- Reviewing business, functional, and technical requirements.
- Creating key architecture/design documentation and deliverables.

**Business Architect** — Like the Technical Architect, you may already have a Business Architect (or a team of them) in your organization. BAs monitor business-critical results and work with internal and external partners on analytical projects. As a member of the CoE, they are also responsible for things like:

- Supporting the leadership team with software development consultation, quality assurance and implementation, data gathering, and data analysis.
- Leading efforts in building sustainable infrastructure, automation, and process improvement.

*Different people prefer to communicate in different ways (some prefer email, some like web conferences, etc.), so use various channels to keep members engaged.*
Implement a governance model

The governance model is a set of systems, principles, and processes by which the CoE is governed, and allows CoEs to be more transparent and aligned. The typical Salesforce governance model will consist of various advisors, a steering committee, and at least one executive sponsor (or a council of executive sponsors) to provide guidance to the CoE and hold members accountable.

By having governance in place, decision-making will be more streamlined and issues can be resolved in a timely manner by the appropriate teams. And by having executive sponsors, the CoE can experience more visibility in the organization, while keeping leadership informed on all things Salesforce-related. Collaborative, agile governance is a cornerstone of continuous improvement.
Make communication a priority

Your Salesforce CoE won’t be successful without great communication and collaboration. But different people prefer to communicate in different ways (some prefer email, some like web conferences, etc.), so use various channels to keep members engaged. It’s important to check in with members regularly about how they want to communicate, how often they want to meet, and what tools/resources they need to succeed.

A great way for your CoE to communicate (and since we are talking about a Salesforce CoE here, after all) is Chatter. As an enterprise social network, Chatter is not only inherently collaborative, but a great way to keep record of topics that can be searched later. It also allows for transparency, and gives employees outside the CoE the chance to pose questions and resolve issues. You can also create CoE-specific hashtags, and use Chatter as a platform for doling out shout-outs and congratulations to peers on a job well done.
Managing and improving your Salesforce org

One of the greatest benefits of having a Salesforce CoE in place is the ability to get a better overall picture of how your Salesforce org is operating, and to shed light on issues or improvement needs as they present themselves. But as many organizations will find — even ones with active, well-developed CoEs in place — ongoing administration and continuous improvement of their Salesforce org can be costly and time-consuming, and some simply lack the appropriate internal resources. Many businesses are forced to stretch their limited IT teams across roles in which they may have little experience, resulting in slow response times or mistakes. Or they may let the enhancement backlog grow, and lose the confidence of users.

Salesforce users have been conditioned to expect fast resolution of questions, bugs, and enhancement requests. Your CoE leaders and other Salesforce experts in your organization must keep pace with the speed of business changes and expectations. Organizational changes, productivity initiatives, unanticipated usage patterns, and platform upgrades create unpredictable demand for resources to manage your Salesforce org.

Do you need a Cloud Management partner?

To reduce the burden on internal teams, more and more organizations are turning to managed services providers (MSPs) to maintain their Salesforce org. An MSP can help extend the capabilities of your internal teams with experts who know the Salesforce platform inside and out, can deliver quick resolutions of issues, and provide support during upgrades and new releases. Partnering with a trusted MSP — like Appirio’s Cloud Management — whose model is built around delivering frequent change makes enhancing the quality of solutions and process improvement goals brought forth by the CoE more attainable.

If you do decide to partner with an MSP, members of your CoE — particularly your Business Analysts — will likely play a key role, working directly with your Cloud Management partner to write user stories, prioritize items for upcoming sprints, and socialize change. If
your organization doesn’t have BAs, the MSP can often provide “BA-as-a-service” on a temporary or permanent basis. System administration usually remains the responsibility of your internal IT staff, or business partners who work in various departments (e.g., a sales operations specialist who works in the sales department may be a Salesforce administrator). But system administration is often a full-time role, so if you need help with it, find an MSP that offers it as an add-on service.

Whether your organization has the resources in place to effectively manage your Salesforce org in-house, or you need to look to an MSP to get you where you want to be, it’s imperative that your technology teams embrace the process, and always encourage continuous improvement. Consider implementing a Salesforce CoE in your organization as the first step toward creating a more efficient, transparent, and collaborative environment.

Learn more about managed services in the cloud

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