

How do we ensure that our projects yield the best results?

Each project will always follow the same steps. This way we make sure that the quality of our work is at the highest standard each time.

Explore in more detail how we work on each phase of the project

01

Workshop

“Listen and ask”

The workshop is all about the client. After all, our clients are the ones who know their business to the core.

Our aim is to get to know the client, their business, their processes and the IT solutions that are currently in place.

Our consultants will listen and ask questions about client's needs and challenges. Based on these we will suggest the best fitting solutions using the Salesforce platform.

02

Scoping

“Talk and reflect”

During the scoping phase, our consultants will draft a fitting solution, as well as an implementation strategy based on the information gathered at the workshop.

The solution and strategy will be shared with the client to ensure that it reflects their needs. The client can easily change and modify this according to their preferences.

At the end of scoping, the solution, timelines and the project package have been agreed upon.

03

Work Phase

“Get it done!”

This phase is separated into three parts:

IMPLEMENTATION | TESTING | DEPLOYMENT

Implementation

The solution that was defined in the scoping phase will be implemented in this phase.

The project is divided into tasks that make up “user stories”. These reflect the work flow of the implemented process.

An example of a simple user story: Potential customer fills a form on the client’s website - a lead is automatically created in Salesforce with the customer’s details.

Testing

Every client has the opportunity to test individual user stories in their Salesforce org before the solution goes live.

We use Taskray to record each outcome of the story. This is done to make sure that tasks and work timelines are respected and well communicated.

The user stories are always tested by the developer, consultant and of course the client.

Once the user story is tested and approved, it is ready for deployment.

Enabling the client to test the user stories from the initial stage, ensures that our solution reflects exactly the client’s needs.

This stage also enables the client to be involved in the process from start to finish. This way we make sure that the client understands from the start how everything works together and is fully fluent with the solution once it is deployed.

Deployment

As a result of our testing process, we are able to ensure that everything is in place and working before deployment.

In this phase the client goes live with the solution.

Communication with client

In order to maintain clarity and transparency in the process, we ensure that each step is well documented. As well as this, we keep a constant flow of communication with the client during and after the project.

All tasks and their process are documented and shared with the client through **Salesforce** and **Taskray**. This way the client has a clear overview of the tasks that are being worked on, completed tasks and errors.

This gives clarity on the timelines as well as enables the client to make sure that the project stays within the agreed budget.

We organise regular meetings with the client to ensure all the steps related to the project are going according plan:

- ✓ Status of tasks
- ✓ Status of tests
- ✓ Making sure we are within budget
- ✓ Timelines

Once the solution is deployed and running, our consultants are available for support and training needs if this is requested by the client.

If you have questions about our project process or would like to hear more about how we can help your business. We are happy to help.

Reach out to us at:

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