



WHITE PAPER

Governance

Version 2.0 HE



Table of Contents

Success Path.....	4
Introduction.....	4
What Is Governance.....	5
Governance Stages of Maturity.....	6
Why Governance Is Important	6
Innovation.....	6
Compliance.....	6
Velocity	7
Delivery.....	7
Risk.....	8
Benefits of a Governance Framework.....	8
Pitfalls of Poor Governance.....	8
Governance Subdomains	8
Steps in Creating Governance	9
Conclusion.....	9
Additional Resources	10
Appendix 1: Vision & Strategy.....	11
Appendix 2: Principles of Software Engineering	12
Software Development Lifecycle	12
Technology Governance.....	12
Release Cadence	12
Why Having Principles of Software Engineering Is Important.....	12
Pitfalls of Poor Principles of Software Engineering	13
How to Achieve Maturity in Principles of Software Engineering.....	13
Appendix 3: Business Backlog	14
Why Having a Business Backlog Is Important	14
Pitfalls of a Poor Business Backlog.....	14
How to Achieve a Mature Business Backlog	15



Appendix 4: Communications Strategy.....	16
Why Having a Communications Strategy Is Important.....	16
Pitfalls of a Poor Communications Strategy	16
How to Create a Communications Strategy	16
Appendix 5: Data Architecture	18
Why Having a Data Architecture Is Important	18
Pitfalls of a Poor Data Architecture.....	18
How to Create a Data Architecture.....	18
Note in Multiple Clouds.....	19
Appendix 6: Stakeholder Management.....	20
Executive Sponsors	20
Stakeholders	20
Why Having Stakeholder Management Is Important.....	20
Pitfalls of Poor Stakeholder Management.....	21
How to Create Stakeholder Management	21
Appendix 7: Additional Cloud Subdomains.....	22
Creation Process.....	22
Team Composition.....	22
Principles of Software Engineering.....	22
Development/Creation Process.....	22
Commerce Cloud	22
Marketing Cloud	23
Environmental Management.....	23
Appendix 8: Governance Framework	25



Success Path

There are normally three phases that occur when an organization is addressing business challenges:

1. **The Why.** Define the business challenges and a set of business capabilities that are required to address the challenges.
2. **The What.** Select IT vendors for the technology to deliver the business capabilities.
3. **The How.** Deliver these business capabilities and associated business objectives using the selected technology.

Creating the “How” requires three things: People, Processes, and Technology. When things are not going well, it is common to blame technology. However, the issues are generally related to people and process. Thus, Salesforce has developed a methodology to help organizations successfully create the “How” with a program called Compass. Compass helps define the right processes with the right people to deliver the required business capabilities.

A Salesforce Success Path is a clear set of action plans, resources, and guidance to move toward Governance maturity, address current challenges, and ensure an effective journey to success. These Paths are living journeys, since challenges and business objectives continue to change over time. To help organizations create a Path to success, the Compass methodology has a set of eight Domains with key Subdomains that address specific challenges with the aim of delivering value for all Salesforce programs and across all Salesforce Products.

Introduction

Most organizations document and publish their executive vision and strategy on their website. This provides strategic direction, describes what the organization aims to achieve in the future, and guides its internal decision-making. The Vision and Strategy is used by senior leadership to focus resources on achieving the documented business objectives.

No IT initiative is approved without a very compelling business reason that helps deliver the organization's vision and strategy. In addition to aligning with vision and strategy, all IT initiatives should have a governance framework in place to manage the projects and guide decision making. Governance is the guide rails to allow the Program team to deliver the business outcomes within the required quality and time.



The industry standard for IT governance is known as COBIT¹. This standard suggests that all IT initiatives, Programs, or projects should have a cascading vision and strategy from the organization's vision and strategy. Inst

What Is Governance

One of the biggest challenges with managing Salesforce environments is lack of governance. There are several common reasons why this is the case:

- The Business purchased Salesforce with little (if any) input or involvement from IT.
- The Business requires a highly agile platform for delivery of business requirements and they believe governance processes will add unacceptable delays.
- Due to the nature of aPaaS (Application Platform as a Service), many believe changes should be simply made directly in production and that governance is not required.

Governance is the minimal set of processes needed to allow your Program to deliver the business outcomes with the quality required and within the business timeframe. That is, it's the guide rails to enable you to go fast.

This whitepaper outlines the foundational processes to implement an effective governance framework and to minimize overall initiative risk. The goal of this framework is to address 90% of all challenges related to developing and managing Salesforce.

Establishing governance for your Salesforce deployment will help the Program team focus on the business backlog and, at the same time, adhere to IT policies and best practices without loss of agility. The most successful Salesforce implementations have comprehensive governance frameworks in place, with the business and IT working in partnership to build and manage mission critical Salesforce solutions.

Many people think that governance will slow down agility, but the opposite is actually true. A lightweight governance framework, based on foundational processes, will improve agility by focusing on the business objectives and at the same time adhering to IT best practices and processes.

¹ <http://www.isaca.org/COBIT/Pages/default.aspx>



Governance Stages of Maturity

When developing a Governance framework, it's important to consider the maturity level that is desired. The levels are:

1. **Non-existent/Basic:** There is no governance framework.
2. **Emerging:** There is a basic governance framework in place. However, it is not used across the entire organization.
3. **Practicing:** There is a governance framework in place. However, teams do not deliver the required business capabilities on time.
4. **Leading:** There are defined success metrics which are aligned with the vision and strategy. There is also a plan for how to proceed if expected progress is not being achieved.

Why Governance Is Important

Governance enables important capabilities for project success:

- Innovation
- Compliance
- Velocity
- Delivery
- Reduced Risk

Innovation

When looking at the big picture and focusing on the key Program outcomes and strategies, Governance can allow the business areas to innovate at their own pace, not the pace of traditional IT. Governance enables innovation in the following ways:

- The Salesforce platform is a TRUE agile development platform in the marketplace, and adopting agile allows IT to deliver business outcomes very quickly with a high ROI.
- It allows you to focus on the ever-changing business requirements, which in turn helps to transform your business.
- Finally, Salesforce is constantly analyzing the marketplace and bringing new technology to the marketplace quickly using our agile deployment process. This helps to drive innovation by adopting new features and functionality in business processes.

Compliance

Data security, visibility, and access are critical to meet regulatory requirements, and Governance processes ensure the new solution meets all compliance issues. Following are several key things to consider:

- Security models that meet IT risk requirements



- Information security to prevent data leakage
- All regulatory requirements are met
- Correct data is audited
- Application is developed according to Governance processes

Governance ensures the above points are considered and applied when required, which reduces the reputation and operational risk and delivers a compliance solution which is fit for purpose.

Velocity

To realize rapid time-to-value, business requirements must be prioritized and the application roadmap must be developed and communicated. Governance is key to ensuring the consistency of this process. Governance has more benefits than managing risk; it also makes sure that IT focuses on business priorities and hence drives business value. A good Governance model drives innovation and business velocity.

- Governance puts the focus on the correct projects and applications that the business requires to drive their goals and enable them to meet business objectives.
- The Salesforce platform can be used by business analysts or professional developers to significantly reduce the business backlog. It allows business analysts to use configuration to build solutions, create reports, etc., and this frees professional developers to solve the more complex requirements that require code.
- High velocity implies trust between business and IT, and results in rapid delivery of value to the business user.

The above points can only be successful if the correct governance models are in place. Governance drives focus and business velocity, and builds a partnership between the business and IT.

Delivery

To achieve success, you need a sound development process, the ability to share best practices, and identifying the correct skills. Governance is the framework to ensure these are all in place. This Governance framework should be customized to each organization's culture. The goal for Governance is to identify and document best practices for your organization and continue to update them as needed. This helps reduce overall risks and drives up the quality of the deliverable.



Another goal of Governance is to develop the optimal balance between the business requirements, change management, and IT, by documenting the correct process, tools, skills, and technological know-how. That is:

- Having the correct staff
- Defining the best processes
- Sharing knowledge
- Using the correct technology, including integration

Risk

We reduce business risks by delivering what the business requires and when they require it. Some additional items that should be considered include:

- Define an architecture that reduces the overall project risk; for example, how to manage very large data volumes
- Ensure that the correct org strategy is in place and each application is assigned to the best org, reducing the business risk
- Break down projects into manageable chunks (phases)
- Help each project by sharing what works well and what does not work
- Share best practices between teams
- Use the best resources for each task

Benefits of a Governance Framework

- Drives business value by achieving objectives
- Reduces and manages risk
- Enables greater agility, innovation, and compliance
- Ensures timely delivery

Pitfalls of Poor Governance

Effects of not having the right governance framework in place:

- Lack of alignment between business and IT
- Low solution adoption
- Increased costs and reduced value
- Increased program risk
- Slow capabilities delivery

Governance Subdomains

To help create Governance, there are several key subdomains:



- **Communication Strategy:** Define a communication strategy to ensure governance alignment across all stakeholders.
- **Business Backlog:** Define who will own and prioritize the requirements backlog and what they will consider.
- **Principles of Software Engineering:** Create a clear development, testing, and QA process for all teams.
- **Data Architecture:** Create a business-data model and determine the source of truth where all data will be collected and managed.
- **Vision & Strategy:** Define a clear vision and strategy, including business objectives, how they'll be achieved, and what metrics will measure progress.
- **Stakeholder Management:** Define all stakeholders who should help determine or understand the governance framework.

For Marketing and Commerce Cloud, there are 2 additional subdomains:

- **Creation Process:** Determine how software development works with online store strategy and digital marketing campaigns.
- **Team Composition:** Define digital marketing and commerce teams and their roles and responsibilities.

See Appendices for details of all the subdomains.

Steps in Creating Governance

Following are the steps to develop your Governance framework:

- Document delivery challenges for the program
- Understand the maturity in your core framework processes
- Develop a clear vision and strategy, then engage and get alignment from all stakeholders
- Ensure the business owns and prioritizes their requirements
- Review your current approach to data architecture and management
- Implement the basic principles of software engineering
- Implement foundational processes
- Ensure all projects within your program follow the defined processes
- Consider additional processes based on your challenges
- Constantly review processes and how to improve their maturity

Conclusion

Use your governance framework to carry out the processes you have put in place to manage your overall program.



Additional Resources

- [Salesforce Governance Framework](#)
- [Vision & Strategy Whitepaper](#)
- [Governance Workshop](#)
- [Governance Presentation](#)
- [Governance Webinar](#)



Appendix 1: Vision & Strategy

All IT initiatives require a vision and strategy document, also known as a Program Charter or North Star. This document should include the business objectives that the initiatives are trying to achieve and the agreed upon strategies. To measure if the initiatives are achieving the objectives, several measurements (KPI's) must be identified. Each project within the initiative should also have a vision and strategy which maps to the overall vision and strategy document.

A Vision and Strategy is a short document outlining the business objectives that the Program is trying to achieve with a set of strategies to deliver these objectives with a set of KPI's to measure progress.

The vision is the bold, clear, and inspiring statement of where your organization aspires to be. Business goals are set by leadership to identify the primary outcomes that are to be accomplished, and business objectives identify how the goals will be achieved with the IT Program. The strategy defines the approach to achieve the business objectives. For example, when there is a goal to increase revenue, there are two completely different strategies that could be pursued: practices to increase sales of high dollar items or practices to increase the number of items purchased. To ensure alignment across the organization, it is important to define strategies.

To ensure business goals and objectives are achieved, it is critical to define a small set of measurable KPI's which will help to track progress. Then, if KPI's are not trending in the correct direction, prompt detection allows strategies to be reviewed and efforts modified accordingly. Any business or IT obstacles that could hinder success should be identified and action plans identified to address them. Otherwise, the obstacles could become significant roadblocks to delivering business objectives.

Note: See Vision and Strategy Whitepaper for details.



Appendix 2: Principles of Software Engineering

Applying software engineering principles to all projects is critical for success. In addition, adopting industry wide best practices and processes in the development and maintenance of software solutions will increase the quality and velocity of delivery.

Software Development Lifecycle

The Software Development Lifecycle (SDLC) is the process of developing and testing the solution. The SDLC should ensure that development is carried out in the development system, testing is carried out in a test systems, and user acceptance testing (UAT) is done in a mirror copy of the production system. All changes should migrate from system to system to allow for system testing of the configuration, code, and interdependencies with other applications/projects in the same org. Due to the nature of Salesforce technology, some changes need to be made into production. However, it is recommended that impact analysis is performed to understand the risk. It is recommended that these changes are first applied to a test system and NO changes are made directly into production without testing first.

Technology Governance

Salesforce has best practices and architectural standards for the use of Salesforce technology, such as security in building solutions. The starting point for Technology Governance is to use Salesforce's best practices. Over a period of time, these may be updated to meet specific requirements and culture.

Release Cadence

To ensure high quality for all solutions that run on the same Salesforce org, a common release cadence should be adopted for all releases, even break-fix releases. Having a well-defined release cadence enables constant business capability delivery.

Why Having Principles of Software Engineering Is Important

- Drives quality, since it follows industry best practices. Salesforce has guidelines and specific best practices for our technology.
- Drives agility with well-defined processes which offer guide rails to allow you to develop solutions quickly, with best practices and comprehensive regression testing in place to ensure new solutions or enhancements do not break existing solutions.
- Allows flexibility if the business outcomes change.
- Minimizes end user disturbance by having a regular release cadence.



Pitfalls of Poor Principles of Software Engineering

- Poor quality, since one release can impact another due to lack of overall org regression testing.
- Disruptive impact on users since multiple uncontrolled changes can occur.
- Lack of agility, since each release will gather technical debt.
- Misalignment when the development team focuses on “bell and whistles” instead of core business capabilities.

How to Achieve Maturity in Principles of Software Engineering

- Document your current processes.
- Understand Salesforce best practices in software development lifecycle and technical governance.
- Perform a gap analysis between your current processes and Salesforce best practices.
- Identify the optimal future state.
- Develop a plan to migrate from the current state to future state.
- Enhance your team's skills.
- Implement the plan.
- Monitor the effectiveness of the plan.
- Modify if appropriate.
- Remember it's a journey, so take small steps.



Appendix 3: Business Backlog

Key for the success of any initiative, especially Salesforce based solutions, is to have a comprehensive business roadmap of all the projects within the Program mapped to the business objectives and strategies. This roadmap is owned and managed by the business.

During the planning phase, all interdependencies and synergies between each project requirements are taken into consideration in the creation of the roadmap. The roadmap is constantly reviewed to keep in line with changes to the business objectives and strategies.

The roadmap is prioritized by the business with help from IT to create a Business Backlog, which is based on the business objectives and maximizes the business return.

The key to the success of any Program is to develop a prioritized backlog of the business requirements for the development teams.

- A backlog is a set of prioritized and approved user stories.
- The backlog has been prioritized by the business using the vision and strategy.
- Out of the box Salesforce features have been considered.
- An MVP (Minimum Viable Product) approach should be used.
- The overall business roadmap should include all initiatives and projects within the same Salesforce org.
- The business backlog and roadmap should be reviewed regularly, and should be updated immediately after any new business strategy, business unit reorganization, and after each release.

Why Having a Business Backlog Is Important

- Drives synergies between business units.
- Drives standardization of business processes.
- Optimizes your investment.
- Enables the delivery of user stories based on your business objectives and strategies.
- Drives alignment between all projects within the initiatives.
- Minimizes risks by highlighting dependencies.
- Maximizes the business return.
- Enables alignment between all stakeholders.
- Allows flexibility if the business objectives change.

Pitfalls of a Poor Business Backlog

- Spending effort and resource on capabilities that are not required.



- Developing capabilities which are within Salesforce or about to be released since due diligence has not been applied.
- Capabilities cost more than planned.
- Lack of synergies between business units; work is developed twice.
- One business unit enhancements break other business unit's capabilities.
- Lack of synergies between business and IT.
- Lack of planning can cause significant dependencies risks.
- Can cause an increase in technical debt and org complexity.

How to Achieve a Mature Business Backlog

- Understand the Salesforce capability roadmap.
- Include all initiatives within the same Salesforce environment.
- Ensure an agreed upon vision and strategy is in place.
- Document dependencies.
- Highlight any synergies, including initiatives in other Salesforce environments.
- Develop a roadmap using vision and strategy and the Salesforce roadmap with IT help in defining the size of the requirement.
- Secure buy-in on the roadmap from key business and executive stakeholders.
- Communicate the agreed upon business backlog to all stakeholders.



Appendix 4: Communications Strategy

A Communication Strategy is fundamental in driving alignment of all stakeholders and ensuring the new initiative is successful. It is critical for end users to understand why the way they work is changing and the benefits the system will bring them.

In the development of a communications strategy, there are a key number of questions to answer for each communication:

- **To whom:** Executive sponsors, stakeholders, project teams, and end users. In many cases, different communications need to be sent to the different personas. Know your audience.
- **How often:** daily, weekly, monthly, and quarterly.
- **What:** vision and strategy, meeting minutes (executive, management), project(s) roadmaps, training schedules, etc.
- **Via what channel:** chatter, email, desk drops, and posters.
- **By what media:** written, video, face-to-face.

Why Having a Communications Strategy Is Important

- Defining a strategy ensures that all stakeholders, from executives down to the end users, are totally aligned and understand the business value that the new solution will bring them, which is documented in the project vision and strategy.
- In the world of “go fast not perfect”, it is extremely important to communicate to the users what they will experience, why this approach was chosen, to reinforce the feedback culture, and for them to understand “what’s in it for me” and how it maps to their personal KPI’s.
- People may disagree about decisions and/or direction for many reasons. It is important that everybody can openly discuss disagreement, drive consensus, and achieve alignment.
- Finally, in today’s workplace, there is a lot of communication “noise”. The strategy is to ensure that the stakeholders read and understand the project communications.

Pitfalls of a Poor Communications Strategy

- Misalignment of stakeholders.
- The business objectives for the solution are not being achieved.
- End users do not understand the purpose of the new solution.
- Poor decision making process and hence wrong decisions have been made.
- Poor solution adoption since users do not understand why.

How to Create a Communications Strategy

Decide:



- To whom (Persona's)
- How often
- What
- Via what channel
- By what media

Remember in your strategy you need to communicate differently to all the personas.
Consider a communication matrix like the following:

Communications	Overview	Audience/ Persona	Channel	Frequency	Owner

Appendix 5: Data Architecture

Core to any system is the way data is architected and managed, and it's interaction with other systems. The business data architecture is the foundation, which is then mapped into a physical implementation within Salesforce.

The areas included in the end to end management of data are:

- Business Data Architecture
- Physical Data Implementation
- Migration of Data
- Data Back-up and Archiving
- Data Compliance Requirements
- Data Governance

Why Having a Data Architecture Is Important

- Drives a consistent data model across Salesforce and other systems, making integration simpler and consistent.
- Prevents over complex record types and page layouts.
- Makes it easy to keep data clean, due to a clear understanding of what each data field is being used for.
- Allows the correct approach in dealing with large data volumes.
- Enhances user experience since old data is archived.
- Ensures solutions meet data compliance requirements.

Pitfalls of a Poor Data Architecture

- Delay of go live, due to poor quality of data migrated from the legacy system.
- Lots of duplicated data.
- The overuse of custom fields, causing a significant amount of technical debt.
- Complex integration due to poor data mapping between Salesforce and other systems.
- Escalating costs due to expanding data volumes and growing technical debt.
- Performance issues due to the lack of architecture to deal with large data volumes.
- A solution that is not compliant.

How to Create a Data Architecture

- Understand your organization's business data architecture.
- Understand data compliance requirements.
- Understand the complete documented business roadmap.
- Create a high level Salesforce business data architecture based on proposed initiatives.



- Design the physical data architecture.
- During each future release, refactor the data model based on the new enhancements.

Note in Multiple Clouds

In a multiple cloud solution, each system has its own data structure and repository. For example:

- Core Salesforce uses a set of standard and custom objects, and custom fields can be added to both.
- Marketing Cloud has lists with attributes and data extensions, which are a database table.
- Commerce Cloud has a native data-model, which can be extended with custom properties.

These three clouds have a different architecture for storing data and use different terminology. Having an end-to-end data architecture will avoid data chaos. The following is a high-level approach to defining your model:

- Based on the business capability model, define an end-to-end business data architecture. Include data visibility, temporal needs, source system, and quality thresholds. The frequency and latency tolerance is important to define since it will help with the integration design (real time or scheduled).
- Based on this model, design the physical data model, including multiple clouds and on premise systems.
- During this design, decide which system will be the master and which acts as a source for each component of the data model based on the business requirements.

In addition, design data backup, archiving, and disaster recovery architectures for each system.



Appendix 6: Stakeholder Management

To hold the Program accountable and to ensure that the Program is successful, it needs sponsorship. Sponsorship falls into two areas:

- Executive Sponsors
- Stakeholders

Executive Sponsors

Securing executive sponsorship from two key areas, business and IT, is critical to the success of the Program. These sponsors form the steering committee that provides leadership, final approval, and adequate funding/resources necessary to complete the initiative. If the scope of the Program covers multiple Salesforce orgs and/or Products, then all the impacted business units must have business executive representation.

Executive Sponsors include:

- Business sponsors: These represent the strategic business units. For example, if the project involves a strategic enterprise-wide initiative, then the CEO/President should be a founding sponsor. The Business representative(s) needs to have sufficient bandwidth to attend and participate fully in the steering group meetings.
- IT sponsors: The IT representative is typically the CIO or CTO.

Stakeholders

A Program is broad in size, scope, influence, and impact. This means all relevant stakeholders must be kept abreast of the progress of the project. This is especially true of the stakeholders who will be responsible for delivering the vision and strategy.

Everyone who is involved in the Program needs to be aware of the vision and strategy and its goals. All the relevant stakeholders from each deployment within the scope and their associated integration partners need to be identified and engaged, and their commitment secured. This allows them to plan accordingly if the project requires access to some of their resources. Please note: during the project lifecycle, the stakeholders will change, so it's important to keep the list up to date.

Why Having Stakeholder Management Is Important

- Drives alignment between all stakeholders
- Ensures there is a true partnership between all stakeholders
- Enables agility
- Drives joint ownership between the stakeholders
- Ensures commitment to the Program



- Defines who will be included within the communication strategy

Pitfalls of Poor Stakeholder Management

- Lack of alignment between the four groups of stakeholders, and especially between the business and IT
- Lack of buy-in from the stakeholders for the new initiative, especially secondary stakeholders
- The capabilities delivered may not meet the business requirements
- The Program can overrun and cost significantly more to deliver
- Lack of delivered business value and hence reduced business objectives.

How to Create Stakeholder Management

It starts by identifying the stakeholders:

1. **Executives – the business:** The owners/leaders of the business initiatives.
2. **Executives – IT:** The IT leader responsible for the delivery of the technology.
3. **Management – the business:** Key middle management, whose business processes the initiatives will affect.
4. **Management – IT:** The key IT management that will deliver the initiatives.
5. **Users:** Key user personas.
6. **Secondary:** Business and IT owners of all the backend systems the new initiatives will integrate with. Additionally, any other teams that need to be included, such as the training department.

When highlighting Stakeholders, consider the following:

- Who are your key stakeholders?
 - What areas of the business do they represent?
 - Ensure all business units have coverage.
 - How do they work together?
- Do the stakeholders use the application?
- Does management use the application?
- What common set of reports and dashboards have been deployed to managers, executives, and stakeholders?
- Have you identified champions and power users?
 - What workgroups are they a part of?
 - Do they cover all business units?
 - How are they helping you drive change management (adoption)?
 - Do they cover all the personas?



Appendix 7: Additional Cloud Subdomains

Creation Process

When creating digital marketing campaigns and on-line stores, the principles of software engineering still apply to campaigns/stores that are new or updated. Campaigns and merchandise should go through a creation/development, test, UAT, production process which drives system and compliance.

Team Composition

When using Marketing and Commerce Clouds, digital marketing and commerce teams need to have the correct roles and responsibilities to create and manage campaigns and on-line stores.

Principles of Software Engineering

Development/Creation Process

Different cloud-based technologies use different tools and processes to develop user stories. For example:

- Core Salesforce allows configuration/Apex/LEX development using the Settings for configuration and Visual Studio Code for code development.
- Commerce Cloud allows configuration and javascript development using storefront toolkit and several developer tools for coding, and now supports Visual Studio Code.
- Marketing Cloud allows the development of customer journeys and content, and developers use the built in tools like Journey Builder. However, many marketing campaigns require a mobile application or web landing pages. To enable consistency and common skills between the different technology teams, it is also recommended that they use Visual Studio code.

The key to success with all clouds is to ensure that every system change goes through a development/test/UAT/production process with automated testing. This enables consistent and quick end-to-end regression testing which ensures a change in one cloud does not affect another cloud.

Commerce Cloud

In Commerce cloud, two basic capabilities are required:

- Development of the storefront: This includes the initial development of the site with integration to the other clouds within the solution. Team members involved include the Product Owner, Cloud Architect, Business Analyst, Scrum Master, Developers (configuration/Code), and Test Engineers.



- Ongoing storefront maintenance: This includes the ongoing update of merchandise and associated offers and pricing. Team members involved include System Administrator, Merchandiser, and Test Engineer.

Marketing Cloud

In Marketing Cloud, two basic capabilities are required:

- Development of the Marketing Cloud environment: This includes the initial development of the environment with integration to the other clouds within the solution. Team members involved include Product Owner, Cloud Architect, Business Analyst, Scrum Master, Developers, and Test Engineers.
- Development of the Marketing Cloud customer journeys and campaigns: This includes the ongoing updates and development of customer engagement. Team members involved include Project Manager, Editorial Staff (copywriters, editors), Graphical/Brand Designers, Test Engineers, Data Managers, and Analysts and Developers for mobile and web content within the campaign.

Environmental Management

In a cross-cloud environment, each system has its own approach to development and hence environments required. Planning for these different systems takes time to coordinate between each release.

Core Salesforce has a comprehensive set of sandboxes for development, testing, and UAT. However, it's important to remember that a full sandbox can only be refreshed every 29 days and best practices recommend a new full sandbox is created before UAT. The sandbox architecture needs to be designed to meet the defined release cadence.

Commerce Cloud is defined by a realm and within it there is a Primary instance group that contains three environments:

- Development: a simulated production environment, used for final testing and UAT.
- Staging: used for final merchandising and configuration of storefronts.
- Production: runs the live storefronts.

The Realm also has a secondary instance group, which contains sandboxes that allow developers to enhance and/or create new storefronts. It can take up to five days to create a new sandbox. Code and configuration are migrated from environment to environment via the Business Manager application.

The Commerce development teams should adopt source driven development using Salesforce DX technology.



Marketing Cloud does not have sandbox infrastructure, however, you can consider creating another Business Unit within Marketing Cloud for development and testing. This approach is only available with enterprise edition. Also, there is no method of automating changes from BU to BU's.



Appendix 8: Governance Framework

A review of a large number of successful, global Salesforce customers found that they all had several common Governance processes and best practices. Based on these common processes and best practices, Salesforce has developed a comprehensive governance framework.

The Salesforce Governance framework embraces the core principles of key industry frameworks such as COBIT and ITIL.

