ADA – SFDC BRANDED WEB TEMPLATES ORGANIZATION

APRIL 16

SilverTech, Inc.
Development

silvertech

Change the game.

OVERVIEW

This document summarizes the findings of SilverTech from conducting an audit of the ADA environment. ADA leverages Salesforce (SFDC) for a support portal / knowledge base to assist ADA Website clients. ADA wants to increase engagement within the Support Portal and use cases to create additional knowledge content. In addition, they want to centralize support cases within Salesforce for both web and email cases.

Primary Findings:

- **Minimal Customization in the overall Salesforce.**
  - 1 Custom Object
  - Minimal custom fields.
  - 1 Apex Trigger / and support classes.
  - No custom Lightning Web Components

- **Digital Experience Site / Community**
  - Single Page Template, Jepson Theme.
    - Leverages OOTB components / Themes with configurable customizations.
    - Single "Default" Page Template is widely used.
    - Minimal styling customizations apart from theme configuration.
  - Mainly used for logging support cases, and viewing knowledge articles
    - KB Articles are filtered by Topic and Searchable
  - Desire to increase engagement with ADA BWT Site users
  - Content could be improved / additional functionality.
    - Alerts Component
    - KB Article Content Cleanup
    - Improved Content Strategy / Organization of site

- **Service Cloud**
  - Incomplete Configuration / Setup.
  - Case Management exists
    - Case Assignment / Routing can be improved.
      - Omni Channel Setup is incomplete. Single Case Queue: BWT.
    - Email to Case
      - Partially implemented. Work with ADA to finalize the implementation to track all email related cases.
    - Case Escalation:

- Mainly done by Priority: General / Critical.
    - Room to improve overall case workflow and escalation process
  - Case to Knowledge Article
    - Partially implemented. Work with ADA to finalize the implementation to easily generate additional KB Articles.
  - Knowledge Articles
    - 172 overall articles.
    - Content was scraped from "sitefinitytraining.ada.org". This resulted in broken images.
      - Can provide report on KB Articles with broken images.
    - Ratings are enabled
  - Reporting / Dashboard
    - Initial Dashboard upon login can be improved.
      - ADA and SilverTech can define a better dashboard experience for Service Cloud users.
    - Better reporting around Ticket Volume (Month / Quarter / Team, etc.)
    - Search metric for community members.

- **Change Management**
  - No Source Control
  - Changes are promoted from Developer Sandboxes to Production.
  - Better validation of Triannual Salesforce Releases (Spring / Summer Winter).

Recommendations:

- Complete Service Cloud setup
  - Email to Case
  - Case Routing
  - Case to Knowledge Article
  - Re-Assess the Case Workflow
- ADA BWT:
  - Improve content strategy
  - Additional Web Components
    - Alerts
  - Additional Page Templates
  - Implement additional OOTB features
- Reporting:
  - Configuring a useful dashboard for Service Cloud users

- o Training / Documenting the existing reports to identify any gaps
- Security:
  - o All Service Cloud users are System Administrators.
  - o This is not recommended for most users.

End User Experience:

- **Digital Experience Site**
  - o Customer Service Template
    - ▪ Update is available but has not occurred been installed.
    - ▪ Updates to the overall experience site will occur with Summer '25
  - o Jepson Theme with ADA configured branding and some fonts.
    - ▪ No custom Page Templates / Theme
    - ▪ Mainly uses "Default" page.
    - ▪ Leverages Salesforce provided web components.
  - o Google Analytics – Not Setup / Configured.
    - ▪ Track end user use of the site.
  - o Search:
    - ▪ Auto Complete / Search Bar
      - • Knowledge Articles
      - • Content of the site
      - • "Discussion" is included but not in use
        - o Chatter feeds / publisher enabled. This is used by service cloud users.
    - ▪ Search Results:
      - • Knowledge
      - • Content of the site
  - o Content Security Policy is enabled
    - ▪ Allows for inline scripts and whitelisting additional domains.
    - ▪ No CSP errors reported in the past 30 days.
- Better Understand Salesforce Experience Sites
  - o Training and demos.
- Desire an Alert mechanism
  - o Custom Web Component.

Salesforce:

Security & Access Control
- Profile and Permissions sets for Object / Field Level security
  - Knowledge Users: Limited licenses to 3.
  - Site User: "ADA Society Member" sets for Experience Site portal users.
    - Some users have the "Customer Community Plus User"
    - ADA BWT Help Desk for guest access
    - ADA Society Member
- Service Cloud Users:
  - All users are currently System Administrators.
    - This should be re-evaluated.
- Organization Wide Defaults and Role Hierarchies used for record security.

Configuration & Metadata
- 1 custom objects.
  - This is the Knowledge Articles
- Minimal Custom fields around cases / contacts / Activities (Tasks and Events)
  - Activities are not in use.
- Custom fields on Opportunities / Leads
- 5 Active Flows, (4) are used for email alerts, (1) is to support email to case
  - 0 Process Builders.
  - 0 Workflow rules
- 1 Custom Apex Trigger / 1 Apex Class
  - Case Comment Trigger / Case Comment Trigger Handler.
  - Unit Test, no test data generator.
- OOTB Visualforce and Lightning Web Components
- 8 Installed Managed Packages (All released by Salesforce).
  - 5 are reporting focused
  - 3 are to support mobile pages / phones. Released by Salesforce team.

Data Quality & Integrity
- Not a large volume of data.
  - Data integrity is high.
  - Knowledge Article Content should be re-evaluated.
  - Account and Entitlement (Support level an account / customer) is not consistent.
- Validation Rules used to enforce data integrity on Accounts and Cases.
  - Could impact email to case.

Reports & Dashboards
- Re-evaluate the dashboard for service cloud users to display more relevant information.
    - Ticket Volume (Monthly/ Quarterly / Per Team Member)
        - Can adjust the dates.
        - Reports: "Cases Currently Open by Agent"
    - Time to Resolution:
        - Report: "Case Resolution Time"
    - Case Status
        - Report: "Cases by Status"
    - Cases Created By Users per month
    - Knowledge Articles Search / Searched terms
        - BWT should be excluded.
        - Report Example: "Search Frequency by Term (30 Days) 2.0
    - Many of these base reports exist.
        - Define a better dashboard for Service Cloud users is advisable.

User Adoption & Activities
- The desire is to increase the use of the BWT experience site.
    - Better / easier deployment of content
    - More engagement with Knowledge Articles
    - ADA Members using the site more frequently for support
- Not largely in use. 22 "Member Logins" since beginning of year

Apps & Integrations
- Managed packages, around experience site engagement reports
- Email to Case is desired. It's enabled, but not fully implemented.
    - Routing Email is not configured
- API user exists: no known third party integrations.
- Phase 2: Explore potential SSO between the AMS SFDC organization and this salesforce organization to reduce the number of member user logins.

Change Management & Documentation
- No Code Repository / Source Control
- Customization are promoted from Sandboxes to Production via Salesforce Package Manager,
- UAT environment / partial sandbox not in use.