



# Executive Communication for Salesforce Admins

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He/Him





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San Francisco was originally home to the Ohlone people.

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# Brian Shea

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Blaze your trAI!



# Agenda

1. Executive Communication: How Admins Can Make a Bigger Impact
2. Rule #1: Understand Your Audience
3. The 5 Principles of Executive Communication
4. An Example
5. How To Improve Your Communications Skills on the Job
6. Q & A



# Make a Bigger Impact

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**Many employers would rather leave a position vacant than fill it with a candidate who lacks soft skills. (especially communication skills)**

*“IT’s soft skills shortage – and how to train up for success”, [CIO Magazine](#)*

The letters "CIO" in a large, red, serif font are centered within a white circle. To the right of the circle, there are several green leaves extending outwards.

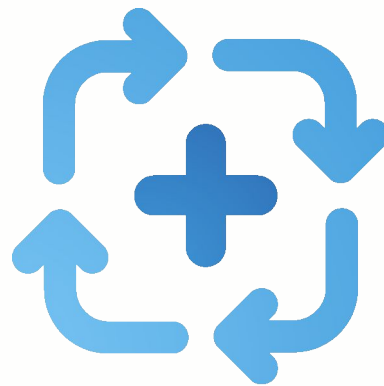
**CIO**

# Presenting Your Ideas

**Advocating for  
yourself and  
your team**



**Make the  
business case for  
positive change**



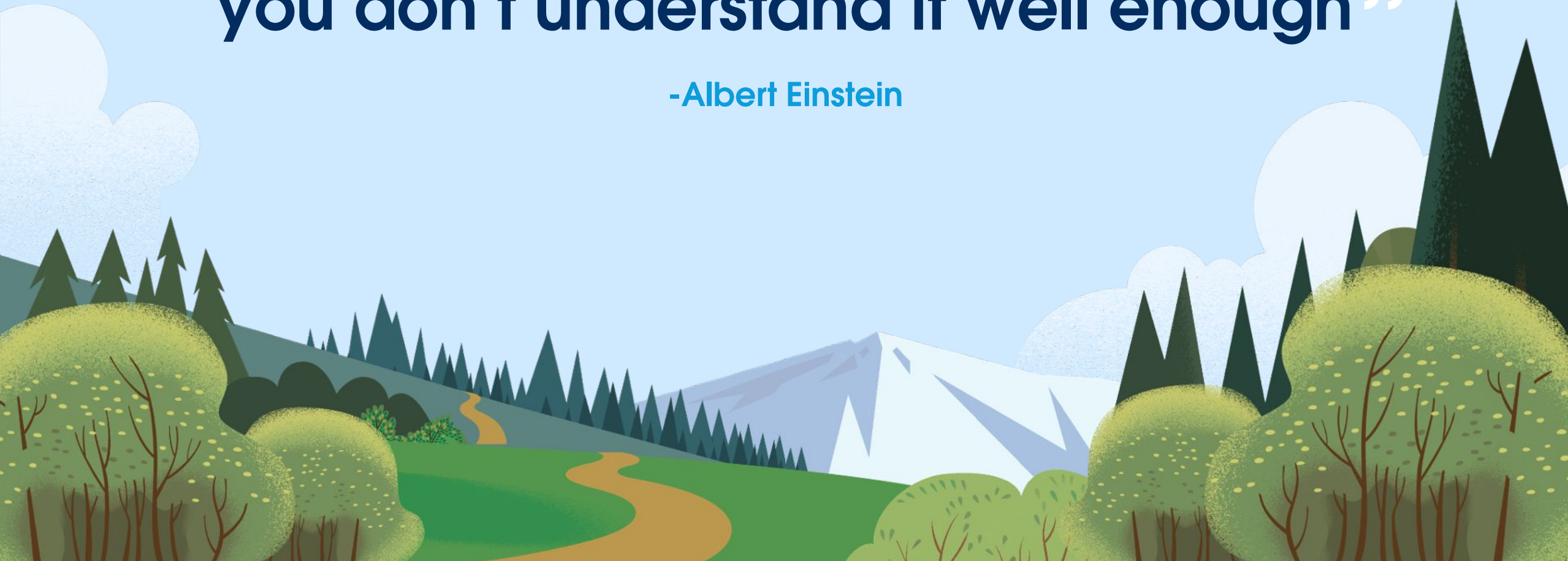
**Obtain  
budget**





**“ If you can't explain it simply,  
you don't understand it well enough ”**

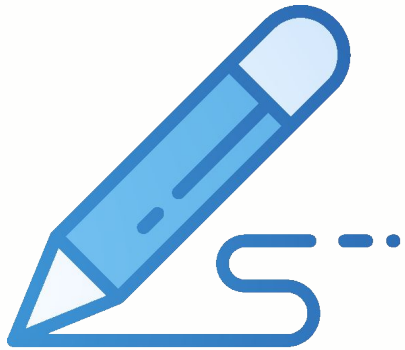
**-Albert Einstein**



# Types of Executive Communication

## Written

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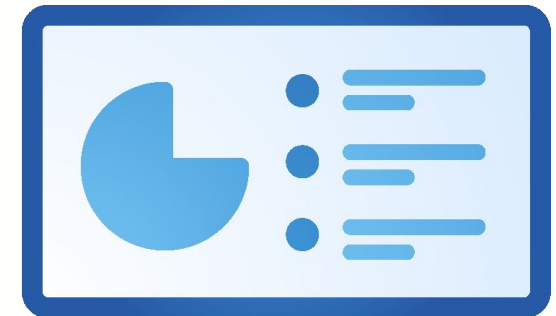
## Verbal

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## Presentation

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# Rule #1: Know Your Audience



# A story about (mis)communication



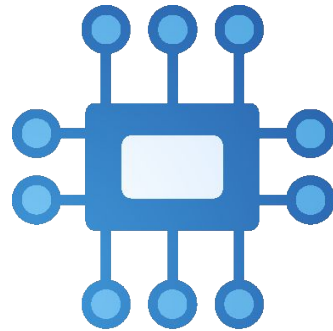
# Understanding Executive Audiences



**Busy**



**Less Tech Interest**



**Less Context**



**Prioritize Business Value**



# The 5 Principles of Executive Communication



Principle #1:

# Focus

Make one main point



## Principle #2:

# Business Value

Explain the Business Value of Your  
Technology Solutions

Big Picture (Business Value)  
+ Relevant Technical Details





# Types of Business Value

## Efficiency

How well are we using our resources?

- Decrease Manual Work
- Accelerate Time To Resolution
- Reduce Maintenance Cost

## Performance

How well are we achieving our goals?

- Increase Sales Performance
- Improve NPS, CSAT
- Enable Business Scale (New Products, New Services, M&A)

## Risk / Compliance

How well are we managing our risk?

- Increase System Reliability
- Improve Data Quality
- Regulatory Compliance

## Principle #3:

# Quantify

Whenever possible, quantify. For example:

- Number of hours
- Cost
- Frequency an issue occurs

Many Executive Leaders understand their organization through Key Performance Indicators (KPIs). Use KPIs to tell your story.

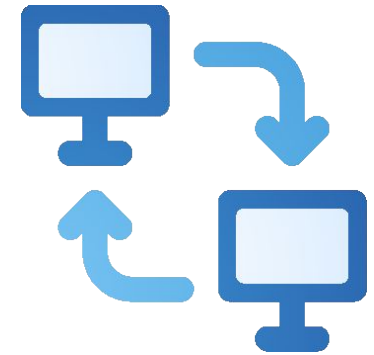


Principle #4:

# Peer Organizations

What are other organizations doing?

What are the best practices?



## Principle #5:

# Provide Options

Whenever possible, present multiple solution options

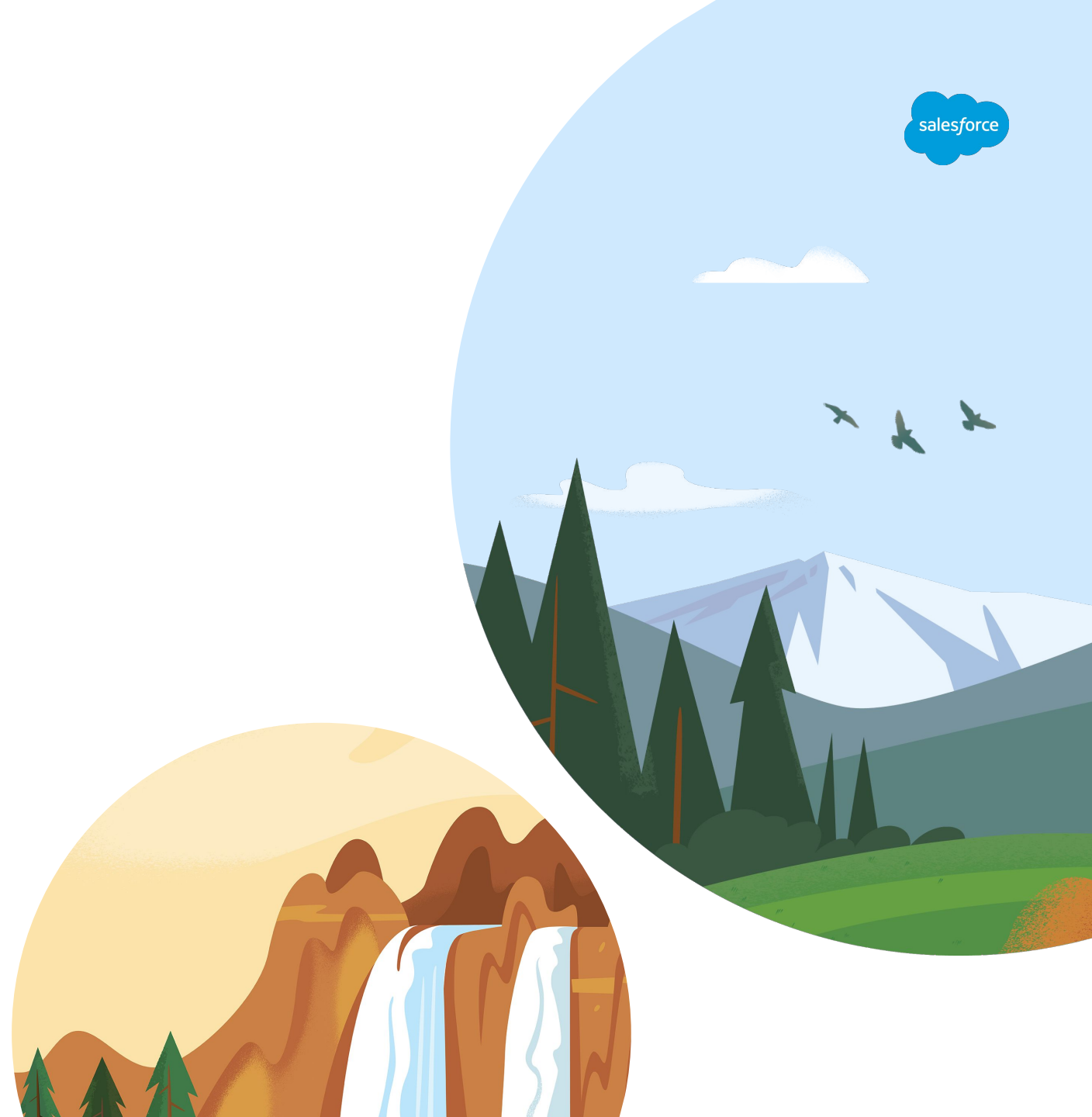
Side-by-Side comparison should including:

- Expected Value
- Functional Scope
- Cost (Upfront, Maintenance)
- Risk

Excellent way to better understand stakeholders' priorities



# An Example



# Example: Business Case For Flow (Rough)

- Flow is Salesforce's primary declarative automation tool. Enables Admins to build sophisticated automations without code (using a drag-and-drop builder)
- Salesforce is phasing out Process Builder, so going forward new automations should be built in Flow.
- Much more flexibility than Process Builder.
- Flow can be used for automations that previously required code.
- Features:
  - Screen Flows, Trigger Flows
  - Synchronous and Asynchronous
  - Platform Events/API

# Issues with this Business Case

**Jargon**

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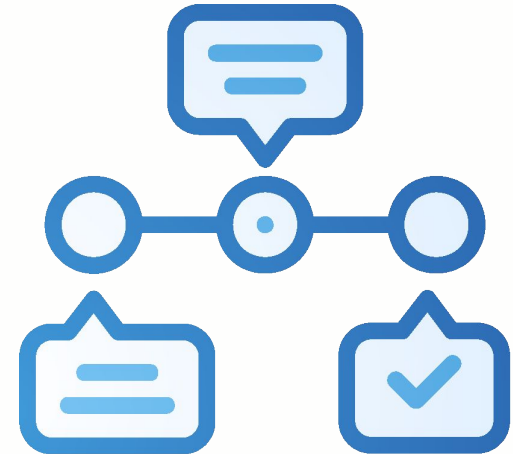
**Too much detail**

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**Assumes context**

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# Example: Business Case for Flow (Improved)



## Overview

### Main Idea

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Our internal Admin team will be able to use Flow to build automations which previously required code.

### Business Value

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For a typical automation request we expect:

- Average Time to Deliver will be reduced from 6 weeks to 2 weeks
- Average budget will be reduced from \$10,000 to \$2,500

### Peers

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Peer organization has built a Service Request Wizard using Flow.





# Example: Improved Version

## Options

### Option 1: Pilot Program

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- Begin using Flow with one business unit only
- Limit to small scale automations requests (less than 20 hours of effort)
- **Goal: Admin team get comfortable with Flow, understand where it is a good fit**

***\*Recommended Approach\****

### Option 2: Big Bang

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- Use Flow as our primary automation tool for our upcoming Business Transformation Initiative.
- All new automation requests will be built in Flow.
- **Goal: Flow will be our primary automation tool by end of year**

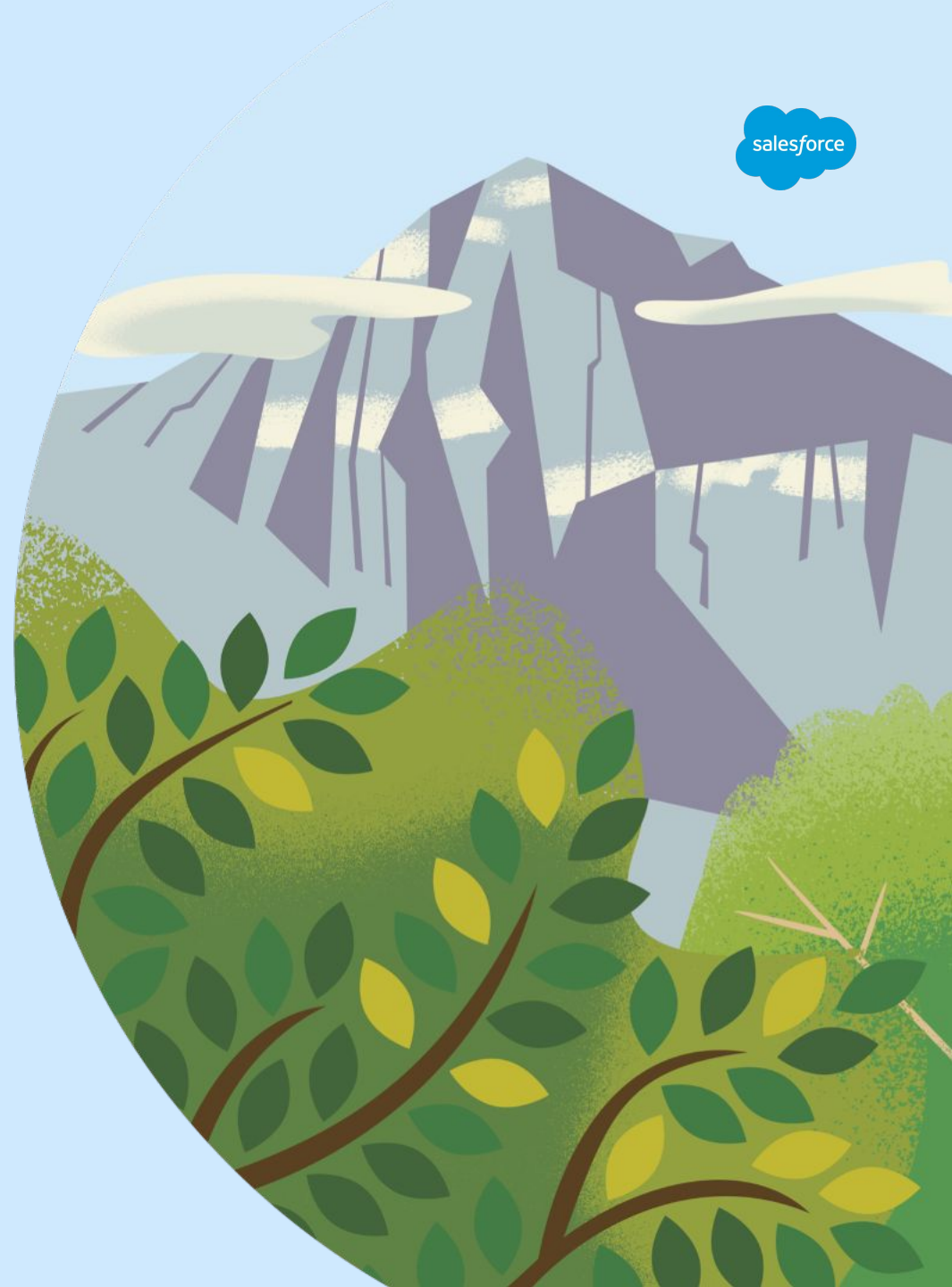


# Recap:

1. Focus
2. Value
3. Quantify
4. Peers
5. Options



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# How to Improve Your Executive Comm Skills On The Job



# Two Truths about Executive Communication

## Truth #1

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No one is born a natural communicator

## Truth #2

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Preparing a presentation will take longer than you expect

# Tip #1:

## Learn By Doing

- Volunteer to present
- Set micro-goals for yourself
- Focus on writing great emails



## Tip #2:

# Evaluate Your Work

- Record your presentations & re-watch later on
- Reread your emails a few days later
- Track your progress over time

## Tip #3:



# Ask for Feedback

- Get feedback from someone you trust
- Maybe your boss, maybe someone else



## Tip #4:

# Give Yourself Time

- Creating effective communications takes longer than you think
- Give yourself plenty of time, expect to create many drafts
- Give yourself time to step away & come back to your work



## Tip #5:

# Get Formal Training

- Speaking (e.g. Toastmasters)
- Writing
- Many organizations have already purchased communication training resources

# Want to improve?



**Practice.**

# Action Item



→ Next time you present or speak in a meeting go back and watch the recording.

1

Identify *one thing* you'd like to improve on.



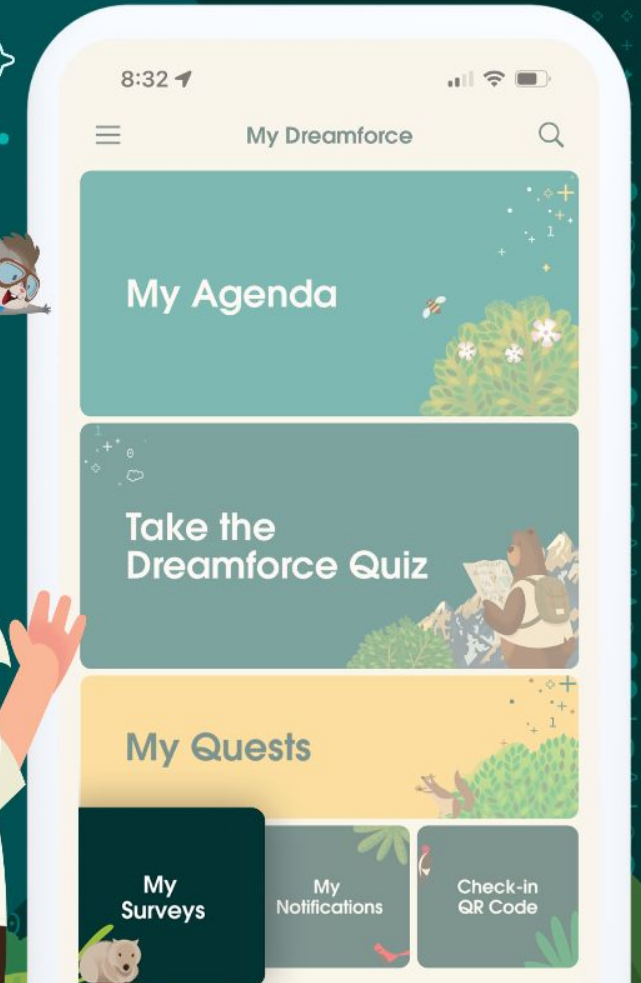
# Questions & Answers



# Share session feedback.



- 1 Open the Salesforce Events mobile app.
- 2 Navigate to My Dreamforce.
- 3 Select My Surveys.





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# Thank you

