



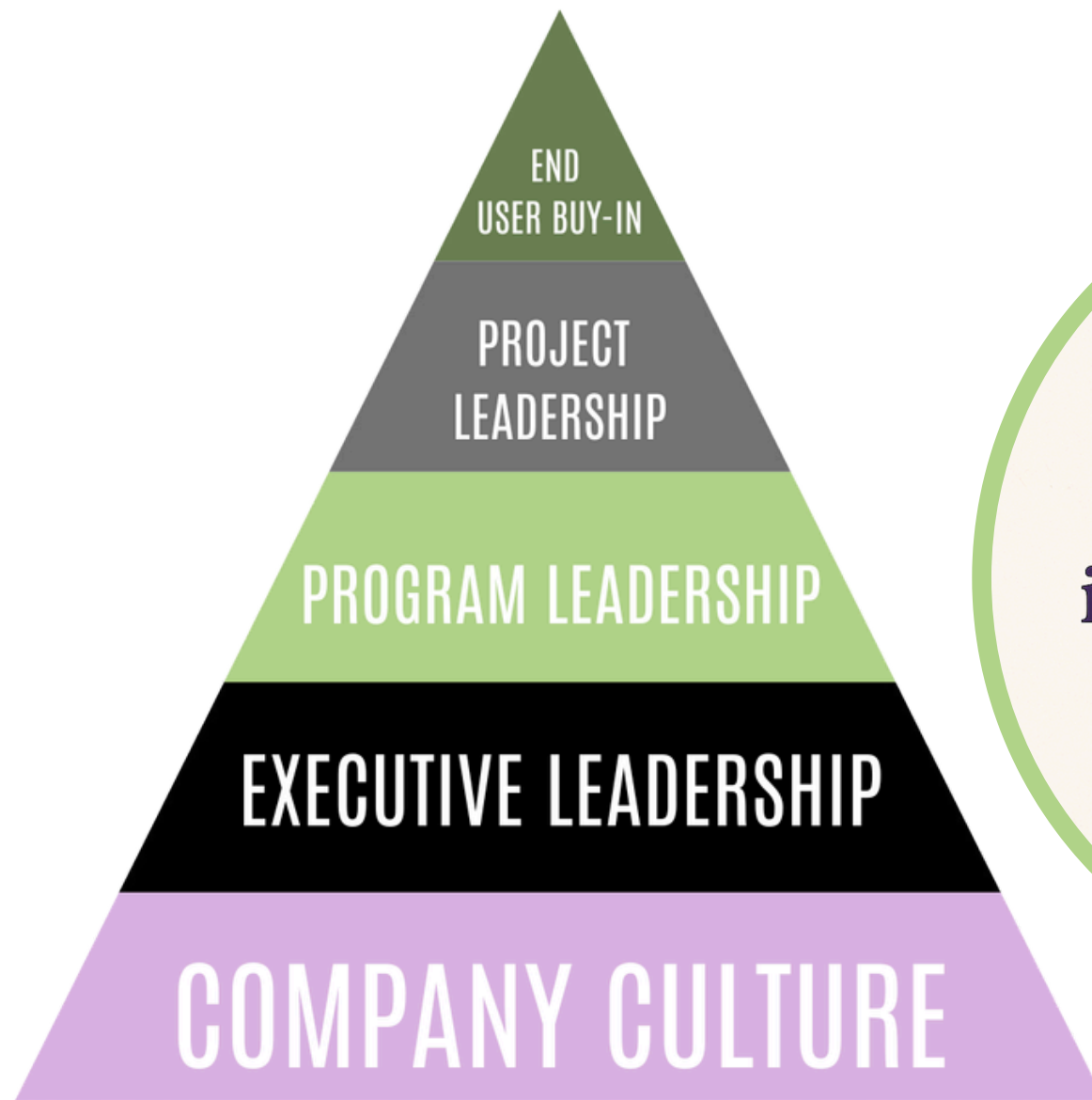
FIRST FRIDAYS

CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM

December 5, 2025



SEASON 1 QUOTES



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

– Darren Paladino

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

– Melissa Hill Dees

**Turn victims
into participants.**

Becca Morgan

**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





ROI



FIRST FRIDAY: SEASON 2

Change Management for ROI (PEOPLE + TECHNOLOGY)



R
E
C
A
P

FIRST FRIDAY: Episode 1

STEADY STATE

FIRST FRIDAY SEASON 2

- No Session in January
- Friday Feb. 6: Req Gathering
- Friday March 6: Demo + Prototypes
- Friday April 3: UAT
- Friday May 1: Go-live



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FIRST FRIDAY TEAM



MICHAEL BRANDWEIN
CO-FOUNDER & CEO AT ARTICHOKE

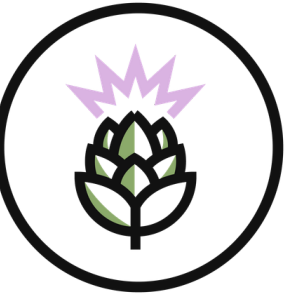


BRANDY NEWMAN
SALESFORCE PRODUCT MANAGER AT CHANGENT



MARK BRANDWEIN
CHANGE MANAGEMENT LEAD AT ARTICHOKE

FIRST FRIDAY TEAM

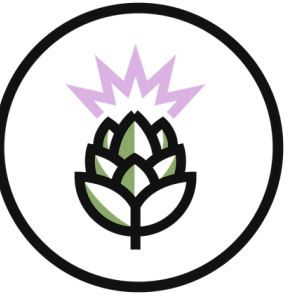


ALLIE BRANDWEIN
CO-FOUNDER & CMO AT ARTICHOKE

JOHN STUMPF
INDEPENDENT MARKETING STRATEGY CONSULTANT



SPECIAL GUEST: APRIL RUST



Work with April at
**Beach Street
Solutions LLC**



Listen to
**The Tech Less
Podcast**

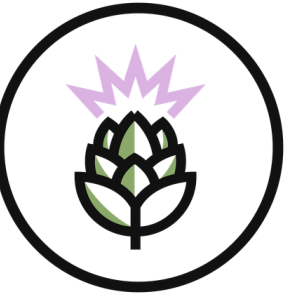




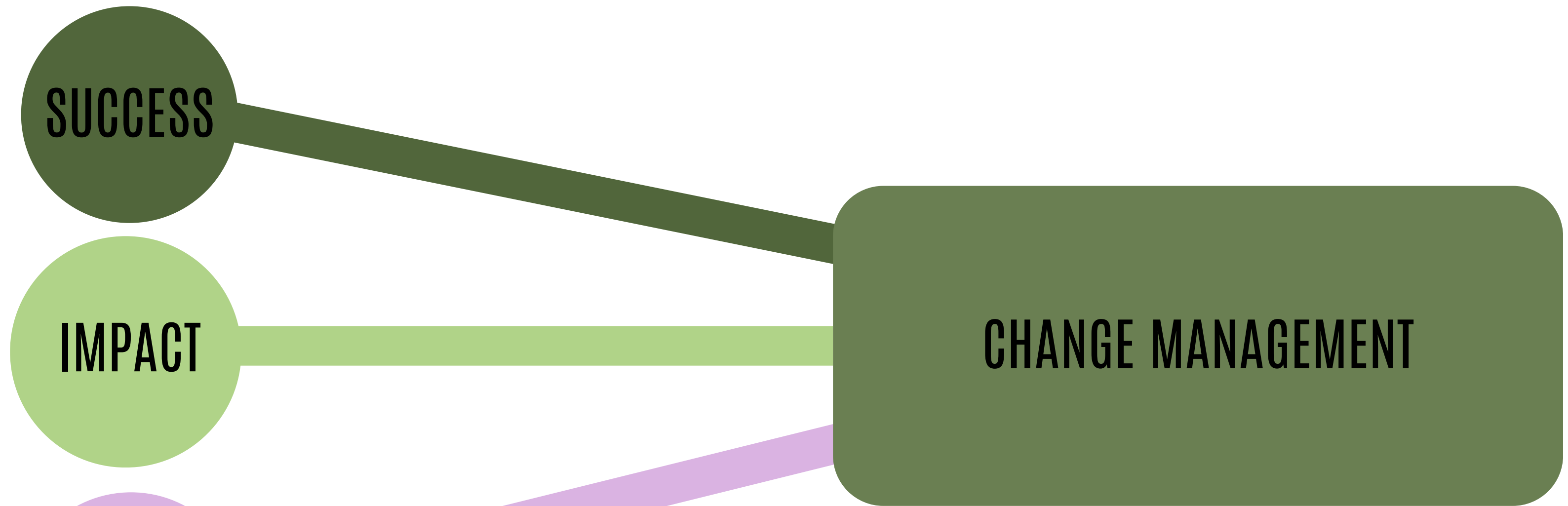
Episode 2

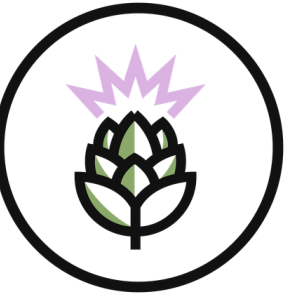
Planning & Discovery





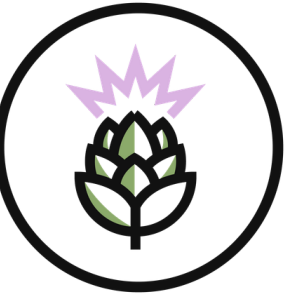
WHAT IS CHANGE MANAGEMENT IN THE “**DISCOVERY & PLANNING**” PHASE?





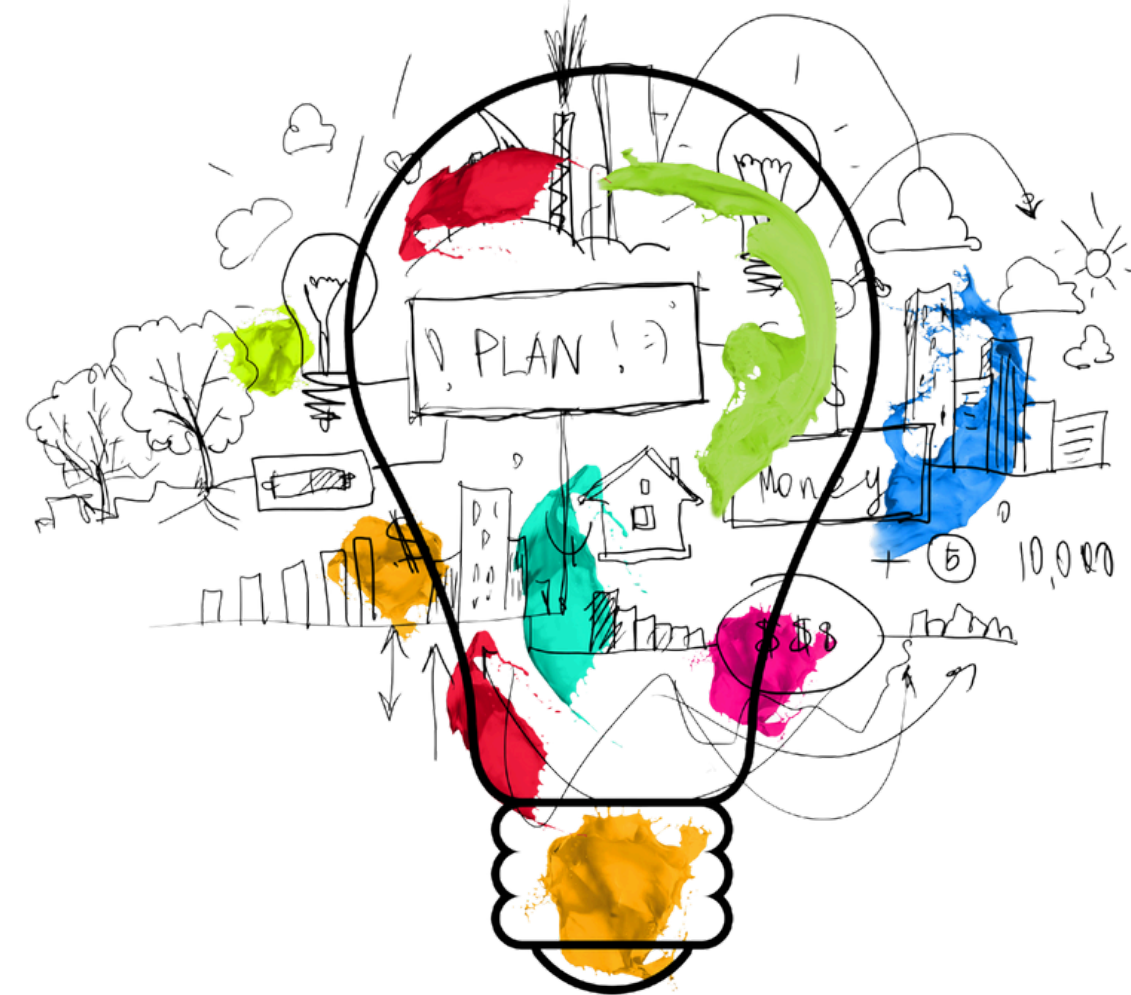
ACTIVITIES DURING THE PLANNING & DISCOVERY PHASE





ACTIVITIES DURING THE PLANNING & DISCOVERY PHASE

- Risk & Mitigation
- Communication Plan
- Metrics
- Resources & Budget
- Coordination



Project Overview (4 P's: Connecting People to Success)



Project	Purpose	Particulars	People
What is the project?	Why are we changing?	What are we changing?	Who will be changing?

TOP 5 CHANGE MANAGEMENT MODELS



Kotter Change Management Model



Prosci ADKAR Model



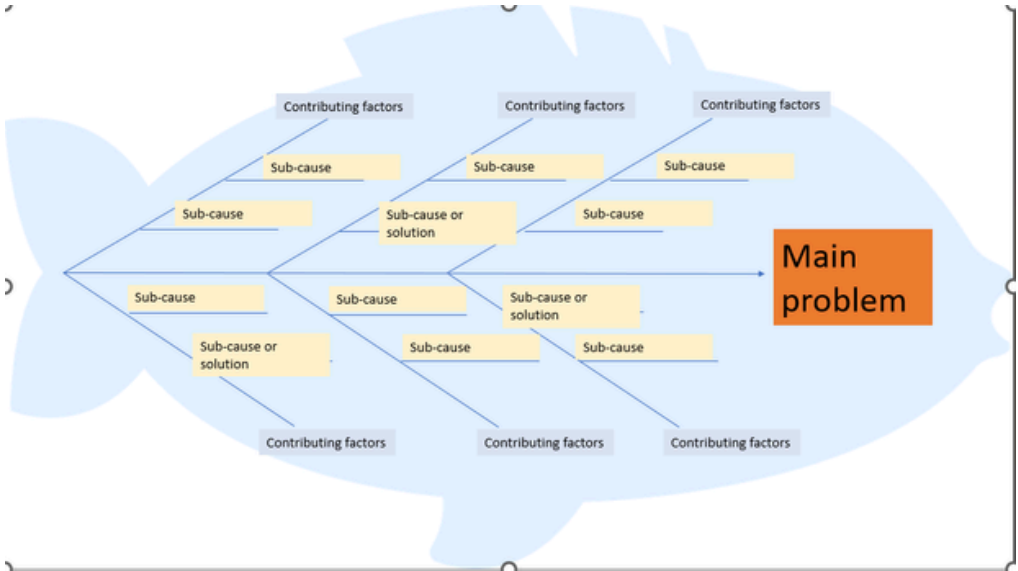
Kubler-Ross Model



Lewin's Model



Bridges Transition Model



**SIPOC
ROOT CAUSE ANALYSIS
KAIZEN
HOSHIN**

Change at the Individual Level 10 Aspects of Change Impact



Lean Six Sigma: DMAIC



Define

Define the problem.



Measure

Quantify the problem.



Analyze

Identify the cause of the problem.



Improve

Implement and verify the solution.



Control

Maintain the solution.



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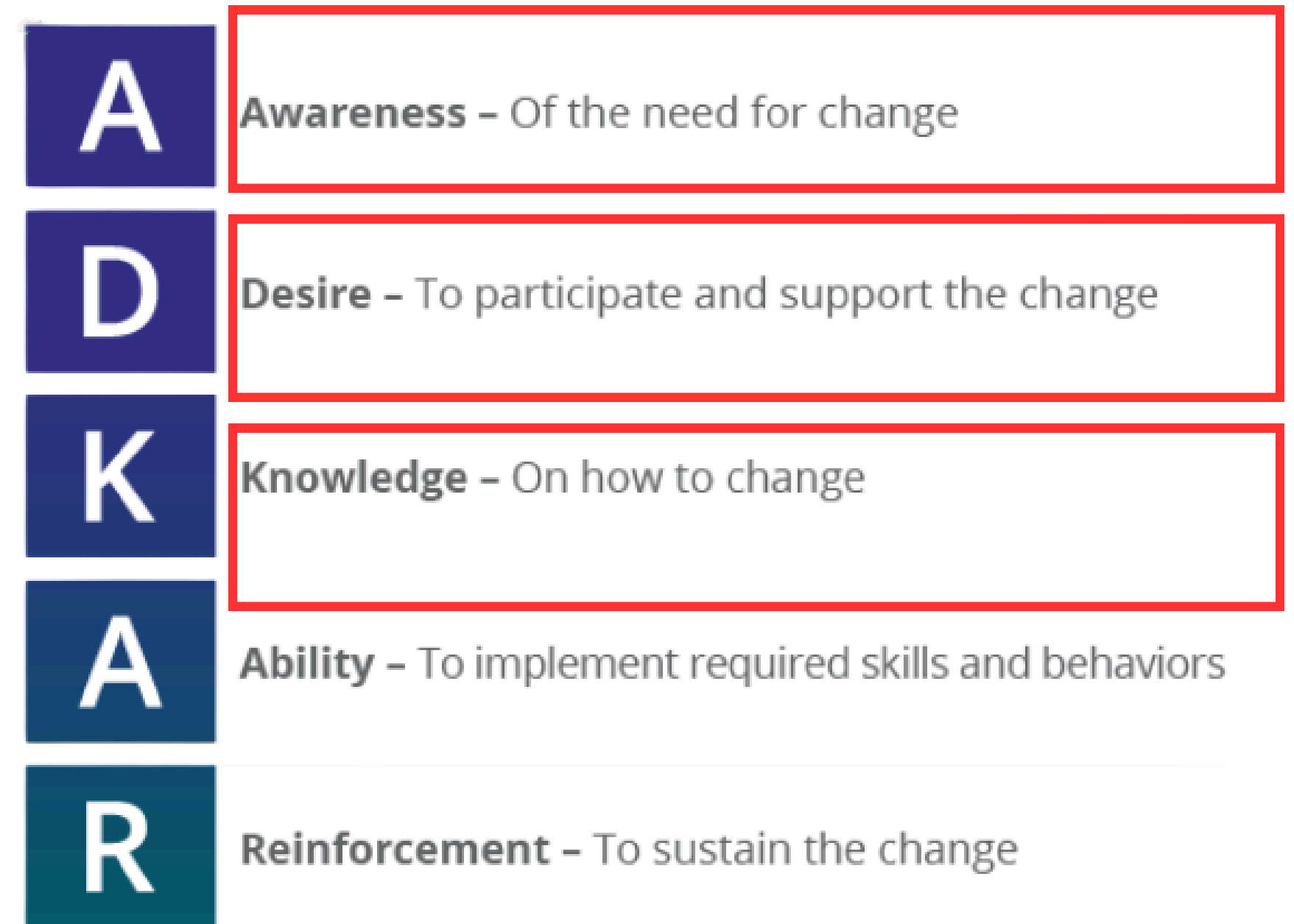


Axsium



EXAMPLE PROJECT THAT CAN PROVIDE LONG-TERM WINS!

SEASON 1 EPISODE
6 CALLBACK: PROJECTS
RARELY GET TO
REINFORCEMENT



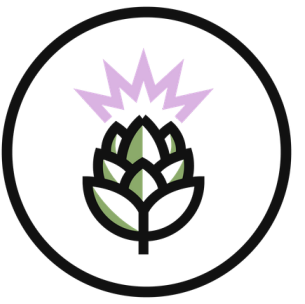


WHAT IS THE PROJECT MANAGER'S ROLE IN OPERATIONALIZING CHANGE MANAGEMENT

BE A PART OF THE PLANNING DISCUSSION!



THE MANY HATS OF A PROJECT MANAGER



1. THE INTEGRATOR
2. THE CLARIFIER
3. SOCIALIZER



SILOED CHANGE MANAGEMENT



GREAT
BUILD, LOW
ADOPTION

TRAINING
CREATED
TOO LATE

COMMS NOT
READY FOR
UAT PHASE

STAKEHOLDER
CONFUSION

PANIC OVER
GO-LIVE

FEELS LIKE
PROJECT IS
“BEING DONE
TO THEM”

WHEN CHANGE MANAGEMENT IS DONE WELL (OR FAIRLY WELL)



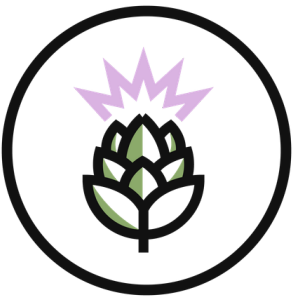
INTENTIONAL ROLLOUT



CLEAR EXPECTATIONS



DEFINING CHANGE MANAGEMENT ROI

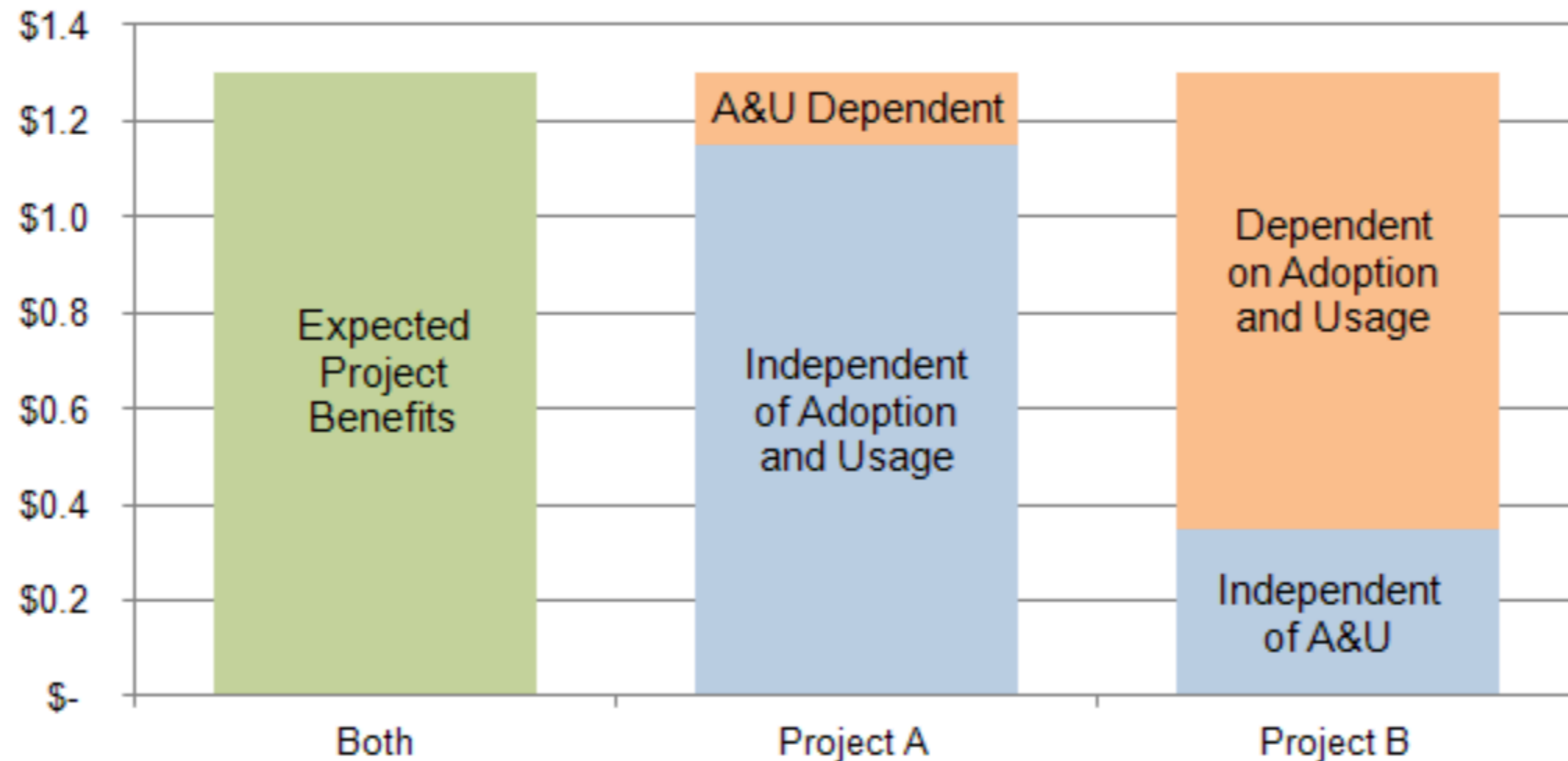


$$\text{Project ROI} = \frac{\text{Expected Project Benefits} - \text{Project Costs}}{\text{Project Costs}}$$



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

How different project have different A&U dependent Benefits

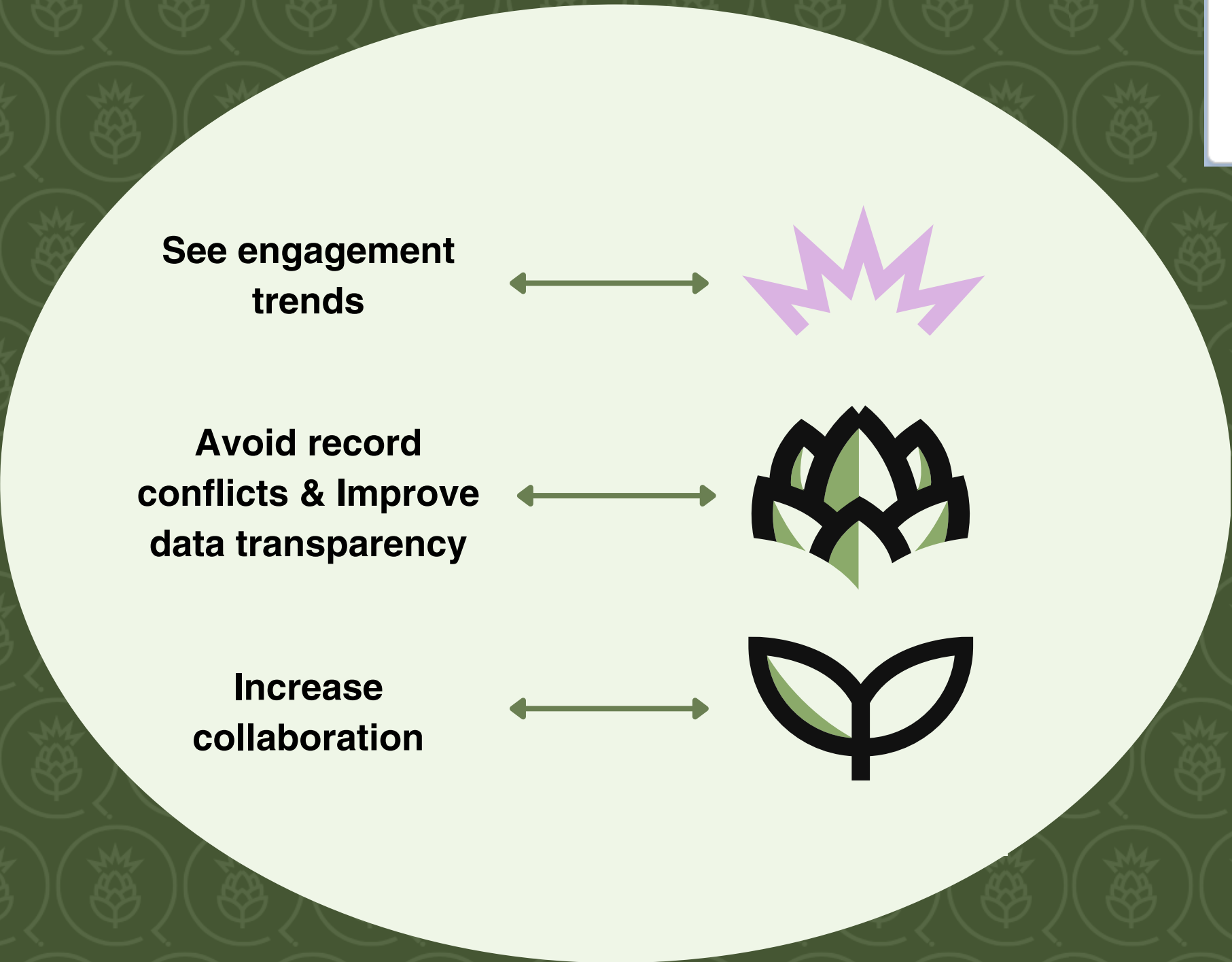


Term: A&U = Adoption and Usage. A&U is the result of change management.



DISCUSSION

RECORD PRESENCE: WHO'S ON MY RECORD



Record Viewing History

Name	View Count	Latest View Date
Arty Apps	8	2025-06-04 8:44 AM
Thistle Apps	1	2025-06-04 9:36 AM

Users Viewing this Account Record

- Arty Apps - Last Viewed: 9:36 AM - View
- Thistle Apps - Last Viewed: 9:40 AM - View



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