PRECURSIVE PLAYBOOK

MANAGING PROJECTS REMOTELY ON SALESFORCE

PRECURSIVE

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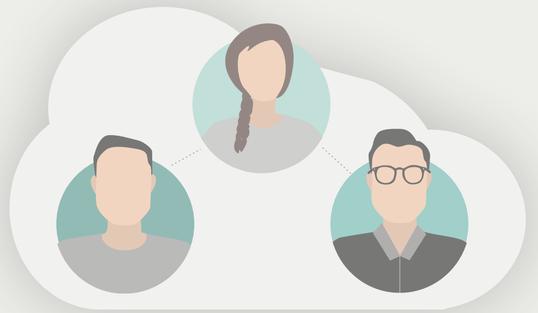

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FORWARD FROM 4C

As we continue to operate in what has now become the new, much more remote working landscape, having the tools and technologies in place to enable this has never been more important, to ensure that we stay connected to our customers, colleagues and partners.

When it comes to delivering projects remotely, alignment, communication and project visibility are key. Processes need to be defined, deadlines set and customers need to be kept engaged and regularly updated on project progress and milestones.

The Salesforce platform, with it's customer success centric focus is the perfect tool to enable businesses to thrive whilst continuing to operate fully remotely and it can be completely customised and configured to meet exact business specifications and requirements in delivering project success.

Divided into three plays, this guide helps the evaluation of your current position. Identify the challenges, create better project management processes in the new remote reality and use this period as an opportunity to build a future-proofed platform to supercharge your growth.

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

WHO IS THIS PLAYBOOK FOR?

Your team delivers customer-centric projects

Remote working is your new reality

Salesforce is your platform for growth

- **Remote working is new normal:** beyond the necessity for short-term survival, there is also an opportunity to supercharge for the future.
- Project Management and Professional Services Automation are part of a continuum: take time to understand where you will benefit.
- While the basic principles of healthy & successful project management have not changed, true resilience in the new remote reality requires the utilization of a new lens.
- There is a range of Project Management functionality on the Salesforce platform that will support you in remote working. Start by evaluating your requirements and let that guide you in your choice of technology.

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QUESTION:
WHAT IS THE NEW REMOTE REALITY?

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WHAT IS THE NEW REMOTE REALITY?

“Like many SaaS businesses, we are pretty much based in the Cloud. What’s been challenging has been the fundamental change to the culture.”

Sean Smith
/ Apperio

Operating on a Cloud-based platform is not a new concept. For many businesses that were already working on Salesforce, they have entered this new world with a distinct advantage - managing their customer operations on a world class, virtual platform.

Whilst the pressure to optimize delivery models to see success faster with every customer has always been present, the current crisis has forced peoples’ hand. All the levers now need to be working together to keep our businesses resilient.

That’s what we call the New Remote Reality.

For customer-centric businesses, connecting your project delivery to your Salesforce platform makes perfect sense, in the new Remote Reality today and in the future, to quickly de-silo your company.

THIS IS YOUR PLAYBOOK TO MANAGE PROJECTS ON SALESFORCE . . . REMOTELY

YOUR PLAYS

1

STABILIZING:

Evaluating priorities and project requirements against your existing platform

2

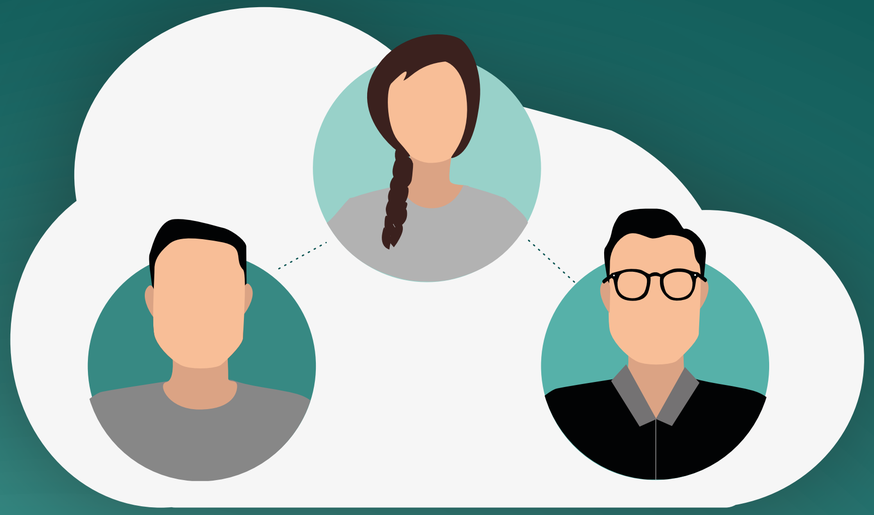
SETTING UP:

The anatomy of successful remote project management

3

FUTURE-PROOFING:

Planning for the future in the new remote reality



PLAY #1

STABILIZE: EVALUATING YOUR PRIORITIES AGAINST YOUR PLATFORM

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CAN YOU USE SALESFORCE FOR PROJECT MANAGEMENT?

CAN YOU EVEN USE SALESFORCE FOR PROJECT MANAGEMENT?

In order to stabilize your project delivery you may look to your existing toolset. The basic Salesforce instance comes with only the very barest of the essential project management capabilities.

So whilst companies do use Salesforce for project management, they are typically adapting it to classic PM processes.

Salesforce provides a 360 degree view of the customer helping companies succeed. The great news is that once you bring these rich customer stories into an environment with project management capability, you are in a position to deliver truly customer-centric outcomes.

Of course, the joy of Salesforce being a cloud based platform, is that you and your team can can log in and access this project data from anywhere (however remote).

But is it Project Management or Professional Services Automation?

One more consideration - whereas the terms Project Management and Professional Services Automation (PSA) are frequently used as if they are interchangeable, in reality it is more sensical to consider them as occupying different positions on a spectrum of functionality. So base-level Salesforce will help you survive, but will it help you succeed?

“How do you actually see a project or a task? Salesforce does not provide this out of the box. You can roll your own and start from scratch with a few custom objects or get a head start with an app from the AppExchange.”

Andy Mahood, CTO / Precursive

QUESTION:
WHAT IS THE DIFFERENCE BETWEEN SURVIVING AND SUCCEEDING?

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ANSWER

ANSWER: PLATFORM, PROJECT MANAGEMENT OR PROFESSIONAL SERVICES AUTOMATION?

Sorry for answering a question with a question, but in order to stabilize delivery, look towards your current methods and requirements which will highlight if you're currently surviving or if you are progressing to smarter delivery. There is a wealth of project management functionality available to you on Salesforce to support remote delivery, from the basic out-of-the-box set up, to the full automation in the form of a Professional Services Platform.

Overleaf is our at-a-glance guide to the main services and the level of sophistication you can typically expect from these three categories of tech.

PLAY #1 - STABILIZE

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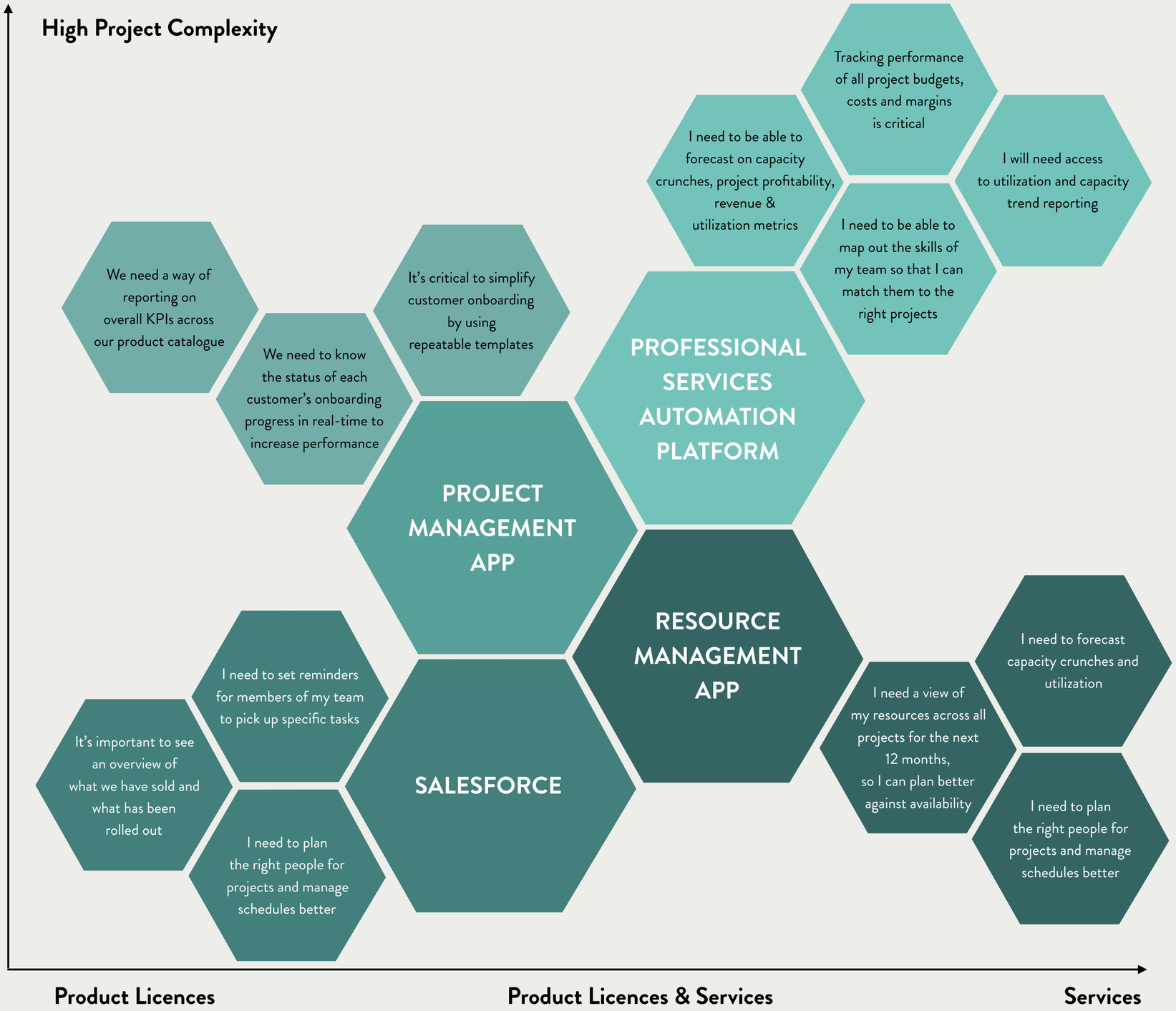
		Salesforce (SF) Out-the-Box Manage your day Basic Functionality	SF + Project Management App Manage your projects Prebuilt Configuration & Automation	SF + PSA Manage & resource projects AI for Optimization
Task Management	1	Survival	Stepping-up	Smart
Team Collaboration	2	Survival	Stepping-up	Smart
Document Sharing	3	Survival	Stepping-up	Smart
Dashboards & Reports	4	Survival	Stepping-up	Smart
Mobile Optimization	5	Survival	Stepping-up	Smart
Process Templates	6		Stepping-up	Smart
Project Overview (Gantt, Calendar, Kanban)	7		Stepping-up	Smart
Time Tracking	8		Stepping-up	Smart
Holiday Planning	9		Stepping-up	Smart
Milestone Tracking	10		Stepping-up	Smart
Financial Tracking	11			Smart
Resource Management	12			Smart
Capacity Planning	13			Smart
Forecasting	14			Smart
Risk Management	15			Smart

EVALUATE

EVALUATE YOUR PRIORITIES

Use our requirements evaluation grid to determine which of these statements you identify with, and where your requirements lie within the four key product areas.



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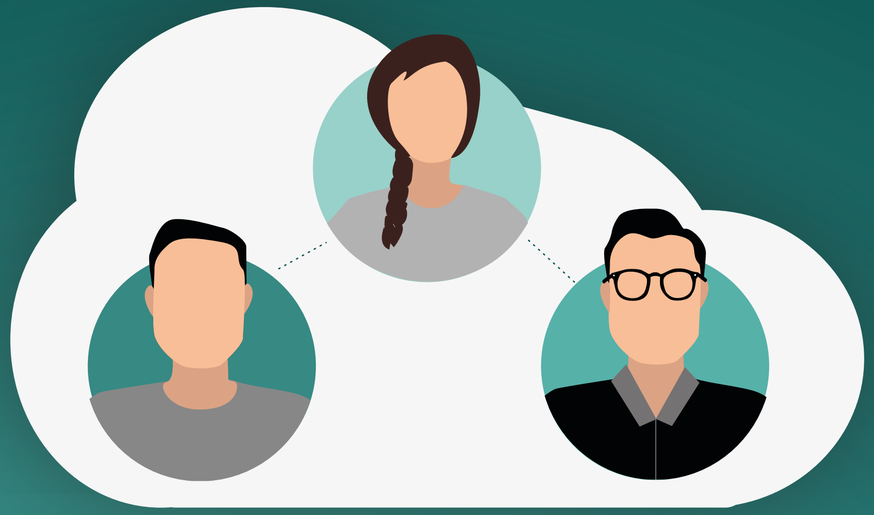

PLAY #2

SETTING-UP:
THE ANATOMY OF SUCCESSFUL REMOTE PROJECT MANAGEMENT

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FIVE STAGES

THE 5 PROJECT STAGES

Whether you are project managing remotely, or not, these 5 key stages apply. However, physical distance from key project stakeholders means that access to the complex information in real-time becomes your #1 priority.

With that in mind, our stage set up map guides you on the key touch points for Product and/or Services orientated delivery models based within Salesforce.

INITIATION	PLANNING	EXECUTION	CONTROL	CLOSURE
Create project charter	Project Scope Statement	Forecasts	Monitoring	Analysis
Opportunity closed won	Create Project	Project milestone completion	Milestone completion tracking	Project milestone analysis
	Generate Playbook	Playbook stage progress delivery	Playbook stage progress tracking	Evaluation of project by stage
	Generate project timeline, including Baseline	Management of project against Baseline	Timeline and velocity tracking	Analysis of team output
	Allocate team	Team management	Utilization and capacity tracking	Project financial report
	Allocate budget	Budget management	Budget tracking	

KEY:

- HUMAN PROCESS
- SALESFORCE PROCESS
- ENHANCED BY AUTOMATION

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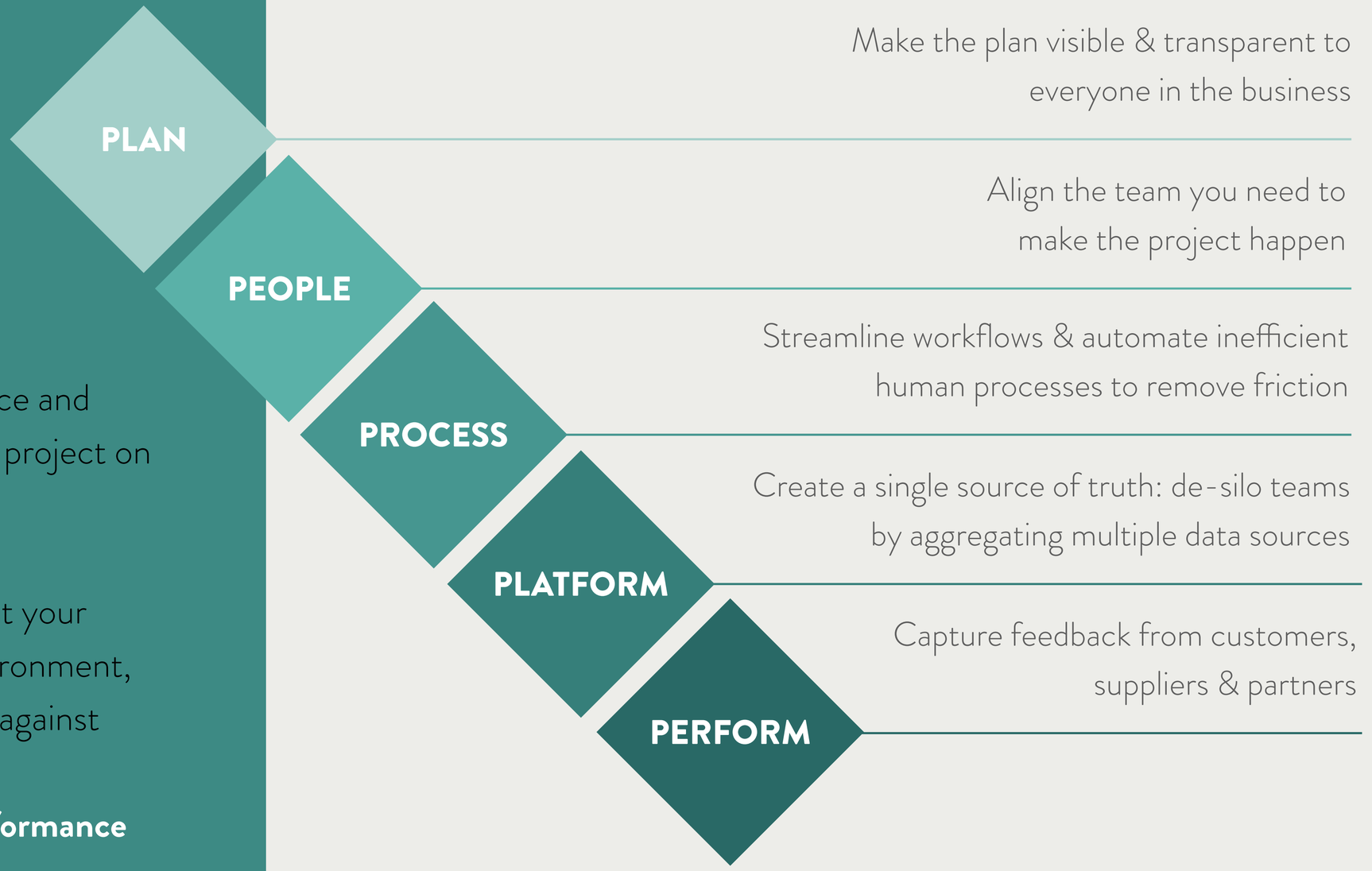
REMOTE PROJECT SET-UP

So far, you have:

Evaluated the technology you have in place and **assessed** what the 5 stages of your virtual project on Salesforce should include.

Now, in order to make the final check that your project will run smoothly in a remote environment, take a moment to consider your strategy against the 5 ‘P’s:
Plan, People, Process, Platform and Performance



“There’s not really a price tag that you can put on good planning.”

Ryan Sullivan
/ PowerPivotPro

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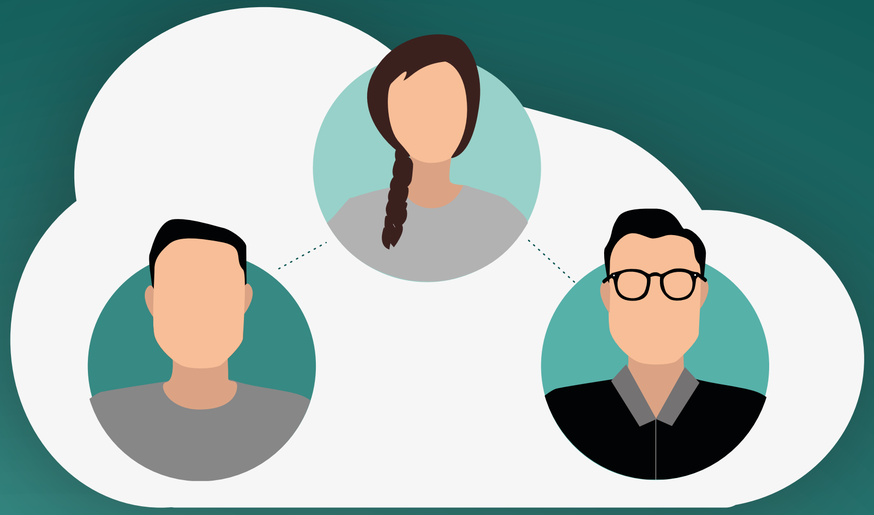

PLAY #3

FUTURE PROOFING:

PLANNING FOR THE FUTURE IN THE NEW REMOTE REALITY

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PLAY #3 - FUTURE PROOFING

LEARN

LEARN

“We will never return to the old ways of doing business. The crisis **accelerated change** in ways that will transform the way we live and work for years to come.”

/ The COVID-19 Response Playbook, Work.com

The two questions we must ask ourselves:

- How do we future proof our projects for the ‘next normal’?
- How do we leverage this opportunity to accelerate digital change to be more relevant than ever to our customers?

The Future of Customer Success is One Platform.

1

Alignment:
Collaboration has never been more important.

Customer strategy, stakeholder objectives and customer success tactics must be aligned. Managing data across multiple systems is a thing of the past.

2

Speed:
Time to value must be your baseline metric.

In the current climate, value creation is the primary driver for any project. If you can not deliver this on time, then you risk losing that customer.

3

Understanding:
Anticipate & analyze project delays.

Being truly agile depends on your ability to react to feedback immediately, feedback from your customer and operational data, across all project portfolios.

BUILD YOUR FUTURE ROADMAP

Our Future-Proof Framework will help you plot a course for greater alignment, insight and speed for your project management processes on Salesforce.

“Everything's on a clock. You have to make decisions quickly, and taking time has an impact”

Ryan Sullivan
/ PowerPivotPro

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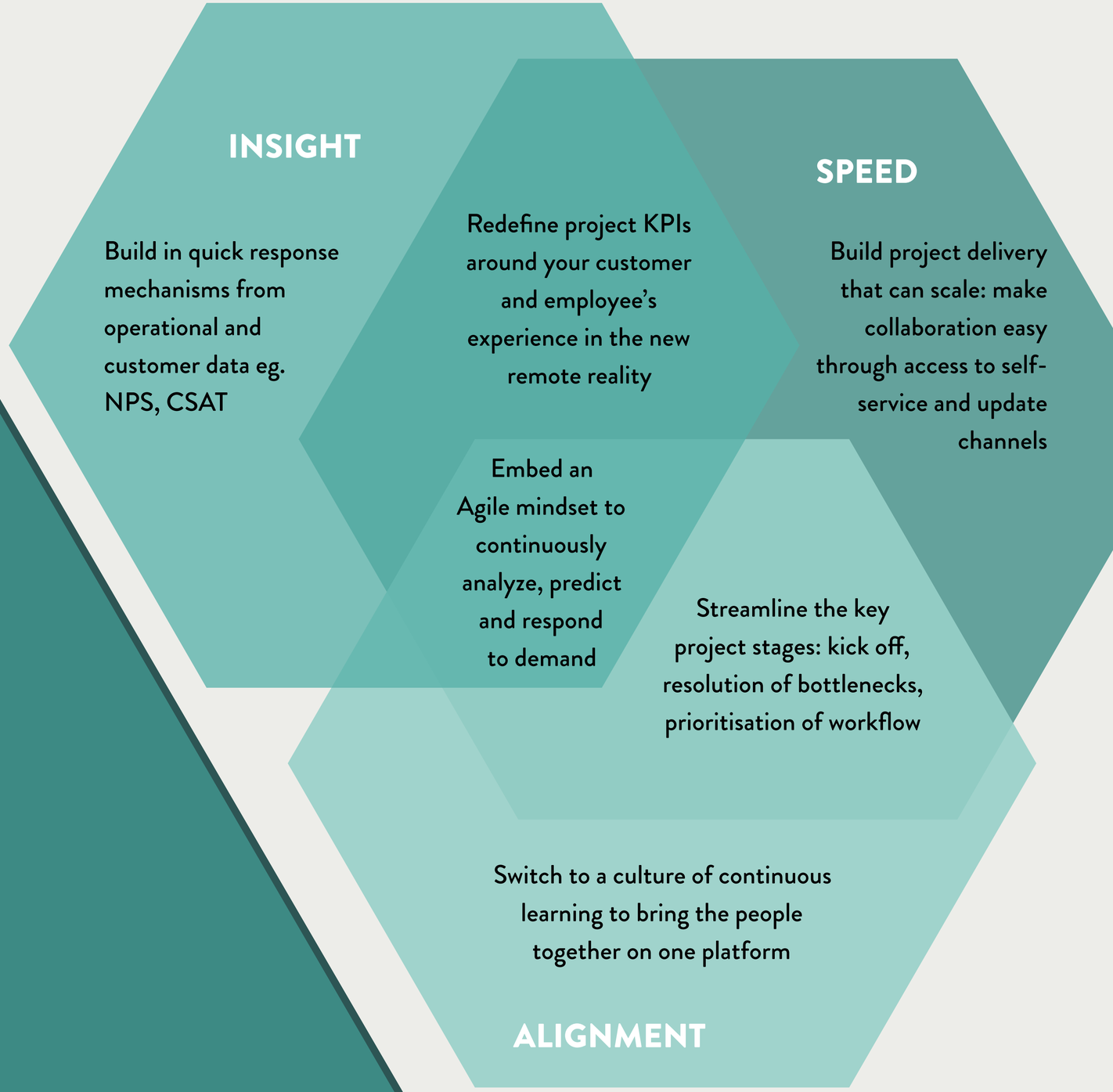

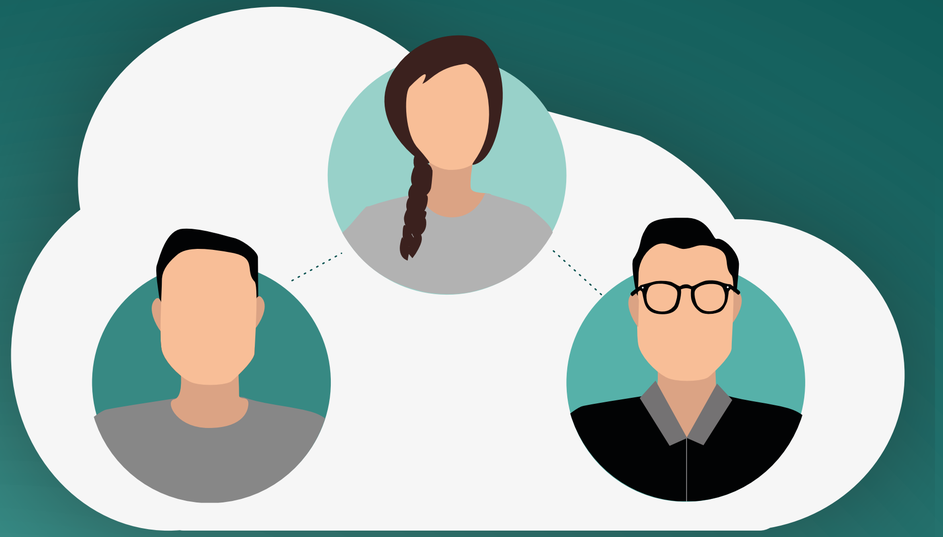

PUTTING IT ALL TOGETHER
WHAT DOES GOOD LOOK LIKE?

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WHAT DOES GOOD LOOK LIKE?

PROCURIFY:

LEVERAGING SALESFORCE TO OPTIMIZE THEIR PROFESSIONAL SERVICES AND PROJECT DELIVERY TEAMS.

Procurify delivers spend management software, enabling organizations to build proactive spend cultures. Their staff have now transitioned smoothly to remote working environments.

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NEW PLAYBOOKS

Introduced templates for different types of implementations

TTV FASTER

Average time to onboard is 45% quicker

NPS RISING

Higher NPS scores during onboarding process

“More than ever, people need to generate an income from their investment in a very few days.

Projects cannot go on and on. There is a direct correlation between the onboarding time and the levels of churn, so the time between purchasing a solution and getting value is essential.”

Julian Hannabuss / Director of Revenue Operations / **Procurify**

THE NEW REMOTE REALITY

IMPACT OF NEW REMOTE REALITY AT PROCURIFY

Procurify were already working on Cloud-based systems

They had trialled remote working across the main teams

Customer demand has increased in some sectors (Ecommerce, Logistics, Biotech, Healthcare & Education)

Some customer segments have seen heavy decline e.g. Retail, and therefore new demands to accelerate value delivery

Organizations wishing to implement cost management solutions frequently go through disruptive, turbulent re-organizations as they adapt to remote working; this can damage implementation

GOALS IN THE NEW REMOTE REALITY

CULTURAL

Help people thrive, bring the team together and help them stay engaged while working remotely

CUSTOMER SUCCESS

Expanding existing customer accounts

Improving project delivery efficiency to accelerate time to value

Reducing a high churn rate

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WHAT DOES GOOD LOOK LIKE?

HOW PROCURIFY MET THEIR GOALS

HOW PROCURIFY MET THEIR GOALS

- Intelligent use of data to pinpoint the main reason for churn - time to onboard
- Analysis and measurement of existing processes in order to define best practice templates
- Implemented scalable project management processes with PrecursiveOBX templates
- Professional services team usage of PrecursiveOBX to manage and deliver concurrent projects
- Monitoring of delivery times in Salesforce, with any variances flagged early
- Business intelligence is aggregating data from Salesforce, PrecursiveOBX and Gainsight to identify potential churn risks
- Predictive risk models used to prompt CS team to engage with specific customers earlier

PRECURSIVE PLAYBOOK

MANAGING PROJECTS REMOTELY ON SALESFORCE

THANK YOU

Precursive would like to thank you following contributors to this playbook for their stellar insights and time.

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4C:
SALESFORCE PLATINUM PARTNER

4C helps companies unlock commercial value and achieve business transformation in the customer age.

The company is EMEA's largest independent Salesforce Platinum Partner. It offers unrivalled expertise in best of breed technology integration, including Salesforce's core clouds. 4C additionally provides consultancy across customer 360, e-commerce, quote to cash and The DocuSign Agreement Cloud.

4C is passionate about client success and takes the time to understand its clients' challenges, building long-term relationships with them.

4C leverages local market knowledge and capabilities to deliver projects across EMEA in a diverse range of sectors including high-tech, manufacturing, financial services, and nonprofit, for SME companies all the way up to enterprise businesses. Founded in 1997, 4C is headquartered in Belgium with offices spanning Europe and the Middle East.

PRECURSIVE:
LEADING PROJECT MANAGEMENT APP FOR SALESFORCE

Precursive helps forward thinking companies to see success faster. Founded in 2011 and headquartered in London, the company's cloud-based software enables growth through improved customer onboarding and capacity planning.

Precursive serves both small businesses and large enterprise across the agency, consulting, high tech and professional services sectors, with customers including Mitel, Procurify, Salesforce, SES and Vidyard. The company is also a strategic Salesforce partner, the world's largest provider of customer relationship management (CRM) software.

In late 2019 Precursive merged with Taskfeed, #1 app for customer onboarding; the combined platform helps technology and services companies to scale.

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MAKE EVERY CUSTOMER A SUCCESS STORY

www.precursive.com