Agenda

- (Brief) History of Salesforce Licensing on Campus
- Key Components of a Salesforce Org.
- Summary of Cloud Types
- Let's Spec a Salesforce Org.
- Campus Statistics & Common Issues
- Dos and Do <u>NOTs</u> of Salesforce Implementations
- Campus Resources

What will not cover:
- Salesforce Einstein AI Tools & Applications
- Troubleshooting DLC-specific Salesforce Org Issues

Contact Salesforce@mit.edu for more on these

A Quick Poll
Show of hands

Overview of Salesforce on Campus
How did we get here?
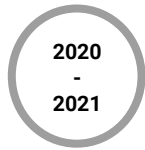
History of Salesforce Licensing on Campus

2009

The Power of Us (P-10s)

Salesforce offers free licenses (P-10s) to individual DLCs.

2019

Salesforce Restructures

Salesforce .org & .com reorg internally. Salesforce phases out legacy and no-cost licenses for MIT.

2020 - 2021

SF + IS&T Partnership

MIT IS&T & Salesforce partner to provide consistent, transparent price structures, contract terms, via our MSA.

IS&T stats CRM data audits & CRM support initiative

2024

Current

IS&T begins working directly with Salesforce to oversee all activity on campus.

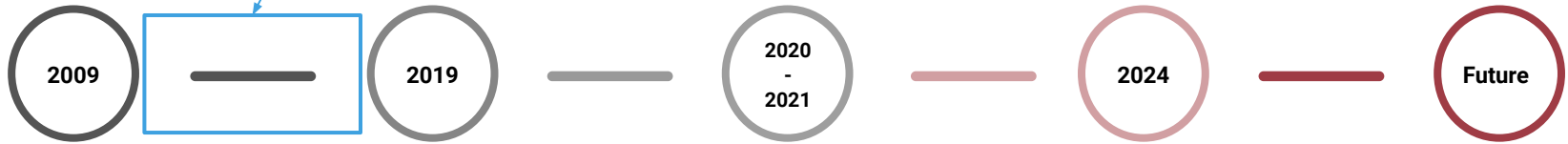IS&T rolls out Salesforce technical, planning, and analyst resources on-demand.

Future

Looking Forward

IS&T will continue to roll out support items.

History of Salesforce Licensing on Campus

A lot of campus activity happened here!

2009

2019

2020 - 2021

2024

Future

The Power of Us (P-10s)

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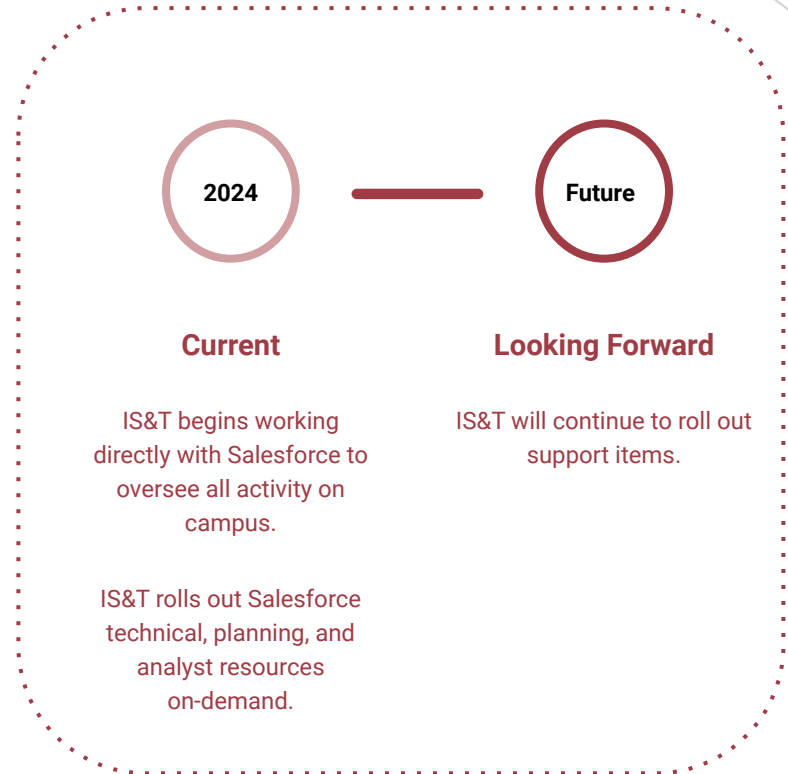IS&T will continue to roll out support items.

How can IS&T help you today?

New or Existing Orgs

Product or License Review

Roadmapping

Scoping/Pain Point Review

Vendor Recommendations or Support

Project Discovery Support

Integration Guidance

General Investigation/Bug Review

Technical Org. Assessment

Release/Upgrade Support

Security Review

Training

Monthly SIG Trainings

Trailhead Review/Recommendations

Individual/Group On-Demand Training

2024 ⎯⎯⎯ **Future**

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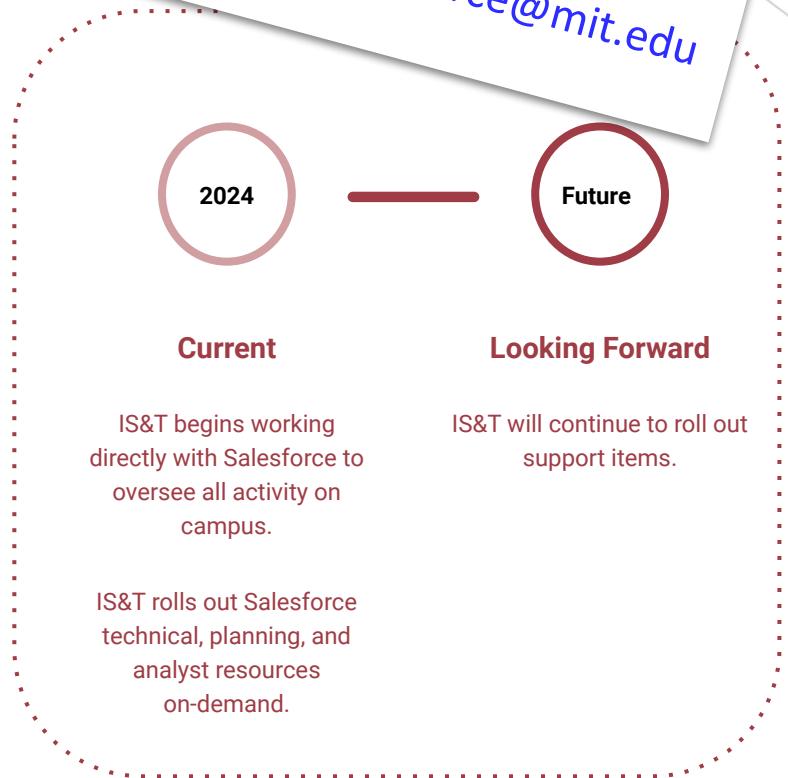
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Join the SIG or e-mail mitsalesforce@mit.edu

2024 ——— **Future**

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Salesforce Pros, Cons & Alternatives

PROS

1. Comprehensive
2. Scalable
3. Integration capabilities
4. App marketplace
5. Large user community
6. Customizable
7. Strong analytics

CONS

1. Difficult to implement
2. Cost prohibitive
3. Technical debt
4. Design trade-offs
5. Learning curve
6. Finding vendors
7. Complex pricing model

Market Alternatives -
HubSpot
Microsoft Dynamics 365
SAP
Adobe Experience Cloud
Google Cloud Platform

Common Campus Alternatives -
Tableau
Excel + Outreach tools
e.g., Mailchimp

Reminder: IS&T is CRM agnostic.

Source: MIT Salesforce Special Interest Group (SIG) + Campus Salesforce users

Key Components of a Salesforce org
How does it work?

Key Components in a Salesforce **Cloud**

CRM Platform Objects

Account	Contact	Lead	Opportunity
Case	Campaign	Task	Event
Product	Price Book	User	Asset, etc.

Platform Functionality

Apex Code	Flows
Surveys	Reports, etc.

Platform Security

Profiles	Roles	Sharing Rules, etc.

Platform User Interface

Page Layouts	Custom Visual Components	Record Types, etc.

Cloud-Specific Objects

Student	Course	Program	Class, etc.

ⓘ **Cloud Schema:** A predefined set of objects, fields, relationships or rules based on cloud (or industry) type.

1. Cloud (or Clouds)

4. External Tools (Bolt Ons)

2. Edition Type

Sales Cloud

Service Cloud

Marketing Cloud

Core Salesforce Functionality

Unlimited OR Enterprise Edition Type

Packaged Applications

Tableau   Slack   Blackthorn   Conga Composer

3. Salesforce Packaged Applications

APIs/Connectors

DocuSign

Drupal

Stripe

ZoomInfo

5. APIs/Connectors
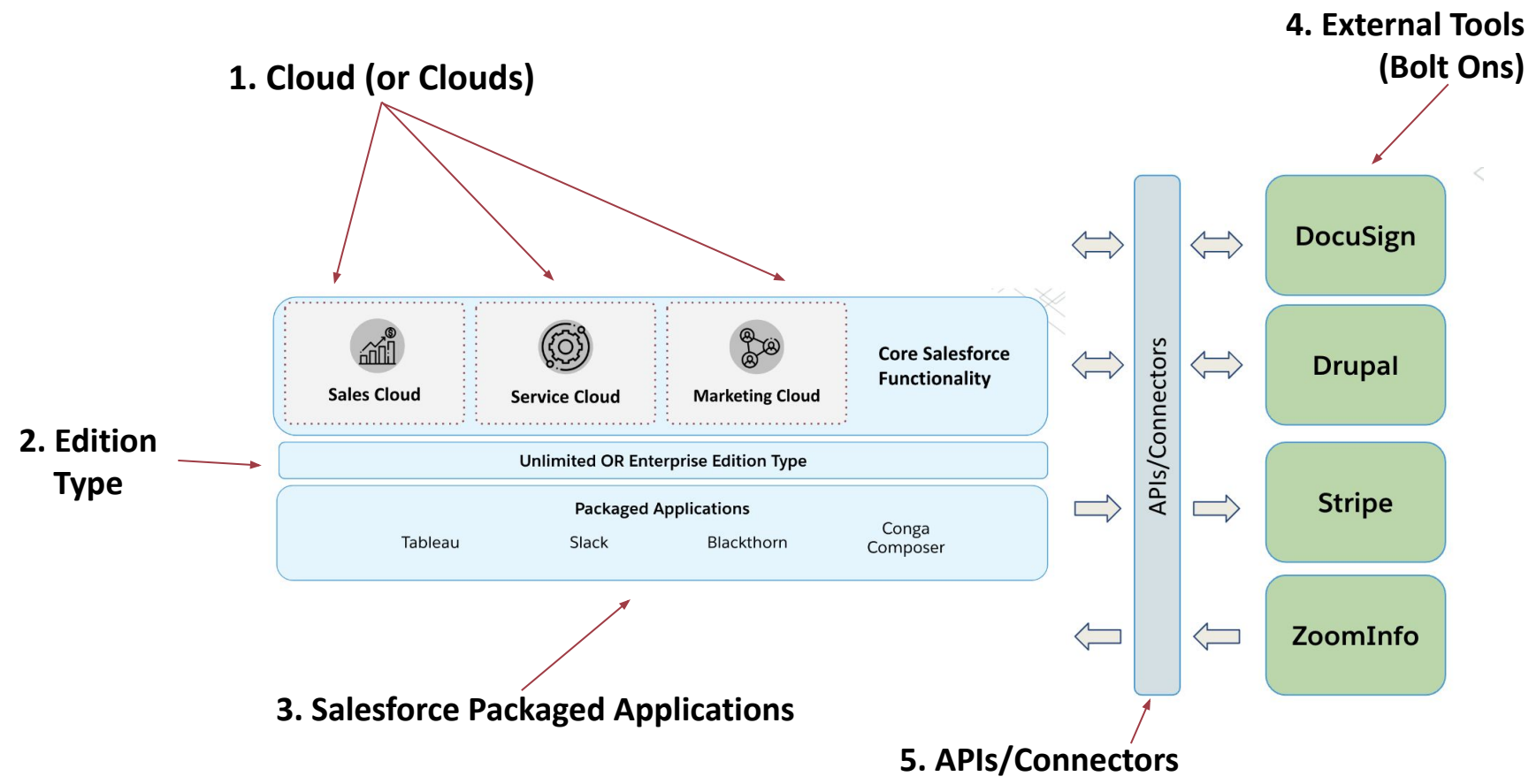
Summary of Cloud Types
With a focus on MIT-relevant types

Summary of Cloud Types

Sales Cloud
Manages sales processes and customer relationships to drive growth.

Service Cloud
Provides customer service tools and support case management.

Marketing Cloud
Enable personalized marketing campaigns and engagement across multiple channels.

Non-Profit Cloud
Manage donors, fundraising, grants, and programs.

Education Cloud
Manage the student lifecycle and institutional relationships.

Community Cloud
Create digital experiences for customers and employees through portals.

Commerce Cloud
Create online shopping experiences and e-commerce operations.

Data Cloud
Provide a unified platform for managing and analyzing data from multiple sources.

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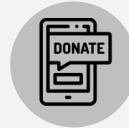Provides customer service tools and support case management.

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Let's Spec a Salesforce Org.
4 Easy Steps

Sales Cloud
Manages sales processes and customer relationships to drive growth.

Service Cloud
Provides customer service tools and support case management.

Marketing Cloud
Enable personalized marketing campaigns and engagement across multiple channels.

Non-Profit Cloud
Manage donor relationships, fundraising efforts, etc. for nonprofit organizations.

Step 1

Edu...
Mana...

✔ **My DLC wants to ...**

1. 'Sell' participation in certificate program courses.
2. Manage relationships with corporate entities for future collaborations & internships.
3. Develop relationships with potential program sponsors.
4. Create a system for support requests and cases. Provide self-service Knowledge Articles.
5. Promote and manage events. Track and manage event attendees over time.

Let's Spec a Salesforce Org. - Identify your Cloud

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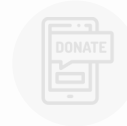
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Edu

Mana

Sales Cloud

Service Cloud

Marketing Cloud

Core Salesforce Functionality

Unlimited OR Enterprise Edition Type

Step 2

Enterprise Edition (EE) - Includes a standard level of API calls, sandboxes, custom objects,etc.

Unlimited Edition (UE) - *Only recommended for DLCs with extensive or business critical processes in Salesforce.* Provides higher limits for custom objects, fields, and API calls. Includes 1 full copy sandbox.

Warning: Once you migrate up to Unlimited Edition, you cannot return to Enterprise.

Let's Spec a Salesforce Org. - Confirm your Edition Type

Environments & Support: Enterprise vs. Unlimited Edition

	Enterprise	Unlimited	Key benefits
Developer Sandbox	25 included	100 included	
Developer Pro Sandbox	$	5 included	
Full Sandbox	$	1 included	
Success Resources (Premier)	$	√	Access to Customer Success team – best practices: adoption recommendation, release readiness, roadmap, advanced webinars & specific communities content
Unlimited Admin Services (Premier+)		√	Additional bandwidth for you. Configuration Salesforce team can execute 100+ types of requests: routine configuration updates like creating users, reports, workflow, dashboards.
Unlimited Premier Online Training (Premier)		√	100+ training for Business & Power Users. All Salesforce admin, developers, architect training available.
24x7 Premier Support (Premier)		√	Highly reactive 24x7 technical support. 1 to 8 Hours response time
Developer Support (Premier)		√	Apex , Visualforce and Force.com API best practices. Error troubleshooting for up to 200 code lines. Performance analysis
Data Storage	20MB per user	120MB per user	6 times more data storage. No needed for extra data storage
Dynamic Dashboard	5	10	
API Calls in a 24hr Period	1000 / License 1 million Total	5000 / License Unlimited Total	
Maximum custom objects	200	2,000	
Access to Accelerators		√	Accelerators are packaged services with fixed scope delivered by a Salesforce Specialist aimed at delivering business outcomes. The customer will be provided 1 x 5 Premier Points if the customer upgrades to UE.

Sales Cloud

Service Cloud

Marketing Cloud

Core Salesforce Functionality

Unlimited OR Enterprise Edition Type

Packaged Applications

Tableau

Slack

Blackthorn
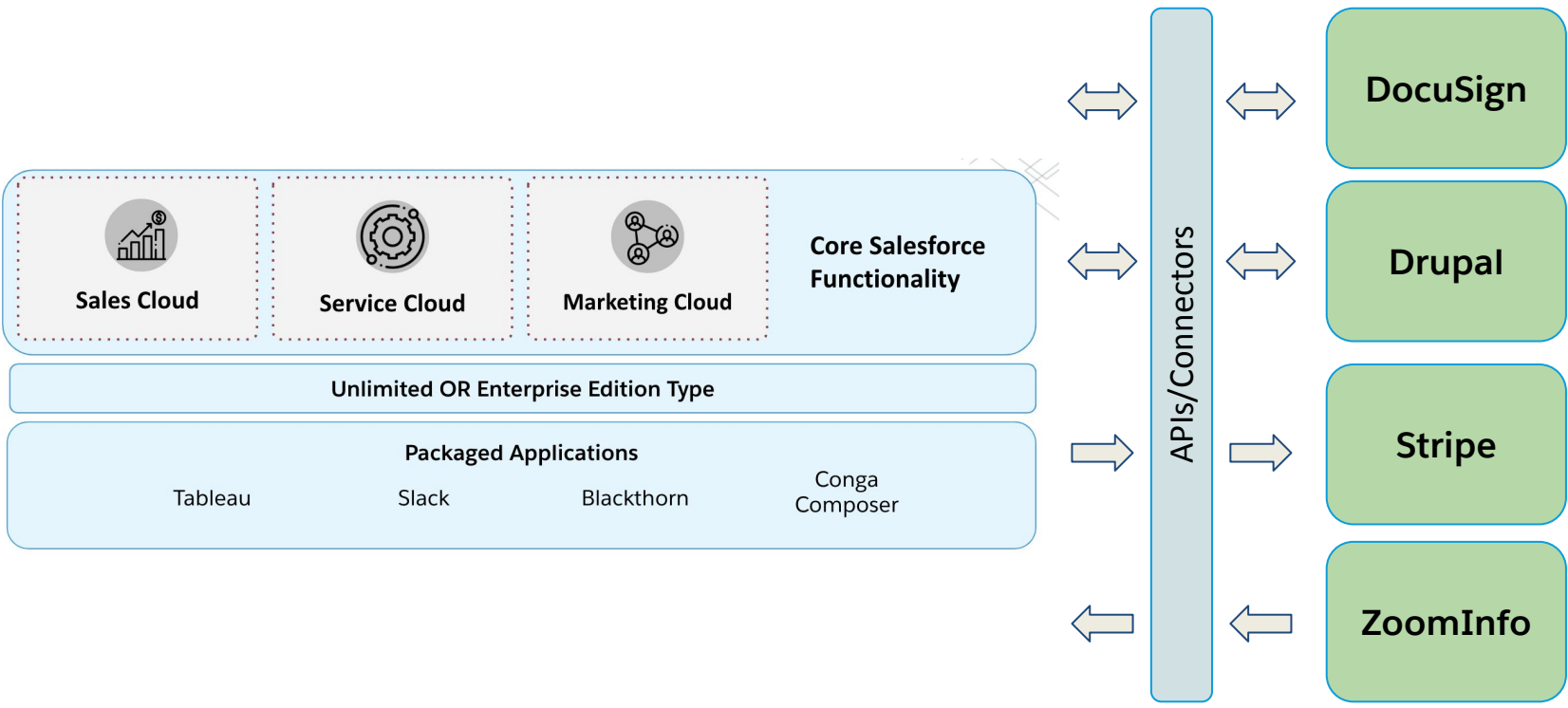
Conga Composer

Step 3

ⓘ **Packaged Applications:** Created for specific business needs and can be shared with other Salesforce organizations via the Salesforce AppExchange or via direct install. Managed or unmanaged.
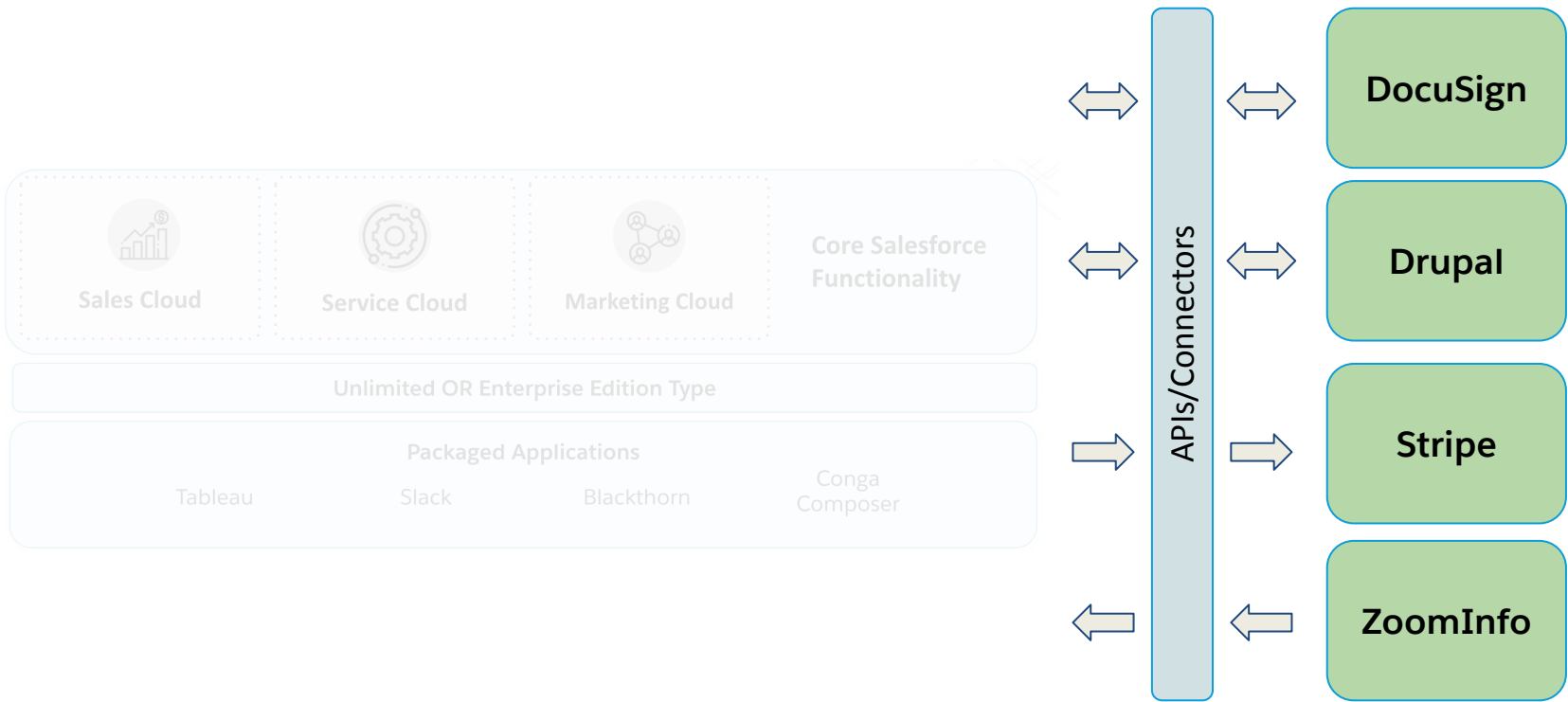
📢 **Warning:** Be mindful of unmanaged packages.

Let's Spec a Salesforce Org. - Bolt Ons & Connectors

Step 4

Campus Stats and Common Issues

Current Campus Use Cases

Total Salesforce Orgs:

2022 - 40

2023 - 32

2024 - 25

2025 - 30 est.

(As of 2022)

■ Sales Cloud ■ Service Cloud ■ CRM Core
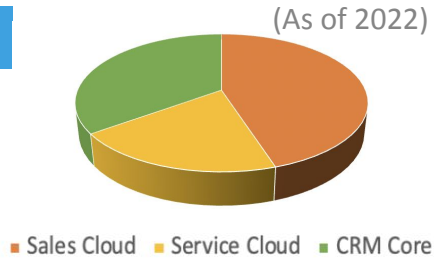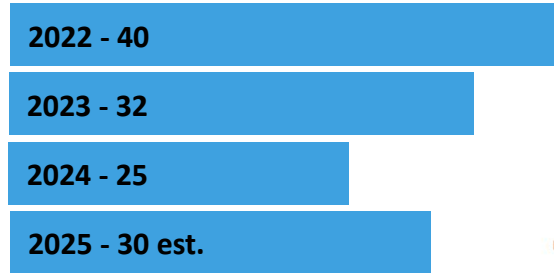
(Current)

75%
Of users rely on Sales Cloud

4 Orgs
Utilize Community Portals

3 Orgs
Utilize Service Cloud

5 Orgs
Run Marketing Cloud

Emerging Trends (from the SIG)

Understanding Salesforce's AI Suite of Tools

Downgrading License types

Marketing Cloud v. Pardot

Crowd-sourcing vendor recommendations

Enrichment tools (Zoominfo, DB Hoover, etc)

Common Issues on Campus

For New Projects

Lack of Clear Requirements

Teams are Not Aligned or Empowered to Make Decisions

Scope Creep

Too many ways to 'skin the cat'

Buying products too early

Product & Licensing Conflicts

For Existing Orgs

Employee Turnover

Lack of Training

Navigating Technical Debt

Business Model Changes

Finding technical resources

With Salesforce

Lack of General Support

Confusion Surrounding Products & Roadmaps

Confusion Surrounding Base Product Functionality

Lack of Consistent Communications

Dos and Do <u>NOTs</u> of Salesforce Implementations

Dos and Do NOTs of Salesforce Implementations

DO

- Identify point persons for key business areas
- Understand your **people**, **process**, and/or **products**
- Clearly define your use cases before bringing on a partner
- Empower your team to make timely decisions
- Right-size your software (start small)
- Follow Salesforce best practices
- Scrutinize Salesforce Cloud Roadmaps
- Ask questions in the SIG
- Dedicate project resources
- Communicate regularly
- Plan your maintenance budget

DO NOT

- Forget your use cases
- Over customize without justification
- Build without anticipating core business shifts
- Mixing & match products without scrutiny
- Buy beta or interim products
- Rush testing & user adoption
- Ignore security
- Relearn the learning curve
- Deprioritize Data Governance
- Skip user training

Paths to Salesforce Implementation

Notes on Implementation Partners

- Specialize by:
    - Org size, industry & products
- Check references
- Check time zones
- Confirm they understand your business (early)
- Watch for talent swaps
    - Especially on phased projects
- Do a little internal pre-training
- Don't assume you're aligned

Note: Your vendor expects you to know *exactly* what you want

Although...

Could my DLC self-implement?

- Small-scale org
- Business processes are simple
- In-house SF expertise is available
- Dedicated project 'team' resources are available
- Post Implementation support plans:
    - Data governance & change mgmt

Campus Resources
We're here to help

Campus Resources

- MIT Salesforce [Special Interest Group](#): A group of users from DLCs across campus who meet (roughly) every two months to discuss shared issues, vendor details, updates, or enhancements.

Next SIG Summer Training Session: 6/27 @ Noon

- Ad-Hoc support via mitsalesforce@mit.edu

- MIT Salesforce [Knowledge Base](#): Future location of all enterprise-related Salesforce materials including support and pricing details.

Taylor Phelps
Campus Salesforce
POC, IS&T

Cheryl Miller
SF SIG Co-founder
MIT CISR

Emma Levett,
Software Asset
Manager

Trent Stephens
Salesforce
Business Analyst

MIT Salesforce Special Interest Group (SIG)

Helpful for

- Finding like-minded users
- Pain point review
- Product demos
- Vendor referrals

Helpful for

Getting familiar to advanced topic training

Start here

- Salesforce 101
- Salesforce as a CRM Tool
- Accounts & Contacts 101
- Salesforce's EDA Package general and administrative

An Exercise

PEOPLE - Who are the key stakeholders or constituents you aim to track within a Salesforce org?
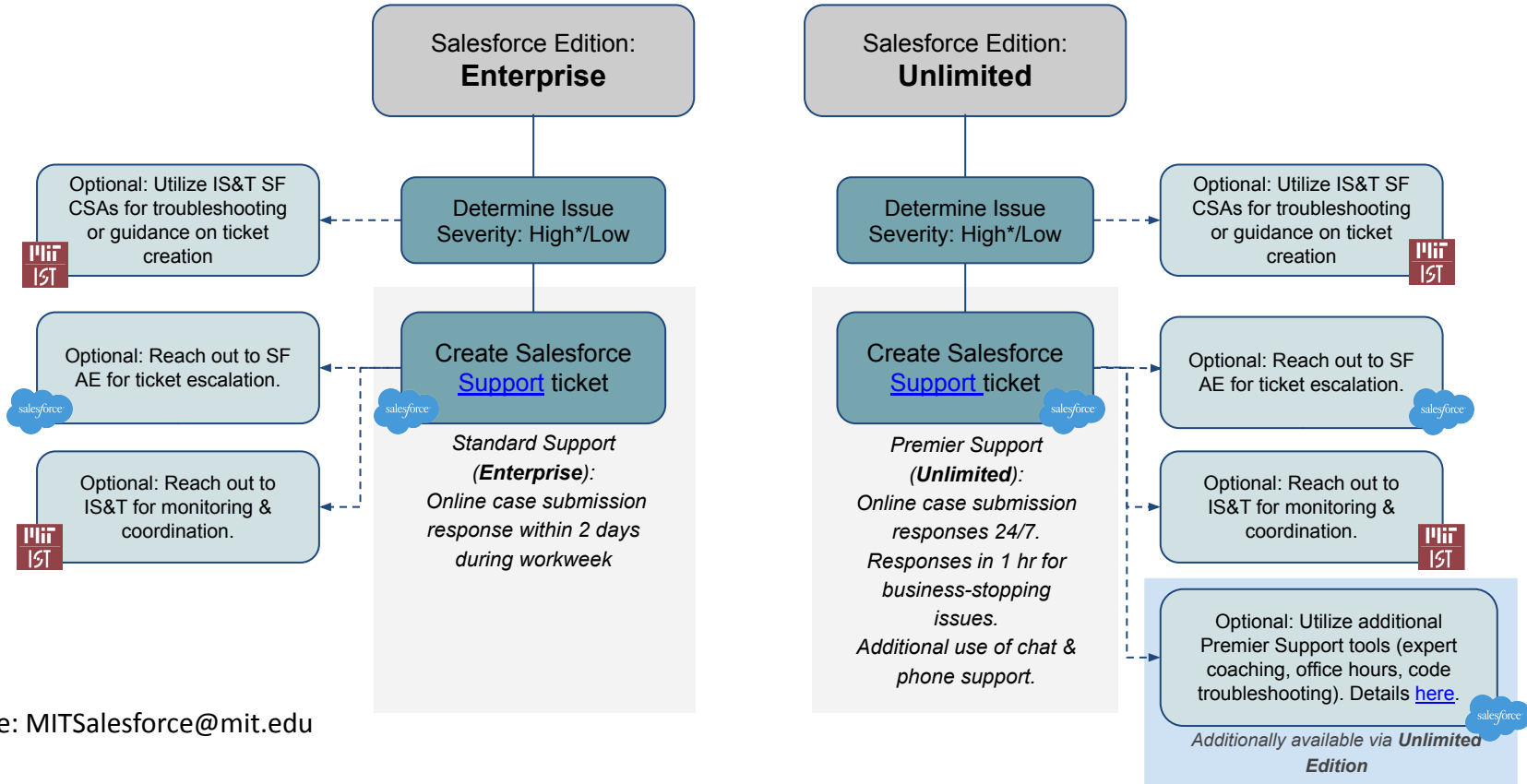
PRODUCTS - What are the key products or services you offer to your community or target audience?

PROCESS - What key processes do you manage or maintain within your organization?

Supporting Docs

Salesforce Edition: **Enterprise**

Salesforce Edition: **Unlimited**

Optional: Utilize IS&T SF CSAs for troubleshooting or guidance on ticket creation

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Determine Issue Severity: High*/Low

Determine Issue Severity: High*/Low

Optional: Reach out to SF AE for ticket escalation.

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Create Salesforce Support ticket

Create Salesforce Support ticket

Optional: Reach out to IS&T for monitoring & coordination.

*Standard Support (**Enterprise**): Online case submission response within 2 days during workweek*

Optional: Reach out to IS&T for monitoring & coordination.

*Premier Support (**Unlimited**): Online case submission responses 24/7. Responses in 1 hr for business-stopping issues. Additional use of chat & phone support.*

Optional: Utilize additional Premier Support tools (expert coaching, office hours, code troubleshooting). Details here.

*Additionally available via **Unlimited Edition***

Source: MITSalesforce@mit.edu

DLC Assessment for New Solution	Engage with IS&T	Prepare DLC Use Cases	Confirm Implementation Approach	Procure Project Resources
Document current state	Reach out to *mitsalesforce@mit.edu*	Refine project use cases	Decide on use of implementation partner	Solicit vendor RFP (as applicable)
Identify future system needs	Salesforce performs software 'Needs Assessment'	QA check-in with IS&T	Identify project timeline	Procure salesforce licenses
Develop system's use cases	Review proposed software package		Finalize budget	
	Find like-minded DLCs/Industry Partners		Identify internal project team	

IS&T-focused support

Salesforce/Procurement-focused support

Details for each step are provided here.

Sales Cloud Editions

Unlimited Edition

| | 24x7 Response in 1-hr | Success Guidance | 1-to-1 Expert Coaching | Developer Support | Data Storage (MB/User) 120 | API Calls Per Day 5,000 | Custom Object 2,000 | Sandbox – Developer Pro 5 | Sandbox – Full Copy 1 | Sandbox – Developer 100 |

Sales Engagement

Inbox & EAC

Sales Cloud Einstein

Einstein Conversation Insights

Enterprise Edition

Account	Contact	Case	Opportunity	Campaign	Report	Dashboard	Account Team	Lead
Opportunity Team	Survey Responses 300	Calendar & Event	Asset	Console App	Activity & Task	Chatter	Approval Process	Case Team	Forecasting
Territory Management	Opportunity Split	Contract	Product & Pricebook	Quote	Order	Record Type	Process & Flow	Custom Permission Set	Custom Profile
Sandbox – Partial Copy 1	Sandbox – Developer 25	Data Storage (MB/User) 20	API Calls Per Day 1,000	Custom Object 200	File Storage (GB/User)	Web Services API	Identity	Apex Code	Advanced Sharing

Source: MIT Salesforce AE

Service Cloud Editions

Source: MIT Salesforce AE
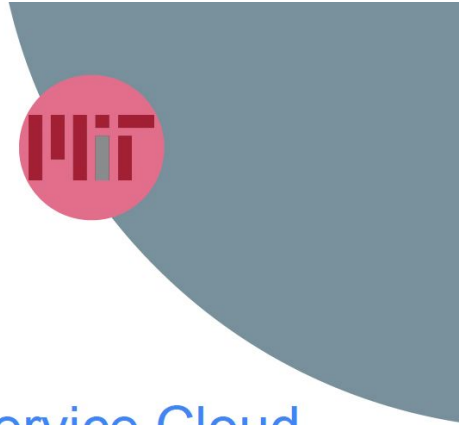
How Salesforce products change

Service Cloud Enterprise vs. Unlimited Edition

Capability	Enterprise	Unlimited
Developer Sandbox	25 included	100 included
Developer Pro Sandbox	Add-on: 5% of net price	
Full Copy Sandbox	Add-on: 30% of net price	
Apex Debugger Session	Add-on: $18k	
Data Storage	20MB / User	
File Storage	612MB / User	
API Calls in a 24hr Period	1000 / License 1 Million Total	
Maximum Custom Objects	200	
Custom Fields per Object	500	
Custom Apps	260	
Validation Rules per Object	100	
Dynamic Dashboard	5	
Success Resources		
24x7 Premier Support	Add-on: 30% of net price	
Developer Support		
Expert Coaching Sessions	Not Available	
Knowledge Base	Not Available	
LiveAgent Chat	Not Available	

New Service Products Included in UE

Sales Cloud Enterprise vs. Unlimited Edition

Capability	Enterprise	Unlimited	
Developer Sandbox	25 included	100 included	Increase Sandbox Capacity
Developer Pro Sandbox	Add-on: 5% of net price	5 included	
Full Copy Sandbox	Add-on: 30% of net price	1 included	
Apex Debugger Session	Add-on: $18k	1 included	
Data Storage	20MB / User	120MB / User	Higher Storage Limits
File Storage	612MB / User	2GB / User	
API Calls in a 24hr Period	1000 / License 1 Million Total	5000 / License Unlimited Total	
Maximum Custom Objects	200	2,000	More Platform Resources
Custom Fields per Object	500	800	
Custom Apps	260	Unlimited	
Validation Rules per Object	100	500	
Dynamic Dashboard	5	10	
Success Resources		√	Help through Success
24x7 Premier Support	Add-on: 30% of net price	√	
Developer Support		√	
Expert Coaching Sessions		√	
Salesforce Meetings	Not Available	√	Advanced Selling Features
Pipeline Inspection	Not Available*	√	
Custom Measure Forecast	Not Available	√	
Sales Engagement (fka High Velocity Sales)	$75/u/m	√	
Sales Cloud Einstein	$50/u/m	√	
Salesforce Inbox**	$25/u/m	√	
Einstein Conversation Insights***	$25/u/m	√	

New Sales Products Included in UE

*Pipeline Inspection can be added to EE with the purchase of Revenue Intelligence | **Inbox Mobile App not included with Unlimited |***Limit of 120 hrs/year

Source: MIT Salesforce AE

Source: Salesforce help article

Source: TLO Salesforce Production Org
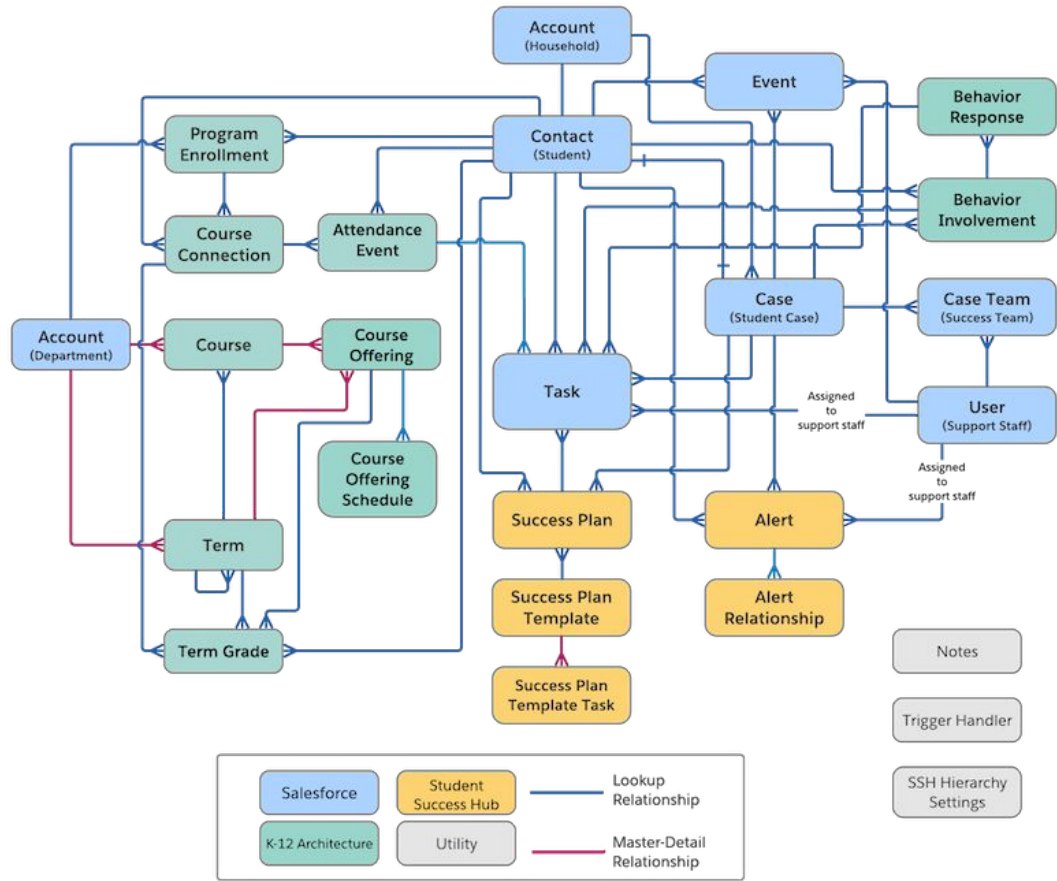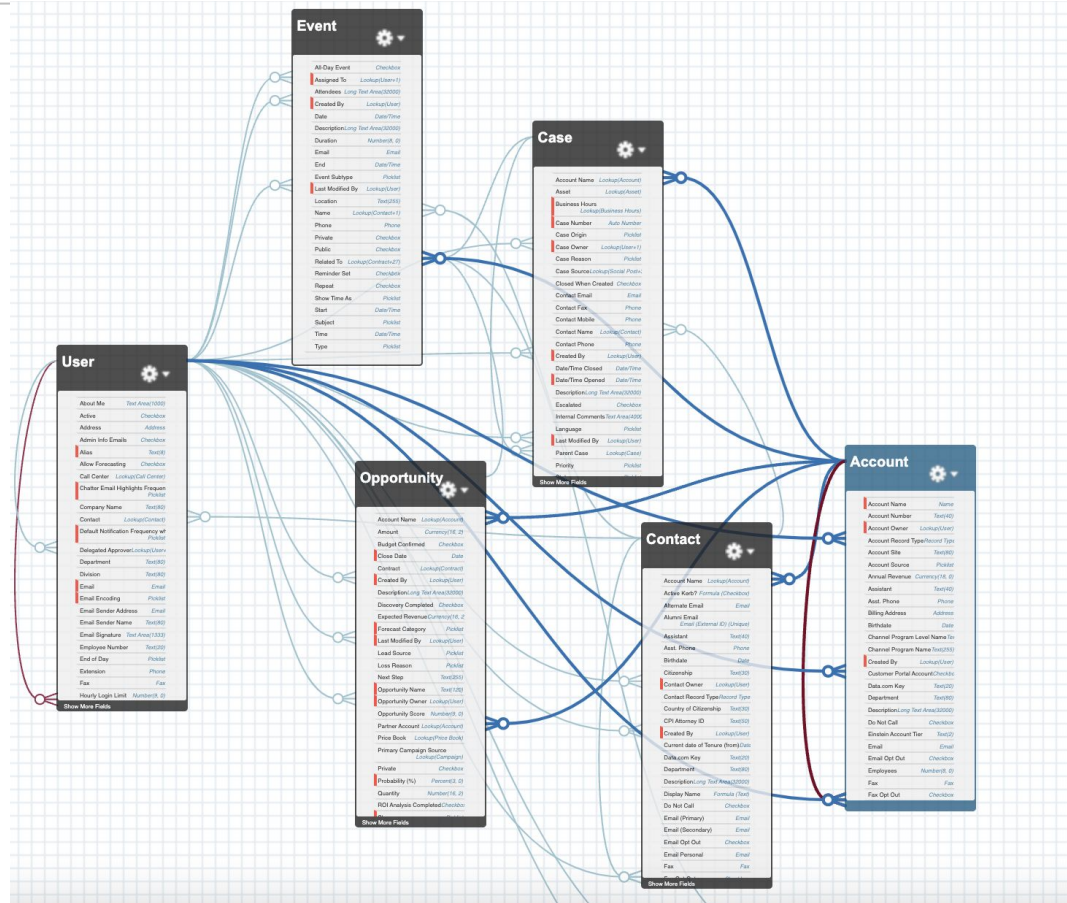
Business Process Mapping Value Proposition

Source: SalesforceBen.com
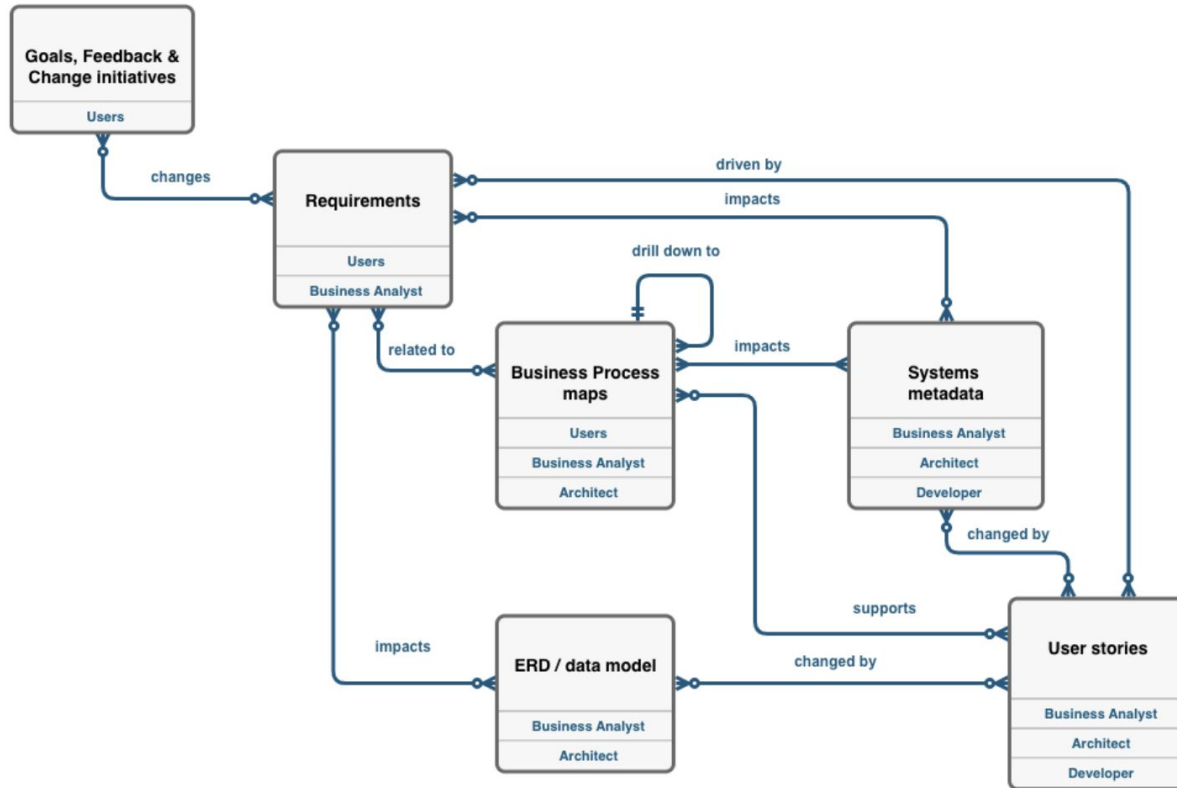
Salesforce.org (SFDO) and Salesforce.com (SFDC) have merged into a single platform offering. Salesforce is phasing out its legacy license plans and no-cost licensing options. This will impact MIT by requiring all DLCs to transition off of these legacy licensing options.

The Master Services Agreement negotiated terms and pricing for DLC's including:

- Product and price structures with discounts for Salesforce products in use across MIT today
- Consistent contractual terms and competitive pricing
- An overall contract including increased privacy and data protections
- A dedicated Salesforce team supporting engagements across MIT

Legacy Pricing for DLC's will be honored to 7/8/23.