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FAMILY CONNECTS INTERNATIONAL

SALESFORCE HEALTH CLOUD MIGRATION

PROJECT KICKOFF

May 29, 2023

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Thank You!

AGENDA

1. Project Vision & Strategy
2. Introductions
3. Planning for Long Term Success
4. Project Life Cycle Review
5. Driving Adoption
6. Next Steps

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Project Vision & Strategy

- **Project Title**: Salesforce Health Cloud Migration

- **Vision & Strategy**
  - The purpose of this change is to support FCI partners' ability to deliver more **efficient** and **effective** service to families.

- **How?** Streamline assessments, reduce data entry time, automate and integrate systems where possible, improve reporting and analytical capabilities.

AGENDA

INTRODUCTIONS

INTRODUCTIONS

The Prolocity Team

BRIAN MEIMANN

Sales Executive

ERIC ROBERTS

Sr. Project Manager

ADAM SPOTTS

Sr Solution Architect

SHERYL SHEPHERD

Project Oversight

KAT ROLLEY

Sr. Client Success Manager

GEORGE RIECHMANN

Director of Solution Engineering

GREG HART

Sr. Technical Architect

JASON SPENCER

Sr. Technical Architect

JEFF WILENSKY

Sr VP Strategy & Growth

Family Connects International KEY STAKEHOLDERS

SHERIKA HILL, PHD MHA

Executive Director

Andrew Riley

Director, Data Systems

Daniel Cohen-Vogel

Project Management

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PLANNING FOR LONG-TERM SUCCESS

KAT ROLLEY
SR. CLIENT SUCCESS MANAGER
katherine.rolley@prolocity.com
513-259-8842

AFTER THE PROJECT

Where do you go for support?

What's next to accelerate growth?

PLANNING FOR SUCCESS

RECOMMENDED APPROACHES

- Support Options:
  - Salesforce Support
  - Prolocity: PROserve Support Services
    - Essential, Partner, Admin 360
- Future Phase Projects:
  - Ensuring long-term ROI with Salesforce
  - Our team is committed to your success
  - Let's stay in touch!

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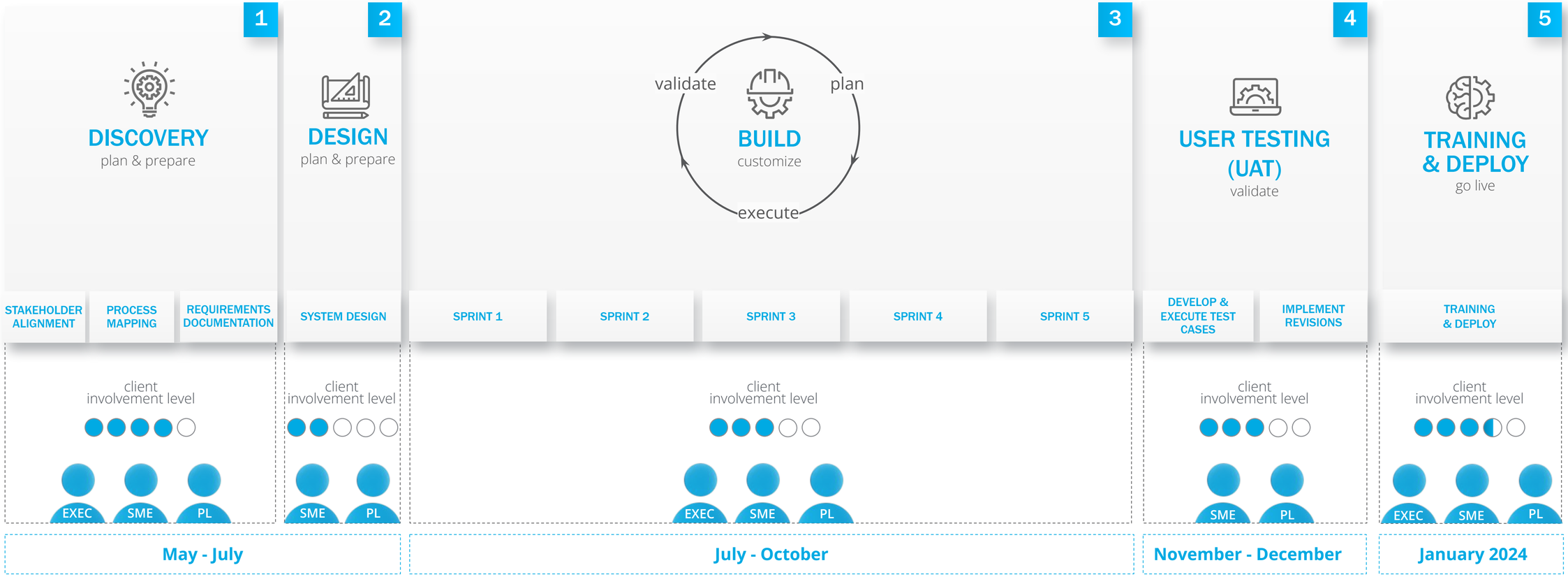
PROJECT LIFECYCLE REVIEW

PROJECT PHASES + TIMELINE



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DISCOVERY

OBJECTIVES

- Identify and **define all business processes** Salesforce must support for a successful implementation
- **Identify pain points**

ACTIVITIES

- **Interviews** with appropriate SME's
  - **Develop user stories** (required features from an end user perspective)
  - **Develop process maps**
- Define **data migration** strategy
- Define change management strategy

RESOURCES

- **Executive Leadership**
- **Project Leadership**
- **All relevant SME's:**
  - Sales
  - Finance
  - Customer Service
  - Marketing
  - Product Management
  - IT

PERSONA

Jane Miller
Nurse Supervisor

Jane Miller has been with Family Connects Springfield for the past 5 years serving as a Nurse Supervisor. Serving hundreds of families in her community, it's no surprise Jane spends much of her time searching for the latest referrals available. Jane also spends a lot of time playing middle person between nurses and various departments in the Springfield Health System— leaving less time to support nurses and families directly.

AS A...

Nurse Supervisor

I NEED...

The ability to easily view family transaction history

SO THAT...

I can find all relevant information in one place and provide referrals correctly

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DISCOVERY:

USER STORIES

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DESIGN

OBJECTIVES

- Utilize the approved requirements and narrative to **develop the optimal solution** based on the best possible combination of configuration, customization and applications.

ACTIVITIES

- Hold design sessions with various stakeholders to **review recommended configuration, customization and applications.**
- Determine required **development and testing environments**
- Review and finalize Design/Configuration document for **client approval**.

RESOURCES

- **Project Leadership**
- **All relevant SME's:**
  - Data
  - Nurses
  - Nurse Supervisors
  - Program Directors
  - Community Alignment

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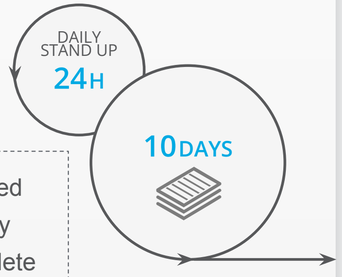
PLAN

1. **Review backlog**
2. **Estimate sprint** backlog
3. **Commit** to Work

PRIORITIZE

- **Select items** to be completed within sprint

SPRINT



- Completed yesterday
- To complete today
- Identify obstacles

REVIEW

- **Demo** to all
- Product Owner to **determine what is "done"**
- Stakeholder feedback becomes **backlog items**

RETRO

- **Inspect & adapt**
- **Keep** doing
- **Start** doing
- **Stop** doing

BUILD

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USER ACCEPTANCE TESTING (UAT)

OBJECTIVES

- **Test and confirm** that the configuration, custom code and integrations meet client business and technical requirements.

ACTIVITIES

- **Develop test cases**
- **Execute test cases**
- **Report Issues**
- **Implement** configuration/code changes based on **feedback**

RESOURCES

- **Project Leadership**
- **All relevant SME's:**
  - Data
  - Nurses
  - Nurse Supervisors
  - Program Directors
  - Community Alignment

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TRAINING

(Nov/Dec)

OBJECTIVES

- **Introduce Salesforce**
- Communicate expected **use and benefits**
- **Ensure all users understand** how to perform activities required for their roles

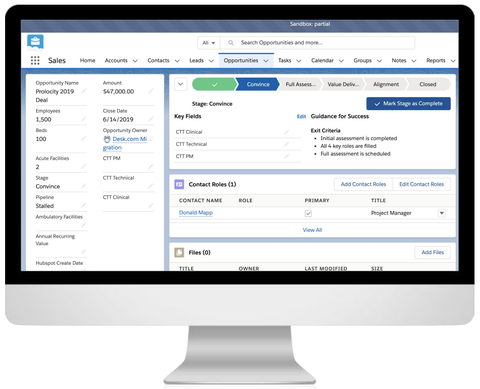
ACTIVITIES

- **Train-the-Trainer** training for Salesforce users
- **Admin training** for system administrator users

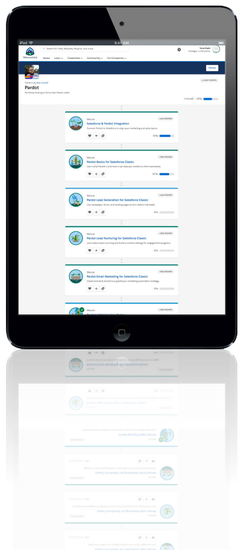
RESOURCES

- Designated Client Trainer(s)
- System Admin

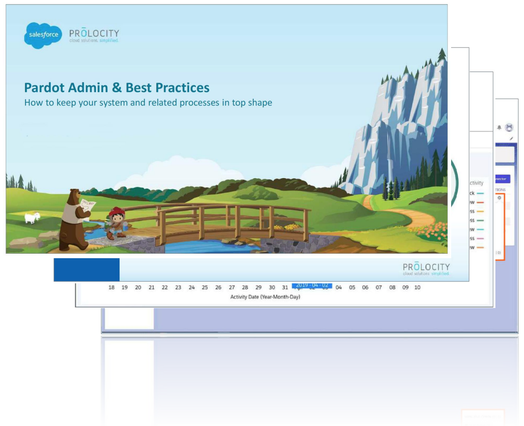
GTM / IN-PERSON



TRAILHEAD



WORKBOOKS



VIDEO

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DEPLOY

OBJECTIVES

- **Move approved** configurations and installations from the sandbox **to your production environment**
- **Migrate data to production**

ACTIVITIES

- **Validate Push to Production**
- **Validate Data Import**

RESOURCES

- **System Admin**
- **Power Users**

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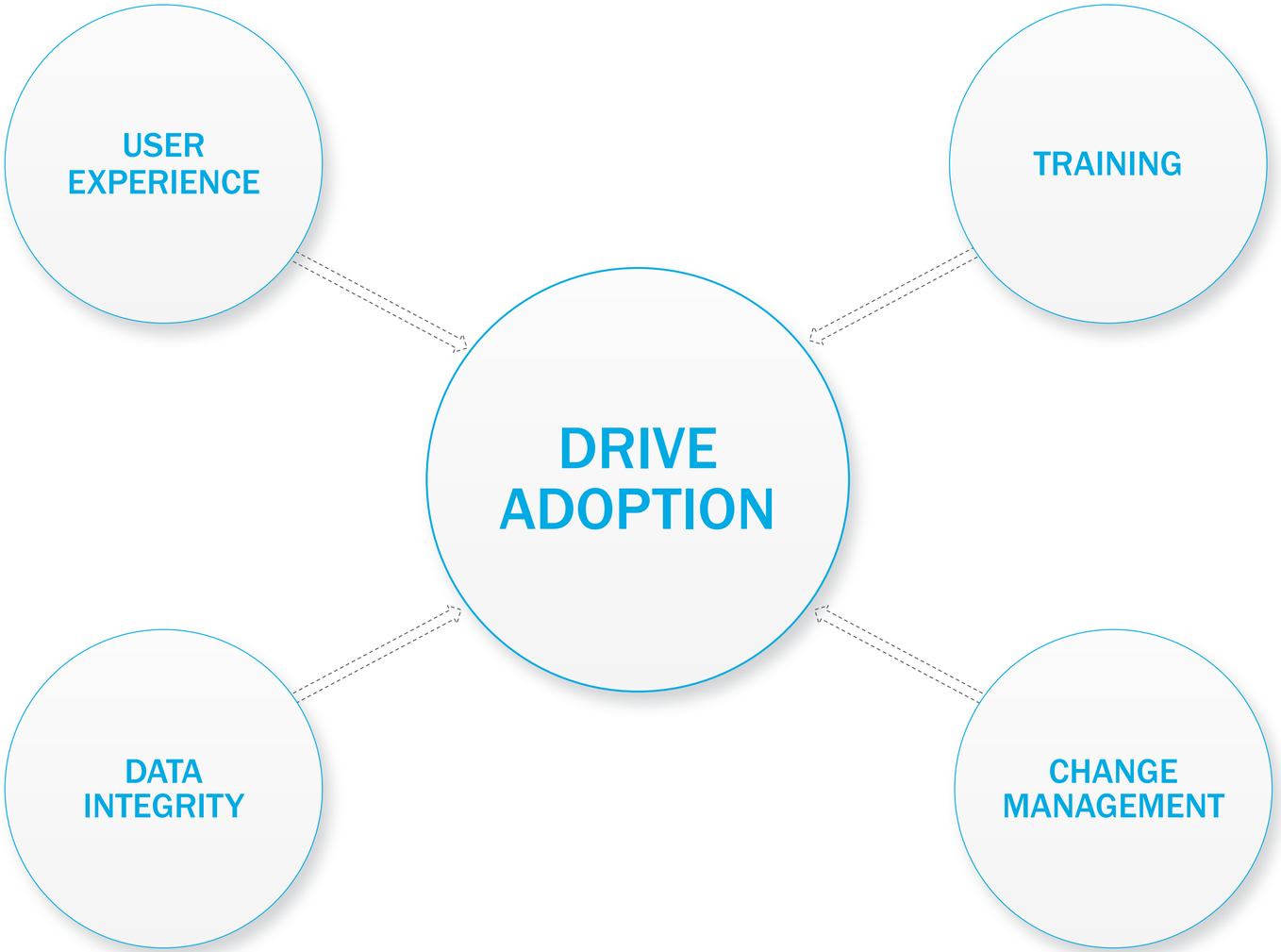
DRIVING USER ADOPTION



DRIVING USER ADOPTION

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NEXT STEPS

NEXT STEPS

1. Schedule of Discovery Sessions (June/July)
   - Dan Cohen-Vogel sending out poll
   - Aligning CPs with 10 sessions
   - Invites will be sent
2. Training Plans will be developed in July for train-the-trainer format
3. Communications
   - Dan Cohen-Vogel (consultant with FCI): dan@dataworkspartners.com

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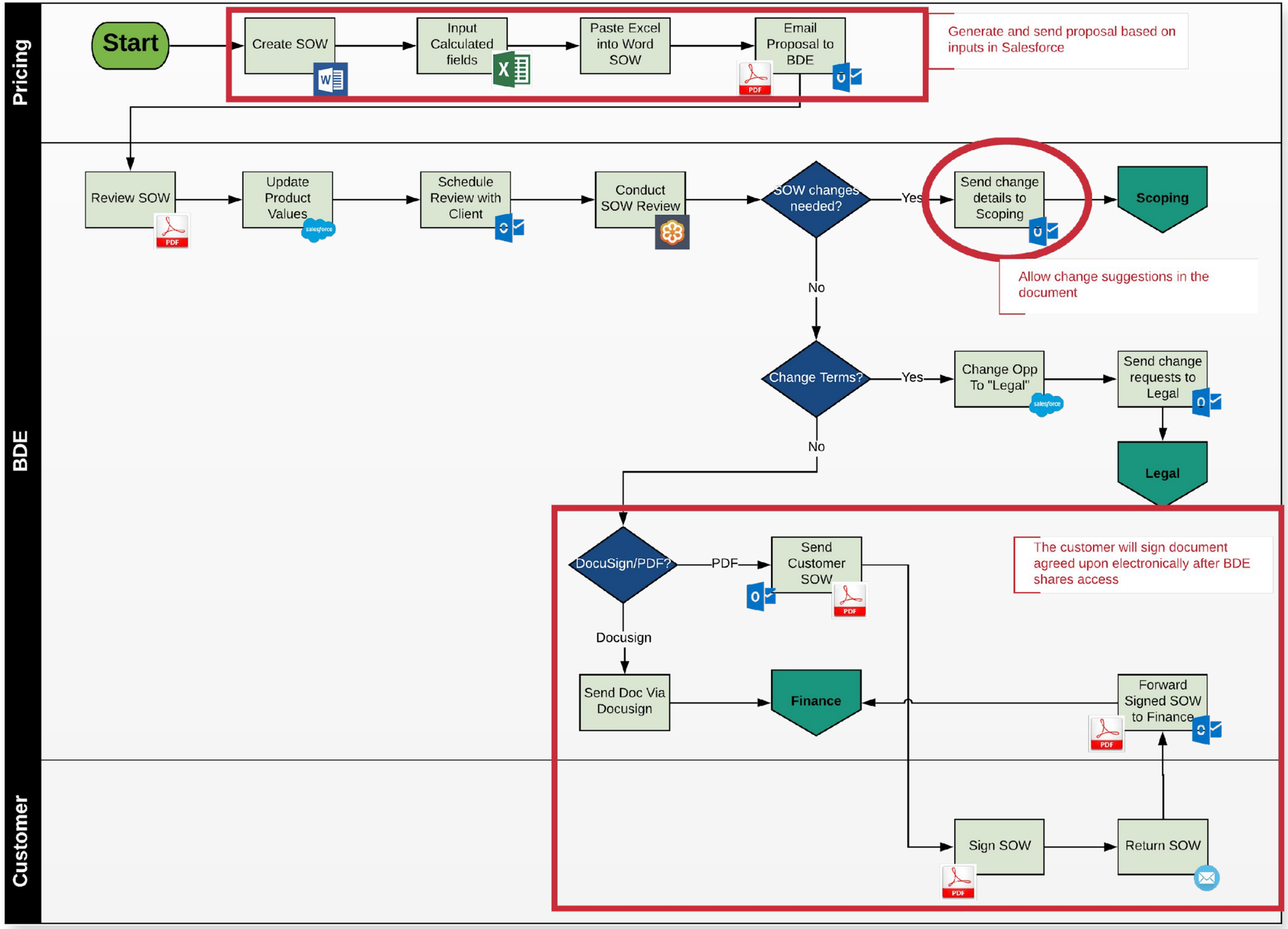
QUESTIONS?

THANK YOU!



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DISCOVERY:

PROCESS MAPPING

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PROJECT PHASES + TIMELINE

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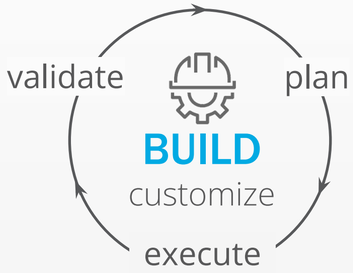
1

DISCOVERY
plan & prepare

2

DESIGN
plan & prepare

3



4

USER TESTING (UAT)
validate

5

TRAINING & DEPLOY
go live

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