

**SALESFORCE TEAM**

# Team Charter

**Team Name: Salesforce Super Users Group**

**Date Chartered: 3/19/2013**

**Team Goal/Mission:**

Maximize organizational effectiveness through exceptional integration of the Salesforce tool with business processes. Drive ownership and accountability beyond the Implementation Team to the business units. Institutionalize this group into the fabric of our business life. Become the first level of Salesforce.com governance.

**Issues to be Addressed:**

- Drive adoption at all levels of the organization
- Identify improvement opportunities and demonstrate how Salesforce can help staff do their jobs
- Define what Salesforce does, communicate/clarify for staff, and be clear on what Salesforce is used for, and what it isn't used for
- Make configuration decisions and share with staff how Salesforce integrates with workflows
- Define data standards and best practices
- Identify consequences of various courses of action
- Publicize improvement activities throughout the company
- Identify training needs
- Conduct acceptance testing
- Facilitate communications

**Ground Rules:**

- This is YOUR time. Be honest and forthright in meetings. Members have same "voice" (no matter their position) in discussions.
- Leave meetings with action items
- Start, end meetings on time
- Send agenda well in advance of meeting to provide ample prep time. Have "post meeting review" as standard agenda item.
- Group will aim for consensus decision making
- Feedback is never too early or too late
- Utilize Team Chatter group to collaborate, share messages, have discussions

**Roles:**

- Facilitator and scribe rotate each week
- Group members will be asked to present/lead discussions and contribute agenda items

**Expected Results:**

- Become the WEDC in-house Salesforce experts

- Establish a first line resource for Salesforce questions from peers
- Co-facilitate training between the training team and staff
- Manage reporting needs and requests
- Communicate changes/issues bi-directionally between business units and Salesforce development teams

**Team Members:**

- Public Policy: Rebecca Deschane
- ECD: Deb Clements
- E&I: Aaron Hagar
- BID: Danielle Jones
- International: Monica Wahlberg
- Controller's Office: Ekta Ragha
- Marketing: Kelly Lietz
- Underwriting: Josh Fazzan
- Human Resources: Lyra Trapp
- Legal: Carmi Cleary
- Compliance: Emily Clavette
- Executive Offices: Tierra Terrell

**Support/Resource People:**

- Salesforce Implementation Team
- Process Improvement
- Training Department
- Consultants

**Team Member Responsibilities and Characteristics:**

Each team member is expected to act as a representative of their business unit. Team members will take proposed solutions and decision points back to their business unit for reactions and feedback. The ideal Super User will have a desire to learn all there is to know about Salesforce. This user will be adept at technology and have a strong understanding of the needs of their business unit. They will be accessible and will be good at providing assistance to others. They will provide leadership by bringing the voice of the customer back to the Implementation Team. This person will be a natural sales person that will advocate for Salesforce usage and adherence to guidelines.