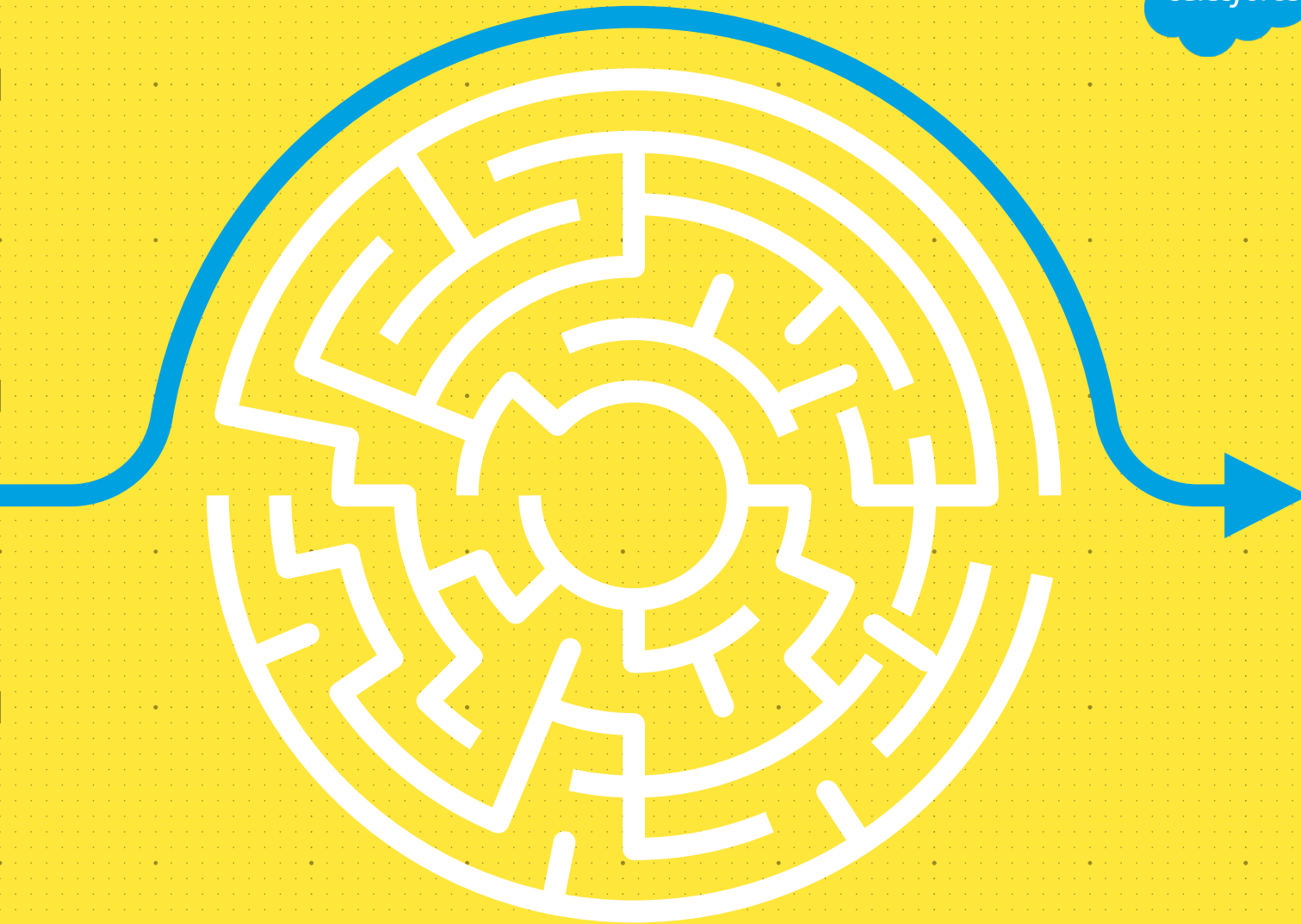




Salesforce Experience Design Playbook

*A three-step experience design process
for rapid digital transformation.*



Go Beyond the System to Discover the Experience



Companies facing business challenges are often tempted to look for the silver bullet in the form of a system:



Apply that thinking to a marketing team's request for an automated email marketing system. The best system for them may or may not be the one with the most advanced features. If the top-ranked system takes too long to learn, or implementation can't be complete before the next campaign, the investment will fail to deliver the expected (or any) business value.

"Half of all failures are due to lack of adoption."

— Business Reporter 2022

But most technology-led digital transformation attempts fail:

"...70% OF DIGITAL TRANSFORMATIONS FALL SHORT OF THEIR OBJECTIVES, OFTEN WITH PROFOUND CONSEQUENCES."¹

Introducing features and functions without considering the humans who will use them leads to poor experiences and unnecessary costs. For example, tennis legend Novak Djokovic swings a 353-gram racket with dense strings. But for a casual player, these features are more likely to produce elbow injury than victory.



¹ Boston Consulting Group

Why Experience is Key to Digital Transformation ^{*}^{*}^{*}

All else being equal, consumers choose the products and services with the best experience. Stock performance bears this out. Customer experience (CX) leaders outperformed the S&P 500 Index by 108 points over 13 years.²

Exceptional experiences transform markets. Amazon transformed shopping by making home delivery more convenient than driving to the store. Spotify shot to the top of its market with a radically simple experience that subscribers value more than the higher audio quality available from other streaming services.

Look closely at other successful digital business transformation leaders and you'll discover experiences that help customers meet their goals **faster, more easily** or **more enjoyably** than they could before.



² *The Customer Experience ROI Study, Watermark Consulting, 2021*

* Salesforce: Supermarket of Top-Notch Ingredients

Salesforce is a smart choice to fuel digital business transformation, providing:

- Products that address most touchpoints across both the front stage and backstage of customer and employee experiences
- Connectors and APIs with other vendors to fill in the gaps

Think of Salesforce's numerous products, apps and tools as **ingredients** for your customer experiences.



A sampling of Salesforce ingredients to choose from:

<p>Marketing</p> <ul style="list-style-type: none"> Marketing Strategy & Planning Journey Management Lead Generation Content Management Marketing Analytics Audience Segmentation & Activation Preference & Privacy Management Direct Marketing (owned) Paid Marketing (ads) 	<p>Field Service</p> <ul style="list-style-type: none"> Field Worker Mobility Resource Management Operational Schedule Management Work Order Management Field Inventory & Replenishment Management Field Service Analytics and Planning Install Based & Preventative Maintenance RMS/Depot Repair 	<p>Configure, Price, Quote (CPQ)</p> <ul style="list-style-type: none"> Quote Management Pricing Management Guided Solution Configuration Product Catalogue Management Proposal Management Subscription Management
<p>Order/Commerce</p> <ul style="list-style-type: none"> Inventory Management Search/Merchandising Promotion Management Recommendations & Experience Assisted Sales & Service Commerce Self Service Shipping and Payment Methods Order Management Order Capture 	<p>Billing</p> <ul style="list-style-type: none"> Billing Management Invoice Management Revenue Recognition Credits & Collections 	<p>Partner Management</p> <ul style="list-style-type: none"> Partner Recruitment & Onboarding Partner Development & Growth Joint Partner Marketing Partner Sales Management Partner Order Management Partner Service Management
<p>Sales</p> <ul style="list-style-type: none"> Account Management Contact Management Compensation Management Sales Enablement Contract Lifecycle Management Cross/Up-Sell Management Deal Support Requests Sales Performance Management Guided Solution Selling Inside Sales Management Lead Management Opportunity Management Product Management Sales Analytics Territory Management 		<p>Service</p> <ul style="list-style-type: none"> Case Management Case Teaming Feedback/Surveys/VOC Knowledge Management Omnichannel Contact Center Self Service Warrant Management Unified Agent Experience Training & Onboarding Service Contract Management & Entitlement Service Quality & Supervision Analytics Predictive Service Remote Monitoring & Proactive Service



Publicis Sapient has partnered with hundreds of companies worldwide to design and implement Salesforce solutions that deliver **exceptional experiences** and **drive growth**.

BESIDES INGREDIENTS, YOU'LL NEED A RECIPE

Selecting the right ingredients for your Salesforce experiences requires a personalized recipe. Just as a chef considers the diners' tastes, dietary restrictions and price range when creating a meal, Publicis Sapient considers users' goals, existing tools and budgets when designing Salesforce experiences.

So, flip the buying process on its head. Instead of buying Salesforce tools and then crafting an experience, envision the experience first and then select the Salesforce tools to bring it to life.

AVOID THESE PITFALLS

Businesses often run into a few challenges during and after a Salesforce implementation. Challenges that could have been avoided if they had pursued an experience-first strategy. Generally, the issues follow this pattern:

- **Long timelines.** Implementation often takes 1.5 years or more—by which time business needs have changed
- **Gaps between the user's needs and what's delivered.** Salesforce solutions with the right features but the wrong experience can flop. Often, one vendor envisioned the experience and another vendor tried to implement it. The fact is, if the design team doesn't have a good understanding of Salesforce capabilities and limitations, the end product won't deliver the expected business value

Design for People, Empower with Technology ✨



At Publicis Sapient, our philosophy is that transformation, done right, happens **with** and **for** people, not **to** them. That is, instead of focusing on a solution's **features**, consider the desired **customer experience** first. What does the customer, employee or business need to accomplish? That answer should inform every design decision that follows.

THE ART OF THE POSSIBLE

If a company isn't starting from scratch, our Salesforce experts will look for ways to leverage its existing technology investments. Just as a skillful chef can build a remarkable meal from ingredients already in the pantry, our skilled teams can repurpose existing Salesforce tools while blending in additional ones as needed. The result: a Salesforce experience that delights, respects the budget and can be launched quickly.

YOUR TEAM

Every Salesforce Experience Design team includes Salesforce experience specialists and technical specialists who have undergone extensive training in Salesforce technology. This enables them to collaborate effectively with the Product and Technology teams to deliver exceptional experiences that maximize your current technology stack by successfully integrating it with Salesforce solutions. The benefits of this experience-led approach include:



OUR CREDENTIALS



Top-20

Salesforce global partner



3,250+

cross-cloud Salesforce certifications



1,000+

passionate Salesforce specialists



1,900+

Salesforce projects delivered across 20 markets

10+ years

of helping clients deliver exceptional Salesforce experiences

Member of
Salesforce Data
Cloud Advisory
Board



Your Three-Step Process for Exceptional Experiences



The Publicis Sapient three-step Salesforce Experience Design offering is crafted to remove complexity, reduce waste and deliver outstanding customer and employee experiences:



Step 1: Envision the Experience in a Half-Day Workshop

Timeline: approximately two weeks



The four-hour Experience Lab is a collaborative, customizable and in-person (or virtual) discovery workshop focused on rapidly delivering outcomes and value. During the lab, issues, process bottlenecks, and the experiences of every user group that touches Salesforce are uncovered. From these inputs, your “as-is” state is mapped out, and the “to-be” state is defined through the eyes of your customers and employees.

Your plan, delivered two weeks after the Experience Lab, includes:

- Key challenges and opportunities
- Vision for customer and employee experience
- High-level success criteria
- Risks and assumptions
- Opportunities and potential solutions, ranked by priority*
- Next steps to realize value

*Priorities are based on what tools you already have, dependencies, the urgency of the business requirement and resource availability.

CASE STUDY: LEADING LOGISTICS COMPANY

The client presented a pressing technology request: “Implement a customer data platform.” However, before focusing on the technology, an Experience Lab was scheduled to discover the business needs, opportunities and priorities. Workshop activities included:

- **Exploring the client’s business objectives.** Participants came to a consensus that the Salesforce solution would be a success if it helped attract and retain customers, increase wallet share, increase customer engagement, improve data governance and expand contacts within existing customers
- **Mapping the business objectives to Salesforce feature categories.** Among these categories were harmonization of multiple data sources, a unified profile, segmentation, insights and analytics and next-best action. Each feature category mapped to one or more business objectives, as shown here:

Feature categories	Value levers	Sum of total capabilities				
		MVP (16 wks)	Priority 1	Priority 2	Priority 3	Priority 4
1 Harmonization of multiple data sources	Growing the contact base	2	4	3	2	1
2 Contacts unified profile	Engaging and converting customers	5	9	10	9	9
3 Segmentation and contact profiles	Retaining customers	5	10	6	7	6
4 Insights and analytics	Maximizing share of wallet	1	2	2	4	2
5 Focus invitations to events						
6 Next-best action	Data governance	2	3	2	3	2

Outcome { Over the next two weeks, a CDP delivery roadmap was developed, with features ranked by priority. Every Salesforce feature on the roadmap directly helped the client realize business objectives uncovered in the Experience Lab.

Step 2: Design Platform Blueprint and Build Proof of Concept

Timeline: approximately 16 weeks 

A dedicated team of Salesforce experience and technical specialists with deep expertise in the Salesforce ecosystem will work with you and your team to:

1 Document baseline state and establish opportunity, using inputs from the experience lab

- Current experience
- Opportunity themes
- Current architecture
- Data: systems, sources and types



2 Reimagine the experience

- North Star vision. For the logistics company, the vision was:

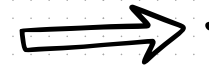


“ TO DELIVER SUPERIOR SERVICES TO TOP-TIER CLIENTS BY USING DATA TO PINPOINT SERVICE GAPS, SALES AND SERVICE OPPORTUNITIES, AND OPPORTUNITIES TO FORGE NEW RELATIONSHIPS THROUGH MEANINGFUL INTERACTIONS AT THE RIGHT TIME AND THROUGH THE RIGHT CHANNEL. ”

- Future-state experience
- Prioritized use cases with journey work packages and epics (see sidebar, “Use value pools to prioritize use cases by their business value”)
- Medium-term suggestions for the target operating model



3 Develop a roadmap and build the proof of concept



- KPIs and success metrics
- Roadmap for epics and products
- Reference architecture
- Customer Data Platform deployment
- Data use case(s) delivered in Salesforce Sales Cloud
- Timeline for build and scale

Use value pools to prioritize use cases by business value

An effective roadmap prioritizes new experiences based on business value. Here’s the process:

- Identify experience gaps—for example, frustration during the returns experience
- Assign value to the gap—“high,” “medium,” “low”—or a specific dollar value for revenue gains or cost savings
- Organize related experience gaps into a **value pool**.
 - A value pool represents a specific customer or employee pain point you intend to alleviate, along with the associated economic benefit. Value pools typically share common elements, such as requiring a specific Salesforce tool, catering to a particular user type or involving varying levels of complexity. For example, a retailer’s value pools might include optimizing the returns process, implementing online orders for in-store pickup or enabling conversational commerce via WhatsApp
- Define the value stream—the specific activities users will undertake during their journey



Goals and Metrics

Define your goals and how you will measure success



Start and End Points

Define the scope of the map



Map Process Steps

Map the process steps involved



Current State

Add relevant process data to evaluate performance and uncover where you can cut waste



Evaluation

Add optimization details



Future State

Map what you would like the improved process to look like



Prioritize

Choose which points are going to be the most important to improve



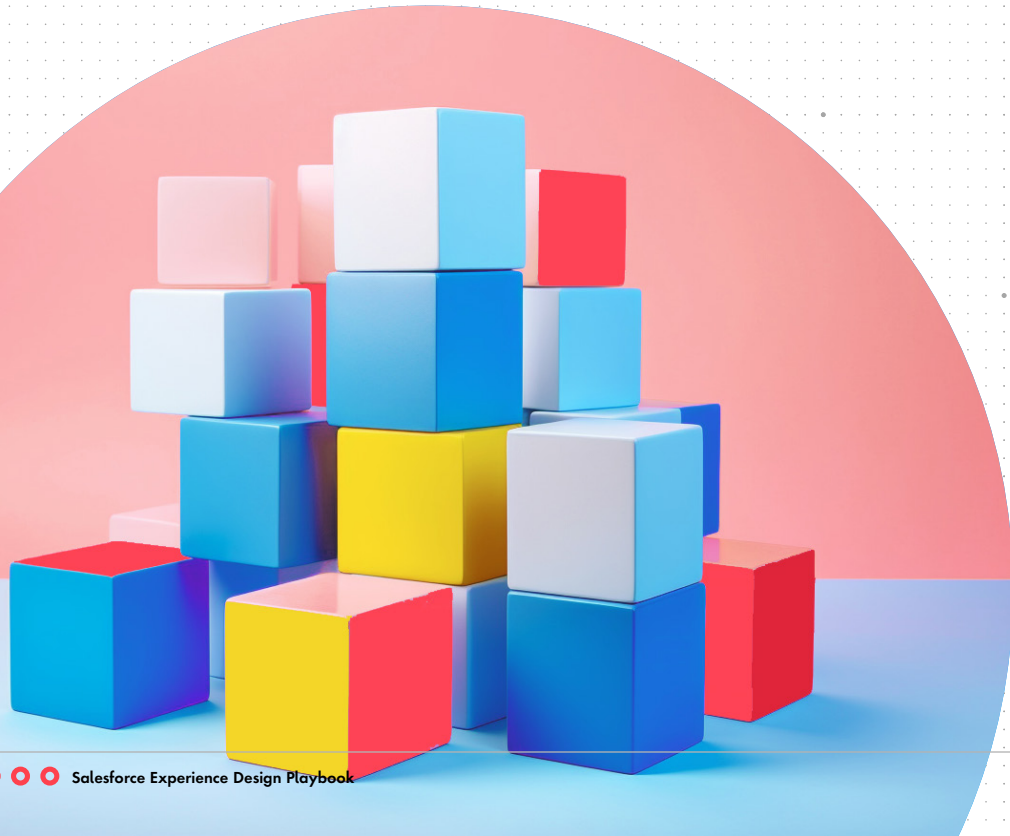
Implementation Plan

Define the next steps to accomplish what you desire for your future state

Step 3: Build and Scale Digital Product Factory



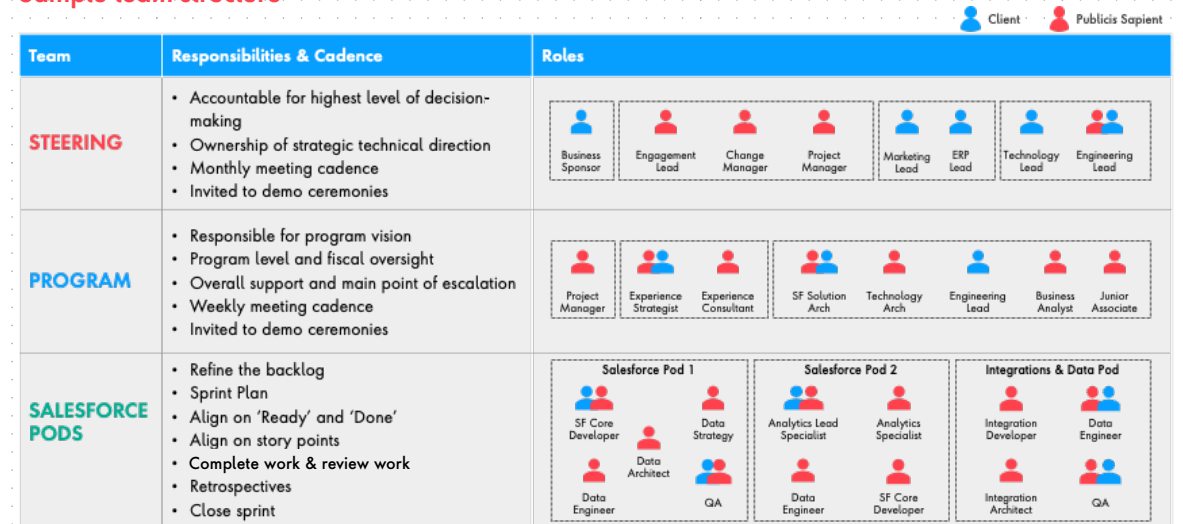
The third step is all about bringing your desired Salesforce experiences to life, at scale. Depending on your business requirements, Publicis Sapient can implement the Salesforce solution, provide ongoing maintenance and management or incrementally evolve the Salesforce experience to deliver ever more business value. Publicis Sapient operates on retainer to provide clients the ease of changing services at any time without the hassle of renegotiating scope.



YOUR TEAM—AS AGILE AS YOUR BUSINESS

The Digital Product Factory is managed by steering and program committees with members from your organization and Publicis Sapient. The project's objectives determine how many developer pods are assigned. Each developer pod typically consists of eight to 10 individuals who take full responsibility for a feature from start to finish.

Sample team structure



* Step 3 continued on page 10

Step 3: Build and Scale Digital Product Factory (continued)



MORE VALUE WITH EACH AGILE SPRINT

Pods work in Agile design sprints, each sprint delivering incremental business value. The experience blueprint is managed at the program level, or an experience pod can be created, to ensure delivery of a consistent experience. This also ensures that all developments are aligned with an integrated customer/employee/business strategy. The approach will depend on the complexity of the project. By keeping a close eye on feedback and reviews, new opportunities can be identified to keep your Salesforce experiences fresh and relevant. Pods follow Agile practices to optimize the speed, quality and value of our work:

- **Speed.** Utilizing Salesforce's "click-to-code" approach (aka declarative programming) allows for faster code development, saving time, reducing errors and requiring fewer specialized coders
- **Quality.** Salesforce core product functions are pre-tested and well-documented. Therefore, quality testing is focused on the user experience to ensure solution components fit and work together as intended
- **Value.** Maximizing the value of your Salesforce solutions involves leveraging built-in hosting, built-in security, the AppExchange marketplace and 3x/year feature releases

With each sprint, pods build and test additional features from the backlog. Weekly status reports include overall health, milestones, risks and issues and value delivered. Regular meetings are conducted with the steering and program teams to fine-tune next steps based on changes to the business and Salesforce capabilities.

Close collaboration with your stakeholders

Quarterly Business Review	Semi-Annual Technology Health Assessment
Business update from you	License usage assessment
Industry trends update from us	Salesforce org scan (SF Core)
New Salesforce capabilities roundup from us	Commerce health summary
Performance metrics review	Marketing technology data and performance summary
Program increment (PI) planning	

REAL-WORLD PERFORMANCE GAINS FROM THE DIGITAL PRODUCT FACTORY

UK Financial Services Provider	Multinational Automotive Manufacturer	Global CPG Company	American Bank
12% ROTE in 2018, up from 3% in 2015	75% Reduction in campaign cycle time	€25M Annual cost savings	56% Increase in sales via digital channels
49% CIR in 2018, down from 54% in 2015	150% Increase in marketing production with same budget	2B+ Consumer Data Points	31% Faster time to market

Summary: Keys for Salesforce Experiences that Wow

- 1 Focus on value—incremental revenue or cost savings.** Make decisions based on evidence, not assumptions. The evidence is in the KPIs—for example, an increase in contact base or customer retention.
- 2 Align with your North Star vision.** Make sure that the delivered Salesforce experiences support the ideal future state.
- 3 Don't neglect the backstage.** The front stage is the customer or employee experience. The backstage is everything that supports that experience: processes, policies, technology and data.
- 4 Follow Agile delivery practices.** Break tasks into smaller deliverables that can be repeated and refined throughout the software development cycle.

Get in Touch



Contact us to learn more and schedule your Experience Lab.

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ABOUT PUBLICIS SAPIENT

Publicis Sapient is a digital business transformation company. We partner with global organizations to help them create and sustain competitive advantage in a world that is increasingly digital. We operate through our expert SPEED capabilities—Strategy and Consulting, Product, Experience, Engineering and Data—which, combined with our culture of curiosity and deep industry knowledge, enable us to deliver meaningful impact to our clients' businesses through reimagining the products and experiences their customers truly value. Our agile, data-driven approach equips our clients' businesses for change, making digital the core of how they think and what they do. Publicis Sapient is the digital business transformation hub of Publicis Groupe with 20,000 people and over 50 offices worldwide. For more information, visit publicissapient.com.