THE LOW-CODE APP DEVELOPMENT PLAYBOOK

How to build the apps you need fast.

salesforce

OVERVIEW

When things don't go according to plan, organizations must adapt quickly. Low-code app development and process automation empower you to do just that – to accelerate productivity, support your employees, and connect with your customers – even in times of change.

How to Innovate Fast with Automation

The Challenge: Thrive during times of uncertainty and change.

Every day, companies must respond to the increasing demand for technological change. New and unexpected challenges – like the shift to a remote workforce and at times an uncertain economic climate – add to that demand. These changes shine a light on problems that, in reality, already existed. Now, it's clearer than ever that the old ways of working must be replaced by new ways.

OLD WAY	NEW WAY
OLD WAY Disconnected systems and people	**NEW WAY** Integrated, collaborative systems let you work together, faster.
OLD WAY Broken, manual processes	**NEW WAY** Give employees tools to streamline processes and deliver value faster.
OLD WAY Fragmented customer service	**NEW WAY** Proactive customer service enables immediate, effective response.

Solution: Empower your organization to automate processes.

As businesses pivot to adapt, many are reimagining broken or lengthy processes in order to deliver value faster. One way to achieve this is to seek input from those closest to the work. Process automation allows you to eliminate manual or repetitive tasks wherever possible and stream-line workflows. The result is happier employees and higher business productivity – and a less strained IT department.

67%
of teams say improving their collaboration with other lines of business is a high priority.[*]

Make automation the heart of your business transformation.

Sometimes automating your processes to reduce friction can actually cause more friction if you don't have the right technology in place. You need tools that help map and design the process logic, integrate across systems, and of course, provide a great user experience for every stakeholder.

See how you can automate your manual processes.

Organizations need a powerful solution for building, managing, and running automated flows and processes. This is where Salesforce's automation tool, Flow Builder, comes in. Flow Builder combines point-and-click builders with reusable building blocks, so employees can build powerful automation with ease, fast.

Automation makes work easier and faster for everyone, from employees to end users. Here are just a few examples.

PROBLEM

When employees aren't sure which action to take, they stop work and spend time trying to find the answer.

SOLUTION

Einstein Next Best Action can provide recommendations for what workflow to kick off next.

PROBLEM

Some tasks such as submitting an inquiry may have lengthy, halting processes that lack clear next steps.

SOLUTION

Create guided visual forms to collect the right information from your end users that will automate follow up tasks.

PROBLEM

Employees must spend time managing data across systems, for example, when updating records.

SOLUTION

Create an integrated process across different external systems, which will update records across your organization for you.

PROBLEM

Sometimes processes just need a tweak, yet the fix requires heavy lifting by IT.

SOLUTION

Leverage prebuilt flow actions and automation components that act as building blocks. You can use them to enhance existing flows and deploy updates quickly.

PROBLEM

Repetitive tasks such as assigning work or sending notifications take little thought, yet eat up time that could be used for more valuable tasks.

SOLUTION

Automate these repetitive tasks by defining the triggering criteria to fire off a behind-the-scenes automation.

In empowering developers and admins to automate processes quickly, you not only improve experiences for everyone involved – you also increase collaboration between IT and other parts of the business. Doing so allows the business to focus on solving problems while tech professionals focus on innovating. And you help organizations transform quickly during times when doing so is essential.

ncino

nCino Successfully Responds to Crisis with Automation.

nCino, a worldwide leader in cloud banking, helps banks digitize and streamline processes like onboarding new customers, opening accounts, and processing loan applications. When the government responded to COVID-19 with the Paycheck Protection Program, banks had to figure out a way to process the enormous volume of SBA loans that came flooding in, to help businesses keep their workforces employed during the crisis.

It turns out, because nCino was built on the Salesforce Platform, this act merely required an extension of capabilities they'd always had.

How did they do it?

1. They used Salesforce tools like Flow and Communities to automate processes and handle the huge volume in loans.

2. Automation made it possible to handle tasks like collecting ID or payroll information without requiring in-person interaction.

3. They had the agility to change loan applications to collect new information in clicks, not code.

4. They had an infinite ability to scale to securely handle the far larger volume of loan applications.

Thanks to automation, financial institutions and customers were up and running in a matter of days, and people were able to get relief quickly during a time of great need.

The sooner you automate, the sooner business productivity will take off.

Regardless of the type of organization, thriving amid today's challenges means transforming – and automation is at the heart of transformation. Low-code automation solutions empower companies to work more efficiently than ever across tools and systems to meet new demands, bridge gaps, enable collaboration, and ensure that customers' digital experiences are seamless. Flow is just one of many powerful offerings within Salesforce Customer 360 that helps companies transform – as you'll learn in Section 2.

Resources

Lightning Flow Datasheet - sfdc.co/flowdatasheet

Flow Trailhead Guided Learning - sfdc.co/flowtrail

Flow Solutions on AppExchange - sfdc.co/flowappx

* "State of IT: Transformative Insights and Growing Trends from over 2,200 Global IT Trailblazers." Salesforce, 2017. https://c1.sfdcstatic.com/content/dam/web/en_us/www/images/form/pdf/pdf/2017-state-of-it-report-salesforce.pdf.

How to Empower Everyone to Build Dynamic Experiences

Build the apps that transform your organization.

Automation is one way to deliver value faster, increase innovation across your business, and thrive amid new challenges. But in today's world, it is all about providing a dynamic experience. Customers today have come to expect seamless and highly personalized experiences. Employees, too, want their workplace tech to meet the same high standards as their personal tech.

75%
of employees want their company to provide the same level of service through technology that they expect from consumer products. [*]

But building apps that both provide beautiful experiences and stand the test of time is hard. Hard-coded apps are hard to maintain, and even harder to pivot to meet constantly changing business demands. And the gap between IT and business combined with limited IT resources makes it difficult to create these apps as quickly as you need them. That's where a component-based app development architecture comes in.

How do I make my apps more dynamic?

Apps built using a component-based architecture are built with reusable elements of functionality, so you don't have to hard-code an entire experience. A component can be a standard UI element, an automated business process, or any custom extension. By breaking up experiences into modularized building blocks, component-based apps make it possible to create new experiences that meet the goals of the business fast, while being flexible enough to be modified for the future.

Consider component-based apps for your business.

Components provide such great potential because they are:

Reusable:

A component's functionality is self-contained and can be reused across multiple applications.

Extensible:

By breaking down hard-coded experiences into components, it's easy to extend the capability of your app by simply adding components for additional functionality, instead of rewriting.

Maintainable:

Compartmentalized, reusable blocks make it easy to be maintained by different developers and to debug.

Pluggable:

You can leverage prebuilt components made available by the community or prebuilt by developers.

If you know your business needs, you can build an app to meet them.

Salesforce's Customer 360 Platform leverages component-based architecture and provides all of the tools your organization needs to build mobile-ready, dynamic experiences fast. The tool that orchestrates it all is App Builder. App Builder lets admins and developers use drag-and-drop tools to create flexible, performant, secure, and scalable apps that are fully customized for your users and that solve business-critical problems.

Provide the right information at the right time.

Gaining access to the relevant information you need is critical to business success. App Builder makes it easy to create a custom experience by dragging and dropping components.

However, you may need to create multiple apps for different users in your company in order to surface the information they need, which can be hard to maintain.

This is where Dynamic Forms comes in. Dynamic Forms transform static data entry forms into dynamic experiences that are intuitive and easy to use. You can build responsive forms that update dynamically based on who the user is, the information presented on the page, and the device that they are using. Simply drag-and-drop fields and sections and configure visibility to suit the needs of every user.

82% of IT leaders say that business units are willing and ready to create apps using a low-code approach.**

Dynamic Actions further allow you to control the set of next steps, or actions, that are available in an experience. As with Dynamic Forms, you set the rules for when actions are shown based on field values or user information. This ensures that people only see actions relevant to them at the right time.

Extend and update your apps with components

Have a new automated process and need to add it to your app?

You can package new automation as a component, turn it into a flow component, and bring your core business process right in.

Don't want to let valuable customer data go to waste?

You can build smart apps with Einstein components that learn from data to provide even better experiences.

Have developer resources?

Extend your app with custom code that your developer built using Lightning Web Component. The best part is that the code is no longer hard-coded, and it can be reused

No developer? No worries.

There's a marketplace of packages containing preconfigured, ready-to-use, third-party components on AppExchange that work with App Builder to build apps with installable code.

About Salesforce Admin Amber Boaz

Amber has worked with Fortune 500 organizations, startups, nonprofits, and everything in between. She has been a Salesforce MVP since 2011 and is always looking for ways to help organizations create more engaging, streamlined processes.

Amber's Tips on Using Dynamic Forms:

- Improve user experience by surfacing critical information at the top of pages, eliminating the need for users to scroll to find what they need.

- Work smarter, not harder; build a form once, and then reuse it across pages and projects.

Benefits of Dynamic Forms:

- Build once, and then reuse and repurpose as needed with permissions intact.

- Improve user productivity by surfacing the right information at the right time.

- Simplify the workflow with only one page to manage.

Start building with components, and leave the code to us.

The best way to quickly build quality applications fast is to leverage a component-based architecture that changes how you build those apps, and how your customers use what you build. Drag-and-drop tools, dynamic forms, and other add-on components allow you to turn great ideas into apps, fast. And with that, your employees and customers can enjoy dynamic experiences that make their lives easier and their days more productive.

Resources

Customer 360 Platform Builders - sfdc.co/appbuilders

App Builder Trailhead Module - sfdc.co/appbuildertrail

AppExchange Components - sfdc.co/componentx

* "State of the Connected Customer: Insights from 6,700 Consumers and Business Buyers on the Intersection of Experience, Technology, and Trust." Salesforce Research, 2018. https://www.salesforce.com/content/dam/web/en_us/www/documents/e-books/state-of-the-connected-customer-report-second-edition2018.pdf.

** "Top Trends In Low-Code Development: Insights from IT Leaders into the Business Value of Low-Code Application Development." Salesforce Research, 2017. https://a.sfdcstatic.com/content/dam/www/ocms/assets/pdf/platform/salesforce-state-of-low-code-report.pdf.

3 How to Scale with Confidence

Build apps fast, building trust along the way.

As much as your organization needs to deliver new apps fast, you also need to uphold compliance and privacy standards. Trust, which encompasses compliance, governance, security, and privacy standards or regulations, is the foundation for building enterprise apps. An effective app development process requires:

Strict measures for guarding privacy

Permission sets to give the right people access

A secure development environment for testing

Governance processes and policies supported by tools that make app management easy

Embedding these security measures into your development process will help ensure the success of your new enterprise-scale apps.

Stay secure and compliant on your app-building platform.

Data privacy is one of the biggest challenges currently faced by companies, which work to protect their systems from cyberattacks and hackers. Meanwhile, customer data is more abundant than ever, and people are understandably concerned for their privacy. Protecting everyone's personal information is vital.

Organizations can ensure privacy by creating enterprise-grade apps on a platform with built-in, comprehensive security. Salesforce Customer 360 Platform enables you to build apps securely. It empowers business and IT to collaborate in the context of high availability, performance, security, and compliance because of the out-of-the-box security that comes standard.

Hide sensitive data and protect privacy.

With privacy top of mind for many consumers and institutions, organizations need to be sure sensitive data isn't seen and doesn't leave their platform.

It's easy to conceal sensitive data using Data Mask. With a few clicks, you can determine the data you want to mask – like email addresses or phone numbers – and you're done.

Give the right people acces with permission sets.

Your company needs an easier way to manage who has access to tools and features to do the work they need to do – and who doesn't.
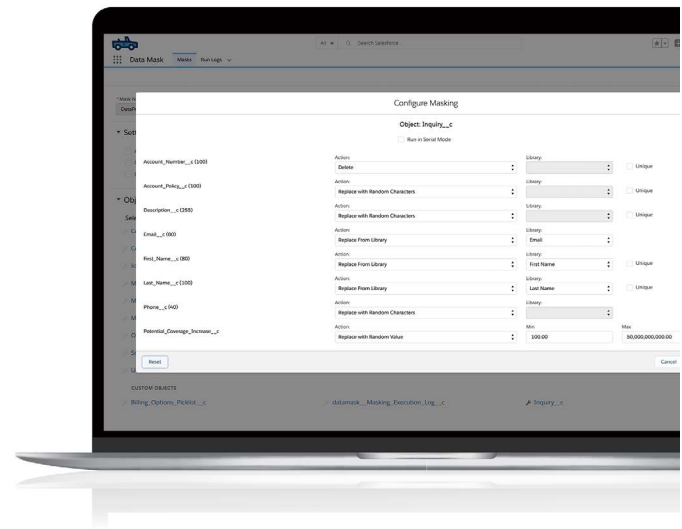
> **We had a well-established governance structure as it relates to IT environments and technology platforms with great process, tools, and security around all the controls. We extended those to additional constituents and still refine them over time.**
>
> **– Trenton Cycholl,** VP of Business Technology, Citrix Systems

Security and permissions are built into the Customer 360 Platform, and you can assign permission sets to grant access to logical groupings of users as needed, while restricting access for others.

Keep your development environment secure and compliant.

When your teams try to adapt to new feature requests or customer needs, they often start in development environments as part of the application lifecycle management (ALM) process. While these staging environments are a great place to test out new features, they are also the one place where security and protocols are often over-looked.

Built to empower everyone to build quickly and test safely, Salesforce staging environments allow you to democratize app development, increase productivity without breaking things, and build with trust. The secure, standards-based tools make managing code changes across environments – and throughout the release cycle – easy.

Governance is vital, so it should be built in.

Low-code platforms are appealing because they allow admins and developers to quickly push secure applications into production without impacting IT's enterprise projects. But to ensure data security and proper use of IT's assistance, you'll need a governance plan tailored to your organization.

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I used to see a lot of 'Let's move fast, let's try to be first in market;' whereas now I see companies putting strong governance into place for citizen development and needing leadership.

– Anna Rodriguez, Solution Principal, Slalom Consulting

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Use these tips to build a governance framework that works for you.

▶ Define a training and certification process for your developers and admins with opportunities to be [certified as experts](#) in anything from automating business processes to creating dashboards.

▶ Set up standard workflow protocols for low-code development: sandboxes, testing, validation, audit, integration, and deployment.

▶ Determine who the approvers are for each of the steps in the development cycle.

▶ Create an evaluation process for admitting projects into either the IT backlog or the low-code backlog.

▶ Create a standard set of requirements that apply to any project admitted into the low-code backlog to ensure each app aligns with compliance and security measures outlined in the governance policy.

▶ No need to reinvent the wheel. If you have a general governance model in place already, use that as a starting point, making adjustments as necessary to provide IT oversight or an approval workflow.

Build apps fast with a solid foundation of trust.

Your business needs to build quality apps fast – but without sacrificing trust. Building with low-code ensures your apps are ready when you and your customers need them. And using a platform with built-in privacy and governance measures to protect data, prevent unauthorized access, and keep sandboxes compliant makes all the difference to ensure your enterprise-scale apps, and your enterprise, go on to be successful.

Resources

[Data Mask Datasheet](#) - sfdc.co/datamasksheet

[Salesforce Environments Datasheet](#) - sfdc.co/sandboxsheet

[Permission Set Groups](#) - sfdc.co/permissions

The bottom line: Don't let code stand in the way of your agility.

Everyone knows that one thing we can all count on is change. Embrace change, and your business will make it through challenging times and emerge stronger than before. While today's challenges are increasingly complex, the solutions are actually simple. Process automation is essential, because you need to work as efficiently and effectively as possible. Smart and dynamic apps empower your team and increase business agility by allowing you to quickly access the information you need at the right time. And since trust is more important than ever, you can take every measure to preserve that trust as you scale with confidence.

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