

1-1-SPA-I-2020 Salesforce Project Analysis & Implementation

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Client: Davanti Consulting Ltd



Project Planning Session



Worked in sprints



Gained a wealth of Project Management Knowledge

INTRODUCTION

The objective of the Capstone project was to provide Salesforce Functional Intern (SFI), with hands on experience in coordinating and analysing sections of a project.

The aim of the assigned project was to expand the Project Clients Customer Relationship Management Systems (CRM) core functionality with automation from the previous build.

Agile methodology was used to manage this project. The SFI was a Development Team member actively involved in completing items listed in Sprints.

DEVELOPMENT

This project was a development from 2 previous phases. The build consisted of 7 Sprints and with focus around:

- Expanding the Project Client's (newly implemented) core functionality with automation.
- Raising awareness to individual branches (throughout NZ) of how the Project Client assists and supports them.
- Building engaging relationships between the Project Client and individual branches.
- Implementing a process to track customer activity at each branch.
- Utilising tools within the system to enable the Project Client to develop fundraising capability.

CONCLUSION

From overseeing this project, I fulfilled my Capstone requirements by gaining a complete understanding of how to coordinate/manage an out of the box project from beginning to completion.

The Project Client's end users can navigate, configure and operate their newly customised Customer Relationship Management (CRM) system; and this project has enhanced Davanti's Junior Salesforce Functionals (JSF) CRM problem solving and configuration skills.

The SFI found the most crucial factor to be communication. By Sprint 3, the Project Client was utilising the Dev Teams communication platform of choice 'Jira'. This meant all communication was captured in one area specific to each item.

This was a great project to actively work in and Davanti consulting Ltd is a great company to work for.