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Technology isn't difficult;
change is.

—

Melissa Hill Dees



FIRST FRIDAY: CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM



MARCH 2025 BENCHMARKING PROACTIVE CHANGE MANAGEMENT

UPCOMING EVENTS

~~1. PDX Salesforce Admin User Group~~

~~Quantifying your Impact as an Automation Expert~~

~~Tues, Feb 25~~

~~Lucky Lab in SE~~

~~Free~~

~~1. TDX (San Francisco, CA)~~

2. Forcelandia (Portland, OR)

Aug 20-21, 2025

Call for speakers open March 17 (St. Patrick's Day) through April 7 (National Beer Day)

Tickets will go on sale April 7 timeframe

3. Mile High Dreamin' (Denver, CO)

Aug 27-28, 2025

AGENDA

Topic	Time	Presenter
Intro, Pyramid of Change	9:00 - 9:10	Michael
Defining Change Management	9:10 - 9:20	Michael
The Benchmarks	9:20 - 9:25	Michael
Story Time: Planning Toward the Highest Benchmarks	9:25 - 9:30	Mark
Hitting The Benchmarks	9:25 – 9:45	Mark
Open discussion, Next Month's Topic Options	9:46 - 10:00	All
Open office hours	10:00-11:00	Michael
Happy Friday	11:01 - 5:00	The group

INTRO

What are we covering today?

1. Defining Change Management—because saying the words ‘change management’ can be a turn off
2. The benchmarks of quality change management—how do I know if things are going well?
3. Examples for how to hit all the benchmarks

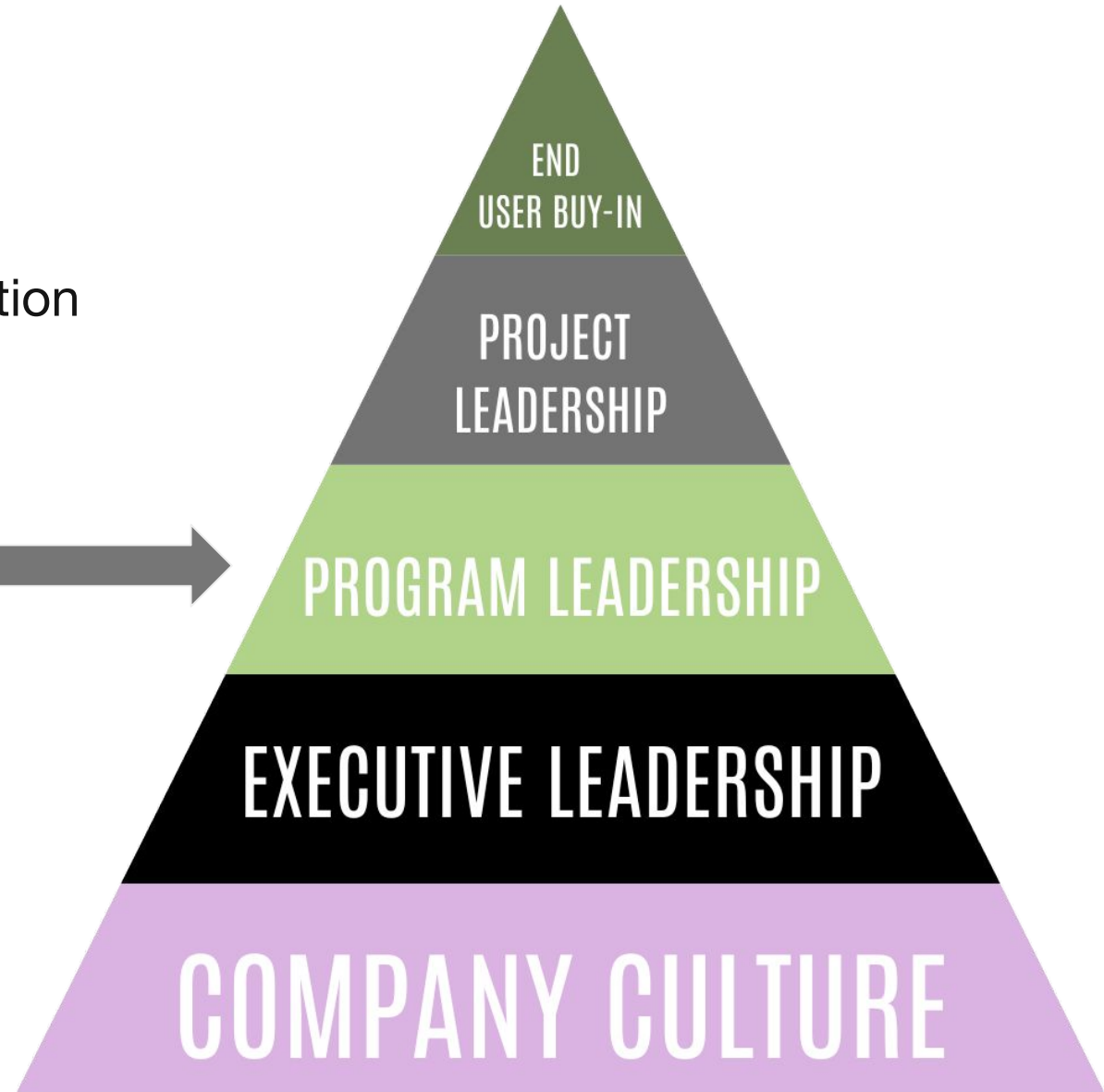
Feel free to hop in with questions and comments as we go!

PYRAMID OF CHANGE

Different change management tactics are required at different levels of the organization



How well change is occurring can be benchmarked at the program level.





DEFINING CHANGE MANAGEMENT

To minimize disruption and ensure successful adoption of new practices or systems, and make sure these processes are sustained over time.

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To minimize disruption and ensure successful adoption of new practices or systems, and make sure these processes are sustained over time.

1. Focus on people: Address employee concerns, resistance, and facilitating adaptation
2. 'The invisible approach': Woven into project and day-to-day work
3. Goal of sustainability: Ensure [new processes] are sustained over time

BENCHMARKS

1. Is your Salesforce technically sound, and does it function as needed?
 - a. This is the lowest bar

2. Are your users comfortable with the solution?
 - a. Eh, it's good enough

3. Are your users excited about the solution and the help it will provide to their jobs?
 - a. This is the highest bar, and what we all strive for
 - b. How can we plan to get here?
 - c. Turning victims into participants

in a past life



Classroom Rules



Mr. B's Class Rules

- 1) When Mr. B talks, we listen.
- 2) Raise your hand if you have a question.
- 3) When we enter the classroom, we walk to our seat.

2nd day of school: A kindergarten shitshow

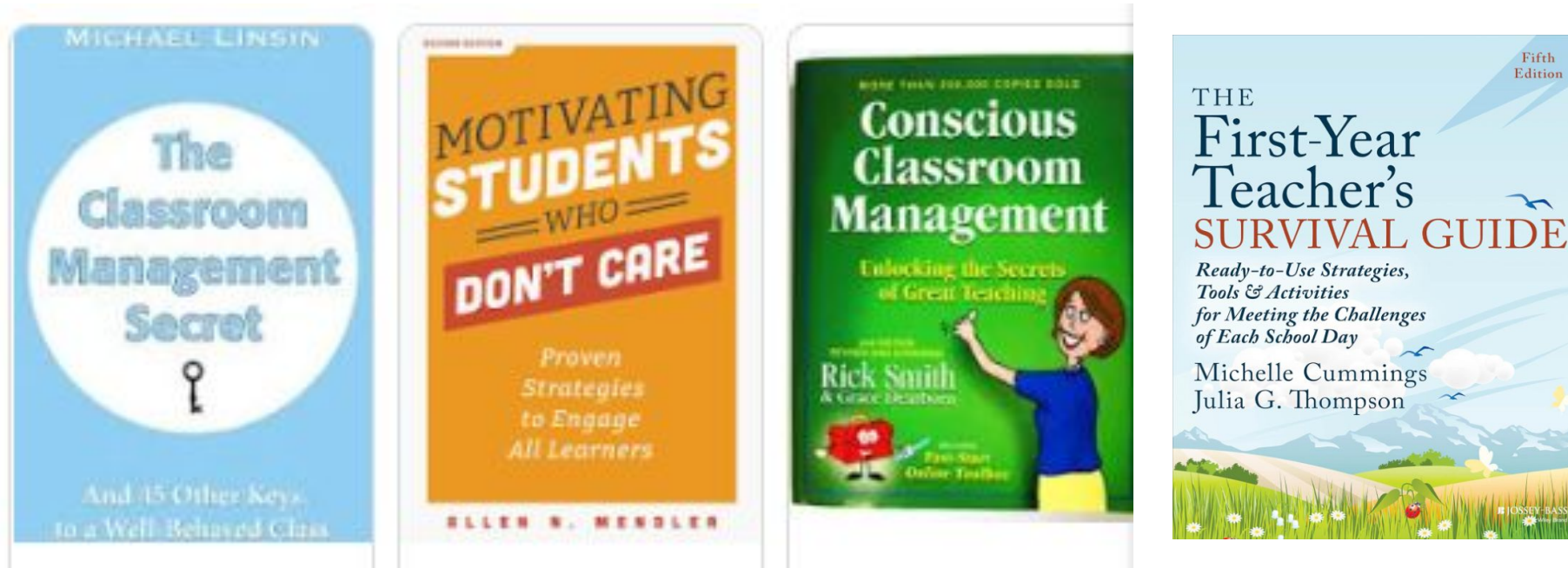


Mr. B's Class Rules

- 1) When Mr. B talks, we listen.
- 2) Raise your hand if you have a question.
- 3) **When we enter the classroom, we walk to our seat.**

What makes the difference?

1. Temperament and experience (90%)
2. Classroom management literature (10%)



Go-Live day



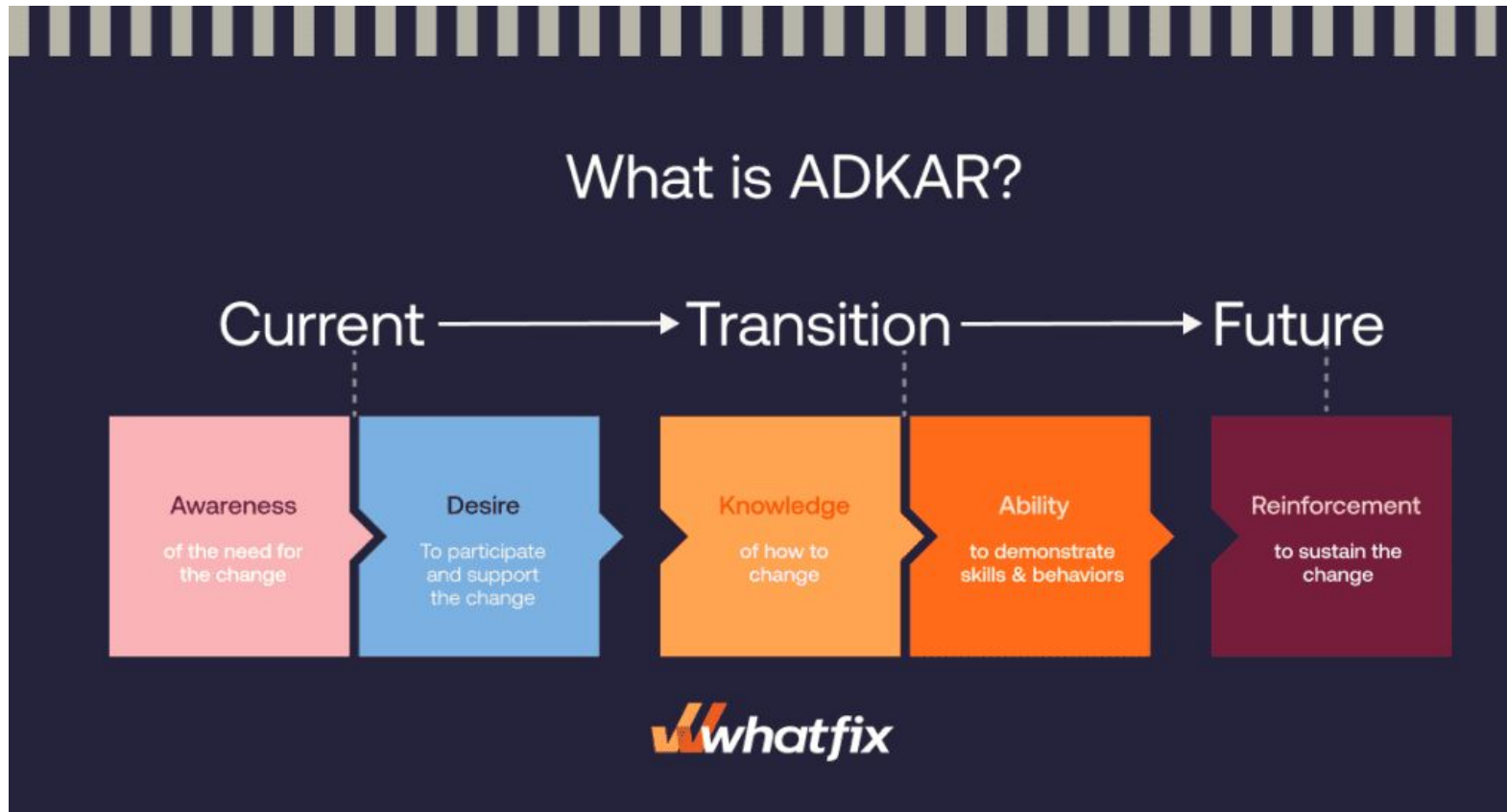
will it be a kindergarten-style shitshow?



or a pretty successful day?

Change Management Literature: does this actually work?

ProSci's ADKAR model: “the ADKAR Model focuses on individual change—guiding individuals through a particular change and addressing any roadblocks or barrier points along the way.”



“The invisible Approach” to CM success

- 1) Change Management doesn't need to be talked about explicitly, it's actually best if it isn't.

“The invisible Approach” to CM success

- 1) Change Management doesn't need to be talked about explicitly, it's actually best if it isn't.
- 2) We can take advantage of existing touchpoints in a Salesforce Implementation to make change simply happen.

Discovery, take advantage!

The image displays a series of 19 numbered screenshots from the SAP S/4HANA Cloud Discovery 1 course. The screenshots are arranged in a grid, with numbers 1 through 19 placed below each corresponding image. The screenshots show various user interface elements, including navigation menus, search results, and detailed views of SAP S/4HANA Cloud components. The screenshots are as follows:

- 1. SAP S/4HANA Cloud Discovery 1 - Overview
- 2. SAP S/4HANA Cloud Discovery 1 - Overview
- 3. SAP S/4HANA Cloud Discovery 1 - Overview
- 4. SAP S/4HANA Cloud Discovery 1 - Overview
- 5. SAP S/4HANA Cloud Discovery 1 - Overview
- 6. SAP S/4HANA Cloud Discovery 1 - Overview
- 7. SAP S/4HANA Cloud Discovery 1 - Overview
- 8. SAP S/4HANA Cloud Discovery 1 - Overview
- 9. SAP S/4HANA Cloud Discovery 1 - Overview
- 10. SAP S/4HANA Cloud Discovery 1 - Overview
- 11. SAP S/4HANA Cloud Discovery 1 - Overview
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- 13. SAP S/4HANA Cloud Discovery 1 - Overview
- 14. SAP S/4HANA Cloud Discovery 1 - Overview
- 15. SAP S/4HANA Cloud Discovery 1 - Overview
- 16. SAP S/4HANA Cloud Discovery 1 - Overview
- 17. SAP S/4HANA Cloud Discovery 1 - Overview
- 18. SAP S/4HANA Cloud Discovery 1 - Overview
- 19. SAP S/4HANA Cloud Discovery 1 - Overview

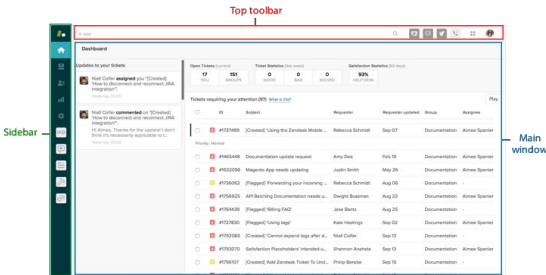
Discovery to Build, earning trust and buy-in



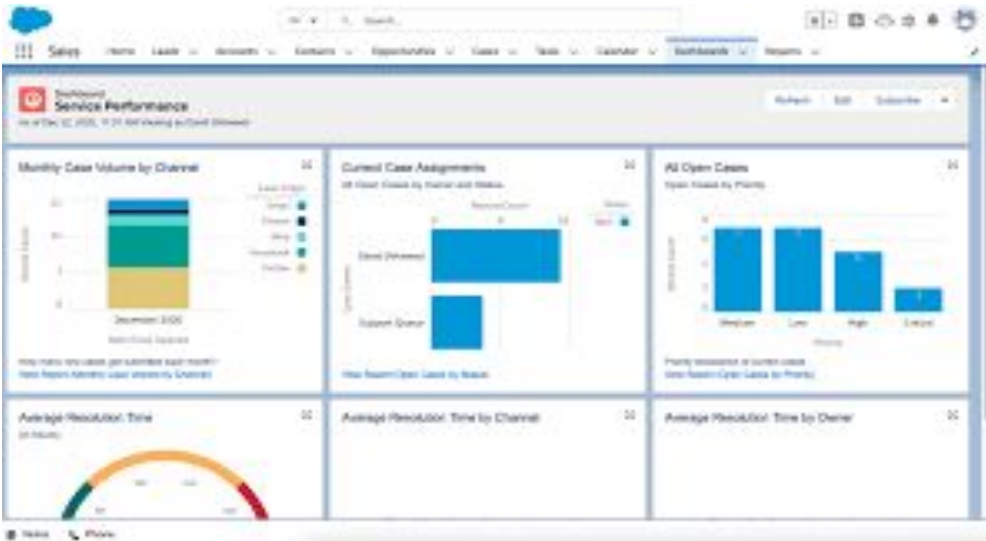
Communication styles



Team-specific jargon



Workarounds



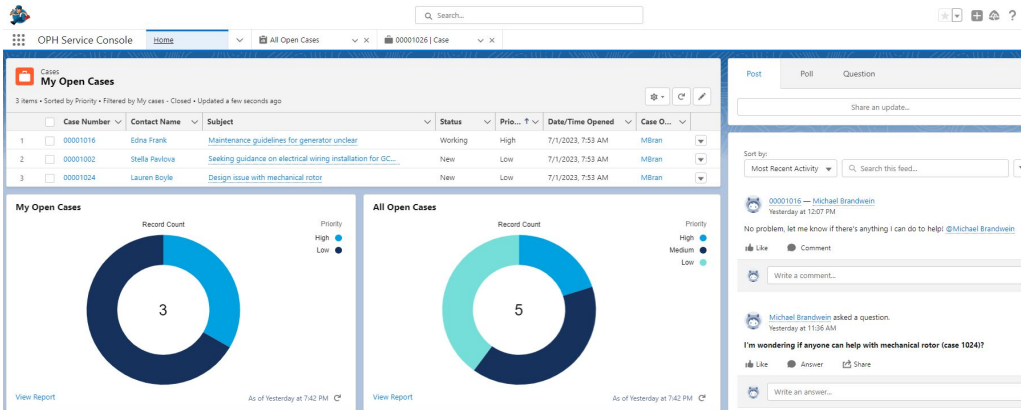
1:1 translations

new solutions

The most powerful CM tool, a multipurpose user guide

		Current Customer Service System [Zendesk]	
1	Customer Service Homepage - Zendesk		Customer service logs into Zendesk. This is the homepage. The homepage includes: 1. Sidebar with links a. Home b. My Tickets c. Dashboards d. Knowledge Base e. Settings 2. Top Toolbar a. Search b. Quick Add (i.e. create new case) c. Login/out of Live Chat 3. Main Window a. Quick View Dashboard [row on top] i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login; similar to chatter
	Customer Service Homepage - Salesforce		The homepage includes: 1. Links <i>see detail below</i> a. Home b. My Tickets c. Dashboards d. Knowledge Base removed for phase 1 e. Settings removed for phase 1 2. Top Toolbar a. Search b. Quick Add (i.e. create new case) <i>see detail below</i> c. Login/out of Live Chat removed for phase 1 3. Main Window a. Quick View Dashboard [row on top] i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login; similar to chatter Functionality in the tab dropdown includes:

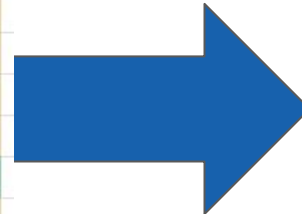
Demo with enthusiastic participation



1	Customer Service Homepage - ZenDesk	Current Customer Service System [ZenDesk] The screenshot shows the ZenDesk homepage. Annotation 1 points to the sidebar on the left. Annotation 2 points to the top toolbar. Annotation 3 points to the 'My Tickets' section. Annotation 4 points to the 'Quick View Dashboard' on the top right.	Customer service logs into Zendesk. This is the homepage. The homepage includes: 1. Sidebar with links a. Home b. My Tickets c. Dashboards d. Knowledge Base e. Settings 2. Top Toolbar a. Search b. Quick Add (i.e. create new case) c. Login/out of Live Chat 3. Main Window a. Quick View Dashboard [row on top] i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login; similar to chatter
	Customer Service Homepage - Salesforce	The screenshot shows the Salesforce homepage. Annotation 1 points to the search bar. Annotation 2 points to the 'My Open Cases' section. Annotation 3 points to the 'All Open Cases' section. Annotation 4 points to the 'Post' section on the right.	The homepage includes: 1. Links see detail below a. Home b. My Tickets c. Dashboards d. Knowledge Base removed for phase 1 e. Settings removed for phase 1 2. Top Toolbar a. Search b. Quick Add (i.e. create new case) see detail below c. Login/out of Live Chat removed for phase 1 3. Main Window a. Quick View Dashboard [row on top] i. Count - my open cases ii. Count - all open cases b. List of tickets in descending order by priority, date open 4. New notes on 'my tickets' since users last login; similar to chatter Functionality in the tab dropdown includes:

User Testing

		Yes = Proficient						
		No = Pending						
		N/A = Not applicable for role						
		Job functions						
Role	Team Member	1	2	3	4	5	6	7
Rep, Cust Serv	Mary Lee	Yes	Yes	Yes	Yes	Yes	N/A	N/A
Rep, Cust Serv	Ted	Yes	No	No	No	No	N/A	N/A
Rep, Cust Serv	Paulina	Yes	Yes	Yes	Yes	No	N/A	N/A
Rep, Cust Serv	Tyler	Yes	Yes	Yes	Yes	No	N/A	N/A
Director, Cust Ser	Kyle	Yes	No	Yes	Yes	Yes	Yes	Yes
VP, Operations	Susan	Yes	N/A	N/A	N/A	N/A	No	N/A
	Task							
	1 Accessing Salesforce, navigating the homepage, das							
	2 Creating new cases manually, updating existing case							
	3 Sending emails from Salesforce, using email templat							



user guide for
each process

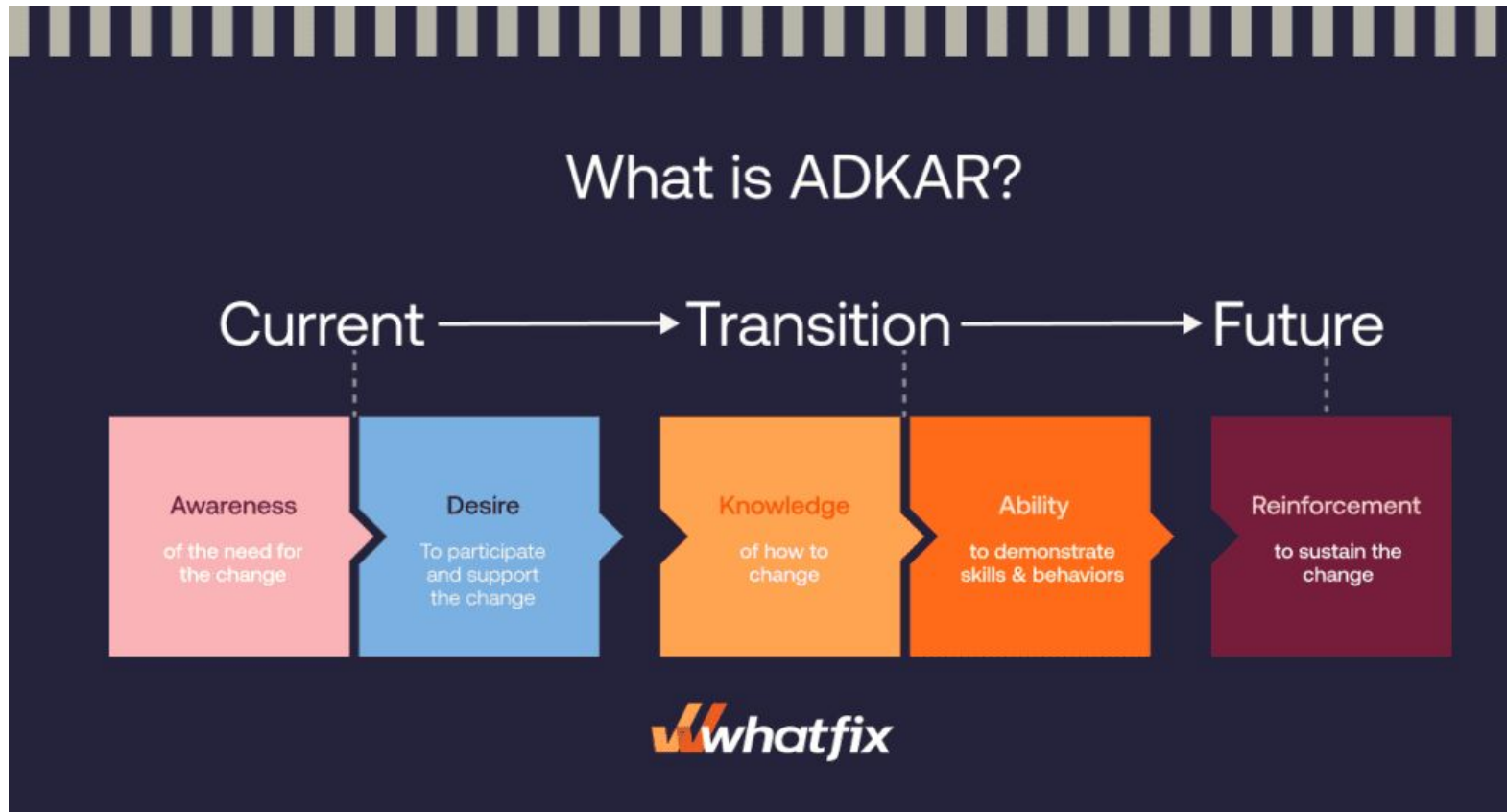
Smooth
day one

Low stress Go-Live!



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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:

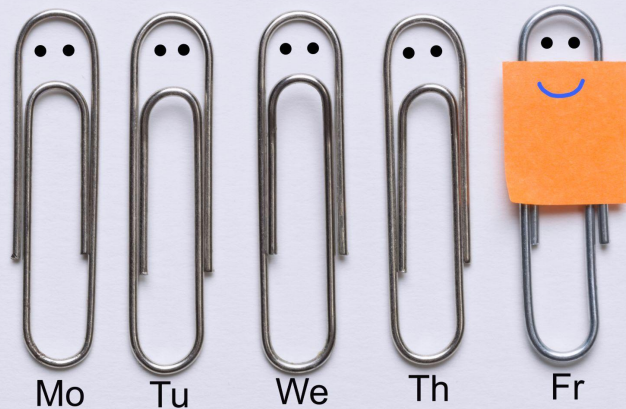
1. How to get my team to stop configuring in Prod
2. Keeping leadership aligned for a project to move forward

FUTURE TOPIC OPTIONS

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.

Ideas:

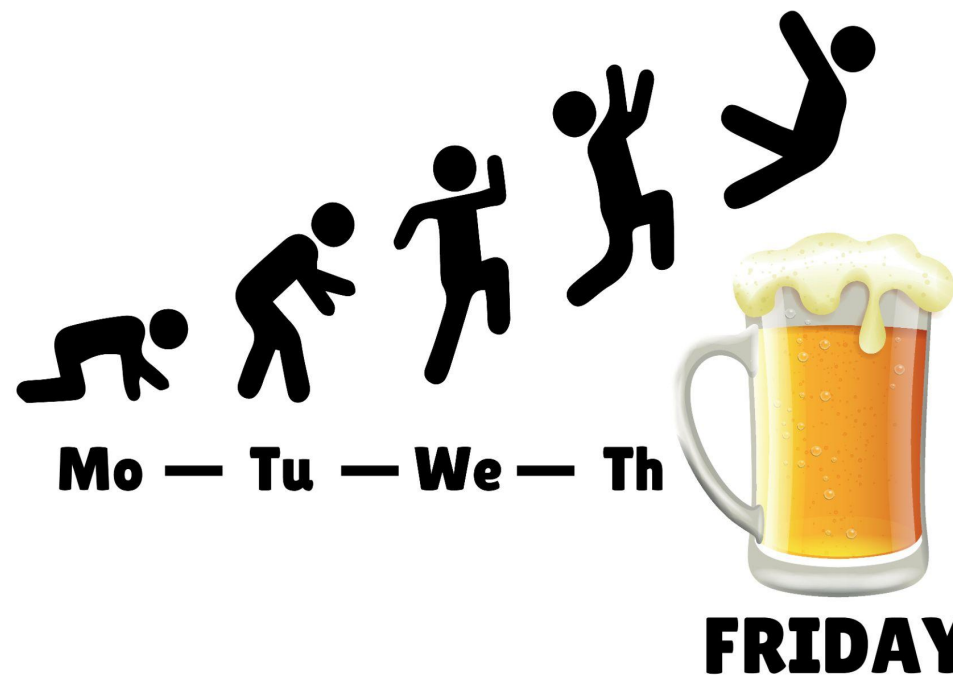
1. What does a change manager do day-to-day?
2. What are change management best practices outside of the IT industry that we could incorporate into our Salesforce world?
3. The history of change management



I love friday



AS ALWAYS, HAPPY FRIDAY!





**FIRST FRIDAY:
10-11a OFFICE HOURS**

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](#)

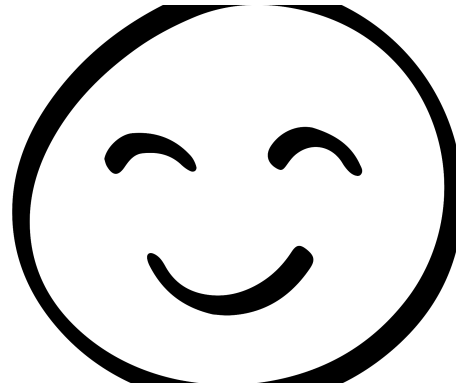
[Reactive Vs Proactive Change Management - Examples and Differences](#)

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'**