



FIRST FRIDAY: CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM



DECEMBER 2024
BUILD ENTHUSIASM FOR CHANGE WITHIN
YOUR TEAM AND ORGANIZATION

AGENDA

Topic	Time	Presenter
Intro, Pyramid of Change	9:00 - 9:05	Michael
Internal Change Requests can go one of three ways	9:05 - 9:15	Brandy
Research basis for today's strategies	9:15 - 9:20	Brandy
Planning	9:20 - 9:30	Brandy
Action	9:30 - 9:40	Michael
Open discussion	9:40 - 9:55	All
Next month's topic ideas	9:55 - 10:00	Michael
Happy Friday	10:01 - 5:00	The group

INTRO

What are we covering today?

In today's session, we are discussing strategies for implementing change when change requests come from ~~leadership~~ **on-the-ground and front-line users.**

At the end of this session, we will show:

- Audience-centric strategies to share “what’s in it for me” for individuals, teams, departments, and organization-wide
- Overcoming apathy
- Leveraging storytelling and outside-the-box communication styles

PYRAMID OF CHANGE

When a change is needed to a business process, the following building blocks come into play to build momentum towards a successful project

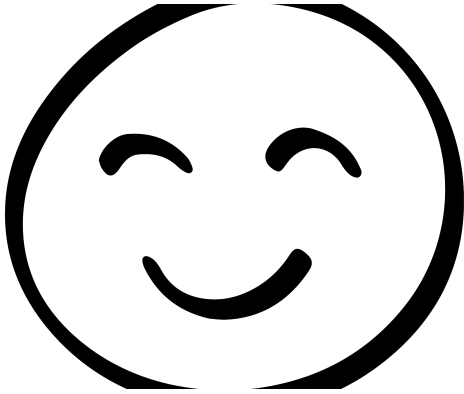
1. Base: Company Culture → **Building Momentum for Change**
2. Tier 1: Executive Leadership → **Building Momentum for Change**
3. Tier 2: Program Leadership
4. Tier 3: Project Leadership
5. Tier 4: End User Buy-in

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5. Tier 4: End User Buy-in → **Today's scenarios start with end-user change requests. That said, if company culture is poor, the request dies here as well. As Salesforce admins, Is it our job to fix company culture?**

INTERNAL CHANGE REQUESTS GO ONE OF THREE WAYS



**Momentum builds,
change happens**

Things go well!



**Issues sit unresolved,
with no real plan**

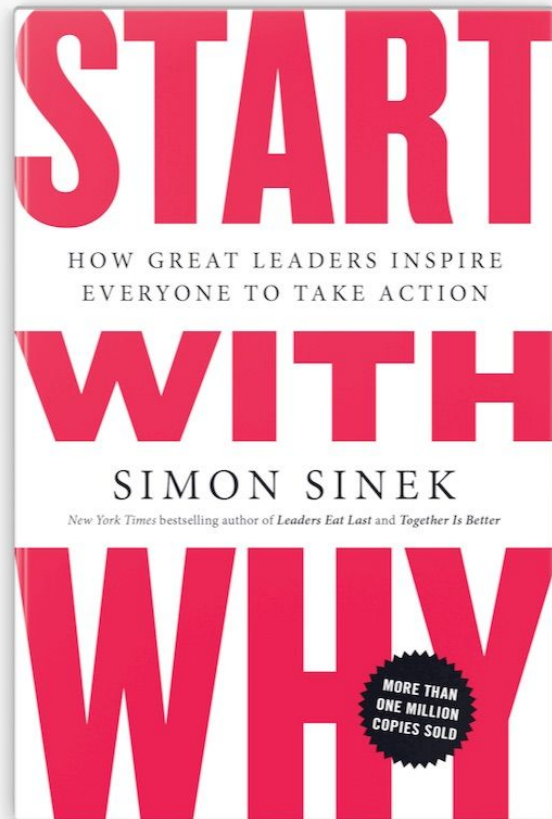
Fits and starts, unhappiness builds



The backlog

At least it's still on the list, right?

**Any stories the group
would like to share
about successes or
issues with building
momentum for change
you know is needed?**



The most quoted
business book of the
2010s still stands tall

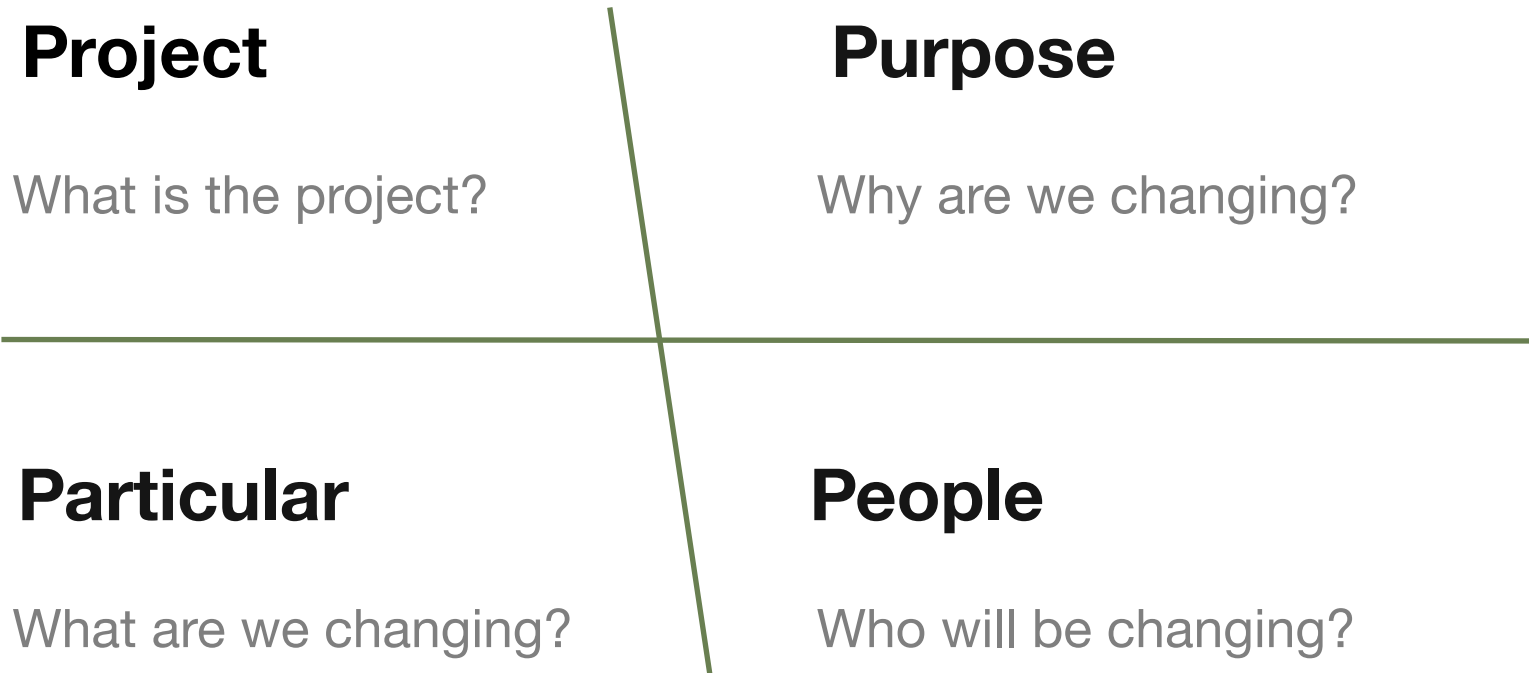
Prosci's 4 P's Exercise



1. Project
2. Purpose
3. Particulars
4. People

1-WHEN A NEED FOR CHANGE IS IDENTIFIED

Change managers should gather the 4 p's



BE TRANSPARENT

Leave your ego at the door.
Take input seriously and do not dismiss others' needs because you believe you have the best solution.

2-REALITY TESTING

1. You don't know where the push back may come from
2. Building consensus between leadership and on-the-ground folks
 - a. Reality testing expectations up and down the ladder
 - b. Feeler conversations on the side
 - c. Use people's direct input to make the pitch
3. Turning victims into participants (great quote @Becca Morgan!)
 - a. Don't expect leadership decisions to simply be successful unless people feel prioritized

3-START TO BUILD MOMENTUM

Soft work

1. Use people's input as input into your plan
 - a. Maintaining flexibility
2. Ego has to go to the side, and the work is separated from the person
 - a. If leadership is pulling rank, be honest

Tangible work

1. If you have hard evidence (i.e., a pattern of tickets, quantify it; cost savings)
2. Define the benefits (aka the why) at all of these levels as different audiences will have varying priorities.
 1. Benefits at the individual level
 2. Benefits at the team level
 3. Benefits at the department level
 4. Benefits at the organization level



4-CUT TO ACTION, PUT YOUR PLANNING INTO PLAY

Turn victims into participants

1. Use people's input as input into your plan. Credit people 1:1 and in meetings.
2. If leadership is pulling rank, be honest. This will go a long way.

Use outside the box communication strategies

1. Speak in stories
 - a. Don't ask 'what would you like changed?', instead ask 'what was your first week like, do you feel like it prepared you for your day-to-day working in our Salesforce instance?'
 - b. People have no idea if you ask a broad 'what would you like'
 - c. Start with a 'what do you do, what do you think could be better, what would be a dream way of doing this'
2. Discussions without visuals or tangible items to work against are a waste of time.
3. Use many different forums and repeat, repeat, repeat.

4-CUT TO ACTION, PUT YOUR PLANNING INTO PLAY

What's in it for me?

1. Measure improvements on the hard evidence
2. Document the benefits at each level as project requirements
 1. Benefits at the individual level
 2. Benefits at the team level
 3. Benefits at the department level
 4. Benefits at the organization level
3. Celebrate small wins along the way.

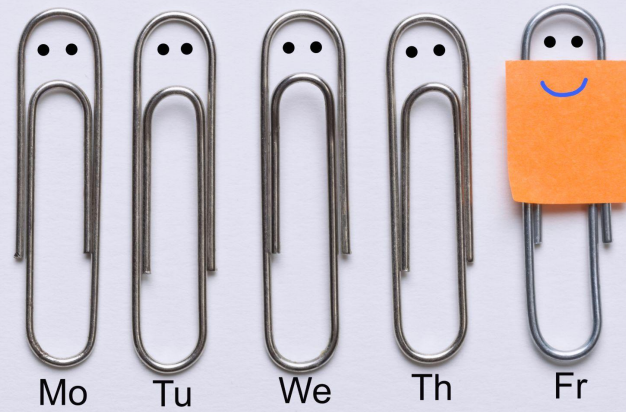
FUTURE TOPIC OPTIONS - JAN 2025

Looking back at overarching themes of the first three meetings, which roll up to the Pyramid of Change

1. Base: Company Culture
2. Tier 1: Executive Leadership
3. Tier 2: Program Leadership
4. Tier 3: Project Leadership
5. Tier 4: End User Buy-in

Preparing for change and positioning projects

1. Creating a clear purpose
2. Building an internal champion
3. Creating a roadmap and building consensus



As always, happy Friday!

I love friday

