



PSO Best Practices for Service Delivery Partners



Introduction

This enablement resource shares Dell Boomi best practices for partner service delivery teams in support of successful delivery practices. Areas covered within this guide include Boomi's Professional Service Organization (PSO) best practices including:

- Architecture & Design
- Delivery
- Support

It is recommended that all Boomi implementation partners review this guide and follow the guided instructions for the best possible customer outcomes.

Recommended Team Structure and Required Training

Roles	Training	Resources
PROJECT MANAGER	Boomi Essentials Training	Boomi Essentials Training
ARCHITECT	Boomi Professional Architect Certification	Professional Architect Certification
IMPLEMENTATION TEAM	Boomi Professional Developer Certification	Professional Developer Certification

Evaluating a Project

Before embarking on any new service delivery project, it's important to identify who your team members are, their role within the project and available resources. Below is a convenient reference table to guide you through project/solution scoping.

Project Scoping

Topic	Who	Resources
DEFINE PROJECT	Sales, Project Manager	AtomSphere Client Engagement Best Practices Technical Enablement Guide Boomi Platform Consulting Matrix Project Manager should utilize their internal best practices for professional service projects.
PROJECT ARCHITECTURE AND DESIGN	Project Manager, Architect	Technical Architecture Discovery Workbook Technical Enablement Guide Solutions and Architecture Toolbox
PROJECT DELIVERY	Project Manager, Implementation Team	Atomsphere Development Best Practices Technical Enablement Guide Developer Toolbox Implementation Toolbox
PROJECT SUPPORT	Partner	Technical Enablement Guide Product Support Toolbox

If you should need support with project scoping, reach out to [Josh Clark, Boomi PSO](#) for related details and costs.

PHASE 1: Kicking Off A NEW Project

Your first step when building a Dell Boomi solution is, naturally, to understand your customer's unique business and IT needs, and how these requirements will lay the groundwork for your solution. On the next few pages, we'll outline the general methodology to follow when assessing a customer's needs, potential pitfalls that could derail the process, and best practices that can make this phase run as smoothly and efficiently as possible

Project Architecture and Design

The Architecture Process

The following steps will help you build an accurate, actionable picture of your customers' architecture and design considerations:

Understand the use case: To start, you want to build an understanding of the customer's use case. Knowing who they are, how they operate, and where they sit in the marketplace will add a lot of helpful context to the goals that brought them to Dell Boomi in the first place. And be sure to start at the business level—not IT—and dig down from there.

Ask plenty of questions: To add to your understanding of the customer's use case, be sure to ask about:

- Their infrastructure—if it's on-prem, cloud, or hybrid today, and what they'll be moving to tomorrow
- Their application architecture, including their current run points—app-to-app, app-to-partner, etc.—and how these may evolve
- Their approach to security as it relates to governance, protocols, mechanisms, endpoints, etc.
- Their communications structures—whether it's handled via EDI or Web Services, and delivered in real time or as a batch
- Their plans for incorporating such emerging technologies as the IoT, blockchain, etc.

Build a discovery document: To supplement the information you gather during the initial conversations with your customer, consider putting together a document that notes all relevant endpoints, interfaces, and integrations, as well as the purpose each serves today, the business functions that currently happen between them, and what will be added in the future. This is critical to filling in the details around the customer's current-state architecture. And, it can position you as an expert partner who deserves a seat at the table during planning sessions.

PHASE 1: Kicking Off A NEW Project (cont'd)

Pitfalls to Avoid

As you build a picture of your customer's architecture and design needs, it's common for a few things to slip between the cracks. Emphasizing the following will help you avoid common issues that could drag out or add confusion into the process:

Prioritize developer training: Dell Boomi's point-and-click development environment can be intimidating for on-site developers who aren't accustomed to working in this way. And this intimidation can quickly turn into confusion and, ultimately, delays. So, you'll want to encourage your customer's development team to go through our developer certification program ahead of their implementation. Doing this will help to ensure they have a formal mastery of the environment well ahead of their solution's go-live date.

Speak the customer's language: With so much to consider as you begin architecting your customer's solution, it's easy to overlook simple things like standards, procedures, and naming conventions. But if you don't accurately reflect these in the plans you're building, it can lead to misunderstandings, delays, and rework. So, make sure you reflect your customer's language in the discussions you have and the materials you put together.

Test early and often: The last thing you or your customer want is an unfortunate surprise once the solution goes into production. So, be sure run plenty of load and performance tests—and seek out hidden availability and DR concerns— well ahead of the customer's go-live date. The more you're able to uncover, account for, and address ahead of time, the happier your customer will be.

Architecture Best Practices

To ensure the architecture and design phase progresses as intended, we encourage you to keep the following best-practice guidance top of mind:

Conduct numerous interviews: The more individuals you talk to, the clearer the picture of your customer's architecture and design needs will become. Spend a few days meeting with key contacts from all sides of the organization to understand the environment, the use case, what they're looking to achieve, etc. And be sure to include business-level contacts in your discussions. Incorporating their feedback into your plans is vital to delivering a solution that meets all of your customer's needs.

Formalize your discovery document: The discovery document you'll build about the customer's use case should include as much detail as possible. It's the template that will guide much of your work with the customer, so the more comprehensive you can make it, the less re-interviewing your technical team will need to do when creating a detailed design plan.

Consider the future state: Make sure to look at things your customer wants to solve for tomorrow, as well as today. Keeping one eye focused on the future state can add further color to the use case you're architecting for, while helping you build a solution that delivers lasting value to the customer's organization.

PHASE 2: Project Delivery

The Implementation Process

The points below outline the basic steps to follow as you begin implementing your customer's solution:

Iterate continuously: You want the implementation process to feel as agile as possible. So, make sure to spend time discussing things like integrations and UIs with multiple stakeholders, then routinely update and tweak your plans as more input is received. You want to pull as many thoughts and ideas together as you can, as this will help to bridge the expectations that were discussed as part of the sale with what needs to happen during the actual implementation.

Define the MVP: Your stakeholder conversations should help you get clarity around the minimum viable product (MVP) the customer needs to satisfy their internal and external requirements. This will become the baseline expectation driving the entire implementation process. To accurately define it, be sure to focus on the outcomes your customer is looking to achieve, as this will help you determine the processes, workflows, etc. that will interact with and be influenced by the Dell Boomi Products you'll be putting in place.

Establish a delivery cadence: Once your general implementation approach has been reviewed and approved, it's time to set up a sequence for delivering the solution. We recommend following a series of two-week sprints. Every two weeks, you'll present your work back to the customer's key stakeholders, review progress, discuss dependencies, tweak your approach as needed, and then move to the next step once the current work has been approved.

Pitfalls to Avoid

There can be a lot of moving parts to manage during an implementation, and confusion or a slip up in any one area could grind your progress to a halt. To minimize the negative impact of unforeseen changes and shifting needs, keep the following in mind:

Don't say "no," say "not now": Customers often escalate implementation issues because they're led to believe what they're asking for can't be done. That's very rarely the case. The Dell Boomi Products are extensible by nature, so customization is almost always an option. If it's not available today, it can be created and put in place to help your customer achieve the outcomes they defined at the start of the process. Just be sure to consider the customer's urgency when requesting a customization.

Be transparent: If a customer is requesting custom development work, make sure you lay out exactly what it will take to create it in terms of time, cost, etc. You want to avoid surprises here wherever possible. And be sure you draw a very clear connection between the additional time and cost you're asking for, and the value the customer will receive in the end.

Ask for help: Customers wanting more is a good thing. But handling these requests can sometimes stretch your resources thin. That's why we encourage you to reach out to our network of Partners and contractors—they can provide the extra support you need to handle additional requests and keep delivering value to your customers.

PHASE 2: Project Delivery (cont'd)

Implementation Best Practices

To help your implementation projects deliver value to your customers every step of the way, be sure to make these tips a core aspect of your day-to-day:

Think about reusability: Instead of viewing your efforts as single-threaded and linear, press yourself to consider which aspects of the MVP could be repurposed elsewhere in the project. Whether it's a process, organization, naming convention, or something else entirely, reuse can go a long way towards helping you deliver the outcomes your customer expects in less time and with less rework along the way.

Be detail oriented: As you discuss implementation needs with stakeholders and begin factoring these into the MVP, be sure you're capturing as many details as possible. And don't be afraid to press your customer contacts for additional information if you feel you need it. The more specifics you can capture in the early going, the fewer surprises you'll encounter midstream.

Take the long view: While the individual steps, processes, and challenges you address during the implementation are important, it's best to think of them not as one-off activities but as pieces contributing to a larger vision. And if your customer doesn't have that broader vision in mind, you should help them build and execute on it. After all, you want this to be a multi-year relationship, so the sooner you can get your customer thinking in those terms, the better.

PHASE 3: Project Support

The Support Process

Eventually, there will come a time when you need to help your customer handle a support issue. And whether it's a simple fix or a complex problem, the information on the following pages will help you understand how to report and escalate issues, anticipate and avoid friction, and contribute to a seamless support experience.

As the middle layer between your customer and internal Dell Boomi resources, you'll play an integral role in initiating and facilitating the support process. The guidance below will help you understand the Dell Boomi support process as a whole, and how you'll participate in it:

Learn the Service Description: Our [Service Description](#) includes language that describes our support levels— Standard, Premier, and Premier Plus— how we define the severity of cases, and the response times per support tier and severity level. Understanding this information at a high level is critical to knowing how a support engagement with Dell Boomi will unfold.

Know your support level: As a Dell Boomi Partner, you automatically have Premier support coverage at no extra charge. It's important to familiarize yourself with the "Premier" sections of the Service Description, as it will allow you to set clear expectations around coverage, response times, resource availability, etc. before you enter any cases on behalf of your customer.

Understand next steps: Once you enter a case, it will be picked up by a Dell Boomi Support Engineer. It's expected that the engineer will work through your customer's issue until it reaches as a satisfactory resolution. The engineer will "swarm" with the appropriate teams internally to ensure the case is resolved in a timely manner. We encourage you to use the existing phone and chat options to escalate cases that need additional attention. Either way, a ticket is closed once a fix is provided and the customer confirms it solved the issue.

Pitfalls to Avoid

Every support request—no matter how we rate its severity—is critical to your customer. To avoid instances where the customer thinks the issue isn't being treated with the urgency it deserves, or a fix is taking too long to be delivered, keep the following in mind:

Increase your technical aptitude: Serving as your customer's first line of support can be a helpful way to understand, diagnose, and potentially even solve an issue before bringing it to our support team. To make your assistance as impactful and efficient as possible, though, you need strong technical aptitude. With the help of our troubleshooting documents, reference guides, forum posts, and Knowledge Center articles, you'll increase your technical savvy around all things Dell Boomi, helping you become a valued support resource for your customer.

Communicate constantly: Keeping customers updated throughout every step of the support process is critical to making them feel as though their issue is as important to you as it is them. So, make a practice of letting them know the status of the request, what's happening next, and when. This same level of communication is just as crucial for the Dell Boomi support team. You want to make sure you're keeping your support contacts apprised of any pressing questions or concerns your customer may have, so we can address them as quickly as possible.

Encourage self-diagnosis: Sometimes, a little self-diagnosis can go a long way. So you should encourage your customers to use the reference guides to learn about and explore potential solutions to their problem. Even if they don't solve it, the effort can help guide the support team and lead to a quicker fix. You customers should also refer to the [Dell Boomi status](#) page to see if the issue they're experiencing is a broader problem that's affecting multiple users.

PHASE 3: Project Support (cont'd)

Support Best Practices

You can use the following best-practice guidance to help your customer navigate the support experience with speed and satisfaction:

Be collaborative: Our Partners live up to their names when it comes to support. We want our support team to work closely with you to understand, diagnose, and ultimately solve the customer's issue, so do your part to contribute wherever possible. After all, keeping our customers happy and successful is in everyone's best interest.

Contribute to the case: We view each support case as the single source of truth about the customer's issue. So as you're discussing a problem with your customer, take note of any key details you hear and pass them along to your support contacts. This information will be helpful as we update the case based on our own conversations with the customer, internal discussions, etc.

Focus on the fix: Ultimately, solving the customer's problem is what matters most. Don't let any confusion, missteps, or friction that may arise as we work to through the issue distract you from the ultimate goal of solving the problem.

Boomi Platform Consulting Matrix

Boomi Platform Consulting Matrix - Time and Material estimation for Consulting Development/Configuration and Testing/UAT activities		
Complexity	Definition	Consulting Allocation
SIMPLE	No advanced workflow, caching or lookups. Straight forward mapping (A-to-B).	28 hrs./process
MODERATE	Process workflow requires multiple steps. May include advanced features. Mapping functions, multi-step, third party application look-ups.	40hrs./process
COMPLEX	Requires multiple processes and/or mappings to achieve integration goals. Includes complex workflow requirements. Conditional Mappings with status checks. Tricky End-point configuration.	56hrs./process

This table represents the **minimum suggested consulting hours allocation**.

The consulting hours may vary from partner to partner and/or project to project based on level of previous integration engagements, level of certifications etc.

Multiple check points with the customer throughout the project are highly recommended – to raise self-awareness and customer confidence level.

Partner Resources

The Partner Resource Center is your go-to place for information that supplements and extends everything we've covered in this guide. [You can login to the Partner Resource Center here.](#)

[The Dell Boomi Partner Toolbox](#) will be particularly helpful as you begin to build a picture of your customer's architecture and design needs, implement their Dell Boomi solution, and provide ongoing support. Descriptions and links to key Toolbox content are covered below.

Solutions and Architectures Toolbox

In this section of the Toolbox, you'll have access to resources that help you build design patterns and architectures, as well as links to the latest product releases and technical bulletins. [Access it here.](#)

Developer's Toolbox

With the help of the resources in the Developer's Toolbox, you'll have everything you need to jumpstart your SaaS integration, including documentation, community blogs, videos, an example process library, and more. [Access it here.](#)

Implementation Toolbox

Here, you'll find valuable materials to support your implementation efforts, including implementation and connector guides, process design patterns, summaries of common errors, and a custom script library. [Access it here.](#)

Product Support Toolbox

Within this section of the Toolbox, you'll find links to a variety of resources that can help you sharpen your support efforts, including product forums, our Knowledge Center, descriptions of common errors, summaries of known issues, a place to submit enhancement requests, and the Dell Boomi Help and Support Guide. [Access it here.](#)