

Strategy Design Techniques **Every Business Analyst Should Know**

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(including Salesforce Strategy Designer Cert)
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Agenda



1. What is Strategy Design?
2. Discovery vs Delivery
3. Strategy Design Example Techniques
4. Salesforce Strategy Design Certification

1. What is Strategy Design?



Have you ever worked on a project that **FAILED**?
(late, over budget, user dissatisfaction)

1. What is Strategy Design?



The most common reason that IT projects fail is because the team doesn't fully understand the needs/problems of their customer.

In other words, the team is trying to build a solution to
a problem that the customer doesn't even have!

2. Discovery vs Delivery



Strategy Design is about **Discovery**

deeply understanding our stakeholders needs and systematically brainstorming ways to address those needs.

2. Discovery vs Delivery



Discovery

Understanding the challenge and desired outcomes; considering possible solutions

Example activities / deliverables:

- Challenge framing, 'how might we' statements
- Identifying desired outcome(s)
- Jobs to be done (JTBD) customer/user interviews, research
- Idea generation, journey mapping, customer co-creation workshops
- Value-driven design, inclusive design
- Prototyping



Delivery

Defining and implementing the solution

Example activities / deliverables:

- Requirements, user stories
- Functional specifications
- Future state business process definition/diagramming
- System architecture/design
- Implementation

← Organizational / Stakeholder Alignment →

3. Example Techniques



Scenario: Low conversion in the middle of our Sales Process

Stage Move	Conversion Rate
New-->Nurture	100%
Nurture-->Meeting	4%
Meeting-->Proposal	50%
Proposal-->Negotiation	50%
Negotiation-->Decision/Closed Won	70%

3. Example Techniques



Technique #1

Always Be Clear About Desired **Outcomes***

*Important:

- Technology is **not** an Outcome
- Acceptance Criteria is **not** an Outcome
- “An Outcome is a measure of human behavior” - [Jeff Gothelf](#)

3. Example Techniques

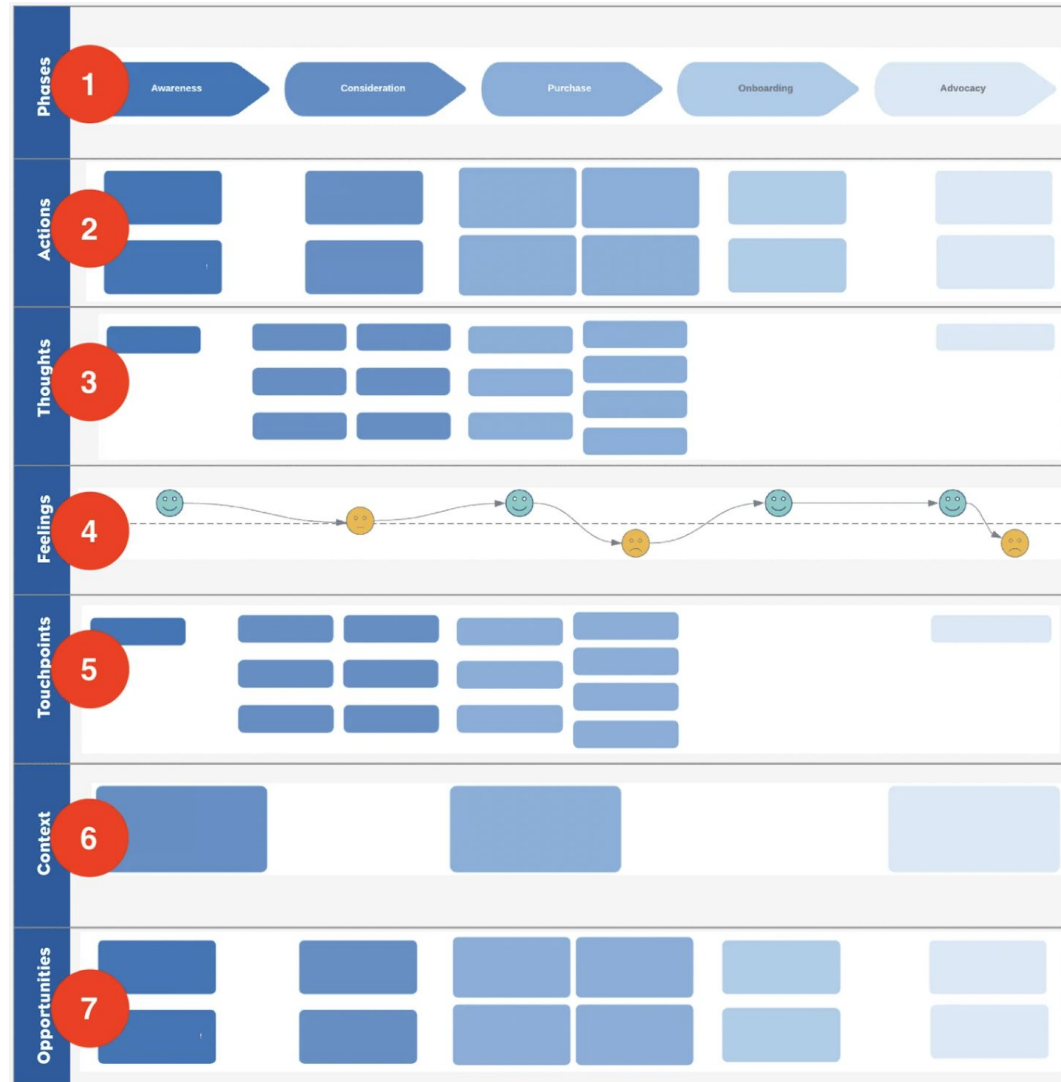


Technique #2

Improve your process diagrams with concepts from **Journey Mapping** (i.e. consider multiple perspectives, process/thoughts/feelings)

3. Example Techniques

Example Method: Journey Mapping



source: Trailhead: [“Journey Mapping”](#)

3. Example Techniques



- **Journey Mapping:** Similar concepts to business process diagram, but Journey Mapping considers the process from more angles: (1) Process / Stages, (2) Actions, (3) Thoughts, (4) Feelings, (5) Touchpoints, (6) Context, (7) Opportunities.
- Journey Mapping is not Just Functional, it also includes considerations of stakeholder **Thoughts and Feelings.**

3. Example Techniques



- Understanding customer/user journey from functional + emotional angle helps us to ideate possible solutions to address customers needs.
- “A Tale of Two Users”

3. Example Techniques



Technique #3

“How Might We?” statements

3. Example Techniques



Use Case: **Low Engagement in the middle of our Sales Process**

“How Might We?” try to address this problem?

- Automate Communications
- Lead Scoring
- Content
- Roles / Org Structure
- Incentives

*some of these solutions are technology, some are not

**we should also confirm our assumption that we're getting high quality leads into our Sales Process!

4. SF Strategy Design Certification



- Salesforce Strategy Designer Certification launched in 2022



4. SF Strategy Design Certification



- Applicable to Salesforce professionals who lead projects and work with stakeholders/users. For example: Consultants, Architects
- While this certification is popular among consultants, this can be a very powerful toolset for people who serve in an in-house / internal / client-side capacity. For example:
 - Salesforce Product Owner, Salesforce Product Manager
 - CRM Director
 - Director of Business Applications

4. SE Strategy Design Certification



- People familiar with Business Analysis concepts will find some strategy design concepts familiar but will also learn new methods/tools.
- Business Analysis is generally focused on functional needs, Strategy Design focuses on **functional, emotional and social**.

4. SF Strategy Design Certification



- While there are no prerequisites, the following experience is recommended:
 - 3 years of hands-on experience as a strategy designer (or similar role like consultant, architect, product manager, UX lead)
 - 1-2 years of experience on the Salesforce platform
 - 2 years of experience in leading complex projects, including advanced facilitation and consultative skills

4. SF Strategy Design Certification



- Compared to other Salesforce certification exams the Strategy Designer exam requires less technical knowledge of the Salesforce platform itself.
- Focus is on Strategy Design methods and what business scenario(s) each is applicable to.
- Also focused on applying Salesforce features/capabilities to better understand customers & inform strategy design.

4. SF Strategy Design Certification



- Trailhead:
 - [Salesforce Strategy Designer Career Trailmix](#) (covers the bulk of the material on the exam)
 - [Prepare for your Strategy Designer Credentials Trailmix](#)
- Flash Cards: Method Name / Description / Purpose*
 - check out the list of Salesforce Strategy Design methods in my article [Salesforce Strategy Designer Certification: Guide & Tips](#)

* *examples of Purpose:*

- *Widen Scope: generating ideas (increasing possible options)*
- *Narrow Scope: validating ideas (reducing possible options)*