

# FOUR WINNING STRATEGIES TO ACHIEVE SALESFORCE PROJECT SUCCESS

## RESULTS FROM TEC'S 2021 SALESFORCE CUSTOMER SURVEY



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# INTRODUCTION

Salesforce is one of the most popular customer relationship management (CRM), sales, and all-around business management systems on the market. The Salesforce ecosystem now includes many core offerings based on application areas, more than a dozen industry-specific solutions, and a robust universe of add-on apps and skilled service providers. But customer hurdles with Salesforce development and management are common.

In 2020, we partnered with Spinnaker Support to survey Salesforce (SF) customers on their challenges, finding that up to 60% were struggling with the administration and maintenance of their Salesforce systems. Even more organizations reported challenges with implementing new functionality, and 62% said their SF expansion plans were compromised due to a lack of Salesforce experts—in-house or otherwise. Learn more about 2020's market report [here](#).

Building on that foundation, we set out this year to learn about approaches that are working for organizations as they look to optimize their Salesforce ecosystems. We wanted to identify winning strategies for clearing the Salesforce backlog and achieving efficient, successful implementations.

Working with a great group of participants, we drilled down into specific Salesforce projects that their companies recently completed, gathering both quantitative and qualitative data. We also asked how their companies plan to continue innovating their Salesforce environment in 2022. This report begins with a brief summary of the findings, followed by a deeper dive into the survey design and results.

# EXECUTIVE SUMMARY

A 2021 survey of more than 100 Salesforce (SF) customers in the US and Canada uncovered common patterns and challenges with SF implementation projects. Our participants also offered direct reflections on what's worked well for their organizations, covering everything from project planning and requirements validation to resource assessment and team composition. Taken as a whole, the results form a valuable, crowdsourced guide to achieving Salesforce project success.

Here we outline four winning strategies that emerged from the data, and highlight the survey's other key findings.

## FOUR WINNING STRATEGIES

1

**FIRST VALIDATE BUSINESS AND USER NEEDS  
AND PLAN EXTENSIVELY**

2

**BE AGILE: ROLL OUT NEW FUNCTIONALITY INCREMENTALLY**

3

**KEEP USERS AND STAKEHOLDERS CONTINUOUSLY INVOLVED**

4

**BE FLEXIBLE TO CREATE THE BEST TEAM FOR THE PROJECT**

## OTHER IMPORTANT FINDINGS:

- The greatest levels of overall project success, user satisfaction, and customer experience improvement were reported when managed services providers (MSPs) did the bulk of the technical work on Salesforce projects. See pages 17 and 18.
- The second-best results were seen when other third parties (contractors, implementation providers, or consultants) performed most of the technical work, followed by when internal Salesforce teams did the majority of the technical work. See pages 17 and 18.
- However, the most common plans that respondents reported for enabling further Salesforce development work in 2022 were hiring more permanent staff and upskilling current staff.

The default response for many organizations when planning for growth or development is to imagine hiring more qualified people. But as our [2020 Salesforce customer survey](#) revealed, there are simply not enough SF administrators, developers, and architects to cover the growing demand for permanent staff. Roughly half of all respondents in that survey cited a lack of internal resources as a major barrier to further Salesforce development work.

Given the challenges most companies will face when looking for qualified, full-time Salesforce staff, it's reassuring that our 2021 survey participants reported the best results when using third-party support for their SF projects.

Read on to find out who participated in the survey, what worked best for their projects, and what advice they have for other organizations looking to optimize their Salesforce environments.



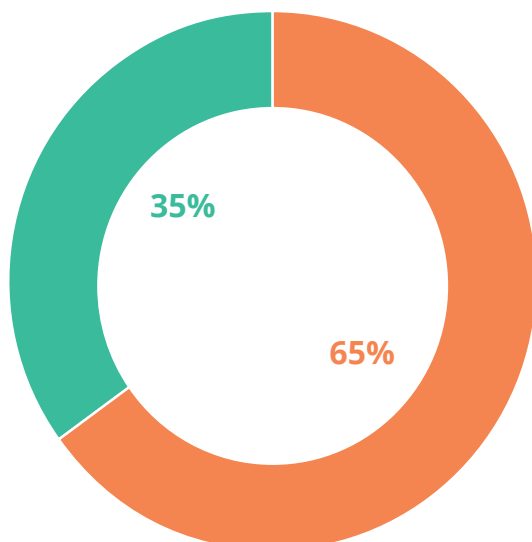
## PARTICIPANTS

We required participating organizations to be in the US or Canada and to have conducted a Salesforce implementation project within the past 24 months. We wanted at least 60% to have 200 or more Salesforce licenses, while the remainder needed to have at least 100. We also gathered information on which SF applications were in use in each organization.

We required each company representative to be closely involved in their organization's Salesforce operations and to fall into a defined list of roles most pertinent to the survey's focus.

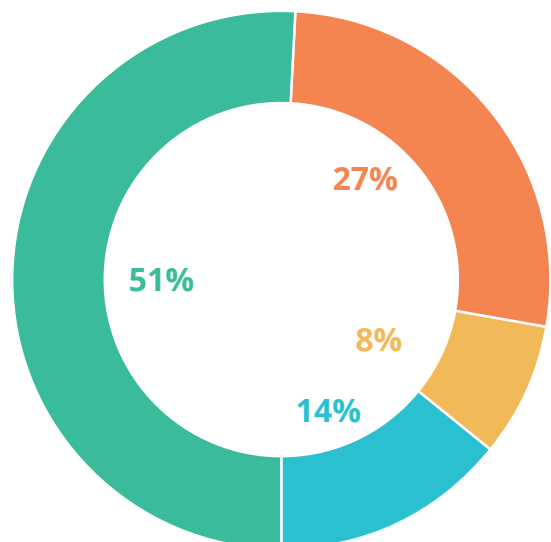
### Number of Salesforce Licenses in Each Organization

- 100-199 licenses
- 200 or more licenses

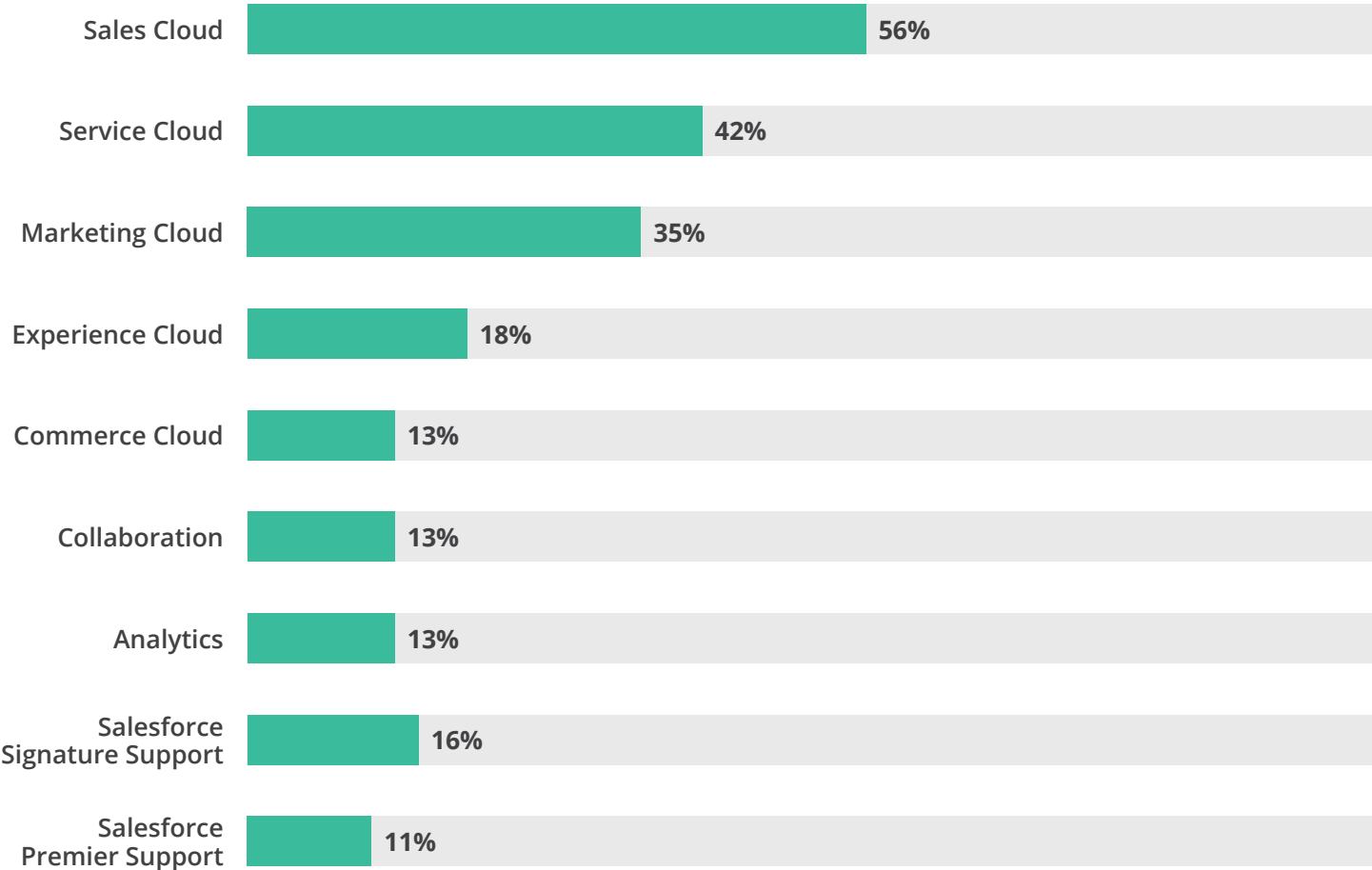


### Respondents' Role

- Salesforce Administrator
- Salesforce Developer
- Salesforce Architect
- VP/Director of Marketing, Sales, or Customer Service



Salesforce Products & Services in Use by All Organizations

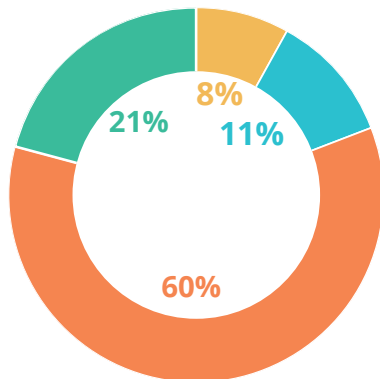


# PROJECTS

Participants were asked to focus on **one** Salesforce implementation project that their organization conducted in the past two years (e.g., adding a new SF application, integrating with an ERP system, rolling out CPQ/billing capabilities, etc.). Here's what those projects looked like and how participants rated their own satisfaction with how the projects went, user satisfaction with the results, and the project's impact on customer experience.

## Type of Project

- Implementation of a first Salesforce application
- Implementation of an additional Salesforce application
- Implementation of a configure-price-quote (CPQ) solution
- Implementation of an analytics solution (e.g., Tableau, Einstein)



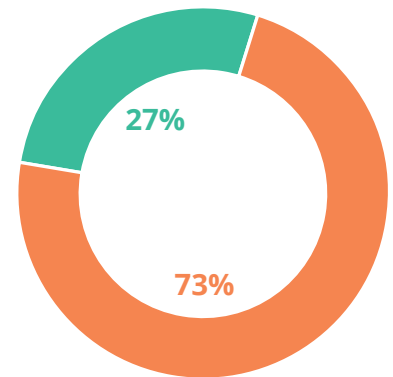
## Implementation Approach

30

Single-release projects

80

Incremental-release projects



## Group Responsible for the Project's Technical Work

Internal  
Salesforce team

70

Implementation provider/  
contractor/consultant (one-off  
project)

19

Managed services  
provider

19

Salesforce  
support

2





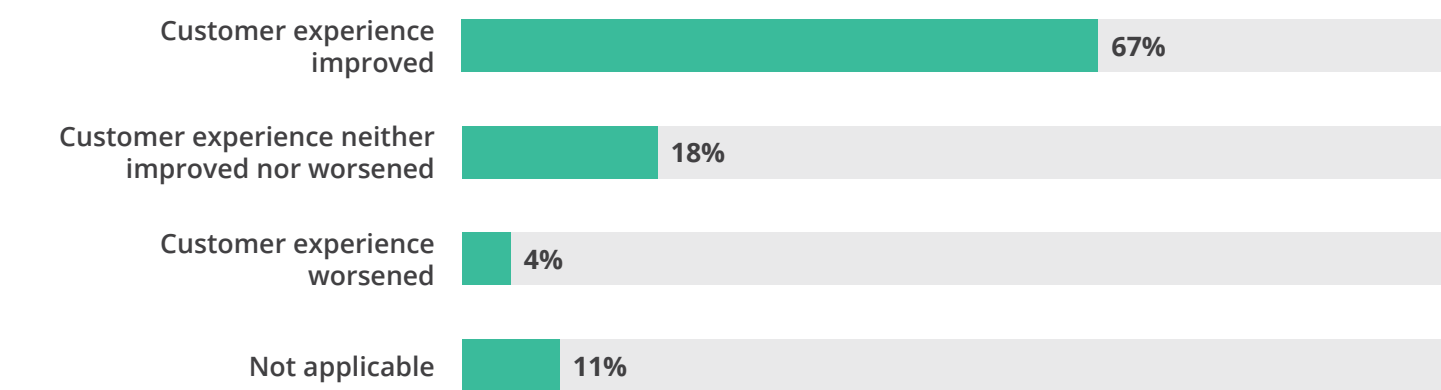
Respondents' Level of Satisfaction With How the Project Was Handled



Perceived Level of User Satisfaction With the Project



The Project's Impact on Customer Experience (CX)



# FOUR WINNING STRATEGIES FOR SALESFORCE PROJECT SUCCESS

In addition to answering our multiple-choice questions, we asked survey participants to answer freely about what has worked well for their Salesforce implementations and what advice they'd give to companies that are struggling with long timelines, major backlogs, or poor user reception.

Four distinct strategies for success emerged from the mix of quantitative and qualitative data.

1

**FIRST VALIDATE BUSINESS AND USER NEEDS  
AND PLAN EXTENSIVELY**

2

**BE AGILE: ROLL OUT NEW FUNCTIONALITY INCREMENTALLY**

3

**KEEP USERS AND STAKEHOLDERS CONTINUOUSLY INVOLVED**

4

**BE FLEXIBLE TO CREATE THE BEST TEAM FOR THE PROJECT**

# 1. FIRST VALIDATE BUSINESS AND USER NEEDS AND PLAN EXTENSIVELY

There's a temptation among vendor-loyal customers to be less exacting with needs assessments and requirements gathering when adding another application from their existing vendor than when implementing a product from a new vendor. But there really is no context in which a new solution should be adopted without due diligence, which means fully validating the business case for the new system and assembling the complete set of user requirements before moving ahead.

It can also mean thinking creatively about how to meet evolving requirements, as several of our participants noted:

“ Weigh the cost of new implementations against the gains. Sometimes user requirements can be met through customizations of your Sales or Service Cloud rather than whole new SF clouds.

“ Conduct business process analysis before hopping on the idea of a new SF app or a major change to the setup. We implemented a new Salesforce Cloud before seeing that we could've achieved what we needed by altering some processes and integrating an add-on app.

More than a third of our respondents talked about the importance of initial validation, careful planning, and taking a user-centric approach. Committing to this level of diligence ensures that the software implementation is not only needed but also will provide the expected ROI. Thorough validation and planning can also help ward off scope creep, one of the most common problems in software development and implementation.

Here's a little more of what participants had to say on the issue:

“ *Plan and architect the solutions early. Do not assume out-of-the-box solutions will work for your business needs. Customization will be needed.*

“ *Keep the original users' requirements and the main goal of the implementation very clear from the planning stage to the post-go-live stage. It sounds simple but most teams lose focus or clarity at some point. Then you get delays, re-working, and complaints.*

“ *Build in the time at the start to validate all user requirements, especially those requiring customizations. It's like planning a complex road trip. You'll save time if you map it out carefully and identify shortcuts versus just setting out with only your final destination in mind.*

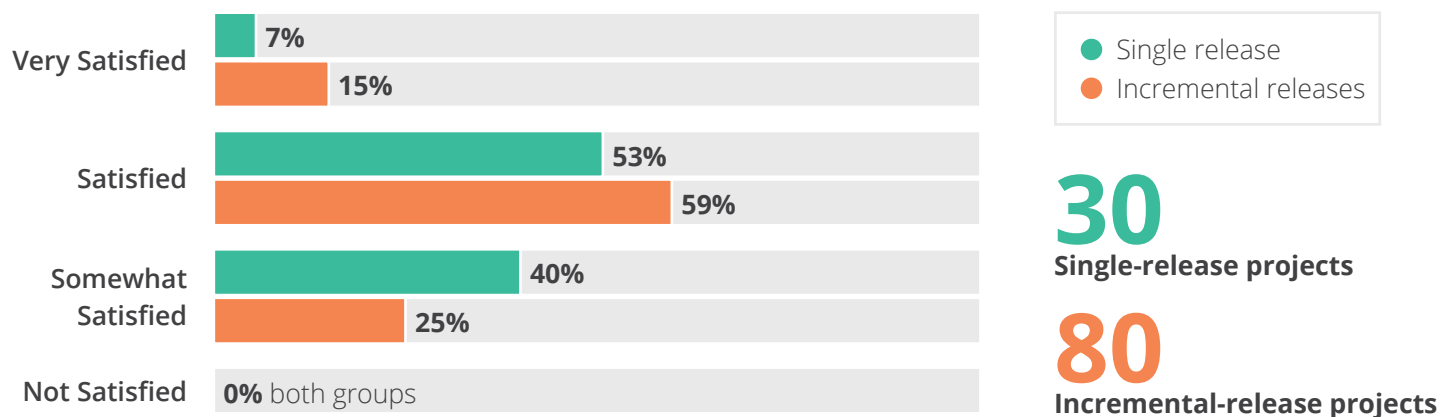
“ *Understand user requirements from A-Z before you start process design, solution design, and implementation planning. If you don't get the user requirements right, everything after that will be off-base as well.*

## 2. BE AGILE: ROLL OUT NEW FUNCTIONALITY INCREMENTALLY

The Big Bang approach still has an occasional place in deployments of larger software systems like enterprise resource planning (ERP)—mostly in newer organizations with systems that the entire business will be adopting, or when the scope is airtight and time is short. But for Salesforce implementations, is there a case to be made for doing the project in one release?

There can be. A first Salesforce application may be a good candidate for a single release, and smaller add-on functionality sets may be as well. But in agreement with most of our survey participants, our view is that rolling out new Salesforce systems incrementally is usually the better call. It's less disruptive to business, and it greatly mitigates the risk for failure. It also puts elements of the new features into play before an all-at-once approach could, and that makes for happy stakeholders and users.

Indeed, in our survey, incremental rollouts were associated with higher user satisfaction levels.



Plenty of respondents touched on project rollout in their reflections and advice, with all discussing the merits of an Agile approach approach.

“ Use an iterative approach not only to get the most important user stories handled first, but to keep making room for user feedback.

“ Deliver changes incrementally starting with the biggest business problem, then addressing the next-biggest problem, etc. This gets the most urgent needs fixed first rather than making everyone wait for everything.

“ Plan the implementation to roll out in chunks and make sure users are involved throughout. A lot of their feedback on one release will inform your work on the next release.

“ What's worked for us is creating precise, small rollouts. Keep sprint planning tight. Agile is not just a project management shift, it's a mindset shift to apply to every step of the work.



### 3. KEEP USERS AND STAKEHOLDERS CONTINUOUSLY INVOLVED

Whether your Salesforce implementation is going live in one release or incrementally, user involvement shouldn't be relegated to requirements gathering at the beginning and training at the end. Stakeholders shouldn't be held at arm's length, either.

Developers can and should ask questions of users throughout the work. Feedback from multiple users should be sought for every release. Stakeholders and users alike should be kept apprised of progress, challenges, and delays through frequent communication from the product owner. Sharing ideas and innovations can offset the times when development hits a snag.

**“** Take your time with users at the beginning and all through the project. Appoint someone who likes talking to them and understanding their challenges and needs. The best of what's possible with Salesforce comes out of these in-depth discussions.



Almost half of our survey participants said that involving users and stakeholders has helped make their Salesforce projects more successful.

“ *The more users and stakeholders you include from all levels when planning and executing, the more holistic and better your solution will be.*

“ *I consider all users to be stakeholders because, in the end, that's what they are. Communicate with them early and often to share the benefits of what is coming and the timeline for implementation.*

“ *Provide solid training for end users. Be flexible about it. Use recordings, lunch & learn sessions, and ongoing workshops. My past company never provided enough training. My current company does the polar opposite, and it shows in high user acceptance and a positive attitude about our Salesforce systems.*

“ *Think of every Salesforce project as a business initiative, not a technology or an IT initiative. Involve senior managers and everyday users from the start and respect their feedback. Try to instill this mindset in all Salesforce admins and developers so everyone is paying equal attention to user needs, user feedback, and the end goal.*

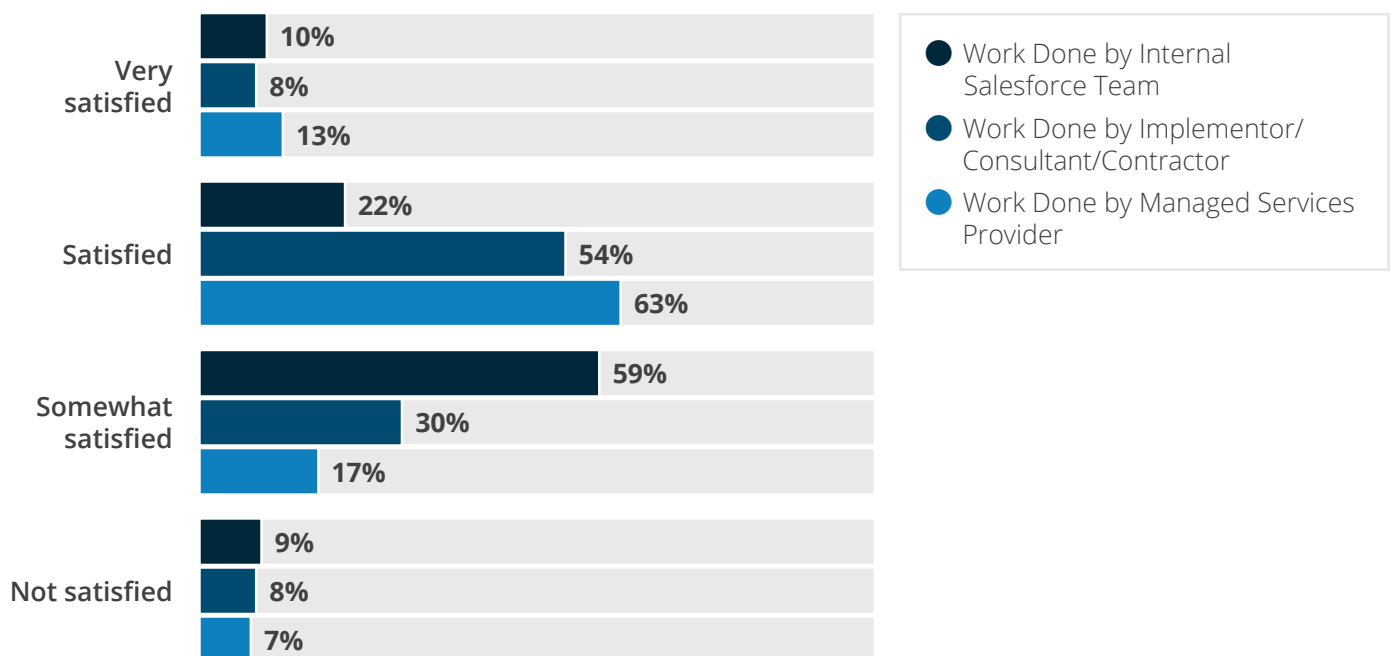


## 4. BE FLEXIBLE ABOUT CREATING THE BEST TEAM FOR THE PROJECT

No single angle of Salesforce project work generated more comments from survey respondents than the importance of skilled staff and the right team. Participants' reflections and advice on this issue, presented on pages 19 and 20, are well worth consideration. But before looking at the qualitative angle, here's the hard data on how project satisfaction and customer experience were impacted by which kind of team performed the bulk of the technical work.

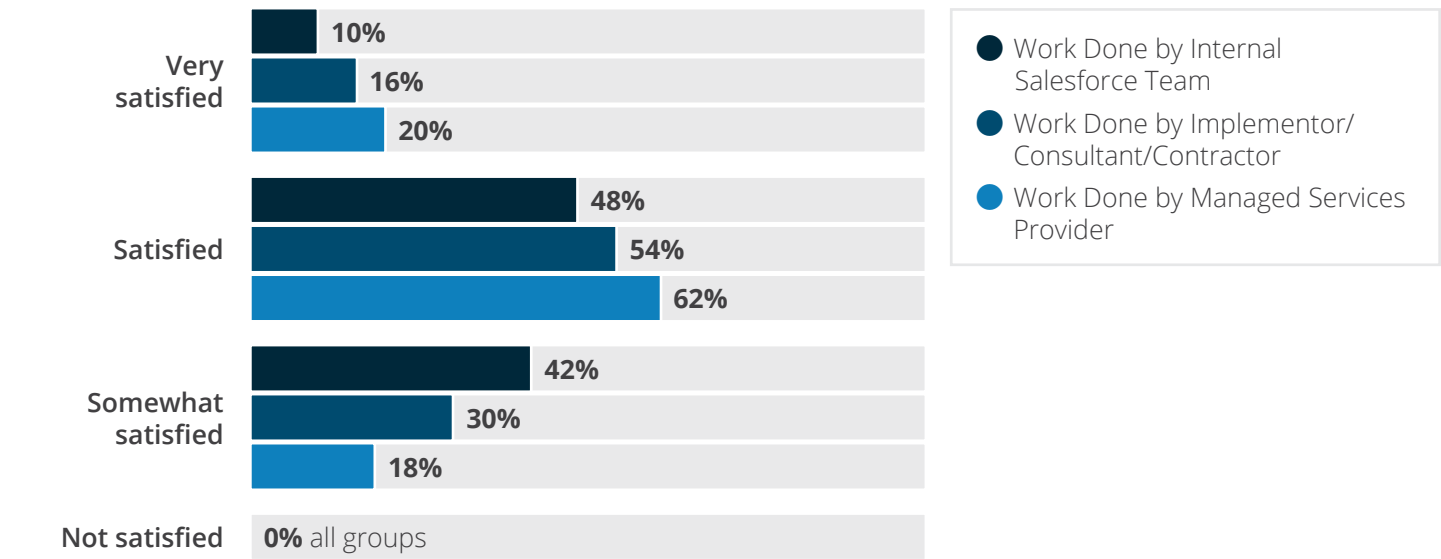
### THE DATA AGREES—IT MATTERS WHO WORKS ON YOUR PROJECTS

#### Respondents' Level of Satisfaction as Impacted by Who Did Most of the Technical Work\*



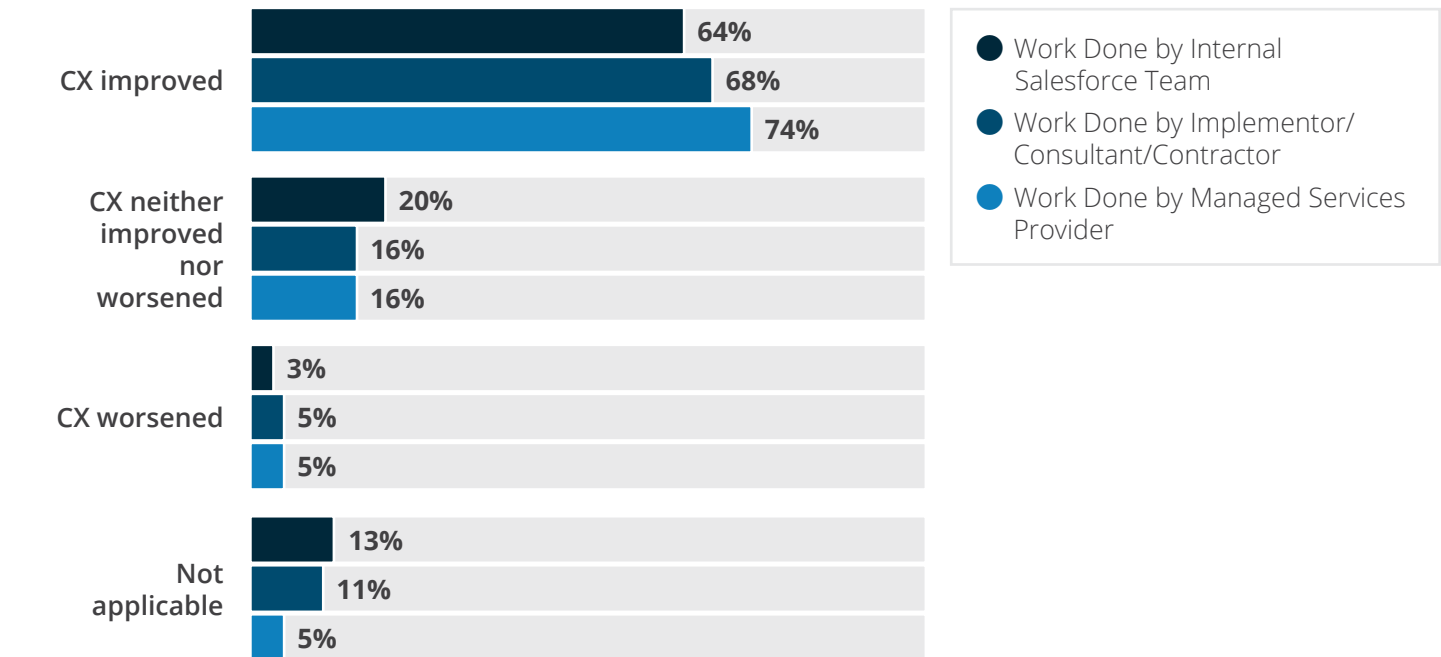
\*Salesforce Support was cited as the main unit responsible for the project's technical work in only 2 cases, making it unsuitable for comparison. One respondent was "Satisfied" and the other was "Somewhat satisfied."

Perceived Level of User Satisfaction With the Project as Impacted by Who Did Most of the Technical Work\*



\*Of the two projects in which Salesforce Support was responsible for most of the technical work, one respondent said users were "Satisfied" and the other said they were "Very satisfied."

The Project's Effect on Customer Experience (CX) as Impacted by Who Did Most of the Technical Work\*



\*Of the two projects in which Salesforce Support was responsible for most of the technical work, both respondents said customer experience was improved.

## RESPONDENTS' ADVICE ON WORKING WITH DIFFERENT TEAMS

Some respondents directed their advice to a specific approach—building the best internal team, working with Salesforce support, or using external resources. There was notable agreement and overlap among many of the comments on this issue. Here is a range of representative responses.

### Building Internal Teams

“ | *Shell out for the best developers and admins you can find.*

“ | *Hire experienced internal resources and lean on Salesforce Support whenever you run into problems.*

“ | *What worked for us was convincing upper management to compensate Salesforce developers and admins better than before, so we could attract top talent. It's paid off in better planning, shorter timelines, and higher-quality work.*

“ | *Invest in your Salesforce staff. Pay for SF training or they'll leave for a company that does.*



## Working with Salesforce Support

“ If you can afford Salesforce support and have someone who is used to working with them, it's worth it. You'll save time and pain in the long run.

“ Convince your company to sign up for extended Salesforce support. No internal team can know everything. Be transparent with upper management about that and about when and how SF support saves time.

“ If you invest in Salesforce Signature [Support], appoint a few people to be the main contacts and run all support requests through them. This streamlines things but also increases how much you know about how well SF support teams are responding to your org's needs.

## Working with External Providers

“ Unless you have a bigger and better-than-average internal team, an implementation firm or managed services provider can add a lot of value because they know the products, they have more people, and they usually have more experience.

“ Finding a good Salesforce partner at a lower price than official Salesforce Support has worked well for us.

“ We found a good partner a couple of years ago after struggling to manage the work on our own (smaller company). Now the work flows well because they know our business and we have good connections with their staff.

“ Find an experienced Salesforce service provider. It's quicker and can be cheaper than trying to hire/train/retain permanent staff, especially with the high turnover trends.

# RESOURCE CONSIDERATIONS FOR 2022 AND BEYOND

We asked participants to provide up to two strategies they intend to implement to continue innovating their Salesforce environments in 2022. More than half picked *hiring more staff* and an even greater number said that *upskilling current staff* is high on their list.

## How Companies Plan to Continue Salesforce Development and Innovation in 2022

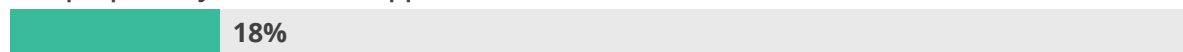
Upskill current staff



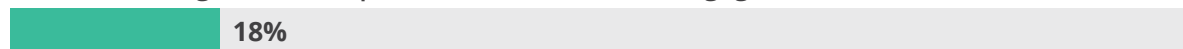
Hire more staff



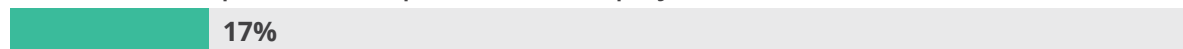
Use proprietary Salesforce support



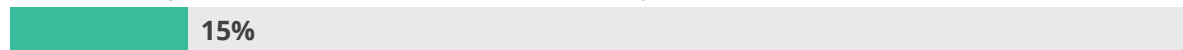
Retain a managed services provider for continuous engagement



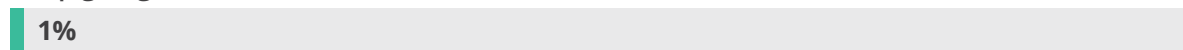
Work with an implementation partner (one-off project)



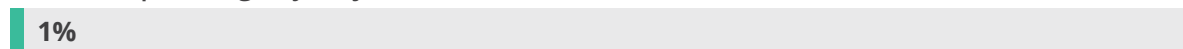
Hire an independent contractor as needed (hourly)



Keep going as we are



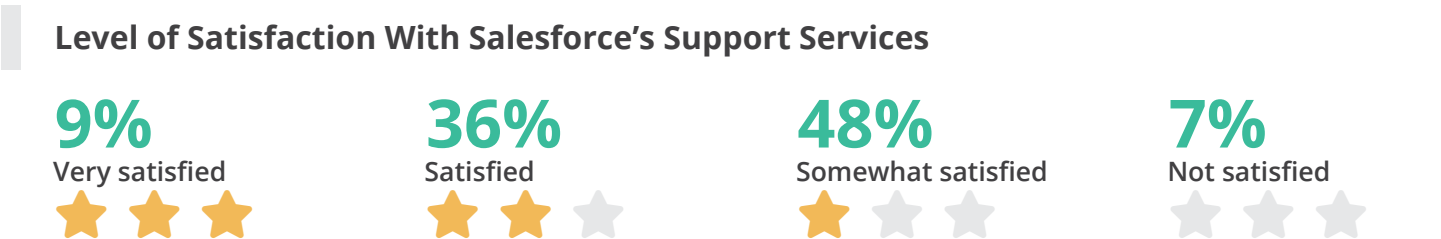
We're not planning any major SF innovations in 2022



It’s natural to want to hire the best possible Salesforce staff for your company’s projects, but as our last customer survey showed, there’s a serious shortage of qualified resources. The “Great Resignation” triggered by the pandemic has only made things harder, creating what is now an all-out talent war.

In addition, our data suggests that relying on internal Salesforce teams may not be the most successful approach. The use of a managed services provider (MSP) for the lion’s share of technical Salesforce implementation work increased reported satisfaction levels among employees and upped the positive impact on customer experience when compared with internal Salesforce teams working alone. This effect was also seen when looking at other third-party providers—implementation partners, consultants, and contractors—though to a slightly lesser extent.

Although we couldn’t evaluate Salesforce support along these lines due to low comparison data, we did ask our participants whether they had access to Salesforce support, and if so, how satisfied they were with those services. Thirty organizations indicated ongoing access to Salesforce Premier or Signature Support services. Another twelve companies indicated having used those services at some point in the past two years, for an overall response set of 42.



## A CREATIVE APPROACH TO BUILDING OPTIMAL TEAMS

All things considered, a blended approach is likely the best and most feasible way to move forward with Salesforce innovations in the coming years. In fact, complimenting in-house resources with external support may quickly become the norm not only in the Salesforce realm but across the whole enterprise technology industry as projects multiply at an exponential pace.

Some of our survey respondents, most of them Salesforce administrators or developers, suggested exactly that approach.

“ Hire one or two strong Salesforce admins/developers/architects and then find a suitable service provider to do the bulk of the work at their direction. That's worked well for us and saved time that we'd otherwise be spending on trying to hire and train more internal Salesforce staff that we might just lose in a year.

“ If your team isn't skilled enough for the work, or for a piece of the work, or if they're overwhelmed, you have to convince senior managers to bring in external resources. A contractor or other service provider with a good track record in Salesforce. It takes too long and too much trial and error to learn as you go or to find new skilled developers.

“ If you want to make the best Salesforce environment, the people working on it really need to understand both the business and the technology and what it takes to make it seamless for users. If you have access to external resources that understand the SF products better than your internal staff, use them. Just make sure they also get to know your business and have experience in your industry. Ideally, you have both resource pools and make the most of them.

## SECURING THE BEST SALESFORCE SUPPORT FOR YOUR ORGANIZATION

Spinnaker Support is a global provider of on-premise and cloud-based enterprise software support services, and the co-sponsor of this market survey. Given their expertise in Salesforce support and the survey's positive data about managed services providers, we wanted to get their take on how organizations can pinpoint the best type of Salesforce support for their needs.





## HOW TO IDENTIFY THE RIGHT TYPE OF SALESFORCE SUPPORT FOR YOUR COMPANY

Chad Stewart | VP, Global SaaS Support Services | Spinnaker Support

As the business owner of your Salesforce platform, you should know that the most important question you likely need to answer is: “How do I plan for the ongoing innovation needs of my company?” Business requirements often change, and Salesforce’s burgeoning portfolio means you will likely need expertise that is beyond the capabilities of your staff.

If there’s one thing I’ve learned over my past decade in Salesforce consulting and services, it is that companies often underestimate the amount of support they will need to make the most of their Salesforce investment. Companies that try to do Salesforce “on the cheap” are usually disappointed with their results.

### But how do you find the right help to achieve your Salesforce goals?

To identify the types of Salesforce support you might need, please check out this blog post: [“How to Identify the Right Type of Salesforce Support for Your Company.”](#) We review the pros and cons of these four Salesforce support options:

1. Salesforce-Provided Support
2. Traditional Managed Services
3. Implementation Providers and Consultants
4. Agile Delivery Framework Experts (new approach to managed services)

Depending on the capabilities of your in-house Salesforce team, you may need one or several of these options.

### Parting Wisdom

The secret to maximizing your Salesforce ROI as your business grows and changes is to figure out the best way to *continually* configure and deploy new features and updates. You will know that you have found the right balance of support investment when you are releasing meaningful improvements on a continuous cadence.

For more on how continuous change experts can deliver you an amazing Salesforce experience, cost-effectively, [please contact Spinnaker Support today!](#)

# CLOSING THOUGHTS

The main survey findings and most of the participants' advice dovetail with what we at TEC and Spinnaker Support know to be true: careful validation and planning, user-centricity, agile deployment, and applying the right team amounts to a recipe for success in any business technology project. Making it all happen is a big challenge, however.

The most difficult element is undoubtedly the team-building aspect, as the demand for Salesforce professionals continues to outweigh the supply, and the high turnover rates create a one-step-forward, two-steps back dynamic for many businesses.

But as our survey reveals, there are a number of creative ways to bridge the skills gap and achieve ongoing development targets without compromising on quality. In fact, engaging the right mix of internal and external resources may well result in better outcomes than going it alone.

We hope our findings and the sage advice of our participants—people actively working in the dynamic Salesforce environment every day—will highlight options for companies looking to push past prior limitations and achieve Salesforce greatness in 2022.

## ABOUT TEC AND SPINNAKER SUPPORT

**TEC** is an impartial enterprise software advisor known for our industry insight and data-driven approach to software evaluation. We regularly survey software users, as their perspectives are essential for rounding out our impressions of products and providers. We offer extensive resources to the user community, from market survey results to buyer's guides, product reviews, and thought leadership on industry developments and best practices for evaluating and selecting enterprise software.



**Spinnaker Support** is a global provider of on-premise and cloud-based enterprise software support services. Mid-size to Fortune 100 global enterprises and public sector organizations that run Oracle, SAP, and Salesforce software turn to us for third-party support, managed services, and/or consulting services. We currently serve nearly 1,300+ organizations located in 100+ countries.

As a Salesforce Partner, Spinnaker Support offers managed services to help organizations sustain, grow, and expand their Salesforce ecosystems. Our certified Salesforce administrators, developers, and architects assist organizations to increase the adoption and performance of their platform post-implementation. For over a decade, we have delivered high return-on-investment support for critical CRM and other enterprise software applications.

To learn more about our services and how we can help save you time and money on your next software purchase, contact us at [AdvisoryServices@tec-centers.com](mailto:AdvisoryServices@tec-centers.com).



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