

# 2022 Hunley Associate Salesforce Consultant Academy



A synthesis of insights and recommendations to develop Hunley's Consultant Academy, based on workshops conducted by Montage Learning.

Press Record



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# Academy Mission Statement

## What is our goal?

Hunley needs consultants with experience **AND** skills capable of collaborating on projects, **BUT** it is difficult to source/recruit/train those who have the right background, **THEREFORE** Hunley's Academy is an opportunity for those that exhibit the right attributes to join Hunley, gain experience, and contribute to the client experience as an Associate Salesforce Consultant.

Montage uses the And, But, Therefore (ABT) model (developed by Randy Olson) to frame a goal, problem or obstacle in a story format.

# Knowledge Buckets

## Support Areas

### Role Best Practices

Role Best Practices: Test Scripts	Role Best Practices: Blueprint	Role Best Practices: Build	Role Best Practices: Client Testing
Role Best Practices: Collect Client Feedback	Role Best Practices: Data Migration	Role Best Practices: Launch & Hypercare	Role Best Practices: Project Closeout
Role Best Practices: Taking Notes	Role Best Practices: Weekly Meetings	Role Overview: Associate Salesforce Consultant	Role Best Practices: Change Management
Role Best Practices: Working on multiple projects			

## Onboarding

Company & Culture	Getting Started (Setup)	PSA Time Tracking	How We Do Business
Systems & Tools Setup	The Hunley Way Overview	PSA Overview	

## 4 Areas of Focus

### Consulting (Soft Skills + What it is)

**Hunley Consulting Mindset**

**Integrated Soft Skills**

- Active Listening
- Communication (Presentation Skills)
- Communication Basics (Verbal)
- Communication Basics (Written)
- Communication: How to ask for help
- Productivity (Time Management)
- Teamwork (Collaboration)
- Engagement (Empathy)
- Engagement (Curiosity)
- Feedback & Accountability

**Consulting Fundamentals (PS Principles)**

- Managing client expectations and alignment
- Being a Subject Matter Expert
- Adapt to environment: customers are different from each other
- Process alignment / getting on the same page
- What does "done" look like
- Acceptances at different stages of the project
- Having difficult conversations (Prioritization - Eisenhower matrix)
- Focus on client's outcomes
- Dealing with tensions with the client
- Speak their language
- Customer's position in the market
- Working within the scope & budget
- Speed of delivery
- The law of the triple constraints (scope, effort, time)
- Escalations
- Customer sense of pride - empathy, understanding, and resolution

8 hours, 16 hours included discussion recorded - 4 hours learned 4-5 hrs in class for certification

Implementation: personal 100 program and role behavior (communication, negotiation, problem-solving, etc.) practice they do in the field (100% written reflection, guided activity, PACE, PACE path evidence)

### Industry

**Construction Overview**

- Intro to BPM
- Intro to AEC
- BPM Specific Business Practices
- AEC Specific Business Practices
- Hunley Products and Accelerators

### Technical (Salesforce)

Automation: Workflows, PBs, Approvals & Flows	Create & Customize App	Custom & Standard Objects	Data Modeling	Security Structure	Commonly Used Apps at Hunley
Fields & Field Types	Formulas & Validations	Import/Export Data Basics	Lightning Experience	Use Case Examples	Environment management
Page Layouts	Platform Basics	Quick Actions/Global Actions/Buttons	Reports & Dashboards	Hunley Group Build Standards	

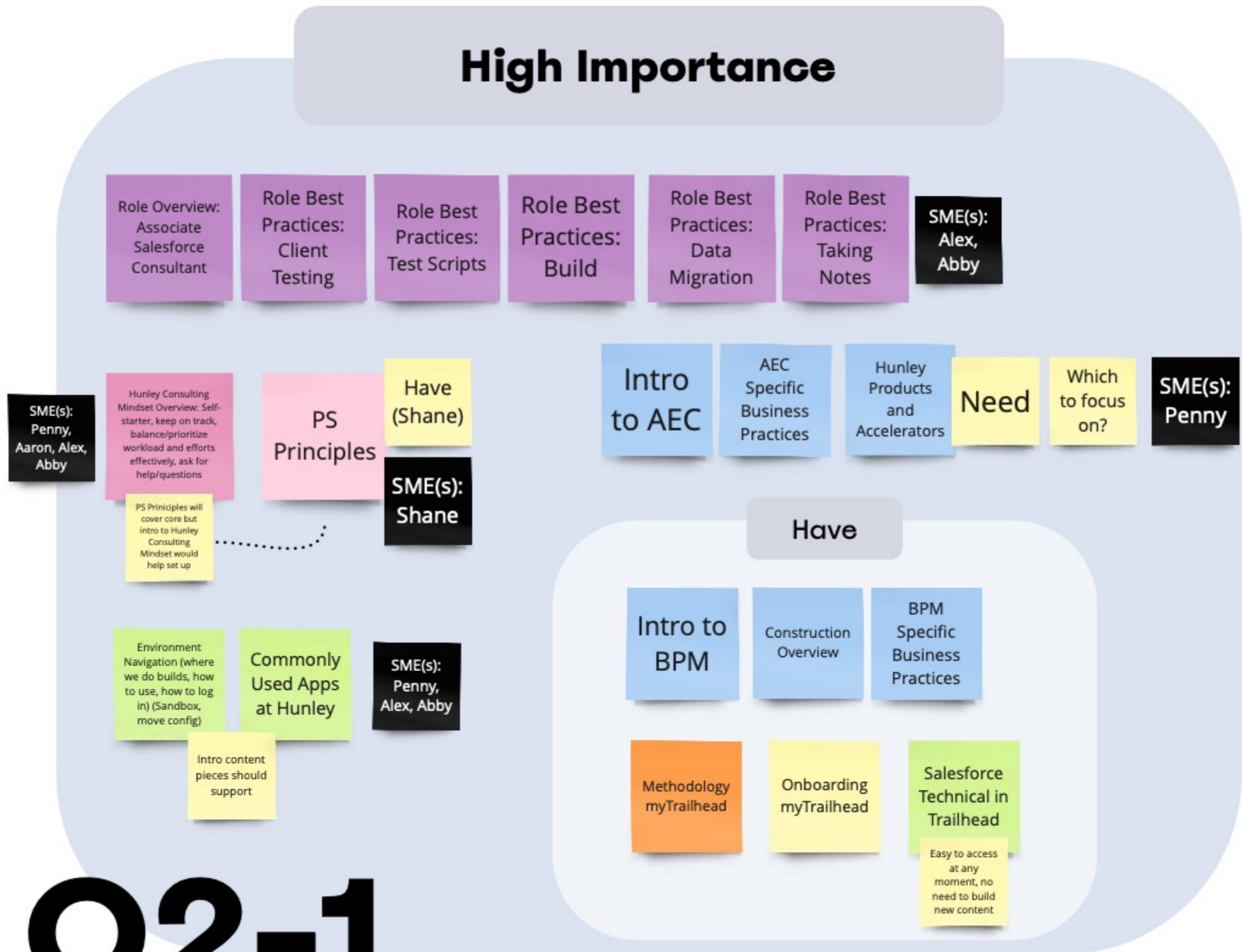
### Methodology

Blueprint 1 Getting Ready	Blueprint 2 Requirements Gathering & User Stories	Blueprint 3 Design & Plans	Blueprint 4 Estimating & Read Out	Sprint Demo	Intro to Project Tracker
Blueprint SubPhase Intro	Build	Client Testing	Data Migration	Sprint Planning	
Internal Testing	Launch & Hypercare	Project Closeout	Project Lifecycle (Methodology Intro)	Weekly Meetings	



# Knowledge Prioritization

## High Importance



## Nice to Have



O2-1



# Academy Phases

4 Phases that integrate the different Knowledge Buckets

## Onboarding

Academy Participants learn about the Hunley Group, gain an overview of the Academy, and get setup.

## Consulting & Salesforce Basics

Academy Participants learn Salesforce Basics and work on their Consulting soft skills.

## On a Project

Academy Participants learn Hunley's Methodology and apply role best practices while working on a Mock Project.

## Capstone & Shadowing

Academy Participants work on, complete, and present their Capstone Project while shadowing others.

### Considerations in Design:

- Remote Environment
- Independent Work
- Opportunities to Apply & Practice

03

3 months, pass admin cert, lead primary but not independent (2 basic clients, not average client), aligned with senior members as support

basic admin cert, support simple clients, work with senior CSM (works on tasks but someone else maintains relationships)

no prior experience get better technically but work with others to accomplish tasks

missing consulting, processes,

ACSM mentorship?

client management excellence - best practices?

what do clients look like? examples of clients

Hunley: best examples of work

ACSM Onboarding & Consulting/SF Basics

ACSM processes?

Different project cycle

different process - need to define MS process (borrow some from PS)

Different flavors for discovery as example

borrow from PS processes



# Academy Curriculum

## 4 Phases that integrate the different Knowledge Buckets

### Curriculum Link

[Hunley Academy Curriculum](#)

### Learner Actions

**Knowledge:** Written content or media that learners can consume passively and independently.

**Application:** Learners take an active role in using recently acquired knowledge to solve a problem or reflect with guidance.

**Practice:** Learners utilize what they've learned in a "real world" scenario, a Capstone Project, leveraging known resources and teammates.

### Academy Breakdown

Segments 1.1 - 1.5

Segment  
1.1

Segment  
1.2

Segment  
1.3

Segment  
1.4

Segment  
1.5

- Remote environments require flexibility
- Allows facilitators to adjust curriculum based on candidates and circumstances

# An Academy Day (Segment)

## What does a day look like?

- Up to 6 hours of work each segment
- Breaks and lunch considered
- Daily Stand Up and Closeout
- Individual check-ins
- Consider Recommendations like Icebreakers, Coffee Chats, Lunch Breaks with Hunley employees outside of cohort, Physical Exercises, etc

### Day (Segment) Structure Example 1

Daily Stand Up  
(Agenda for the Day &  
Questions)

Learner tasks

Individual check-in

Lunch

Instructor  
presentation

Group activity

Learner tasks

Daily closeout

### Day (Segment) Structure Example 2

Daily Stand Up  
(Agenda for the Day &  
Questions)

Instructor  
presentation

Group activity

Capstone Project  
work

Lunch

Individual check-in

Shadowing

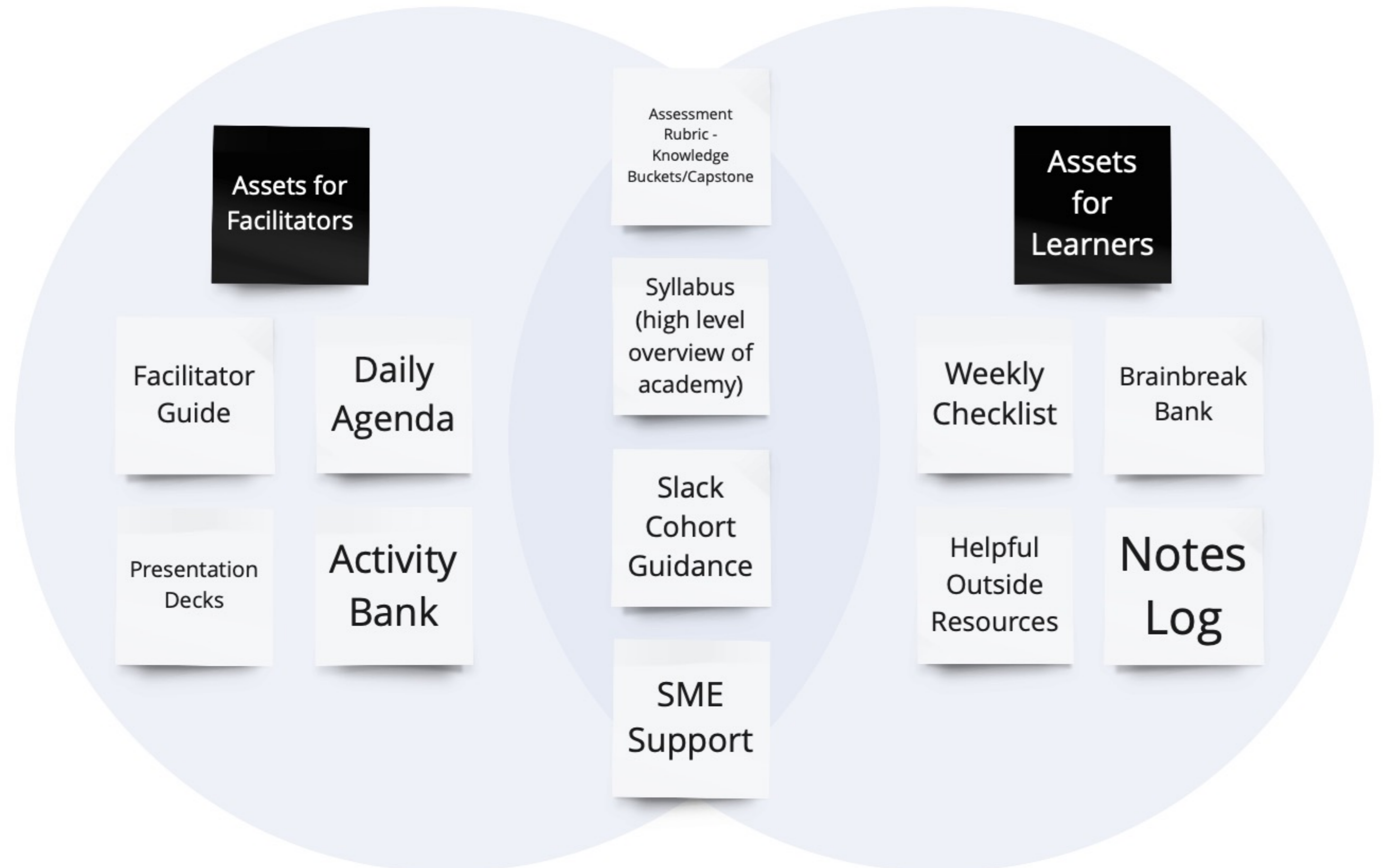
Daily closeout



# Assets

## What tools are needed?

In addition to content creation, there are also tools that are required to support both Facilitators and Learners in their roles throughout the Academy.



# Recommendations

## What are some other things to consider?

- Build Culture:
  - Icebreakers help break up the day and get to know each other (cohort connection, fun activities, virtual mixers)
  - Setup social events for the cohort to bond
- Stress Management
  - **Suggest physical activities (good for company overall)**
  - Incorporate fun competitions
  - Weekly/Monthly lunch/dinner meal budget
- Slack Channel for Academy Cohort
  - Slack Profile sharing
  - Polling in channel
- If possible, gather Academy participants for in-person kick-off for one or two days
  - Hunley Internal Question: Who would need to be involved?
- Academy End Celebration - Capstone Project Presentations

06-1



# Supports

## Subject-Matter Expert

- Time required, dependency based on priority of content build
- Input on building Role Best Practices
- Capstone Mock Client creation
- Input on Consulting content
- Provide feedback on Facilitator Guide
- Hunley Onboarding missing pieces (PSA overview, how we do business, etc)
- Review, edit and sign-off on content/activities
- SME support and availability for Facilitator during Academy (answer questions, presenter for specific topics, interact with Slack cohort)

## Facilitator

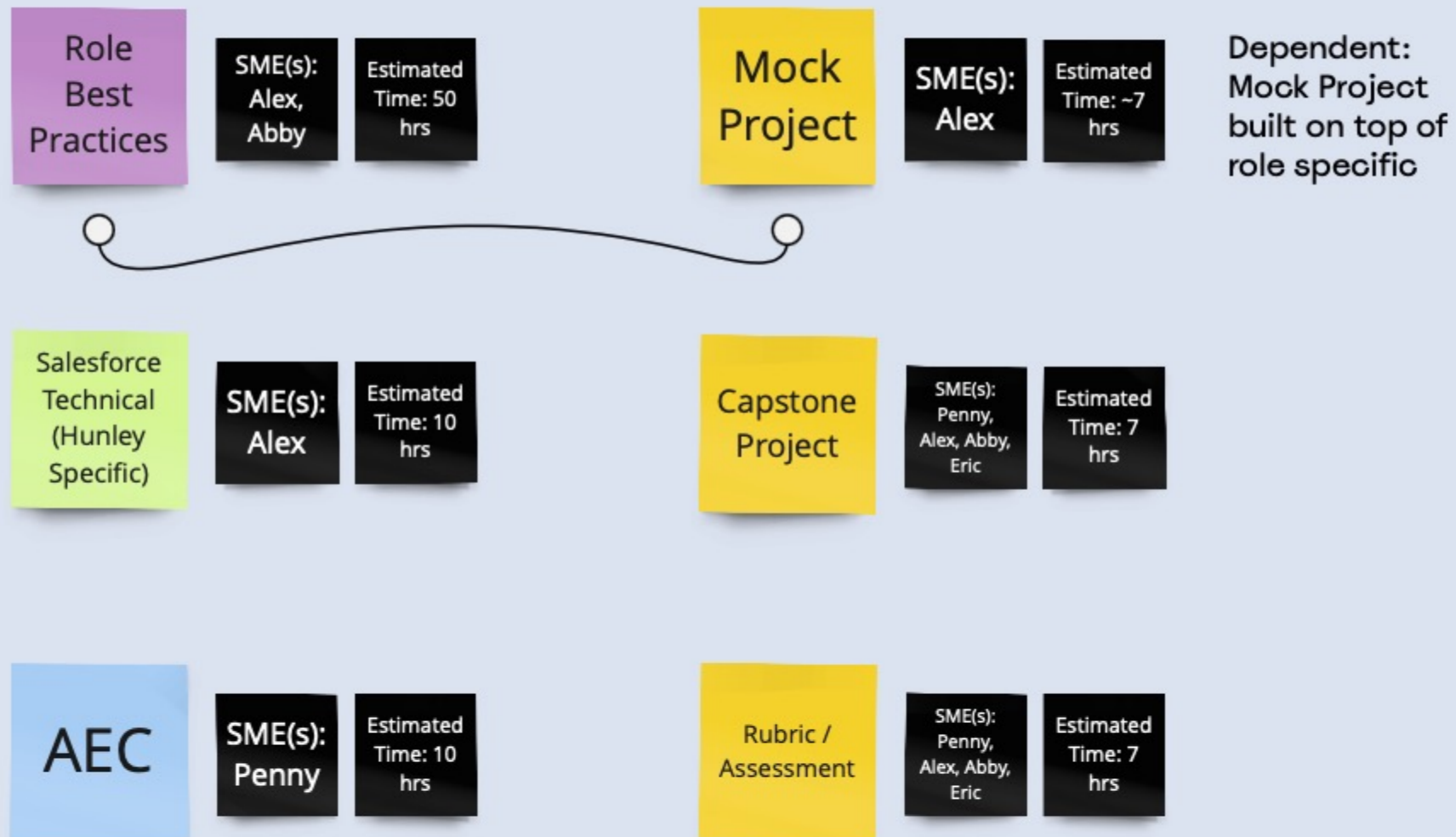
- During Academy:
  - Managing schedule
  - Creating agendas
  - Giving feedback & supports
  - Meeting 1:1 with learners during check-ins
  - Assessing projects & learners
  - Provide coaching
  - Initial assessment of additional curriculum needs
- Assume full time Academy work while in session
- Moderator for Slack cohort
- Facilitator should be one person but can have multiple supports

06-2



# Supports

## Subject-Matter Expert(s)



## Facilitator(s)

Train the Trainer - Academy Preparation

Facilitator Guide

Daily Agenda

Weekly Checklist

SME(s): Who might be facilitating?

Consider Primary, Secondary, Tertiary Facilitators

Do facilitators trade off per topic?

Estimated Facilitation Time: 5-8 hrs per day (part-time to full on Academy, lower hours extends academy timeline)

Co-Facilitator recommended (e.g. moderating Slack channel, Zoom organization, etc)

Guest Speakers for topics (good for cohort to meet others in company)

Who will be signing off on content? SME or other?



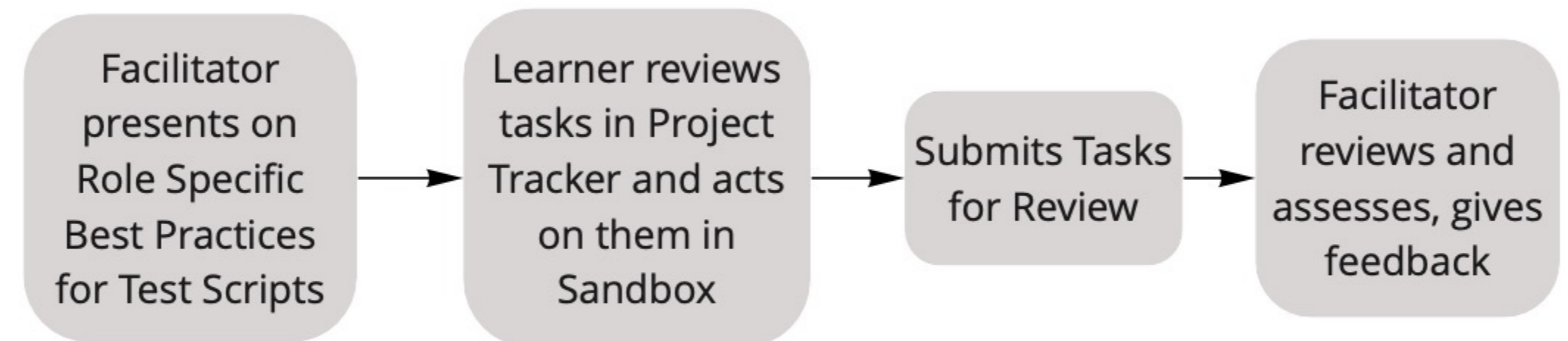
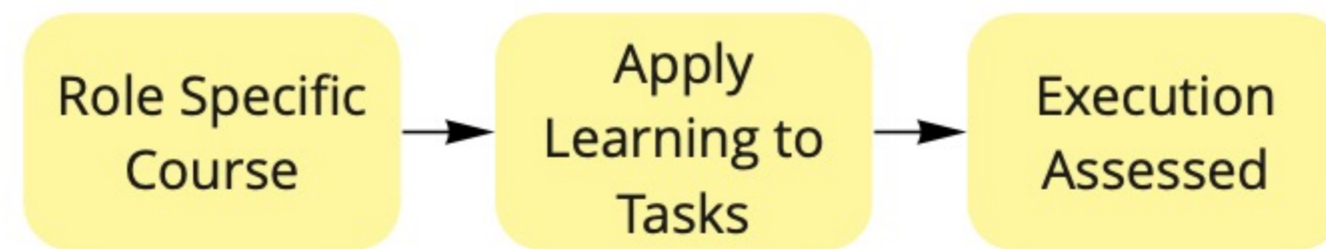
# Mock Project

## Outline & Implementation

- Integrated into the Role Specific knowledge area
- ASC completes tasks assigned to them
- Role Specific topics are introduced and reviewed using Instructor Led Presentations (A Hunley example to give context would help setup learners tasks)
- ASC Learner reviews tasks assigned and takes actions (Tasks can be assigned in Project Tracker, executed in a Sandbox)
- We can also build Short Simulations for specific actions or context that don't require Salesforce technical knowledge for learners to apply what they've learned

**Checkpoint:** Learners apply their Role Specific knowledge + Salesforce Technical Knowledge.

Hunley Effort:  
What steps are needed to get this into sandbox?  
Estimate of time?



# Capstone Project

## Outline & Implementation

- Each group is given a mock client, SOW, and use case (scenario outline) to work from
  - Mock client can either be written or previously recorded client meeting OR Facilitator/Hunley Employees can role-play as a client
- Capstone Projects are non-guided practice opportunities
  - Learners have to manage tasks, the process, and the team
  - Facilitators can be asked questions but learners are asked to review resources or discover other resources
- 3 - 4 weeks

Live role-play?

**Checkpoint & Milestone:**  
Learners apply their Role Specific knowledge + Salesforce Technical Knowledge to complete group project.

Project Phase Introduction Presentation (~3 hours)

Teams work on Project together (~6 hours)

End of Capstone: Teams Present Project

Facilitator presents on project phase, address questions, and ask learners to share experiences

Learners work as a team to manage their project to completion

Project teams use resources and best practices to address project issues

Facilitator reviews and assesses projects, gives feedback

Hunley Effort: What steps are needed to get this into sandbox? Estimate of time?

Resource Materials: User Story Bank

Different Examples needed for ASC vs ACSM



# Rubric Mockup

Align levels with benchmarks?

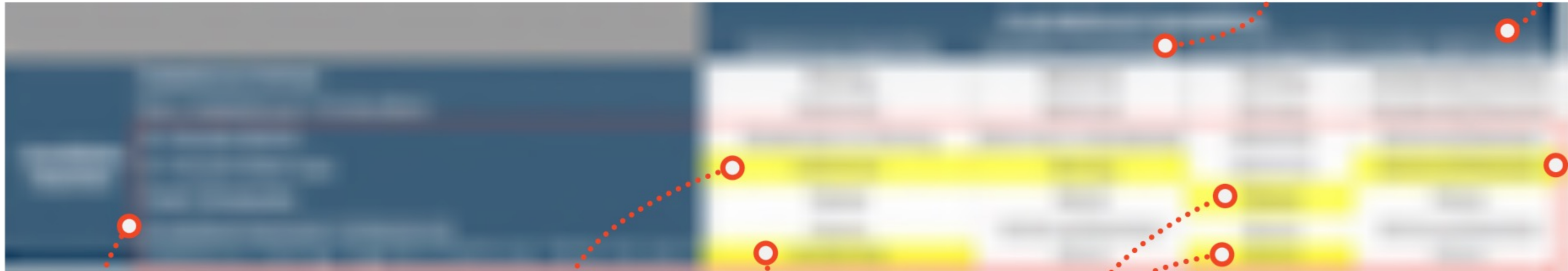
## What might the rubric look like?

- Instructor assessment
- Self assessment
- Team assessment

Knowledge Area	Knowledge Topic	Emerging (1)	Developing (2)	Proficient (3)	Advanced (4)	Expert (5)	Score	Notes
Role Best Practices	Note Taking	<p><b>Know:</b> Has trouble understanding the note-taking process and how to use template</p> <p><b>Apply:</b> Uses note-taking practices inconsistently and relies heavily on resources</p> <p><b>Practice:</b> Requires more opportunities to take notes in context to better understand how to apply</p>	<p><b>Know:</b> Understands best practices</p> <p><b>Apply:</b> Uses note-taking practices consistently with some errors or guidance</p> <p><b>Practice:</b> Able to complete note-taking process in dependently but requires additional time and support</p>	<p><b>Know:</b> Understand best practices and context</p> <p><b>Apply:</b> Uses note-taking practices without error and can give feedback on the process</p> <p><b>Practice:</b> Able to follow note-taking processes in context, but may need additional time to complete (time efficiency)</p>	<p><b>Know:</b> Understand best practices, can explain the process and support others</p> <p><b>Apply:</b> Uses note-taking practices without error and can give feedback on the process</p> <p><b>Practice:</b> Completes note-taking process in a time efficient manner</p>	<p><b>Know:</b> Understand best practices, and mentors others</p> <p><b>Apply:</b> Improves on the note-taking process and innovates</p> <p><b>Practice:</b> Completes note-taking process easily, innovates and standardizes new practices</p>	3	Can improve time efficiency on project tasks

# Notes on Candidates

## Who might be a good fit?



Would industry include BPM or AEC or both?

For methodology does it mean they understand Hunley's, Industry, Salesforce? but haven't implemented?

Need more info: would this individual show interest in Salesforce or the industry?

Sales Ops may have more experience? Depends on opportunities given in last role - a lot of sales ops people have awesome Salesforce admin experience

Minimal to Moderate unless you can review the curriculum first

Consulting skills might be an emerging talent for this candidate (depending on background), more willing to learn something new, may have expertise in an unrelated industry (but might not have job experience or translatable skill sets)

All candidates, no matter level should be looking to grow and learn the Hunley way

What does minimal/related look like?



# Candidate Goals

## Expectations of Candidates after Graduation

How do you see ASC adding value to a project after the Academy?

Actively listen, contribute and review requirements and complete declarative setup

Manage their time efficiently (complete tasks, seamless hand-off)

Own their processes to optimize, rinse and repeat

Provide perspective and feedback for projects

At the end of their first year, what do you see them achieving?

Contributing consistently on projects (e.g. SF recommendations, bring up red flags, pitfalls, time to task completion efficiency)

Strive for certification (potentially)

Choose a career pathway based on interests and strengths

ASC SME: sense of confidence and elegance, presenting solutions (owning a process and presenting it, internal facing), increased independence, expert on simple SF apps, able to mentor new ASCs

Ideal: Admin Cert (within 1st year) (ASC/ACSM)

# 10-1

## Recommended Ideal Candidates

### Optimal

In-House Admin

Salesforce Training Programs (VetForce, Climb Hire, etc.)

In-House Sales Ops

### Acceptable

Unrelated Business Professional

Fresh Graduate



# User Persona

👋 Hi, my name is Taylor

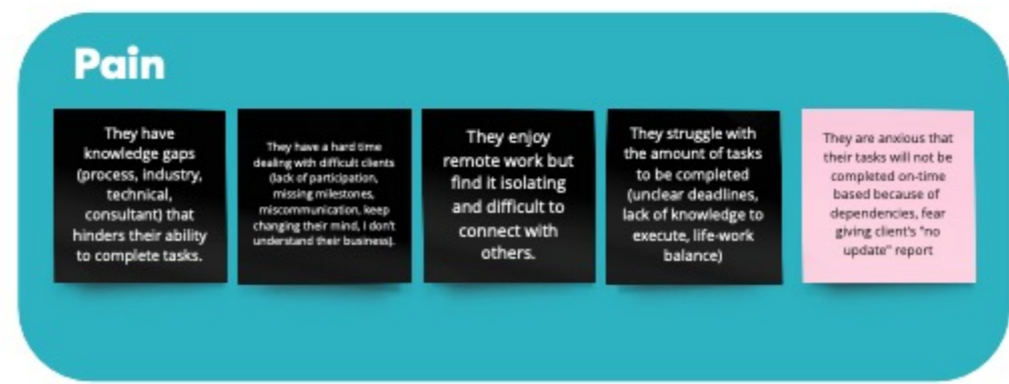
Taylor is our Consultant.

They work remotely, individually and/or collaboratively with a team, to engage and identify a client's business problem. Using their technical skills, they support the build of a Salesforce solution. They have solid technical aptitude and may have technical command; they may have been an "accidental admin" and/or may come out of a Salesforce Admin course.

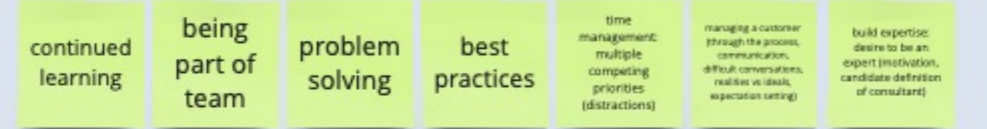
On a project, they may find themselves listening into and sometimes participating in conversations by actively listening to capture takeaways. They ask questions with their team to clarify/define/synthesize/analyze the client's needs in order to build the best solution. If they don't know something, they research to find it. This can be challenging in the moment in navigating project nuance, ambiguity, and juggling deadlines. They have to keep learning to maintain or excel in their role.

# 10-2

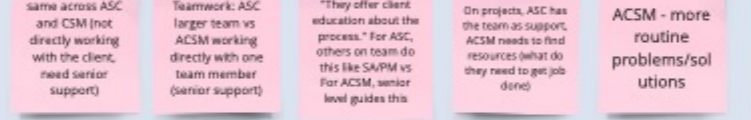
Works in a state of urgency to accomplish client asks based in feasibility and functionality, while trying to understand it themselves



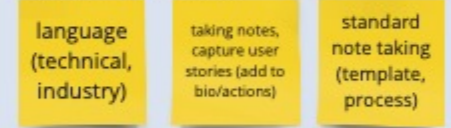
## Topics



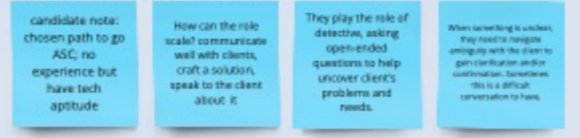
## ASC vs ACSM



## Resources



## Growth in Role



# Build Phases

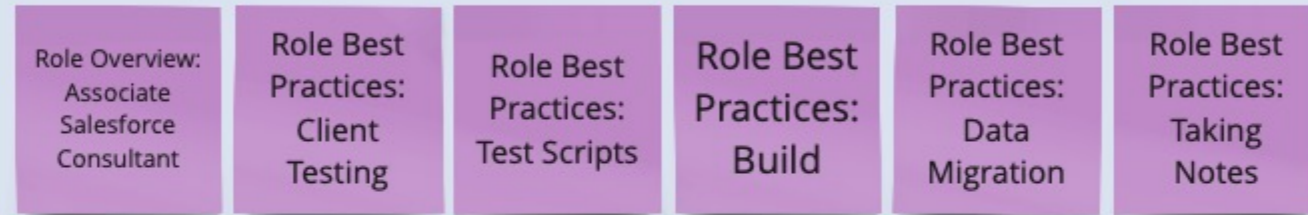
## What needs to be built?

### Phase 1

#### Academy Assets:

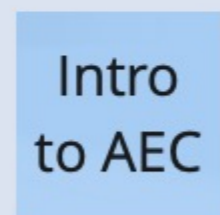


#### Role Specific:



Productivity (Time Management)

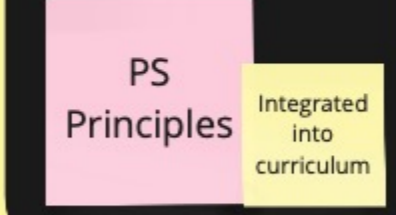
#### Industry:



#### Salesforce:

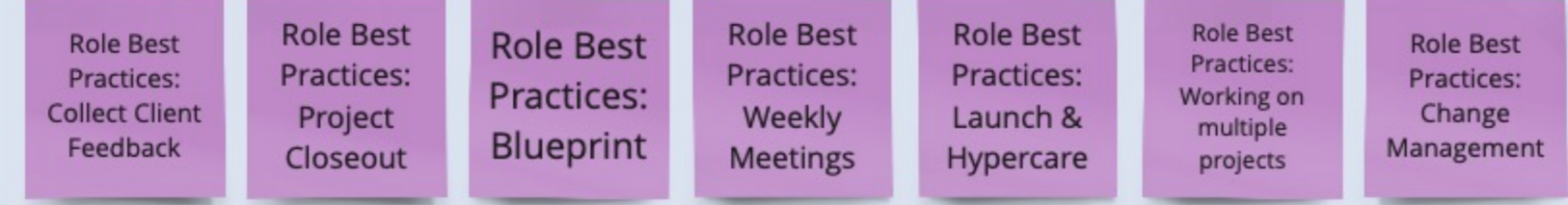


#### Consulting:

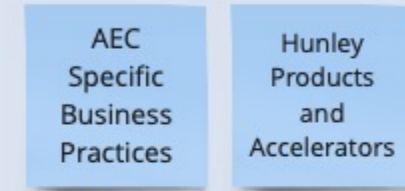


### Phase 2

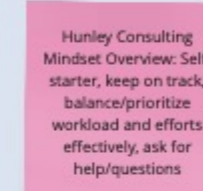
#### Role Specific:



#### Industry:

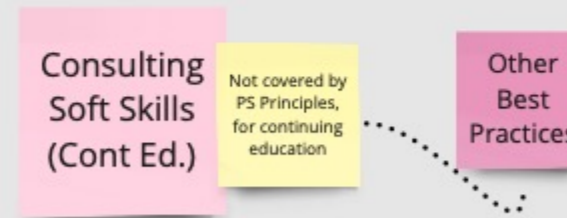


#### Consulting:



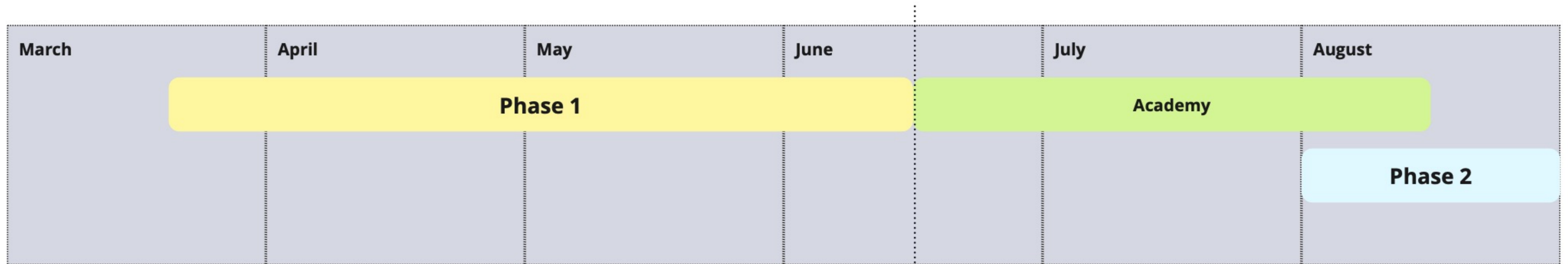
Iterate on Phase 1

### Phase 3 Continuing Education



# Build Timeline

When will things be built?



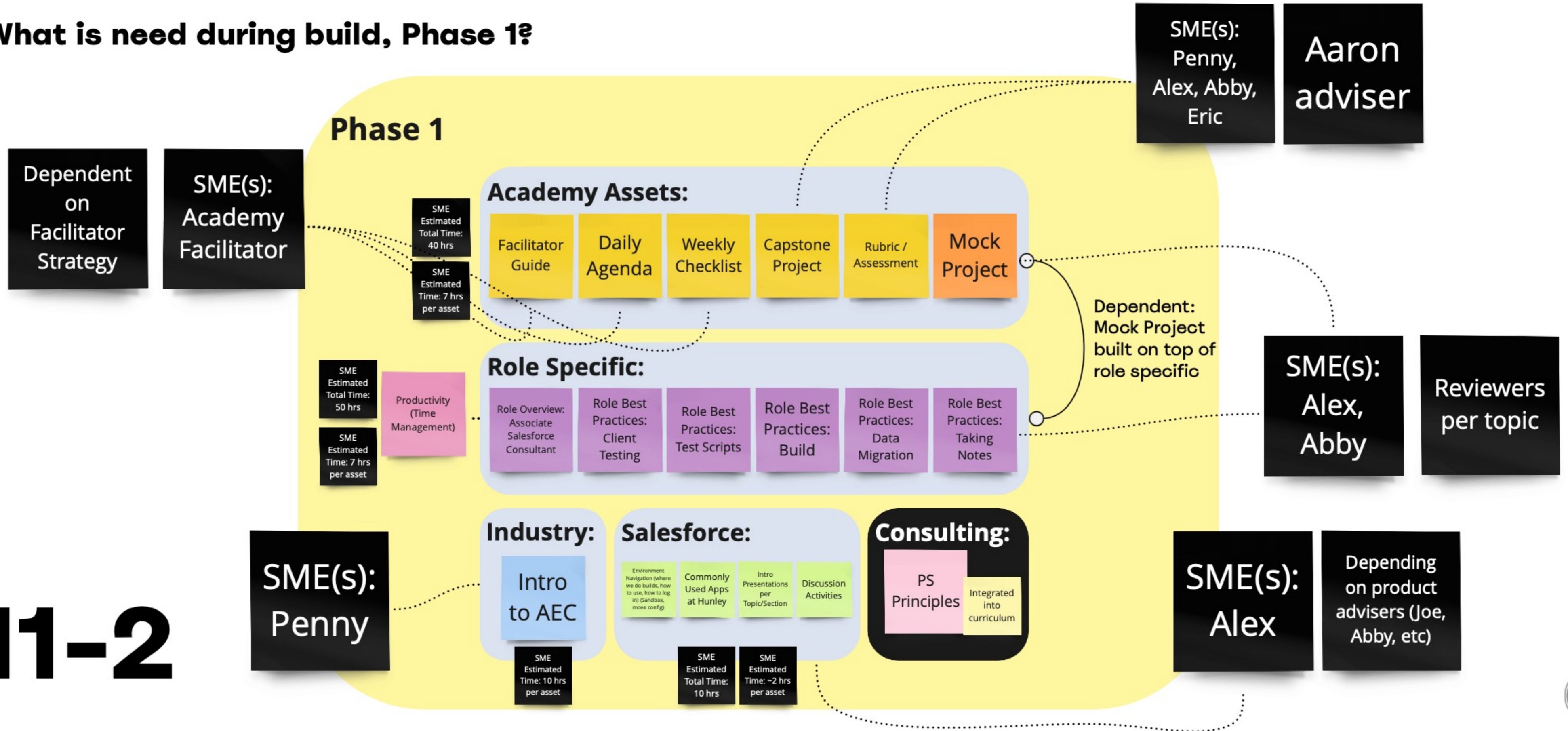
First Academy

11-1



# Build Requirements

What is need during build, Phase 1?



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