

TECHNICAL ASSESSMENT OFFERING

BLUE SURF TECHNOLOGY

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BLUE SURF TECHNOLOGY AT A GLANCE

An Enterprise Architect with focus on implementation of impactful technology

- A Salesforce expert
 - Certified Technical Architect (one of less than 300)
 - Six other Salesforce certifications
- With wider technical skills
 - Integrations, cloud technology, master data management, security, project management, agile methodology...
 - AWS and Boomi certifications
 - Certified ScrumMaster
- And strong business expertise
 - MS Computer Science but also an MBA

Brant Hanna



BLUE SURF TECHNOLOGY - BACKGROUND

- 30+ years IT experience
 - Startups – SMB – enterprise
 - Building from scratch, reinventing companies, positioning for aggressive scaling
- 8+ years of Salesforce
 - Salesforce, Slalom, West Monroe Partners, Etherios and Model Metrics
 - Deep knowledge of 30+ enterprise Salesforce implementations
- Industry experience includes healthcare, financial services / banking, high tech

Brant Hanna



LOGISTICS – HOW WE ENGAGE

- Results driven consulting
 - We take on a specific business challenge
- Not "body shopping"
 - Work hours flex over time to align to the need
- Mix of on-site and remote
 - Always on site the first week or two to get things rolling
 - After that we strike a balance
- Regular reassessment of focus to maximize value

TECHNICAL ASSESSMENT OFFERING

CONTEXT

- An increasingly common pain point...

Salesforce technical debt resulting in:

- Slow and expensive turnaround of delivery to evolving business needs
- Operational inefficiency
- Poor outcomes for customers and partners

Agreement that something needs to be done but lack of alignment on how specifically to proceed.

THE TECHNICAL ASSESSMENT SUMMARIZED

- Three week duration
 - Week 1 (full time and on site) = interviewing key players (both IT and business customers)
 - Week 2 (three quarter time / remote) = digesting interviews, running analytic tools, preparing assessment report
 - Week 3 (full time on site the first three days of the week) = delivery of initial report, quick turnaround of updates as necessary
- What we need from you:
 - Full access to a Sandbox Salesforce Org (including IDE access)
 - Limited access to your Production Salesforce Org or, at a minimum, a Full Sandbox
 - Relevant documentation (ERDs, org charts, new employee training materials...)
 - Access to technical and business team members (to interview them).

THE TECHNICAL ASSESSMENT SUMMARIZED

- Deliverables:
 - The final report deck which summarizes findings and provides a (somewhat subjective) assessment of technical debt / risk
 - A set of generated supporting documentation materials
- Cost = \$18,800 for services (plus associated expenses)

GENERATED DOCUMENTATION

Custom proprietary tools are used to generate:

- Interrelationships between classes and triggers
- Interrelationships between objects
- Count and list of key metadata contributing to complexity - record types, custom objects, processes, triggers, validation rules
- HTML formatted output of metadata for custom objects, profiles, flows and workflows (other metadata types can be added potentially)

ABBREVIATED HTML METADATA SAMPLE

Salesforce Metadata for Object - Case

Action Overrides

Action Name	Type
Accept	Default
CancelEdit	Default
ChangeStatus	Default

Fields

Full Name	Label	Type	Length	Track Field History	Required	External ID	Unique	Reference To	Picklist Value Full Names / Default Status
AccountId		Lookup							
Account_Customer_Class__c	Account Customer Class	Text			false	false	false		
Account_Name__c	Account Name	Text			false	false	false		
Account_Region__c	Support Region	Text			false	false	false		
Account_Topology__c	Account Topology	Text			false	false	false		
Account_Type__c	Account Type	Text			false	false	false		

List Views

Full Name	Label	FilterScope	Columns
AllOpenCases	All Open Cases	Everything	[CASES.CASE_NUMBER] [CASES.STATUS] [CONTACT.ACCOUNT] [NAME] [CASES.SUBJECT] [LR_Component__c] [CASES.LAST_UPDATE] [CASES.CREATED_DATE] [Legacy_Parature_Ticket_Number__c]
All_Cases_In_Queue	** All Cases (In Queue)	Everything	[CASES.CASE_NUMBER] [OWNER_NAME] [CASES.STATUS] [CONTACT.ACCOUNT] [NAME] [Community_Sharing_Partner_Account__c] [CASES.SUBJECT] [Problem__c] [CASES.PRIORITY] [CASES.CREATED_DATE]

OTHER ANALYSIS

- Review of test class and coverage
- High level review of code quality
- Runs of Salesforce provided analytics – security health check, data storage check, Lightning Experience readiness report

THE RESULT

- Assessment of the degree to which technical debt is an issue
- Understanding of specific significant technical debt issues
- Documentation materials which should facilitate support operations independent of the assessment (and also subsequent project work efforts as well)

1. Independent confirmation of the need for action.
2. Input to inform and focus efforts to follow.

Informed by experience across 30+ enterprise Salesforce implementations

RECOMMENDATIONS (FROM LINKEDIN)



Colby Ricker

I help people solve business problems with technology through focus on customers.

July 1, 2019, Brant was a client of Colby's

My firm was taking over a large and very complex implementation from another large SI. Brant conducted a ground-up technical assessment of the Salesforce solution. His work was quick, objective, and accurate (it was reviewed by several senior architects from Salesforce).

Best of all, he operated independently. He is an invaluable asset to any company looking for senior help with Salesforce solutions. I can recommend his work enough. [See less](#)

Thank You

