



FIRST FRIDAY: CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM



FEBRUARY 2025 PROACTIVE VS. REACTIVE CHANGE MANAGEMENT

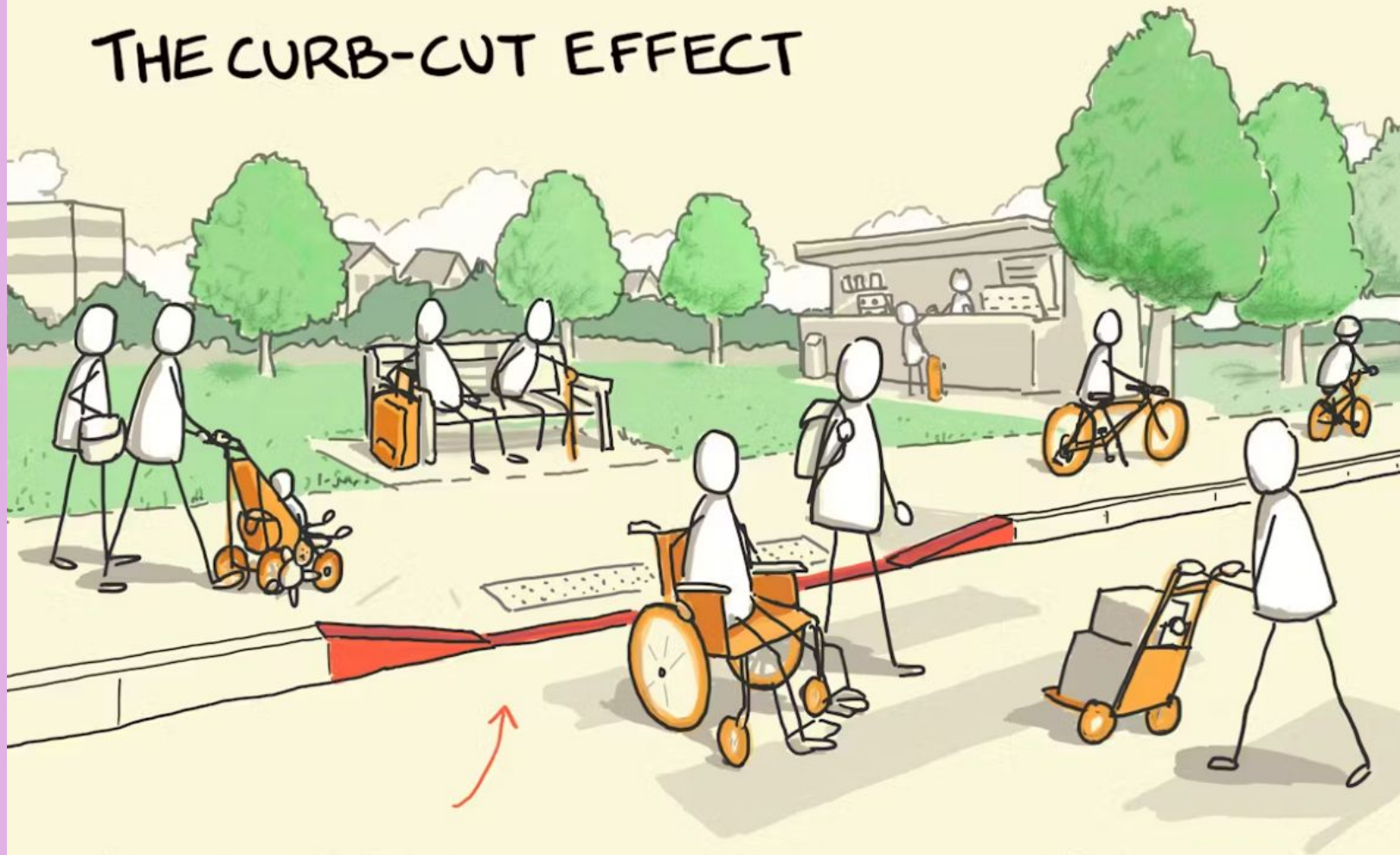
“

Technology isn't difficult;
change is.

—

Melissa Hill Dees

THE CURB-CUT EFFECT



WHEN WE DESIGN
FOR DISABILITIES

... WE MAKE THINGS
BETTER FOR EVERYONE

sketchplanations

UPCOMING EVENTS IN PDX

1. **Salesforce Admin User Group**

Quantifying your Impact as an Automation Expert

Tues, Feb 25

Lucky Lab in SE

Free

2. **SIM PDX (Society for Information Management)**

“From Navajo Code Talkers to Digital Safeguards and Encryption Systems”

Wednesday 2/12

Tualatin Country Club

\$70, dinner included

3. **Forcelandia**

Aug 20-21, 2025

Call for speakers open Feb 14 (Valentine’s day) through March 17 (St. Patrick’s Day)

Tickets will go on sale in the March/April timeframe

AGENDA

Topic	Time	Presenter
Intro, Pyramid of Change	9:00 - 9:10	Michael
Scenario Review: Process Builder to Flow	9:10 - 9:25	Michael
Proactive vs. Reactive in a Chart	9:25 - 9:35	Brandy
Roundtable: How can we make time to be Proactive?	9:35 – 9:45	Mark
Inspirational Quotes	9:45-9:46	Michael
Open discussion, Next Month's Topic Options	9:46 - 10:00	All
Happy Friday	10:01 - 5:00	The group

INTRO

What are we covering today?

1. How proactive change management
 - Saves you time
 - Produces better results
 - Lowers stress
2. How to fit time into your schedules to be proactive with change

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

PYRAMID OF CHANGE

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

The admin's dream: Proactive Change Management is embedded in the company culture.





SCENE

TAKE

ROLL

DATE

SOUND

PROD.CO.

DIRECTOR

RAMAN

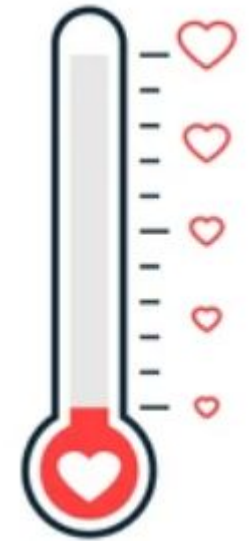
SCENARIOS

SCENARIO: Salesforce has stopped supporting Process Builder, and a company needs to move all automations to Flow or APEX.

STEP 1: Response Plan

- What is the actual sense of urgency? Is it real or perceived?
- Is there a contingency plan? Or temporary workaround?
- What other work may be deprioritized to make room for this?

PROACTIVE



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STEP 2: Document and Prioritize

- Document details, so we don't need to go back and ask the same questions
- Define H/M/L priority in a list we will carry through the project
- Get everyone on the same page
- Prioritize vs. other work

STEP 3: Get to work

- Define H/M/L priority
- Get everyone on the same page by presenting prototypes, and reviewing the H/M/L priority item list
- Prioritize vs. other work



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STEP 4: Go-live

- Finalize the H/M/L priority list
- Show everyone what is done
- Prioritize vs. other work



SCENARIOS

REACTIVE

SCENARIO: Salesforce has stopped supporting Process Builder, and a company needs to move all automations to Flow or APEX.

STEP 1: Do not response Plan

- Let's move some automation!

STEP 2: Attempt to Document and Prioritize

- Define H/M/L priority in a list we will look at a few times
- Define the team of who will own the changes
- Do not ping business users



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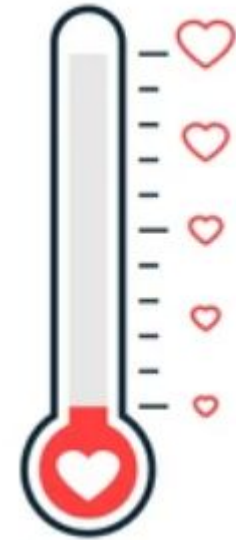
- Let's go!

STEP 4: Go-live

- The work is now done
- People don't know what's going on

REACTIVE

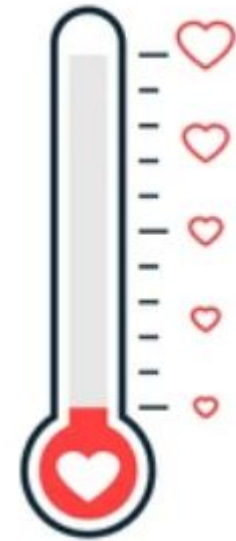
EMOTIONAL DEBT



SCENARIOS

REACTIVE

**EMOTIONAL
DEBT**



	PROACTIVE	REACTIVE
Initiation	Proactive change is initiated based on foresight and analysis of potential issues	Reactive change is triggered by an immediate problem or external event as they arise
Planning	Proactive change management involves detailed planning and strategy development to manage the transition smoothly – long-term planning	Reactive change might require quick decision-making with less structured planning – short-term thinking typically.
Benefits	Proactive change can lead to better control over the change process, minimized disruption, and improved employee engagement	Reactive change can sometimes provide quick solutions to urgent situations The dopamine reward :)
Challenges	Proactive change takes more time and may be less satisfying in the moment	Reactive change may not result in the best solution, or more work needing to be done down the line.
Examples	A company identifies an emerging technology trend and begins researching and developing products to capitalize on it before the market becomes saturated	A company is forced to implement a new marketing strategy after experiencing a sudden drop in sales due to competitor actions. Significant shifts in customer demands for products/services.

PROACTIVE VS. REACTIVE TAKE II

Proactive change management:

1. Anticipating future changes.
2. Taking planned action to address them before they happen.
3. Often easier to implement as people are made aware in advance. (builds familiarity)
4. Allows leadership time to formulate responses to issues and risks.
5. Enables open discussion and active participation of workforce.
6. More controlled and strategic.

Plan:

- Think Long-term
- Make Contingency plans
- Enable open discussion and active participation
- Discuss benefits
- Take small steps and set goals
- Demonstrate success

Reactive change management involves

- responding to changes only after they occur or "responding to events as they happen."
- Implementing change after a need, opportunity, or unexpected situation presents itself.
- often in a crisis-driven manner.
- Quick decision-making required. Limits workforce participation.
- Less time for planning (having a response plan/framework can be helpful).
- Minimizing negative impact.

HOW DO I MAKE TIME FOR PROACTIVE CHANGE MANAGEMENT

We all know we should, so why is it so hard?

ROUND TABLE

Brandy

Michael

Mark

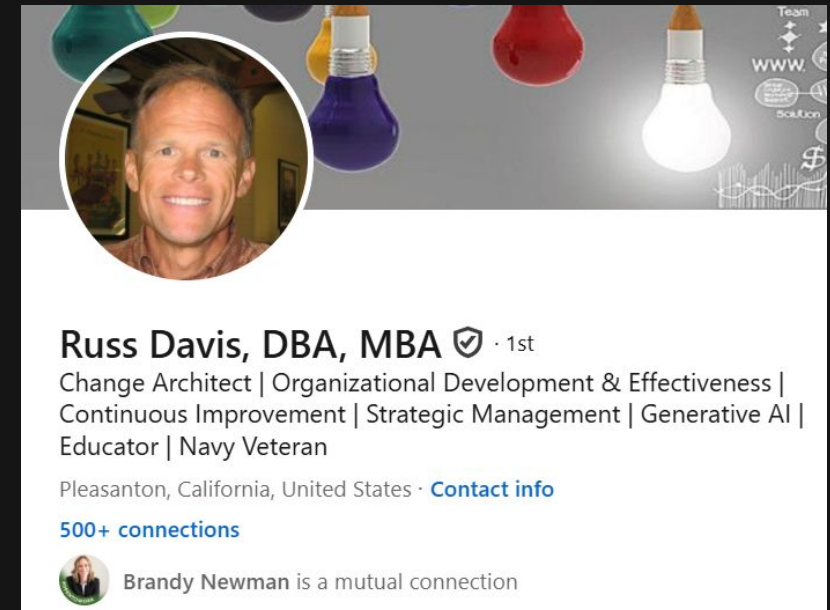
Group thoughts

“Proactive and reactive change management are essentially two sides of the same coin,

aiming to navigate an organization through the waves of change.

However, they differ in their approach to preparation, implementation, timing, and employee involvement.”

-Russ Davis



It requires a significant amount of time and effort to usher in change for the sake of meaningful growth.

A vision must be set. There's information that needs to be gathered. Reflection that needs to be done. Ideation must occur, then those glimmers of possibility must be evaluated against criteria. Decisions must be made. All before we get to implementation.

Whereas **reactive change also releases dopamine in the brain, which triggers the reward centers**. No wonder it feels so good to habituate reactive change.

That's different from proactive change. Day-by-day, consistent effort must be taken to move through defining, and planning the change you seek to create before there are any outward signs of visible progress. And that work can feel thankless or even trite. But it's a necessary foundation for leading change for the sake of meaningful growth and innovation.

-Rosabella Consulting

ANY CHANGE ISSUES THE GROUP IS FACING THAT WE'D LIKE TO DISCUSS?

OPEN INVITATION FOR THE GROUP TO DISCUSS ISSUES

Examples from previous weeks include:

- 1. How to get my team to stop configuring in Prod**
- 2. Keeping leadership aligned for a project to move forward**

FUTURE TOPIC OPTIONS

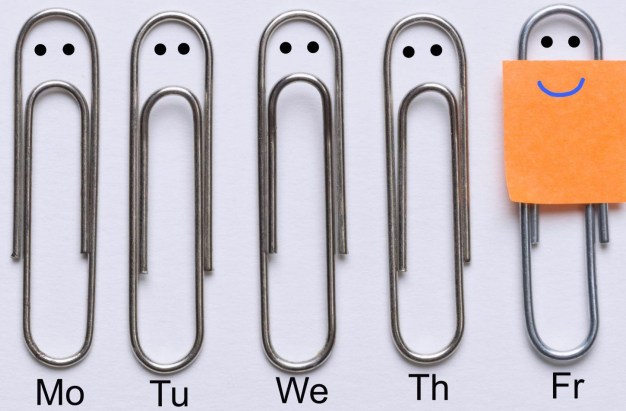
1. **Managing the transition to Agentforce**
2. **Deep dive into practical templates**
3. **Getting my internal Salesforce dev team on board with good change practices**
4. **Any other requests or ideas?**
5. **We will have a guest host alongside the team for the April call, Andrew Orique of Reroute Consulting. Andrew is a system-agnostic change management consultant out of Toronto, ON.**

RESOURCES

<https://www.linkedin.com/pulse/navigating-organizational-change-comparative-analysis-russ-qilnc/> (Russ Davis)

[What Is Reactive Change Management? A Definitive Guide | Indeed.com](#)

[Reactive Vs Proactive Change Management - Examples and Differences](#)



AS ALWAYS, HAPPY FRIDAY!

I love friday

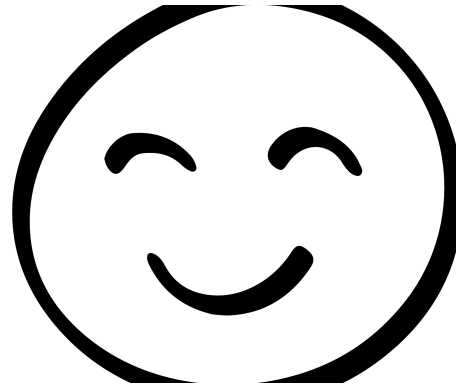


THE STRUCTURE OF SALESFORCE DEVELOPMENT AND SUPPORT TEAMS

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'**