



## SalesForce and Can Do integration

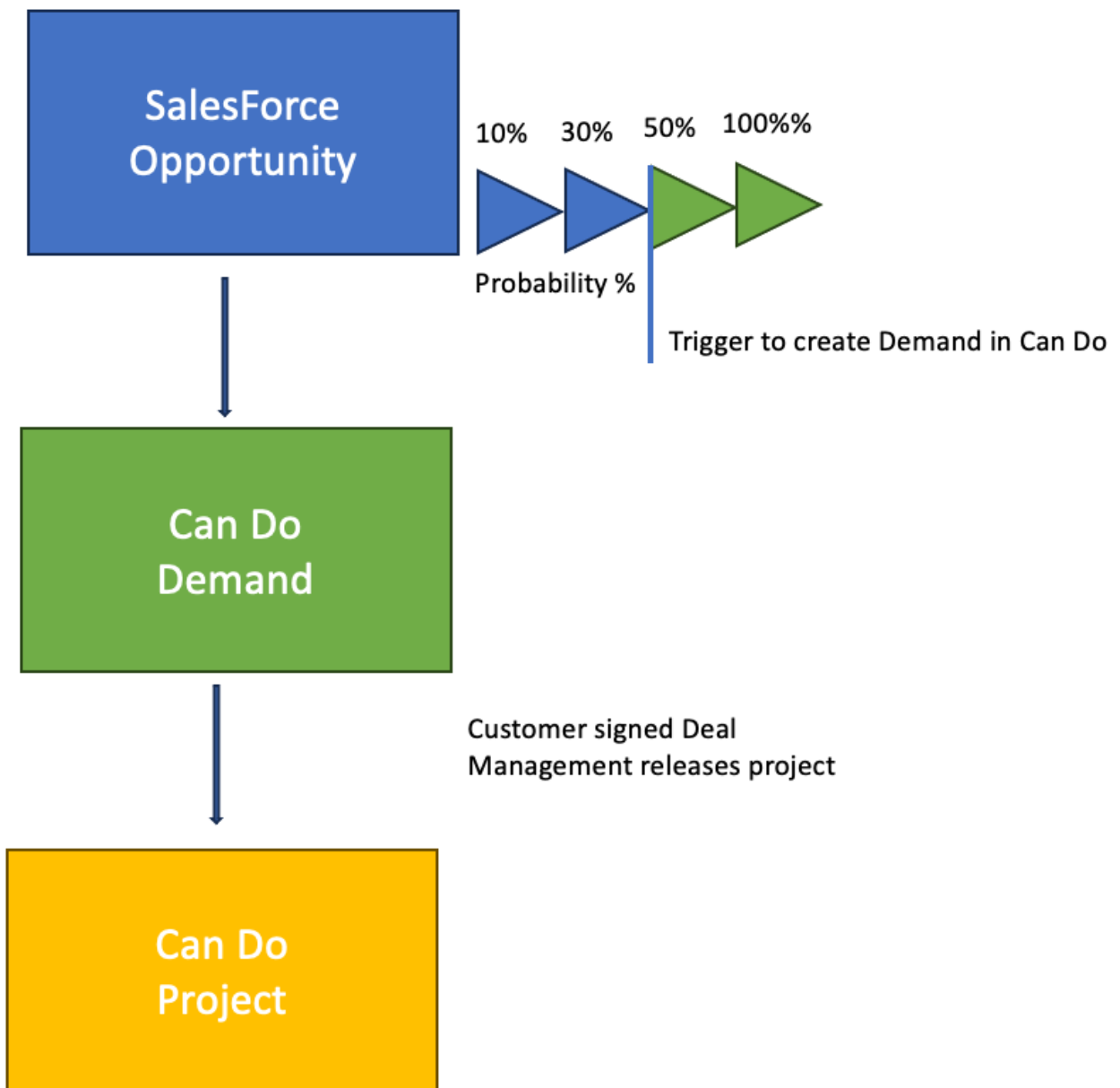
Can Do GmbH  
Implerstr. 26  
81371 München  
[www.can-do.de](http://www.can-do.de)

## 1. Starting position

New projects that originate from customer market activities must be simulated for feasibility within Can Dos.

This is to avoid making any deadlines or capacity promises to the Can Do customer's end customer, which can then not be met in reality.

Even if the simulation in Can Do results in capacity overloads for the project portfolio, the deal can be concluded with the end customer. This decision is subject to the business interests of the Can Do customer and may outweigh the risk outcome of the AI-based simulation.




## 2. Pipelines in Salesforce and Portfolios in Can Do

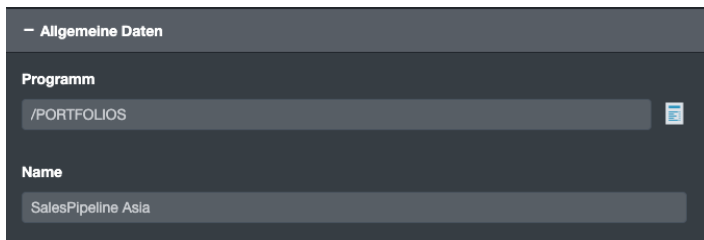
The various “opportunities” in Salesforce are organized in different “pipelines.” The pipelines are organized by “countries,” “industries,” or “customer types.” In principle, there can be any number of these pipelines.

In Can Do, the pipelines are transferred to various “portfolios” that correspond to the pipeline. **Opportunities in Salesforce become demands in Can Do.**

For example, all opportunities from the DACH region are stored in the “DACH region” Can Do portfolio. This is done automatically and is activated within the interface.

Close Date	30.03.2024
Stage	Value Proposition
Risk	100 %
CanDo Id	1203178-0.0-0-40
Budget	
Amount	250.000,00 €
Portfolio 	<a href="#">SalesPipeline Asia</a>

SalesForce: In Salesforce, the name of the portfolio is automatically taken from the pipeline



The screenshot shows a dark-themed interface with a section titled "Allgemeine Daten". Below this, there are two input fields. The first is labeled "Programm" and contains the text "/PORTFOLIOS". The second is labeled "Name" and contains the text "SalesPipeline Asia".

Can Do: [Mask in portfolio demand management](#)

## 3. Problem statement

Projects that are in an initial phase cannot usually be predicted with the same precision as internal or ongoing projects. That is why conventional planning systems on the market are failing to meet this challenge. Thanks to some innovations, Can Do is able to predict the effects much better than usual systems.

### 3.1 Inaccurate information

In the sales process, the exact start and duration of new projects are often unknown. Here, start dates are assumed in quarters and time periods in rough months. Since Salesforce is not able to work with inaccurate appointments like Can Do, Salesforce configures so-called CustomFields in which the sales representative can enter, for example, “second quarter 2024.” This text (string) is then used later in Can Do as a basis for calculation; the same applies for the duration of the project.

This is not absolutely necessary; the exact (accepted) dates and duration can also be transmitted.

Can Do also supports the difference between the desired start (by the end customer) and the planned start in the portfolio. This second start is determined by portfolio simulation in Can Do and returned to Salesforce. In this way, the sales representative recognizes the difference between his customer's request and the possible start.

Zeit	
Desired Start	01.04.2024
Desired End	30.12.2024
Desired Duration	273
Planned Start	01.05.2024
Planned End	30.01.2025
Planned_Duration	274

SalesForce: Preferred date and result from portfolio management in Can Do

### 3.2 Resources, Departments, and Skills

SalesForce cannot calculate capacities and therefore no risk of overload.

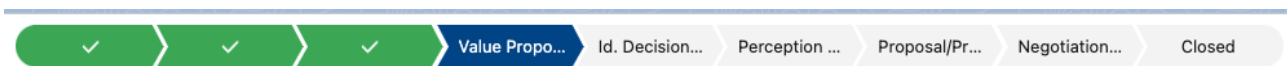
The salesperson can specify the people, skills, or departments they need in SalesForce. This information is automatically transferred to Can Do and checked there with the availabilities as part of a simulation. The potential risk is then displayed in SalesForce.

Resources (3+)		
Virtuelle Ressource (Can Do Testfirma; Java Skript, Consulting)		
Risk:	50 %	
Can Do Id:	1203651-0.0-0-28	
Virtuelle Ressource (Can Do Testfirma; Java Skript, Consulting)		
Risk:	50 %	
Can Do Id:	1203651-0.0-0-28	
Virtuelle Ressource (Prozessredesign)		
Risk:	0 %	
Can Do Id:	1203644-0.0-0-28	
<a href="#">View All</a>		

SalesForce: It looks like SalesForce could do capacity and skill management. In reality, the risks are calculated by Can Do

### 3.3 Probability of occurrence

The opportunity in SalesForce has a probability of whether the deal will be completed or not. This percentage depends on the opportunity level in SalesForce (Sales Stage). The further the opportunity progresses through these levels, the higher the probability becomes.

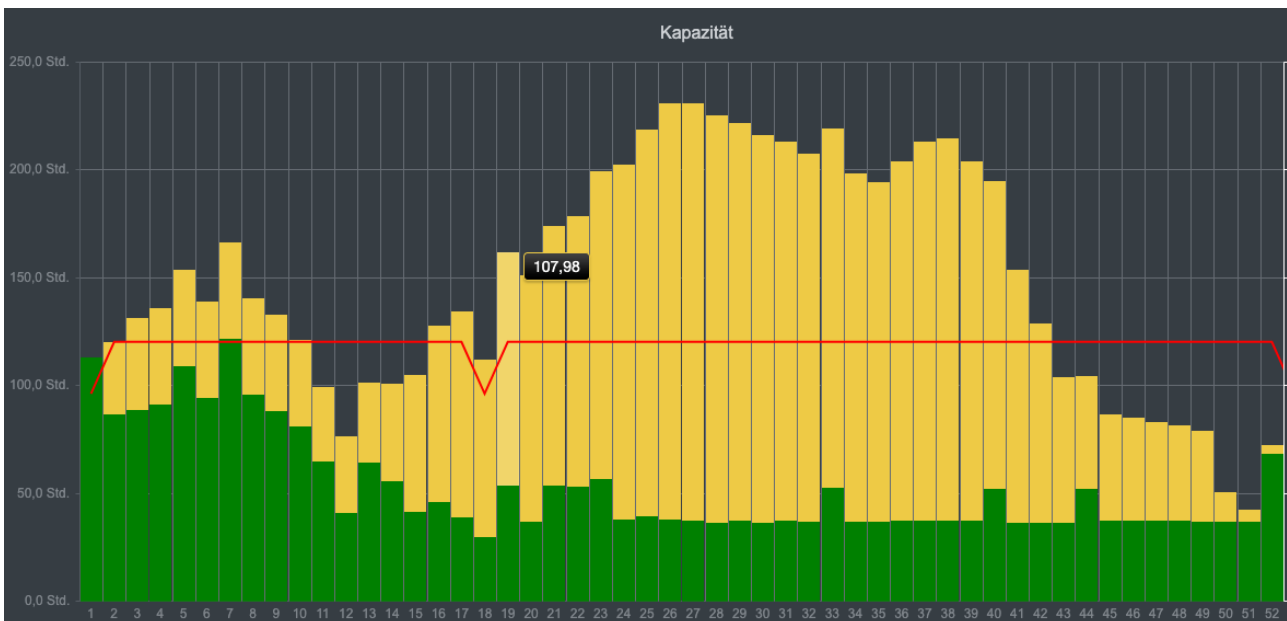


SalesForce: Sales stages in SalesForce, the farther to the right the opportunity is, the higher is the probability that the deal and therefore the project will occur.

The Can Do algorithms also know this field and take this into account when simulating the expected capacity. Every change in an opportunity in SalesForce is transferred to Can Do in real time and triggers a new simulation. The higher the probability in Can Do, the higher the probability that an overload will occur.

NAME	SCORE	EINTRITTSWAHRSC...	DURCHSCHN. GESAM...
Snapshot and OKR Chart Race	-10.000,00	90%	0%
Gast Token-Zugang für Support zu Kunden-Cloud	4.000,00	25%	100%
JIRA-Interface 3rd Generation	0,00	50%	25%
Anbindung Office365	20.000,00	50%	0%
DSGVO Apps	-15.000,00	33%	100%
Licence Management Stage 1	50.000,00	50%	70%

Can Do: The third column shows the probability of Salesforce occurring in Can Do. The last column shows the probability of a risk (capacity overload).



Can Do: Project Manager skill/role capacity. The green bars represent the actual planned workload, the yellow bars show the opportunities from Salesforce

It is therefore possible that the company's capacities are no longer sufficient even though no new opportunity has been created in Salesforce, but that the existing opportunities are developing better, increasing their probability and thus leading to warnings in Can Do.

#### 4. Parameterization

In addition to the basic settings, which can be made independently of each other in both systems, Salesforce and Can Do, it is possible to configure the interface yourself. For example, it can be decided whether the sales representative can even enter the required skills or teams in Salesforce. In addition, other fields from Salesforce can be transferred to the Can Do Data Dictionary. Since any number of fields of various types can

be defined by customers themselves in Can Do, it is also possible to transfer additional information from Salesforce that is necessary for project and department management. As a result, project managers, for example, do not need a Salesforce license; they can retrieve the necessary data from Salesforce in Can Do.

## 5. Technical implementation

Since both systems have extensive REST APIs, communication is bidirectional in real time. Parameterization is carried out in Salesforce in a configuration area and in Can Do in a config app.

The interface has been prototyped and runs quickly and stably. Following this feasibility study, the interface will be fully integrated into the Can Do standard in the second half of 2024. The implementation takes place as part of a customer rollout, which only progresses from the process to the point where the connection makes sense.

## 6. Benefits of Salesforce and Can Do Integration

- *Reliable statements from sales to their customers based on realistic and reliable capacity simulations in Can Do*
- *Visible portfolio of all future projects for operational management on the Can Do side*
- *Avoiding double entry and inconsistencies*
- *Complete digital illustration of the sales and implementation process within a company.*