



FIRST FRIDAY: CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM



PREVENT A KINDERGARTEN SHITSHOW

**IT PROJECTS ARE COMPLEX.
COMPLEX SYSTEMS CAN BE
COMPARED TO RAISING A TEENAGER
~ANDREW OURIQUE**

FIRST FRIDAY QUOTE BOARD

**TURN VICTIMS INTO
PARTICIPANTS
~BECCA MORGAN**



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



**TAKE YOUR PROJECT
THE LAST MILE
~DARREN PALADINO**

UPCOMING EVENTS

1. **Forcelandia (Portland, OR)**
Aug 20-21, 2025
Tickets on sale
2. **Mile High Dreamin' (Denver, CO)**
Aug 27-28, 2025
Tickets on sale
3. **Dreamforce (San Francisco, CA)**
Oct 14-16, 2025
Tickets on sale

BEST TIME TO NEGOTIATE WITH SALESFORCE

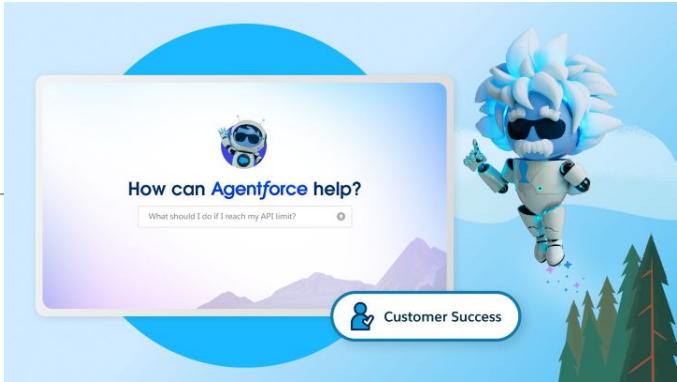
1. **End of Q2:** July 31
2. **End of Q3:** Oct 31
3. **End of Q4 and EOY:** Jan 31
End of year is the best time for discounts

REVIEW A SUCCESSFUL AGENTFORCE IMPLEMENTATION

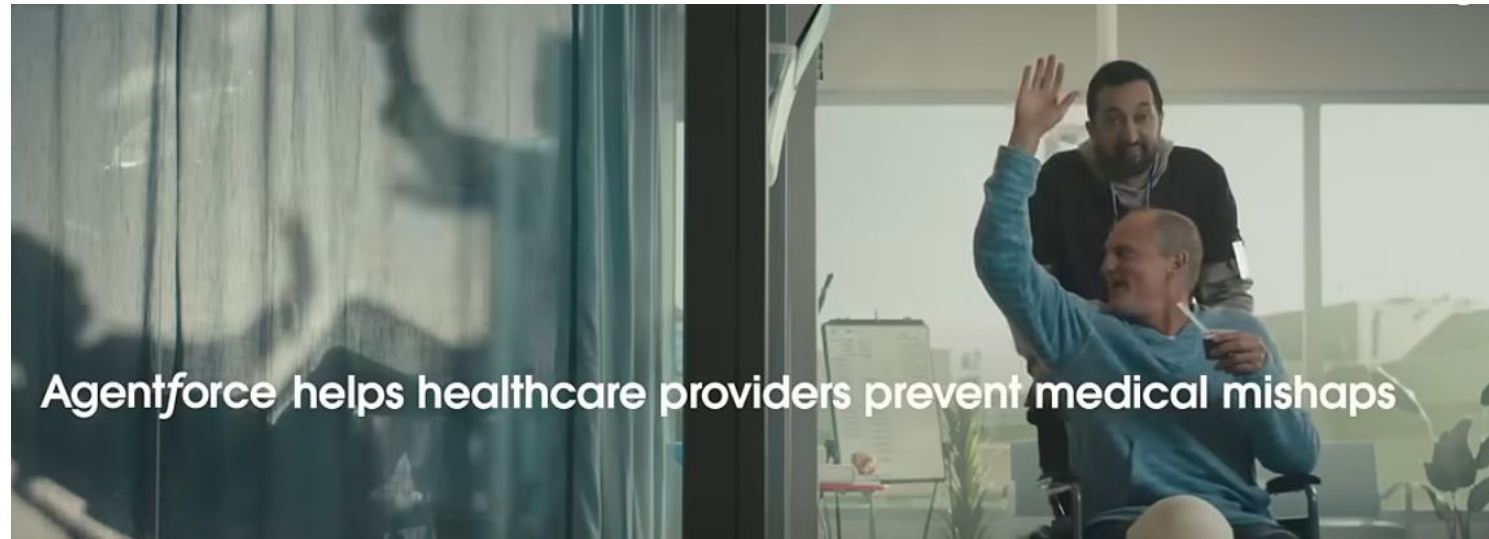
WHAT WENT WELL WITH
1. DATA
2. PEOPLE



WHAT CAN AGENTFORCE DO?

Customer Service	Sales	Escalation
		
Restaurant reservation management	Upselling recommendations	50% Case Deflection

WHAT CAN AGENTFORCE DO?





JUNE 2025 CHANGE AND AI SEASON 1 FINALE

TODAY'S TAKEAWAYS

1. Why doubling down on Change Management is critical for Agentforce success
2. Fear is a much larger factor with AI change than other change

AGENDA

Topic	Time	Presenter
What can Agentforce do?	9:00 - 9:15	Michael
Intro, Agenda	9:15 - 9:20	Mark
People-related change	9:20 - 9:35	Michael
Open discussion	9:35 - 10:00	All
Open office hours	10:00-10:30	Michael
Happy Friday	10:30 - 5:00	The group

Feel free to hop in with questions or comments at any time!



FEBRUARY 2025: PROACTIVE VS. REACTIVE CHANGE

AI-CRM User Adoption Research Conclusions

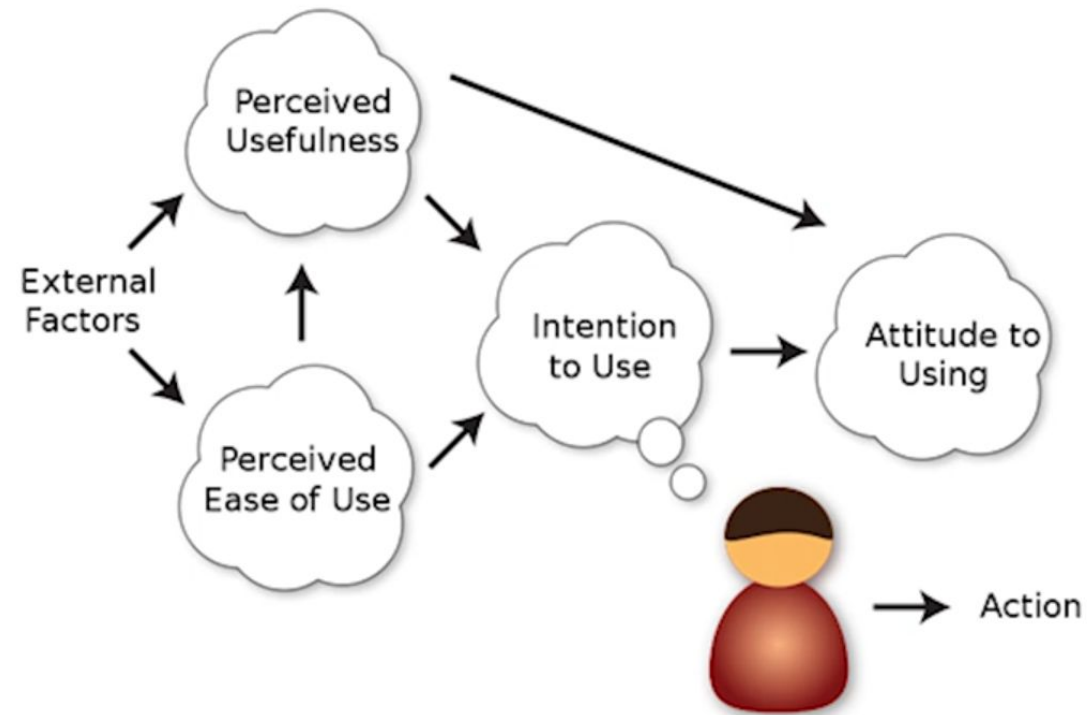
“...adopting AI without planning ahead has failed to provide positive outcomes in terms of organizational performance and may lead to employee resistance. Therefore, in the inevitable trend of AI adoption, it is crucial to provide a strategic guideline on the implementation of AI-CRM, considering both user perception and organizational performance”

(Yoo et al., 2024, p. 13)



DECEMBER 2024: BUILD ENTHUSIASM INTERNALLY

Technology Acceptance Model

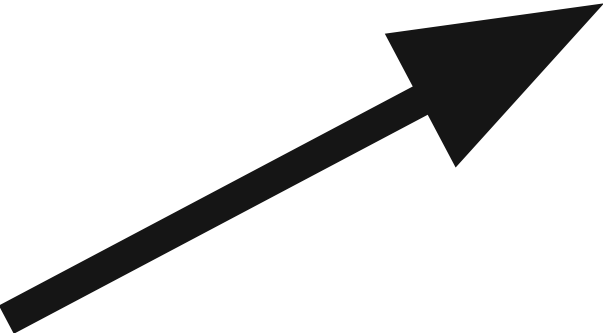


Technology Acceptance Model (TAM)

MARCH 2025: CHANGE METHODOLOGIES

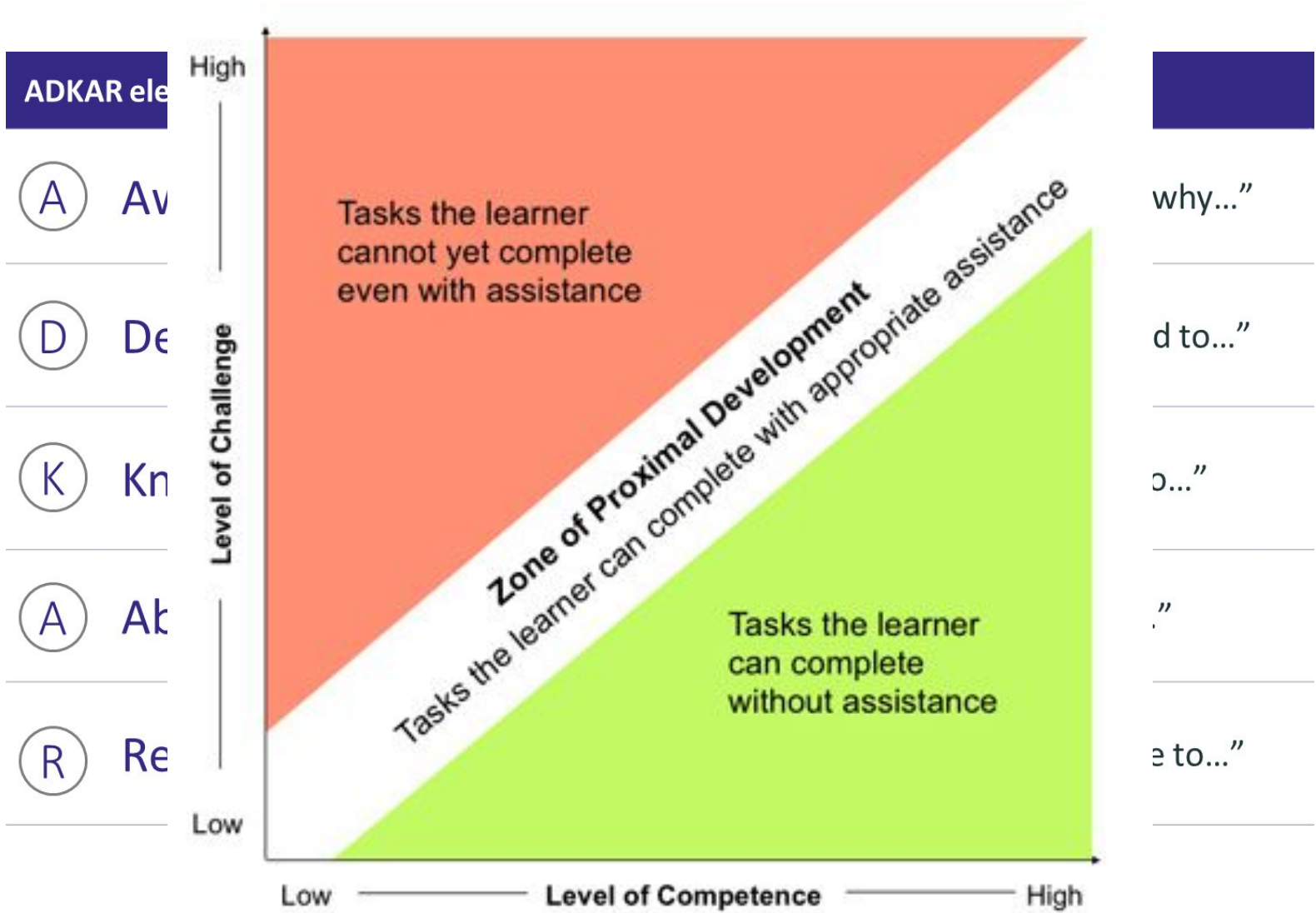
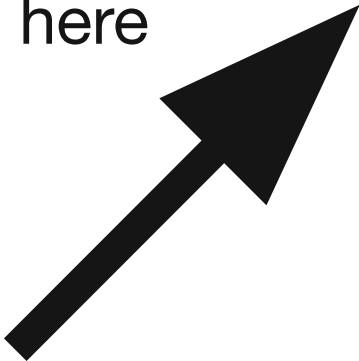
The K - A drop
is already an
issue, and will
be more of an
issue with AI

ADKAR element	Definition	What you hear
A Awareness	Of the need for change	"I understand why..."
D Desire	To participate and support the change	"I have decided to..."
K Knowledge	On how to change	"I know how to..."
A Ability	To implement required skills and behaviors	"I am able to..."
R Reinforcement	To sustain the change	"I will continue to..."



MAY 2025: ADULT LEARNING THEORY

The K - A drop
means
change loses
steam here



FUN FACTS

1-Is AI a less human-centered approach?

No! In fact, the word Human showed up even more in AI-related research studies on change. Humans and fear are showing up even more.

2-Age has not been noted in research as differences in AI adoption

Some people prefer videos, some prefer step-by-step guides

3-Industry differences have been noted, i.e. higher regulated industries are pushing back more (healthcare), which is funny because that's where I'm seeing it.

4-If you look at LinkedIn it looks like everyone is doing AI, but they're not.

Most organizations have some kind of AI-related initiative in play.

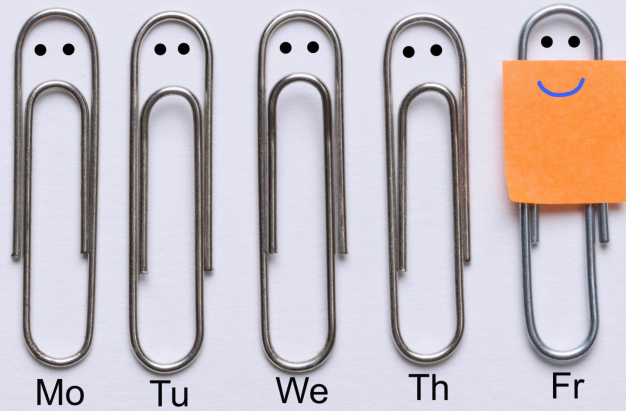


ANY CHANGE ISSUES THE GROUP IS FACING THAT WE'D LIKE TO DISCUSS?

SEASON 2

Season 2 coming in a few months (TBD date)

This series is on your calendar ongoing, so we will figure out how to cancel the invite for skipped months



I love friday



AS ALWAYS, HAPPY FRIDAY!





**FIRST FRIDAY:
10-10:30a OFFICE HOURS**

FIRST FRIDAY'S DEFINITION OF CHANGE MANAGEMENT

The systematic improvement of
you and your organization's
work life.

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](#)

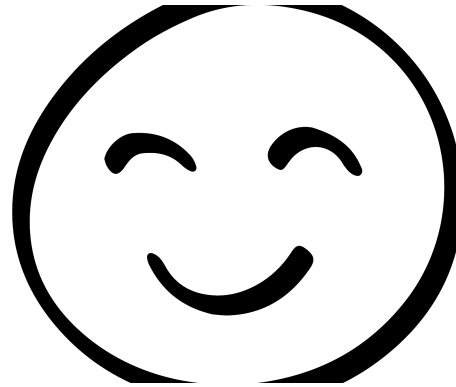
[Reactive Vs Proactive Change Management - Examples and Differences](#)

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'**