

# Best Practices – Salesforce Super Users / Champions

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## Champion Program

### What is it and why do you need it?

- A Champion Program is a coordinated effort to provide Salesforce expertise aligned to local or departmental requirements to gain end-user support
- Within a Champion Program, various roles could include Regional Champions, Local Champions, Key Users and Sponsor Champions; these roles should come from both the Business and IT
  - Align to the business to ensure representation of everyone involved
- A successful Champion Program focuses on adoption and on representation for (global) change management decisions
  - Need to support unique regional processes and “filter and align” for enhancement requests – **Champions know the business best!**
  - Provide peer-based support to soften the “corporate’ messaging
- Typical results of a successful Champion Program are:
  - Improvements of features and processes
  - High adoption and user satisfaction
  - Expanded usage

*Do not miss the chance to get people on board who know the processes, topics and issues by heart.*

### Development of the Champions Strategy & Structure

#### How does it start if not established in the very beginning?

A (global) rollout team should consist of IT experts and Business experts to ensure that you find gaps in the support and project structure that either group cannot discover on their own.

- ➔ Establish a formal representative for each region or function of the business (unit) to ensure localized success (user buy-in), as well as globalized change management.
- ➔ Best Practice: Keep standardization across regions as much as possible.

## Deciding on Goals & Objectives

### Getting Started

- Some goals and objectives of your Champion Program could be:
  - Adoption
  - Aligning local versus global requirements and processes
  - Localized support (language, process, culture)
  - Deciding between configuring and customizing
  - Deciding on expansion versus simplification
  - Standardization
  - Training Support (new features, day-in-the-life, processes, etc.)

### Alignment

- Who / what do your champions champion?
  - Whose interests do they represent?
    - Functions?
    - Geography?
    - Business? IT?
  - Decision on what are they expected and empowered to do?
    - For example:
      - Support IT productivity for small changes (manage users, load data, create reports and dashboards, delegated administration for custom objects)
      - Ensure fully baked requirements are vetted by the business before it comes to IT

**Note: New Permissions and Permissions Sets make it much easier to manage this at a granular level.**

## **A Champion's Role**

### **Champion's are Change Agents**

- Establish a network users from different business areas (by level, role and/or region) that support the change
- Participate with the development of CRM processes and support the Change Control process
- Share requirements with the Project Team
- Act as “first-line” support for functional-related topics: Help answer process and “How To” questions
- Present new features to other users
- Support or deliver training for other users
- Frequent meetings with other Super Users on a regular basis to gather feedback regarding new and current initiatives and status of the application
  - ➔ Early and frequent feedback is key!
- Provide peer-to-peer best practice sharing – users best learn from each other
- Showcase their “day-in-the-life”
- Attend on-going Salesforce training sessions as new features and functions are deployed

## **A Champion's Qualifications**

### **Identify the right people!**

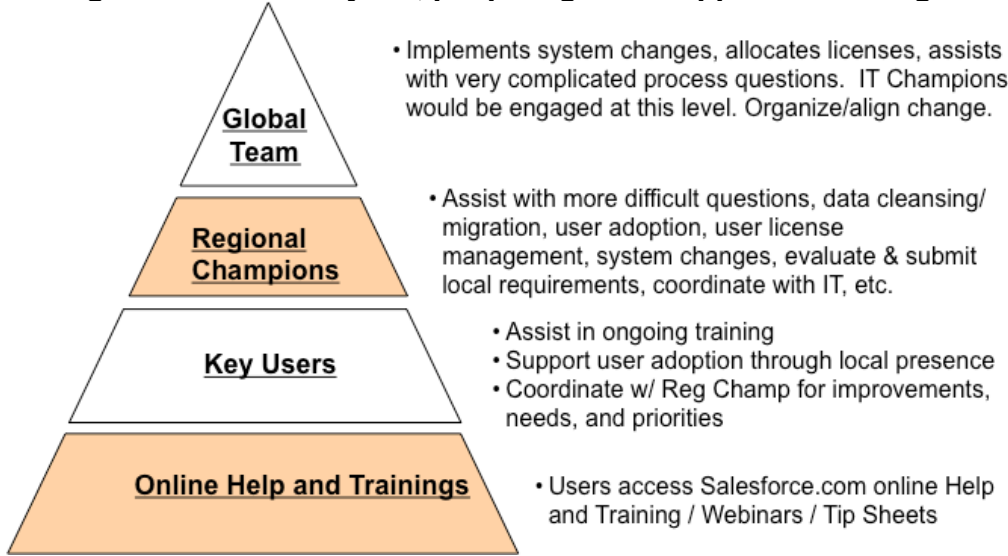
Champions must have

- Good reputation (seen as a leader in their business unit)
- Good business and process knowledge
- Basic Salesforce training
- Interest and commitment to the project

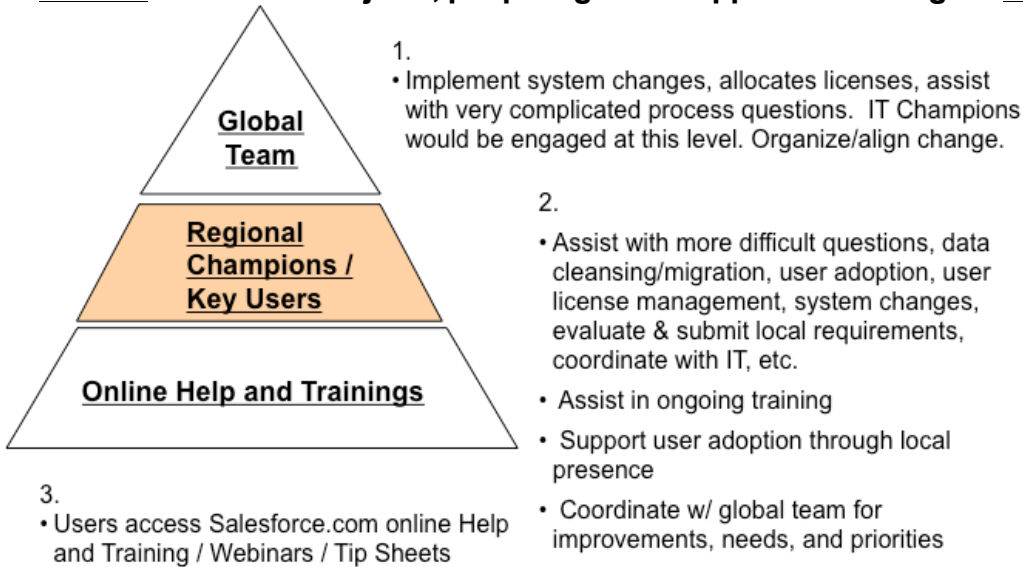
Also, consider the time commitment for your Super Users and think about how you can establish incentives and define common rules.

## Different Champion Program Structures

### In Larger Salesforce Projects, pre/post go-live support and change is four-tiered



### In Smaller Salesforce Projects, pre/post go-live support and change is three-tiered



### Over time, the structure and number of your Champions will grow



## Lessons Learned

### What lessons have other Salesforce customers learned in building their Super User Programs?

- You absolutely have to:
  - ✓ Choose the right people
  - ✓ Consider the time commitment versus their daily business responsibilities – incentivize them
- You should never:
  - ✓ Choose just any person – look at their qualifications and interest
- Overall lessons learned and best practices
  - ✓ Have bi-weekly or monthly calls with all Super Users
  - ✓ Define goals and responsibilities of the role clearly and early on
  - ✓ Set up on-site summits at least once or twice a year for best practice Sharing, engaging and aligning
  - ✓ Communicate!