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# Salesforce Program Management for Public Sector



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# Executive Summary

Public agencies are investing in Salesforce solutions to support digital transformation and to improve citizen experiences. As these agencies continue to expand their Salesforce adoption there is an opportunity to rethink how they are managing these Salesforce investments.

Today, many public agencies view Salesforce solutions as point-solutions intended to solve a specific business objective. These agencies are realizing real business value with these Salesforce solutions. So much so that most are continuing to expand their Salesforce adoption and are deploying Salesforce solutions to solve even more mission critical business challenges.

As these agencies grow in their use of Salesforce they have an opportunity to mature how they are managing the platform by shifting their methods from managing a series of individual projects to managing a larger Salesforce Program.

By bringing a Program Management approach to Salesforce public agencies will be able to realize additional business value from their existing Salesforce technology investments, including:

- Increased alignment with business objectives
- Resource optimization
- Faster decision-making
- Quality assurance, and
- Scalability.

## What is Salesforce Program Management?

Salesforce Program Management is when a customer administers their Salesforce investments and resources as an ongoing strategic asset. An asset which is critical to achieving a range of business objectives and to improving organizational performance. Program Management requires the organization to view a collection of individual Salesforce projects as a larger integrated effort that must be coordinated at an enterprise level.

Program Management requires an organization to:

- Provide long-term funding and resourcing sufficient to realize the desired business outcomes,
- Manage multiple Salesforce projects and implementation partners in parallel,
- Resolve conflicts between projects while seeking out synergies,
- Develop enterprise standards for development and administration,
- Mature Salesforce governance and design practices, and,
- Develop a long-term roadmap to support continuous innovation.



## Does Salesforce Need Program Management?

Yes, most Salesforce customers operate multiple core business processes on Salesforce. This diversity of stakeholders and business processes requires more mature management practices.

To understand why it is helpful to look back at Salesforce's roots. Founded in 1999, Salesforce's target audience was sales professionals looking for a better way to manage their business. Salesforce offered a single solution – Sales Cloud – which could be easily set up and used by a salesperson.

In 2008 Salesforce released the Force.com Platform. This enabled customers to begin building enterprise applications using the same Software-as-a-Service platform Salesforce uses to offer its flagship Sales and Service Cloud products.

Salesforce grew rapidly over the next several years by allowing customers to independently develop their own custom apps. During this time Salesforce grew from a market leading Customer Relationship Management provider into an indispensable enterprise application platform. Along with this expansion came the need for customers to evolve how they manage their Salesforce investments.

As customers built more and more apps on the Force.com platform they began to recognize the need to manage Salesforce at a higher level – they saw the need for a Salesforce Program.

In the commercial segment this evolution from being a single point-solution to an enterprise platform supporting multiple business stakeholders took about a decade.

## How Does This Apply to the Public Sector?

Salesforce's public sector customers are on a different timeline than Salesforce's earliest commercial adopters. Salesforce did not really start penetrating the public sector market until about a decade ago.

In the early days of Salesforce's public sector growth customers were not selecting Salesforce to be their enterprise low-code / no-code platform. Agencies were following traditional IT procurement practices to engage the vendor community to build point-solutions to address discrete business needs.

The vendor community brought Salesforce to the public sector. As Salesforce's implementation partners began to see value in configuring Salesforce to meet public sector use cases they started proposing Salesforce solutions. As these partners started winning competitive procurements, Salesforce's public sector market naturally expanded.

Today, Salesforce has a presence in nearly every federal agency and state government in the US – and many more abroad. The leaders in this space view Salesforce as a Program rather than as a project. These Agencies are realizing tremendous value in viewing their Salesforce investment as a strategic asset to support digital transformation, modernization and enhancing citizen experience.

However, this is not where most of Salesforce's public sector customers are. Most public sector customers are still purchasing Salesforce for point-solutions. Why, because Salesforce offers amazing technology that can efficiently meet their business needs and future-proof their

applications. While this does provide great value, there is more value to be realized by managing Salesforce as a strategic asset – by managing Salesforce as a Program.

In the public sector there are barriers to making this shift. Annual budget cycles, various funding streams, procurement processes, competing project timelines, sunk costs in legacy technologies, skill / knowledge gaps, and lack of executive sponsorship to name a few.

These challenges are not unique to Salesforce Program Management and developing a plan to address the barriers is the first step towards building a successful Salesforce Program as illustrated in the following case study.

## Benefits of Program Management

Salesforce Program Management provides a range of benefits, including:

- **Increased alignment** with business objectives as each initiative aligns to a broad enterprise strategy focused on achieving the most impactful business objectives for the enterprise.
- **Resource optimization** as all areas leverage common resources, licenses, appexchange solutions and staffing thus creating expertise and efficiencies.
- **Faster decision-making** as the program office will have ready made decision criteria to support new efforts.
- **Quality assurance** as the program will set mature design, delivery, testing and maintenance requirements.
- **Scalability** as the overall Salesforce solution is continually optimized to support the full breadth of the agency's most critical work.

## A Case Study: Ohio Department of Development

In 2011 the Ohio Department of Development was at the start of a new administration. Development was in transition as Ohio worked towards adopting a new model for economic development.

Development is a diverse department supporting a wide range of programs including: Community Development Block Grants, economic development loans, grants and tax credits, Small Business Administration programs, Export Assistance, environmental programs, Workforce Development, Energy, Third Frontier and so many more programs.

Early in the administration the Director of the department asked the Research Division a simple question – how much assistance had the department given to a certain Ohio county? Three-weeks later the team returned with a three-ring binder. The binder had tabs for each program area and outlined the assistance provided over the prior five-years. Great information, but three weeks too late for the Director to use.

This interaction became the touchstone for a soon to be launched Salesforce initiative. Development was going to break down the siloed systems and data sources within the department so they could use data in real-time to answer questions about the impact the department makes on Ohio communities.

**Aligning on this vision resolved the first two challenges in starting a new Program – secure an Executive Sponsor and gain support to reallocated funding.**

At the time Development did not realize it was launching a Salesforce Program – they only knew there was a problem and needed to move quickly. Two senior members in the Director's Office had prior experience with Salesforce and suspected it could be used to help the department get a single view of its customer.

In 2011 there were no cabinet agencies in Ohio using Salesforce and Ohio did not have a clear path to procure Salesforce. Salesforce was not an easy selection to make but it did have some things working in its favor.

During this time Ohio was creating JobsOhio which was going to be heavily using Salesforce and there was a compelling business need for Development to be able to exchange data with JobsOhio. Ohio also had a State CIO who understood the problem facing Development and leveraging a SaaS solution aligned with his vision.

**This support helped resolve another next challenge – how to procure Salesforce.**

As the initiative continued to come into focus it became clear this was going to be a large transformation effort. Development had the opportunity to bring in a department CIO who shared in this vision and who welcomed the work ahead. With him onboard work began to reshape the IT staff and to bring in the resources Development would need to help its team through the early stages of this transformation.

## **Putting the technical team in place resolved the skills challenge – they could execute against this vision.**

Next Development needed to build a roadmap. The initial scope of Development's Salesforce journey began by looking at 17 programs across the economic development side of the Department. These programs held the majority of the data required to realize the Director's vision – to be able to quickly report on the Department's impact in each Ohio community.

As this roadmap came into focus, two new challenges became apparent, Development needed to: Win buy-in from the respective leaders of each program area, and design a scalable architecture to meet the individual needs of each program along with the enterprise reporting requirements.

### **Winning Buy-In**

Development had historically given a great deal of autonomy to the program offices. As a result there was no common enterprise solution in place. Each program had charted their own technology path and as a result these 17 programs were managed by a collection of bespoke solutions.

These solutions included:

- Home-built SharePoint sites
- Access database run on local machines with no back-ups
- Dozens of Excel spreadsheets on shared drives
- .Net applications
- COTS products – one which was no longer supported, and
- Paper and .PDF files.

To get support from these leaders to move off of their current business processes and solutions – which from their point of view were meeting their needs – required the team understand each programs' business objectives and to find something they all wanted but could not achieve on their own.

The department's leadership team wanted two common business improvements:

- Faster contract processing
- Visibility to entities which may be in default with another Development program.

## **The team knew Salesforce could deliver real business value and achieve both of these items so the Salesforce team committed to delivering them – winning buy-in.**

With the support of these business leaders secured the initiative continued to move forward. Next, Development needed to execute on the early phases to prove out the solution.

## **Building for Scale**

To move quickly, Development needed to architect the Salesforce solution from day-one with the end-goal in mind. The team knew enough about each of the programs to be able to design a scalable architecture which was extensible to meet each programs' needs. With the design settled, work began with the first program office to migrate their business to Salesforce.

**The successes from this initial phase brought additional credibility to the Salesforce team and proved the architecture would scale.**

## **The Outcome**

Over the following two years, Development successfully supported the migration of 17 programs to a common Salesforce solution. They realized the desired business objective of enabling enterprise reporting for these programs. Along the way, the team created Ohio's first Salesforce Program. This approach took an enterprise view to managing Salesforce assets and enabled continuous innovation and value across the department.

Development's Salesforce Program team went on to become leaders in Ohio's larger Salesforce journey by starting up the state's first multi-agency Salesforce User Group and then also leading the state's Salesforce Center of Excellence. This Salesforce Program was also a critical element of Ohio's COVID-19 response and continues to lead the state's initiatives today.

*Kevin Potter was Assistant Director, Chief of Special Projects at the Ohio Dept. of Development from 2011-2014. This case study is based on his experiences.*

## **Conclusion**

Public agencies are increasingly turning to Salesforce solutions to drive digital transformation and enhance citizen experiences. As they expand their use of Salesforce, there is an opportunity to reconsider how they manage these investments.

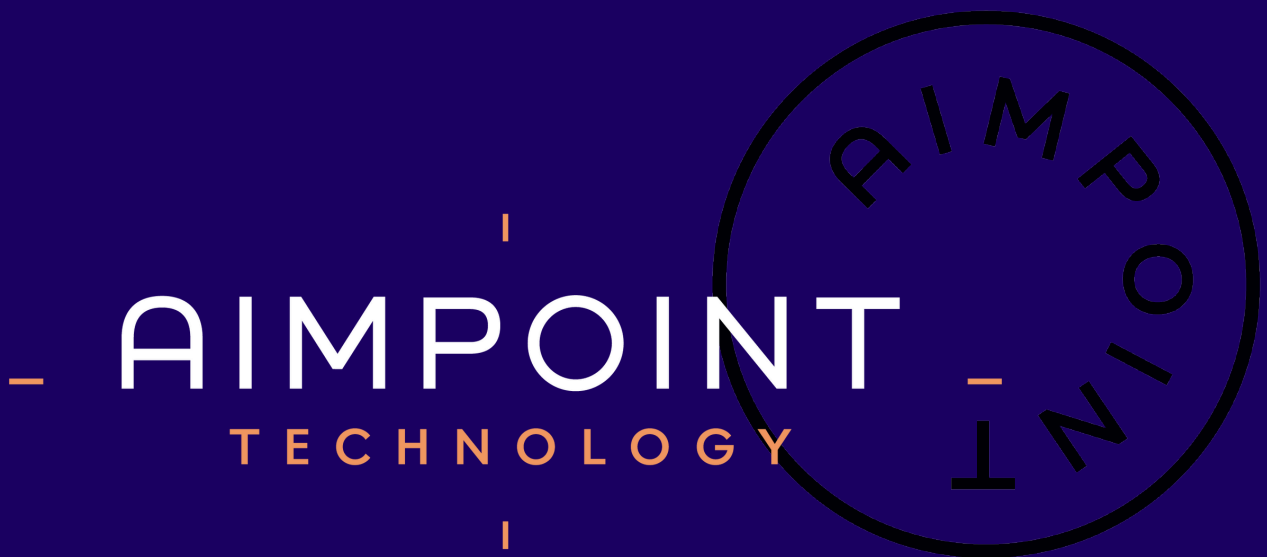
Many agencies currently see Salesforce solutions as tools to address specific business goals, and they have found considerable value in doing so. This success has prompted them to broaden their use of Salesforce to tackle more challenges.

To further maximize their Salesforce investments these agencies can shift from managing individual projects to adopting a Program Management approach. This shift can help them realize additional business value from their existing Salesforce technology investments while providing several operational benefits.



## About Aimpoint

Aimpoint Technology is a Salesforce consulting and implementation partner. Aimpoint specializes in providing expert Salesforce advisory services for public agencies to help them realize more value from their existing Salesforce investments. Aimpoint also provides expert guidance and oversight for new Salesforce projects.



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