



FIRST FRIDAY: CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM



JANUARY 2025

THE ADMIN'S ROLE IN MANAGING CHANGE

AGENDA

Topic	Time	Presenter
Intro, Pyramid of Change	9:00 - 9:05	Michael
The evolution of the Admin role	9:05 - 9:15	Michael
Types of Salesforce support and dev teams	9:15 – 9:20	Michael
Research basis for today's topic	9:20 - 9:25	Mark
Action	9:25 - 9:45	Brandy
Open discussion	9:45 - 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?

1. The arc of the admin role over time.
2. How changes in the role have gotten us to where we are today: **the admin is thrust into the middle of business questions and expected to figure it out.**
3. What is the admin's role in change management, and how can we effectively handle when things are not going well?

Feel free to hop in with questions and comments as we go!

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 → **What is the admin's role in this?**
2. Tier 1: Executive Leadership → **And this?**
3. Tier 2: Program Leadership → **And this**
4. Tier 3: Project Leadership → **OK, we can maybe handle this**
5. Tier 4: End User Buy-in → **This we can help with, I think?**

WHO IS AN ADMIN?

A technical resource who was hired to support and develop an information technology system.

WHAT IS THE EVOLUTION OF THE ADMIN ROLE?

Company's used to have separate development and production support teams.

Now, thanks to the 'ease of configuration of cloud based software' dev and support have meshed into one. The BA and admin role have meshed (though, BAs are coming back), and admins are increasingly put in the position of doing it all.

With little to no BA, change management, testing, project management support, what are admins to do when issues arise in non-technical areas?

WHO IS AN ADMIN?

A technical resource who was hired to support and develop an information technology system.

WHERE HAS THIS GOTTEN US?

The ease of configuring Salesforce has led to 20 years of build first, ask questions later.

We all know that when something is built, it is rarely reviewed later. Tech debt is born.

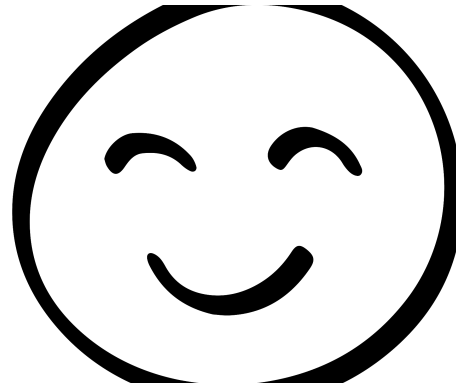
Salesforce understands this is an existential risk to their business and is working in the background to help with help like 'Salesforce Well-Architected', Trailhead, and other training.

THE STRUCTURE OF SALESFORCE DEVELOPMENT AND SUPPORT TEAMS

What are the structures of teams an admin can be a part of?



**An admin who works
with a change
management office**



**An Admin who works
under a product
owner/product manager**



**An admin who is
expected to 'do it all'**

#1 NEW YORK TIMES BESTSELLER

SWITCH

HOW TO CHANGE THINGS

WHEN CHANGE IS HARD

CHIP HEATH & DAN HEATH

THE BESTSELLING AUTHORS OF **MADE TO STICK**

→ DIRECT the Rider

FOLLOW THE BRIGHT SPOTS. Investigate what's working and clone it. [Jerry Sternin in Vietnam, solutions-focused therapy]

SCRIPT THE CRITICAL MOVES. Don't think big picture, think in terms of specific behaviors. [1% milk, four rules at the Brazilian railroad]

POINT TO THE DESTINATION. Change is easier when you know where you're going and why it's worth it. ["You'll be third graders soon," "No dry holes" at BP]



GIVEN THE ABOVE, WHAT CAN ADMINS DO TO MANAGE CHANGE?

Recognize that change is both situational (the actual change) and psychological (behaviors, views, and norms).

1. Use people's input as input into your plan.
2. Ego has to go to the side; separate work from the person/people.
3. Empathy and understanding will take you far. Meet people where they are and then bring them along on the journey.
4. Be flexible, seek to understand.

Understand and focus in on what you have control over.

Your organization may or may not be currently embracing change management practices and principles. It is not your job to lead change for the entire organization.

You can lead by example by building change management practices into the way you do your work and approach project management.

GIVEN THE ABOVE, WHAT CAN ADMINS DO TO MANAGE CHANGE?

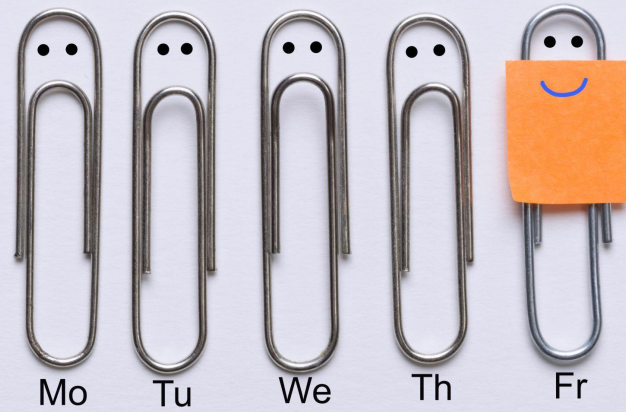
What actions can I take?

1. Build the story and Vision. Then distribute it.
 - Create a shared sense of a desirable future.
 - Use hard data where possible.
 - Document the benefits at each level as project requirements.
 - Keep messaging simple. Use analogies, metaphors, and examples.
 - Repeat, repeat, repeat via various forms of communication.
2. Work with leadership to set clear escalation paths.
3. Be clear on who the decision makers are.
4. Invite people in, actively listen, and assign tasks to build accountability. Feedback loops
5. Celebrate small wins along the way.
6. Be adaptable and open. Ask questions!!
7. Communicate challenges, their impacts, and solutions in a timely fashion.
8. Measure improvements on the hard evidence

FUTURE TOPIC OPTIONS - FEB 2025

Managing the transition to Agentforce

Other ideas?



As always, happy Friday!

I love friday

