



Diagramming for Admins

Delivering Well-Constructed and Thought-Out Architectural Diagrams

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- CERTIFIED**
Identity and Access Management Architect
- CERTIFIED**
Data Architect
- CERTIFIED**
Application Architect
- CERTIFIED**
Service Cloud Consultant
- CERTIFIED**
CPQ Specialist
- CERTIFIED**
Platform App Builder
- CERTIFIED**
Sharing and Visibility Designer
- CERTIFIED**
Development Lifecycle and Deployment Architect
- CERTIFIED**
Integration Architect
- CERTIFIED**
System Architect

What does it mean for Admins to deliver well-thought out and well-constructed diagrams?

5 Tips - from Planning to Design



But Why Diagrams?

1. Address Stakeholder Concerns

I want to know more about...

Stakeholders have “*concerns*” that they may request to be documented.

In other words, a stakeholder has an objective or an interest to learn more about the system.

2. Visual Communication

A picture is worth a 1000 words

Diagramming is the language for Administrators to

“*Clearly communicate [the what] from the point of view of [who]*”

using shared and commonly accepted visualizations.



Before You Put Pen-to-(virtual)Paper

Ask yourself these questions

Why?

Why do stakeholders need the diagram?

Who?

What actors are involved and what is the viewpoint of the diagram?

What?

What are you trying to diagram and at what level of detail?

How?

What type of diagram and tools are best suited for your purpose?

Tip 1: What's Your Viewpoint?

Deciding on the who and what

Clearly define the perspective of **who** and of **what** you will be documenting in the your diagram

Use **actors** to define the who, and confirm with your stakeholder(s) as to the what you are diagramming

Why? Setting the context helps **frame the stakeholder's concern(s)** that you are trying address in your diagram

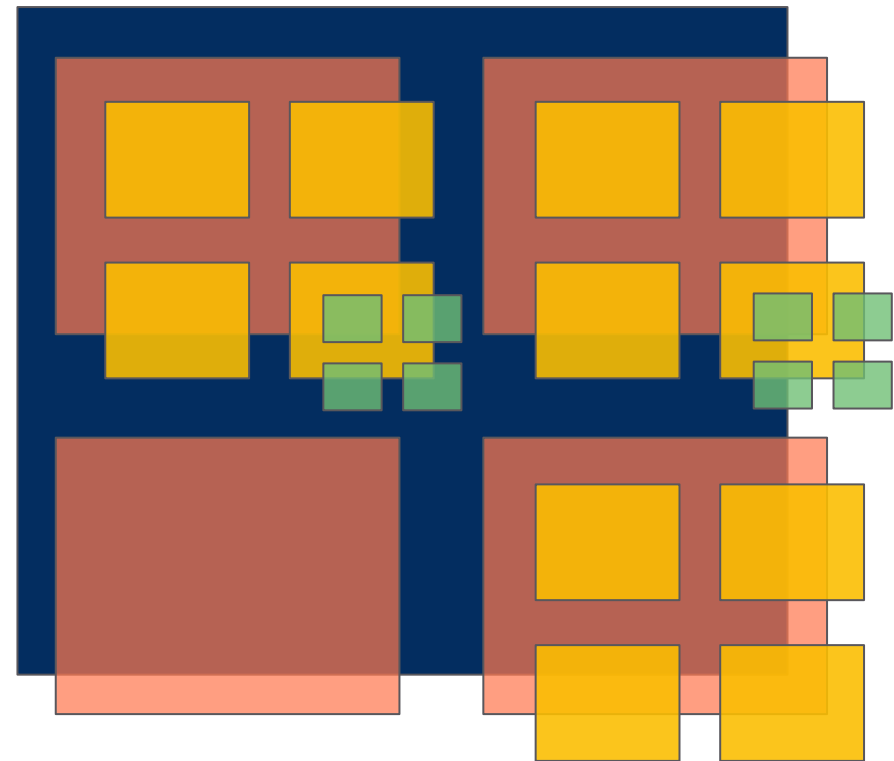


Tip 2: To What Level of Detail Should you Go?

Decide the level of detail that is necessary

Select a level of detail and stick with it:

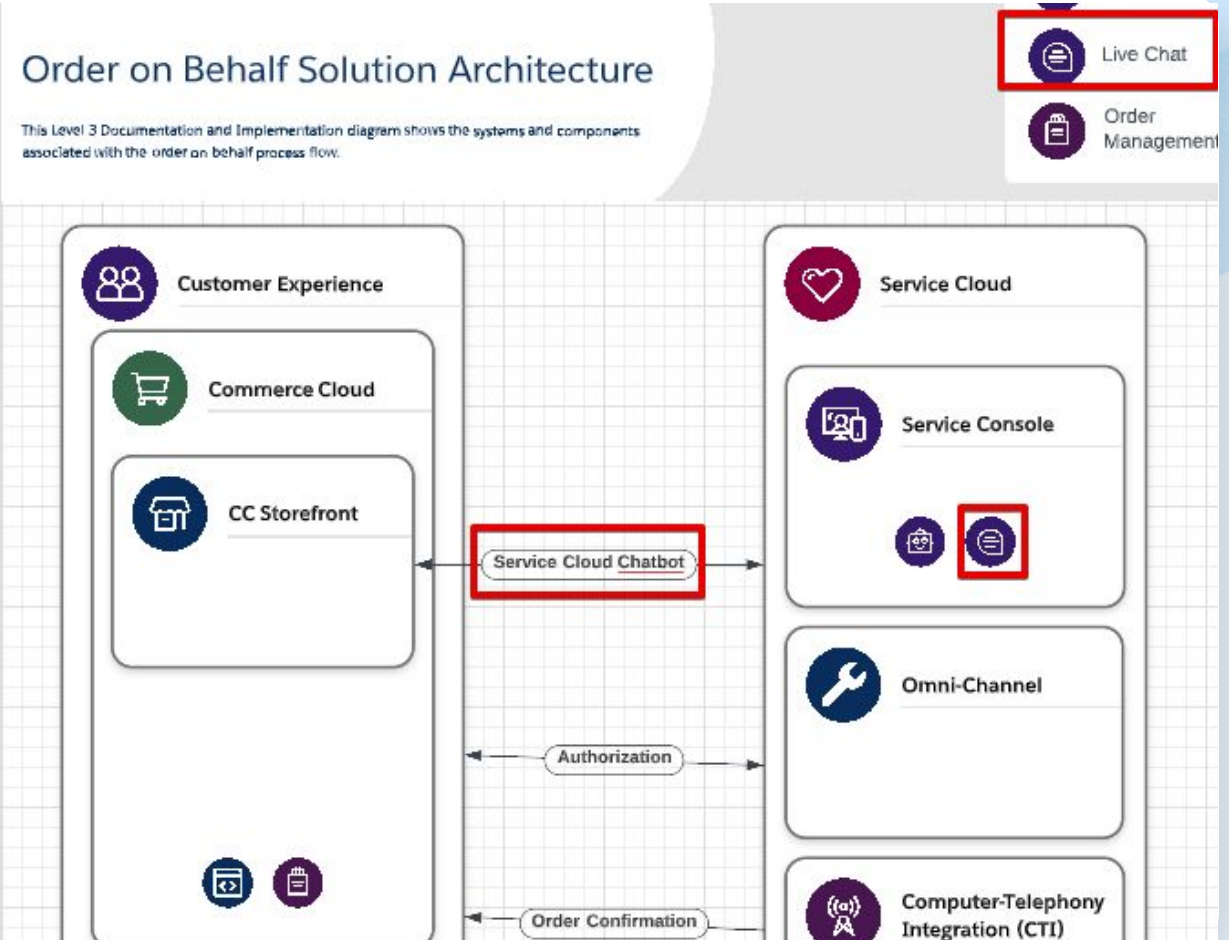
- **Level 1:** The highest level of detail, such as an overall System Landscape diagram
- **Level 2:** The capabilities of a particular system or technology
- **Level 3:** A process flow for a single capability
- **Level 4:** The lowest and most granular level of detail, such as an individual component or feature



Example of Mixing Levels



A Good Start: A simple, “Level 3” diagram for a Commerce implementation with a Service Cloud ChatBot

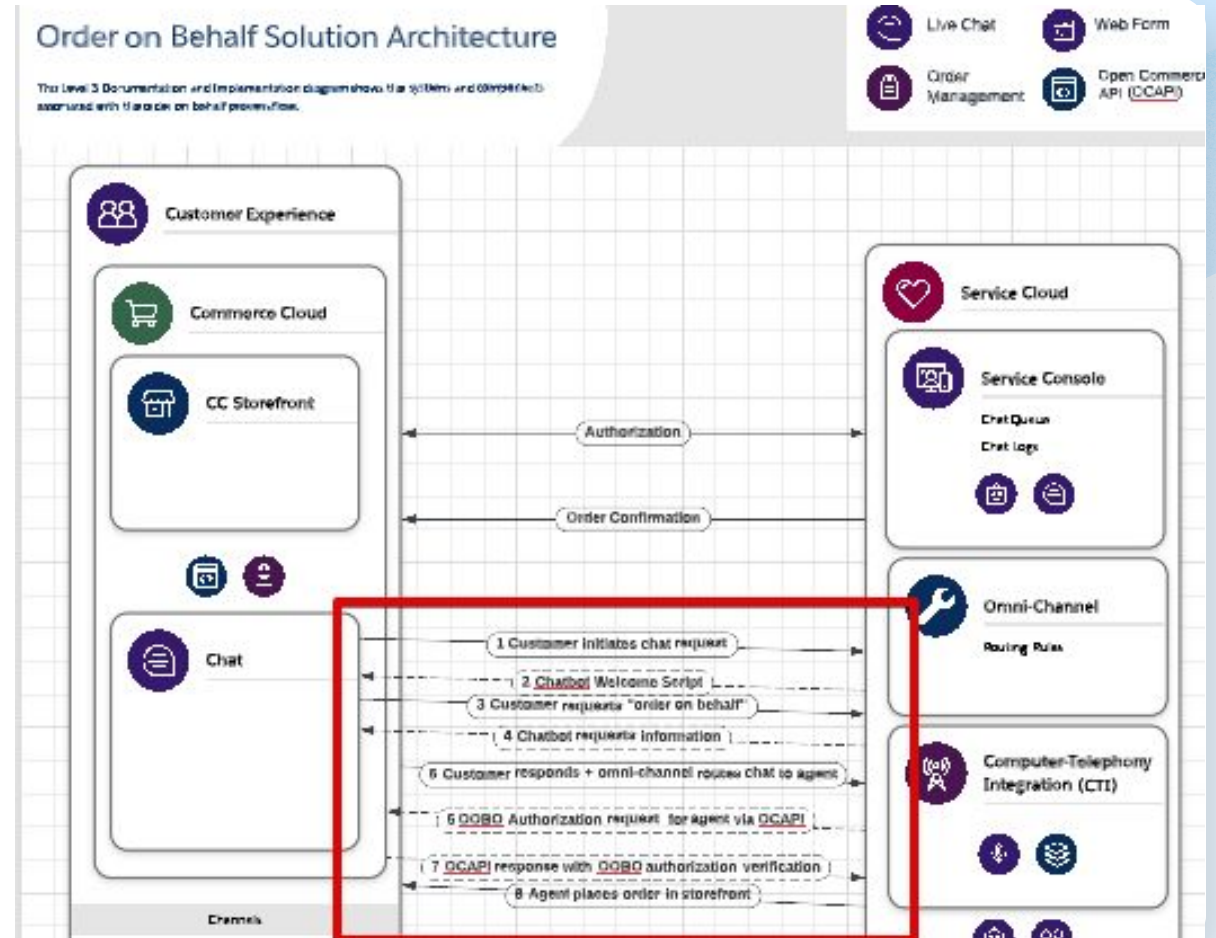


Example of Mixing Levels



A Messy Result: The result of mixing “Level 3” and “Level 4” diagram details about the ChatBot

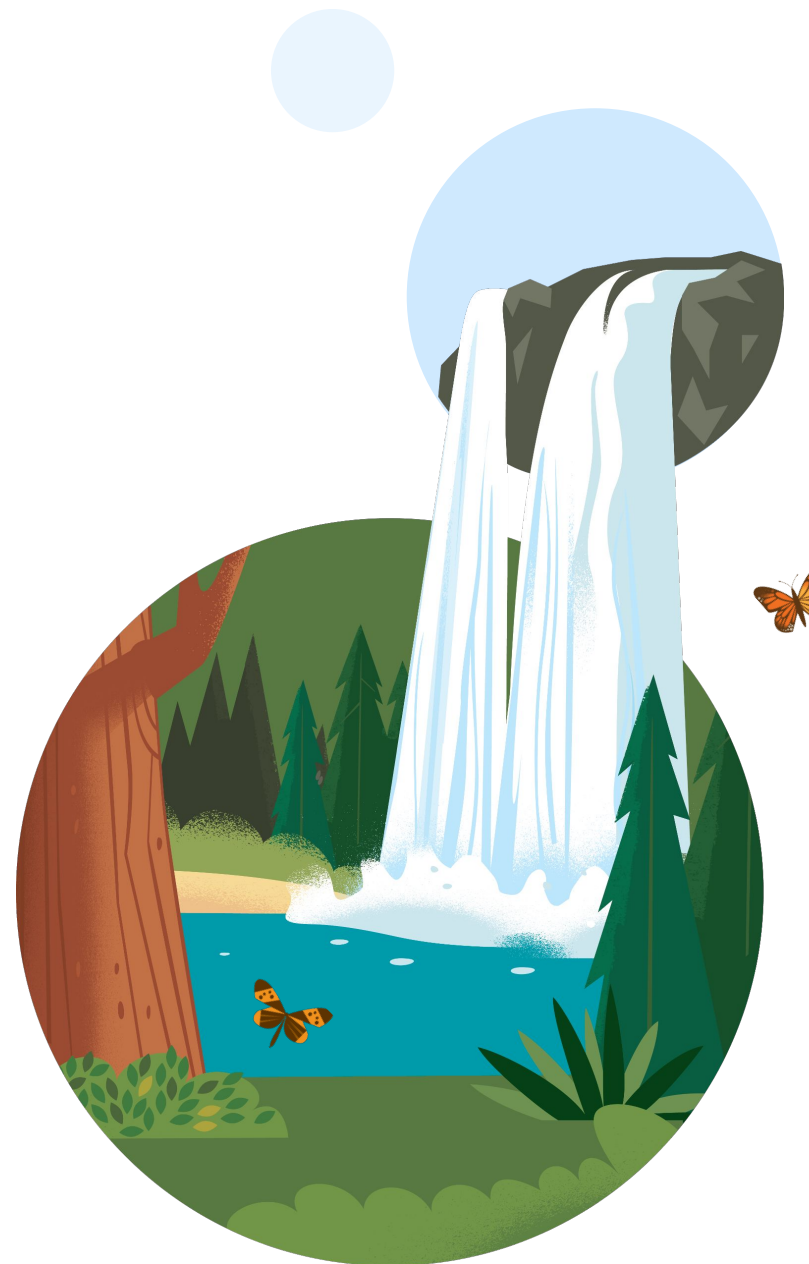
The diagram has lost its purpose and may no longer be clear to stakeholders



Tip 3: Stay on the Path

Follow the trail markers set by those before you.

There are plenty of resources and templates available to browse through and download!



Selecting The Right Diagram

It's not always easy

Before creating a new diagram, take some time to see if there is either:

1. An existing template or example stored within a shared repository by your company
2. A template may be found from one of the many catalogs available to you, including Salesforce!

Salesforce Diagramming Templates

Template Gallery
Find Salesforce data models and pre-built artifacts

<p>Data Model Sales Cloud This data model includes Accounts, Contacts, Opportunities, Leads, Campaigns, and other related objects provided with Sales Cloud. Read More</p>	<p>Data Model Product & Price Book This data model includes Product, Price Book, Quote, and other related objects provided with Sales Cloud. Read More</p>	<p>Data Model Service Cloud This data model includes Cases, Solutions, Entitlements, and other related objects for customer support provided with Service Cloud. Read More</p>	<p>Data Model Tasks & Events This data model includes Tasks, Events, and other related Platform activity objects. Read More</p>
<p>Data Model Retail Execution This data model includes Retail Stores, Visits, Promotions, and other related objects for retail execution provided with Consumer Goods Cloud. Read More</p>	<p>Data Model B2B Ad Sales This data model includes Ad Space, Media Channel, and other related objects for B2B ad sales provided with Media Cloud. Read More</p>	<p>Data Model Loyalty Programs This data model includes loyalty program objects provided with Loyalty Cloud. Read More</p>	<p>Data Model Loyalty Journals This data model includes loyalty journal objects provided with Loyalty Cloud. Read More</p>



Tip 4: Follow General Principles

Keep these in mind from start to finish

Self-Descriptive

Would stakeholders understand the diagram without you having to explain it to them?

A lot of tools have virtual “sticky notes” - don’t be afraid to add them to your beautiful diagram with helpful contextual information



Consistently Consistent

Is a box a box, or can it also represent a square?

Keep your diagrams consistent and simple with the help of templates and icon sets

Accuracy

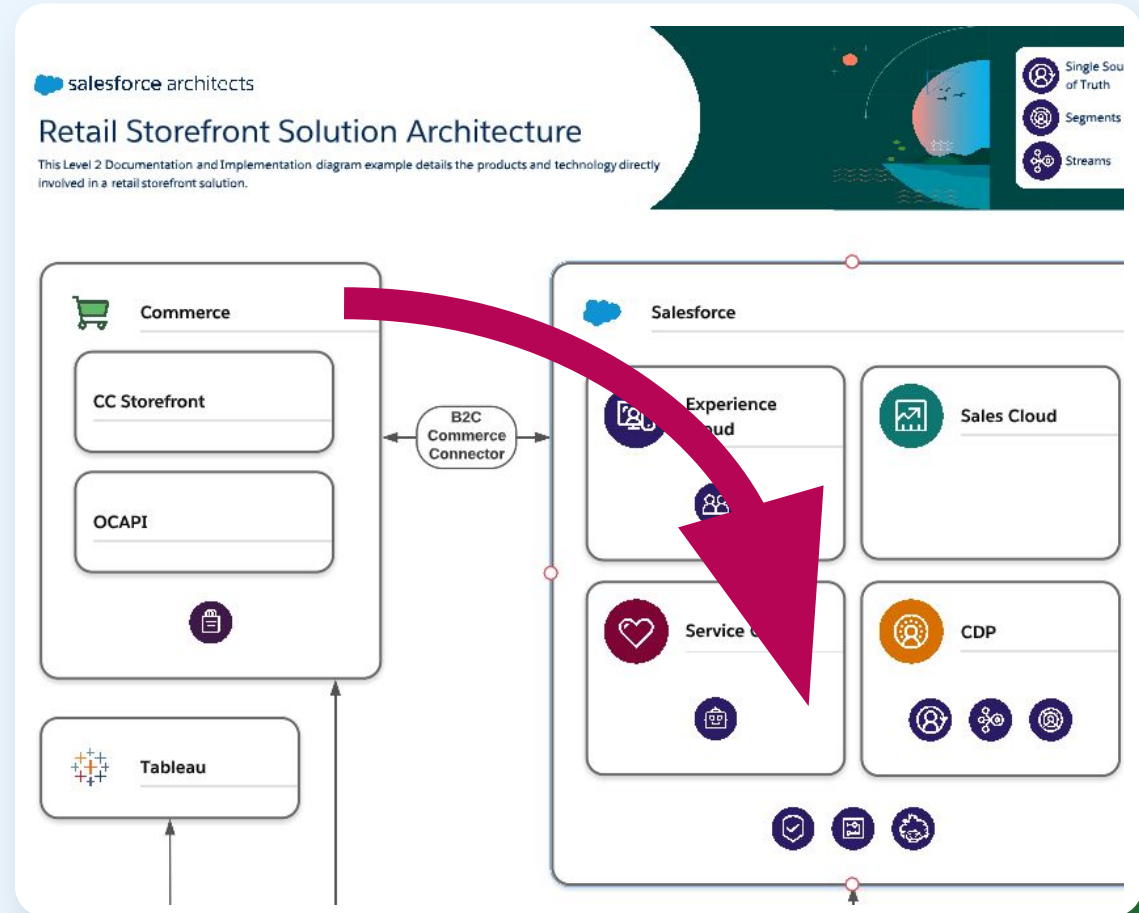
Is the diagram detailed and accurate such that it won’t confuse readers? Will it require constant revisions over time?

Use a versioning system along with reminders or clear instructions on when to revise the diagram

Tip 5: Building the Diagram

Part 1: Make it readable

- Reads left-to-right*, top-down
 - When reasonably possible
 - Includes logical start and end points
- Add Legends/Guidance
- Avoid mixing static and run-time elements
 - static: Data Models, System
 - run-time: Process Flows

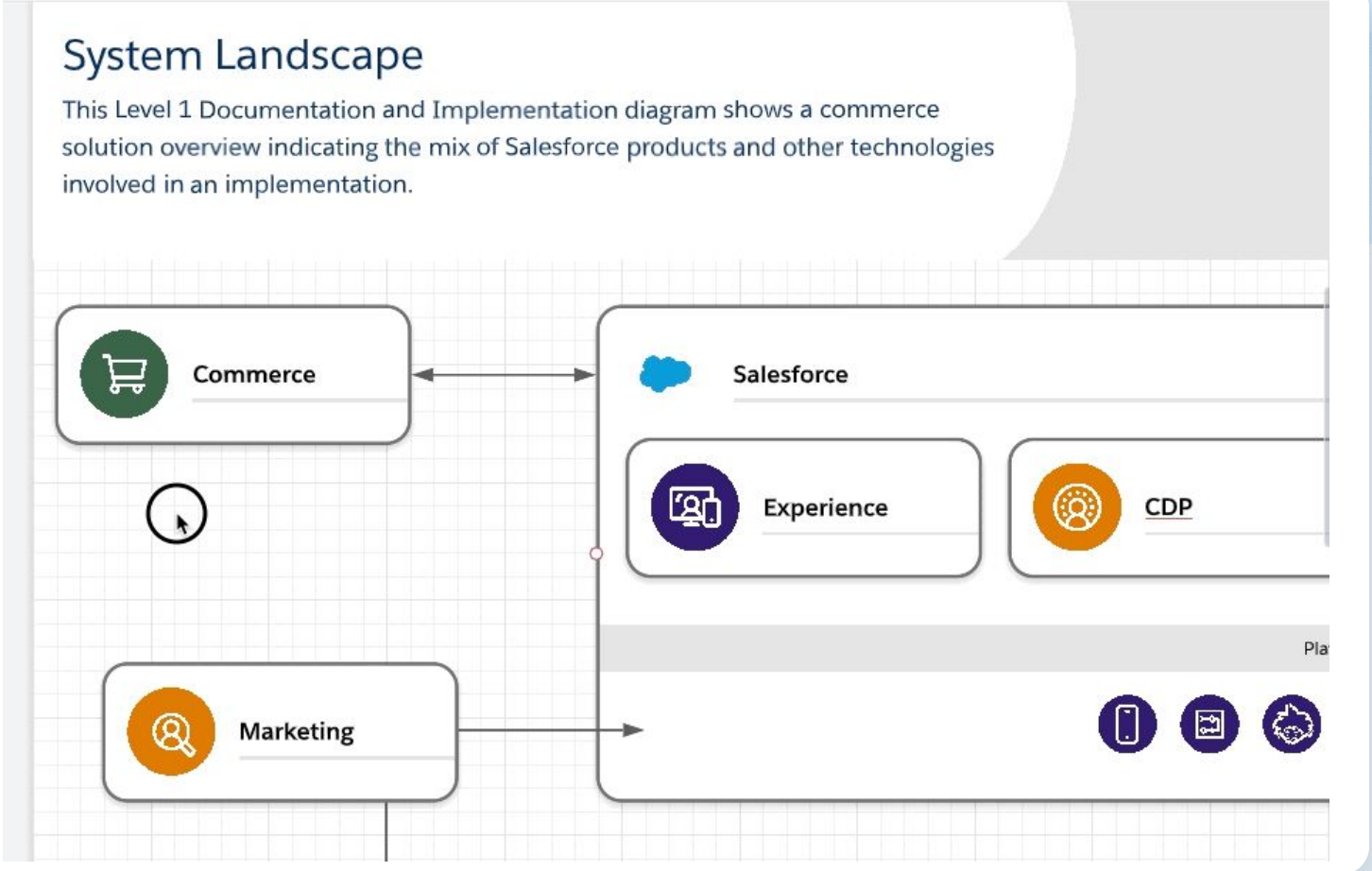


*Not all locales and languages are left-to-right. Know your stakeholders preferences.

Tip 5: Building the Diagram

Part 2: Use spacing and colors

- Use grid alignment
- Use only one font type
 - font-weight can be used to emphasize importance
- Use contrasting colors to make key elements “pop”
 - minimize the color palette
 - utilize whitespace

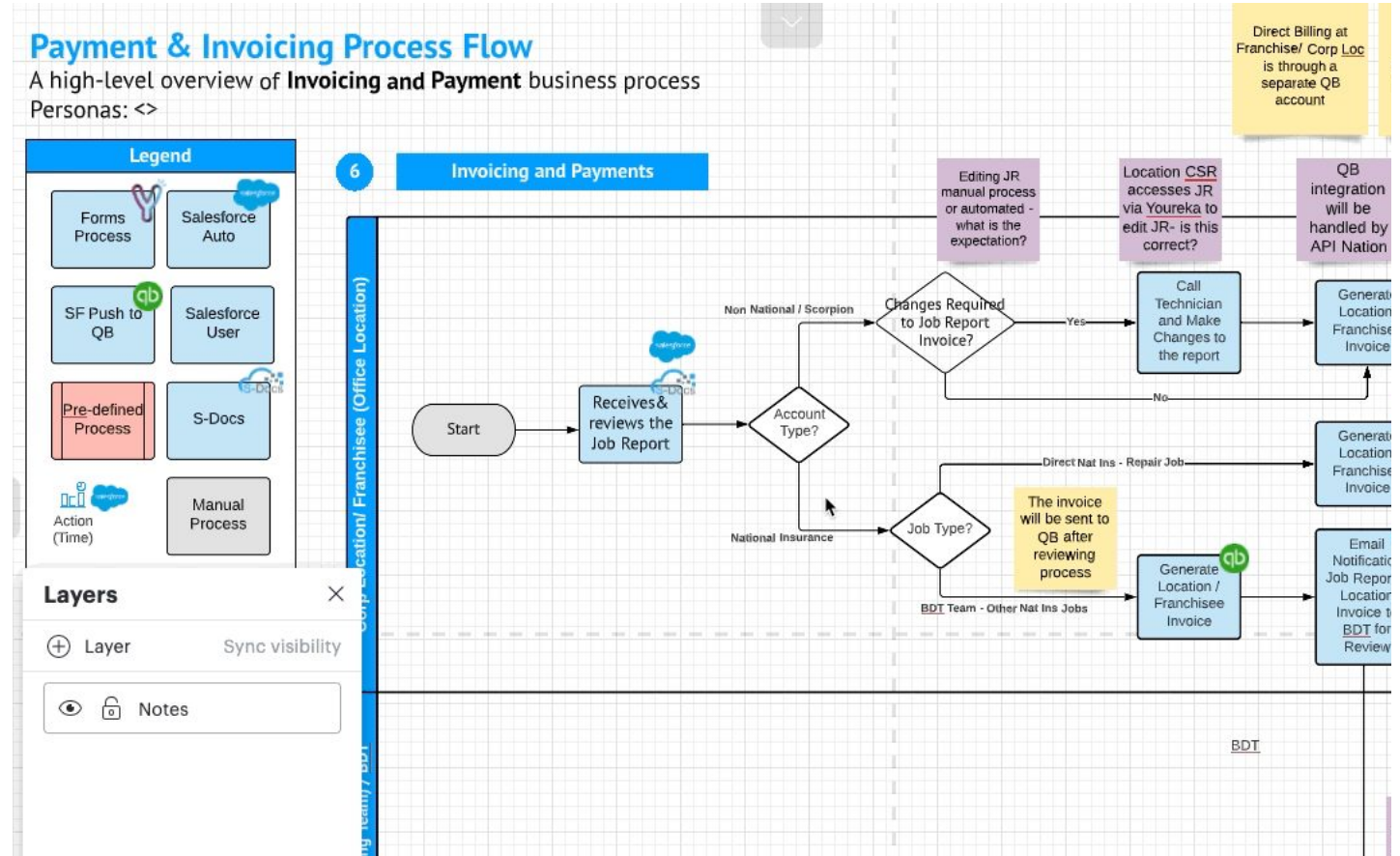


Tip 5: Building the Diagram

Part 3: Utilize layers and sub diagrams

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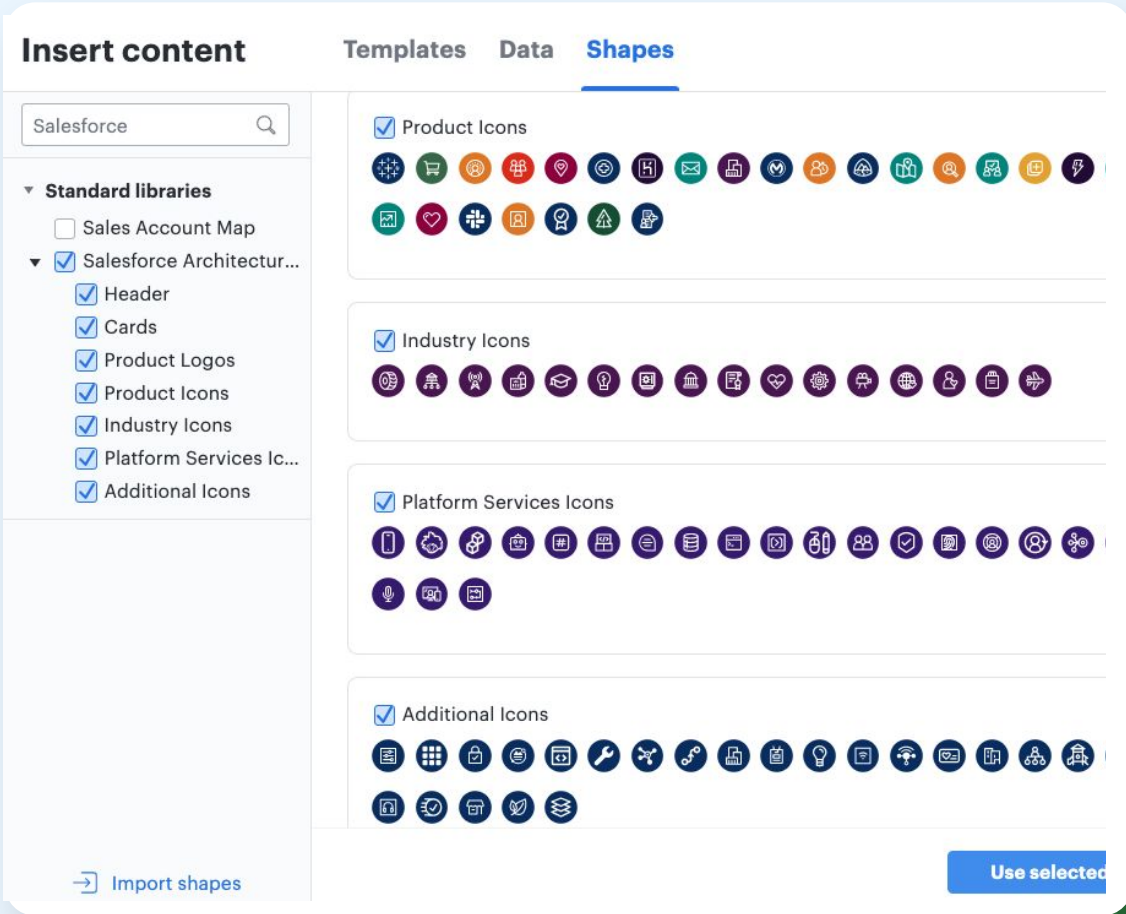
- Use layers to hide sticky notes and “extra” information
 - easily switch to a printable-version of your diagram
- Break complex diagrams into several smaller ones
 - improves maintenance and accuracy
 - try to fit the diagram(s) on “one page”



Tip 5: Building the Diagram

Part 4: Promote reusability

- Import icon sets created for Salesforce
- Create custom, reusable assets that can be shared with colleagues
- Maintain a structured folder system to share and collaborate with colleagues and stakeholders



Ready, Set, Go!

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Ready to start wowing Stakeholders with your diagrams?

Remember these tips when creating your new diagram:

1. **Select your viewpoint**
2. **Select a level of detail and stick with it!**
3. **Stay on the path by using existing templates**
4. **Ensure consistency, self-descriptiveness, and accuracy**
5. **Utilize tools that promote sharing and reusability**

Helpful Resources:

- [Salesforce Architect Diagram Templates](#)
- [Salesforce Trailmix for Diagramming](#)
- [Lucidchart](#) (Diagramming Tool)





Thank you

