



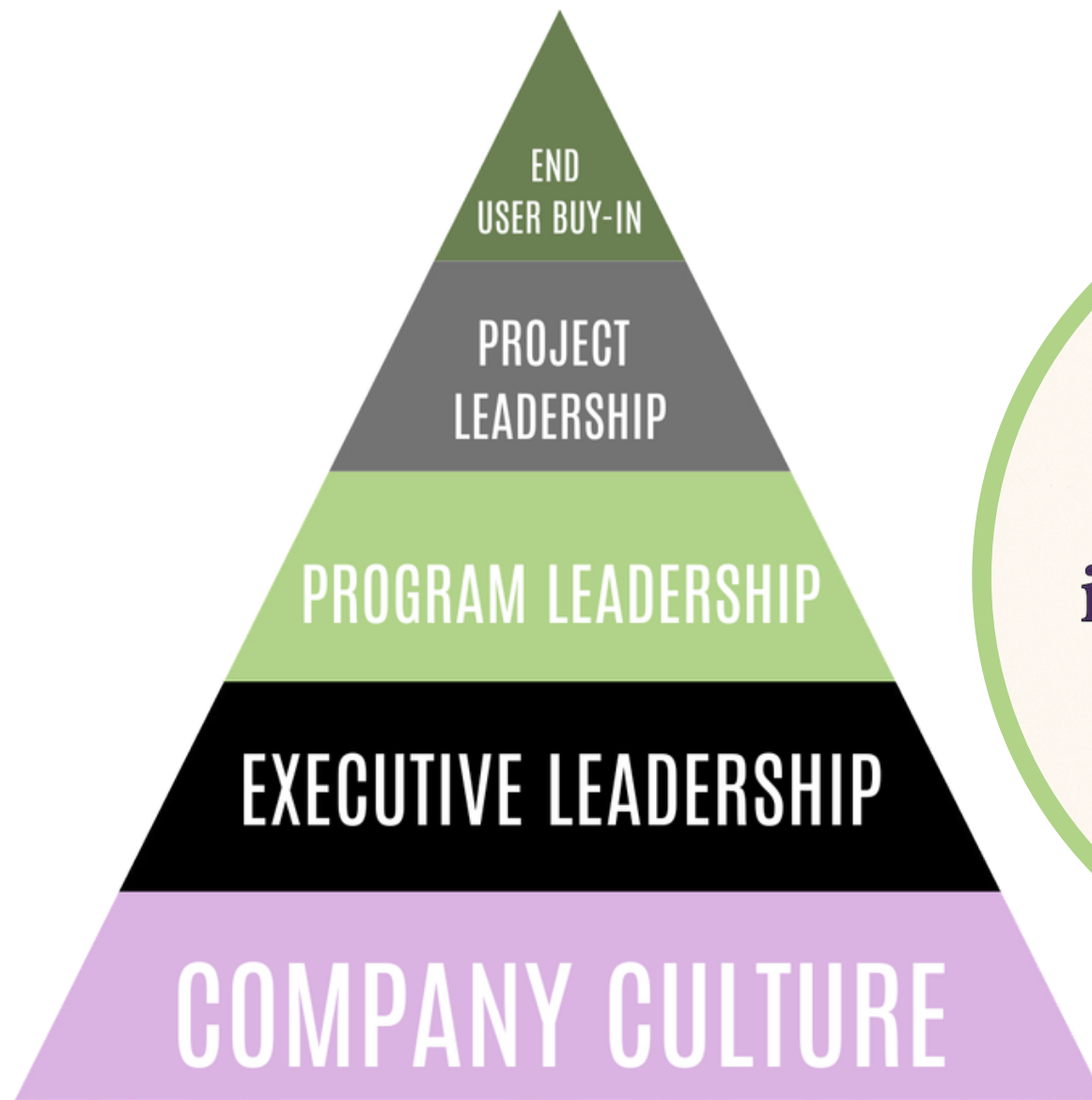
FIRST FRIDAYS

CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM

November 7th, 2025



SEASON 1 QUOTES



**Turn victims
into participants.**

Becca Morgan

**This is what
takes your
project the
last mile.**

– Darren Paladino

**Technology
isn't difficult;
change is.**

– Melissa Hill Dees

**Let's systematically
improve you and your
organization's work life**

– The First Friday Team

**Prevent a
kindergarten
shitshow**

Mark Brandwein



BEST TIME TO **NEGOTIATE** WITH SALESFORCE

End of Q4 and EOY: Jan 31
This is the best time for discounts!

End of Q1: April 31

End of Q2: July 31





R
E
C
A
P

FIRST FRIDAY: SEASON 1

OVERVIEW OF CHANGE MANAGEMENT



ROI



FIRST FRIDAY: SEASON 2

Change Management for ROI (PEOPLE + TECHNOLOGY)

FIRST FRIDAY SEASON 2

- Friday Dec. 5: Planning & Discovery
- Friday Feb. 6: Req Gathering
- Friday March 6: Demo + Prototypes
- Friday April 3: UAT
- Friday May 1: Go-live

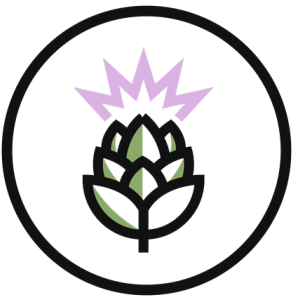


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Episode 1

STEADY STATE

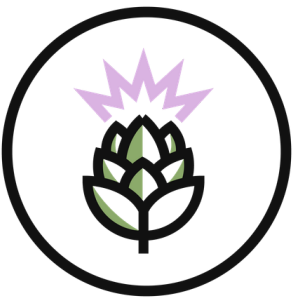


WHAT DOES “STEADY STATE” MEAN?

AS SALESFORCE PROFESSIONALS, ALL OUR WORK IS TO IMPROVE OTHER PEOPLE’S BUSINESS PROCESSES.

WHEN THE SYSTEM IS IN A STEADY STATE, EVERYONE ELSE’S PROCESSES ARE STABLE.

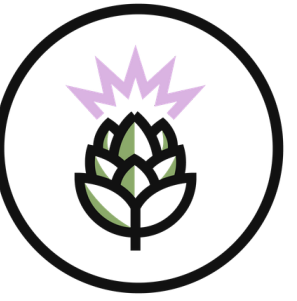
BEING IN A STEADY STATE GIVES US A CHANCE TO WORK ON YOUR OWN PROCESSES.



EXAMPLE PROJECT THAT CAN PROVIDE LONG-TERM WINS!

PER SEASON 1 EPISODE
6, PROJECTS RARELY GET
TO REINFORCEMENT

A	Awareness – Of the need for change
D	Desire – To Participate and support the change
K	Knowledge – On how to change
A	Ability – To implement required skills and behaviors
R	Reinforcement – To sustain the change

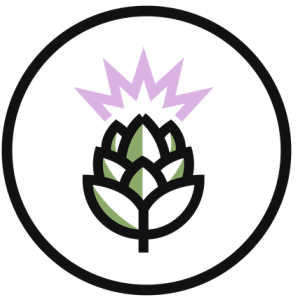


WHAT ARE THE **UNIQUE OPPORTUNITIES** OF BEING IN THE STEADY STATE?

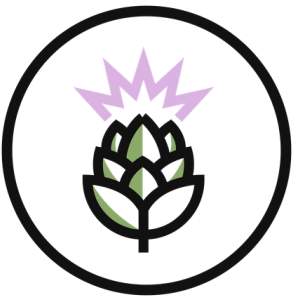
**WE CAN BUILD THE PLANE
WHILE IT'S ON THE GROUND**



DEFINING CHANGE MANAGEMENT ROI



$$\text{Project ROI} = \frac{\text{Expected Project Benefits} - \text{Project Costs}}{\text{Project Costs}}$$



WHERE DOES **CHANGE** FIT IN THE CALCUALTION?

Expected Project
Benefits

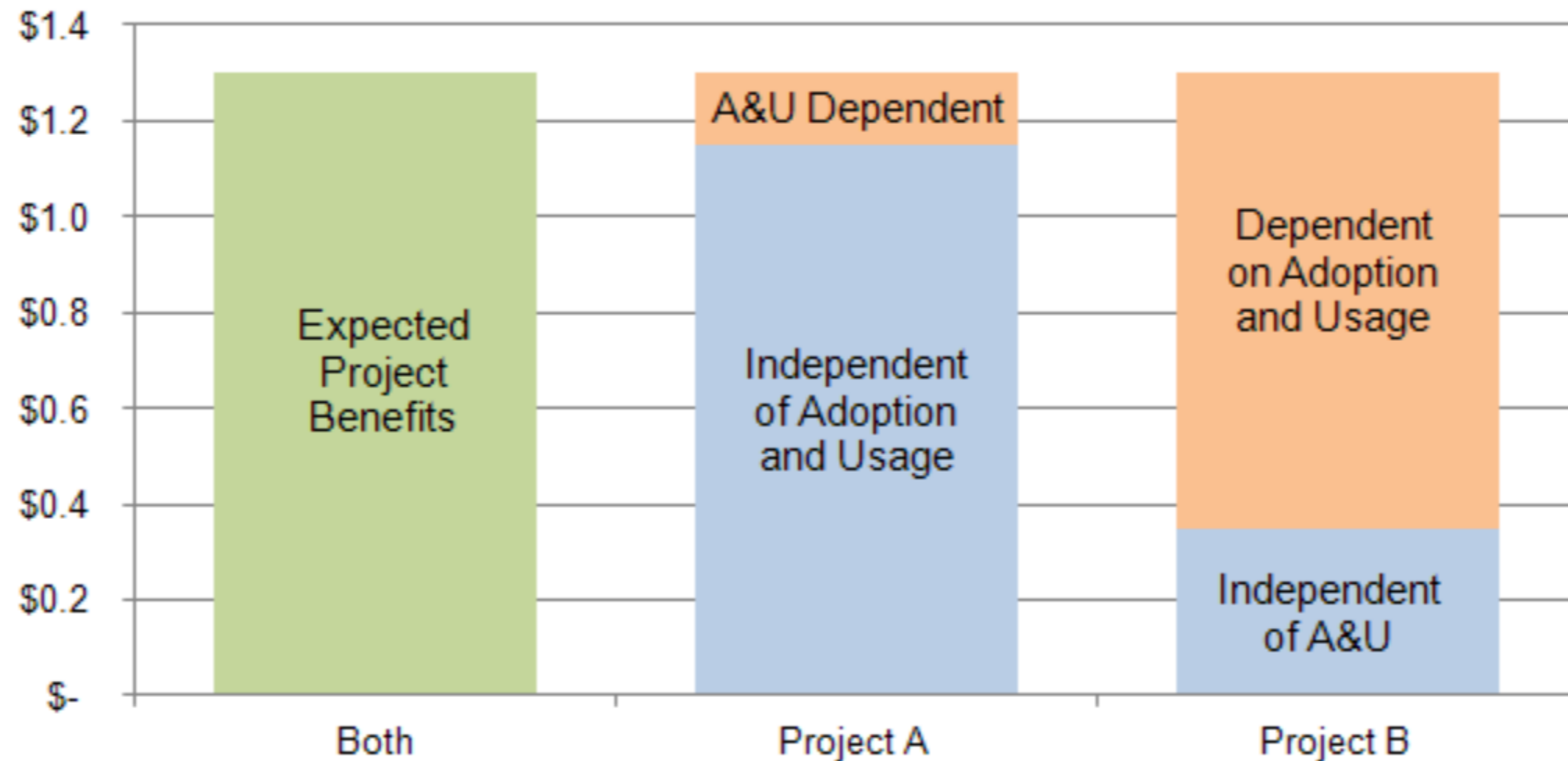
Independent of adoption & usage

Dependent on adoption & usage



WHERE DOES **CHANGE** FIT IN THE CALCULATION?

How different project have different A&U dependent Benefits



Term: A&U = Adoption and Usage. A&U is the result of change management.



Change Management: Getting Adoption & Usage

- 1 - Earn Trust & Participation
- 2 - Communicate in simple & organized ways
- 3 - Taking Action



BUILDING TRUST & PARTICIPATION: HOW DO WE GET THERE?





BUILDING TRUST & PARTICIPATION: **ROI STATISTICS & RESULTS**

**ORGANIZATIONS WITH CONTINUOUS COACHING AND REINFORCEMENT REPORT
55-70% FASTER PROFICIENCY DEVELOPMENT WITH NEW PROCESSES**

**THE BOTTOM LINE: QUALITY CHANGE MANAGEMENT PROVIDES \$3-\$7 FOR
EVERY \$1 SPENT**



COMMUNICATION IN A SIMPLE & ORGANIZED WAY: HOW DO WE GET TO THIS RESULT?

DISCOVERY PROCESS CAPTURE

Oregon Plumbing and Heating: Customer Service



Step #	Item	Description	Status	Owner
	Figure out how to	Quick Question		M
	Pick a name			M
- 1	Data Model	Joe (cablehill.com)		M
1.1	Make a data r			M
1.2	Project__c	Quick Question		M
1.3	Resource__c			M
1.4	Project_Time__c	Hi Joe -		M
1.5	Financial_Sur			M
2	Project Record	Just need this big decision made over email		M
3	Validation Rule			M

Thanks,
Michael Brandwein

Business Overview

Oregon Plumbing and Heating does plumbing and HVAC company in 2023 and are working on...

Project Overview

The company is currently on Zendesk for customer support, and creating a new project to better interact with customers, and create a new project...

Business Goals

- Case throughput: how many cases are processed
- Case touches: how many 'activities' are performed
- Mean case open time

Michael Brandwein

Michael Brandwein

<https://>

Michael Brandwein

<https://>

Setup Menu

Setup

Service Setup

Salesforce Go

Your Account

Agentforce Vibes

view All



COMMUNICATION IN A SIMPLE & ORGANIZED WAY: HOW DO WE GET TO THIS RESULT?

DISCOVERY PROCESS CAPTURE

Step #	Item
	Figure
	Pick a
1	Data M
1.1	Make a
1.2	Projec
1.3	Resou
1.4	Projec
1.5	Financ
2	Projec
3	Validation Rule

Today ▾



Michael Brandwein 8:21 PM

JK - can you make that decision over slack now, even though you were doing something else a few seconds ago

 1  1 

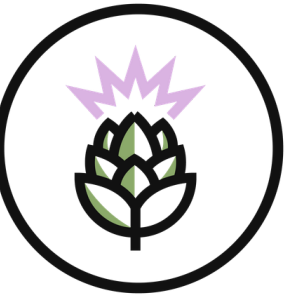
Michael Brandwein [https](#)

Your Account

Agentforce Vibes

view All

Thanks,
Michael Brandwein



TAKING ACTION:

HOW DO WE GET TO THIS RESULT?

- **CONTINUE TO REFER BACK TO PREVIOUS DELIVERABLES TO BUILD FAMILIARITY [ZONE OF PROXIMAL DEVELOPMENT, SEASON 1 EP 9]**
- **LEVERAGE A SHARED STORY, PEOPLE LOVE HEARING THERE WORDS BACK TO THEM [SEASON 1 EP 2]**
- **LEAVE TIME TO BREATHE TO MAKE MISTAKES AND RECOVER**



DISCUSSION

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