# FIRST FRIDAYS

## CHANGE MANAGEMENT IN THE SALESFORCE ECOSYSTEM

### From Theory to Action
### Building the First Friday Toolkit

**November 6th, 2026**



# SEASON 1 + 2 QUOTES

-“Your demos are not really demos, they’re releases.” (Mitch Routt)

-"It's like a spiderweb with water on it... a fly lands and water drops from all different directions" (Joe Telafici)

-“I understand you want blue. But do you want indigo, navy, periwinkle, or cornflower?” (Kelly Spaulding)

-"Never forget, this work is worth 3-7x ROI" (FF Team)



# BEST TIME TO NEGOTIATE WITH SALESFORCE

End of Q4 and EOY: Jan 31
This is the best time for discounts!

End of Q1: April 30

End of Q2: July 31

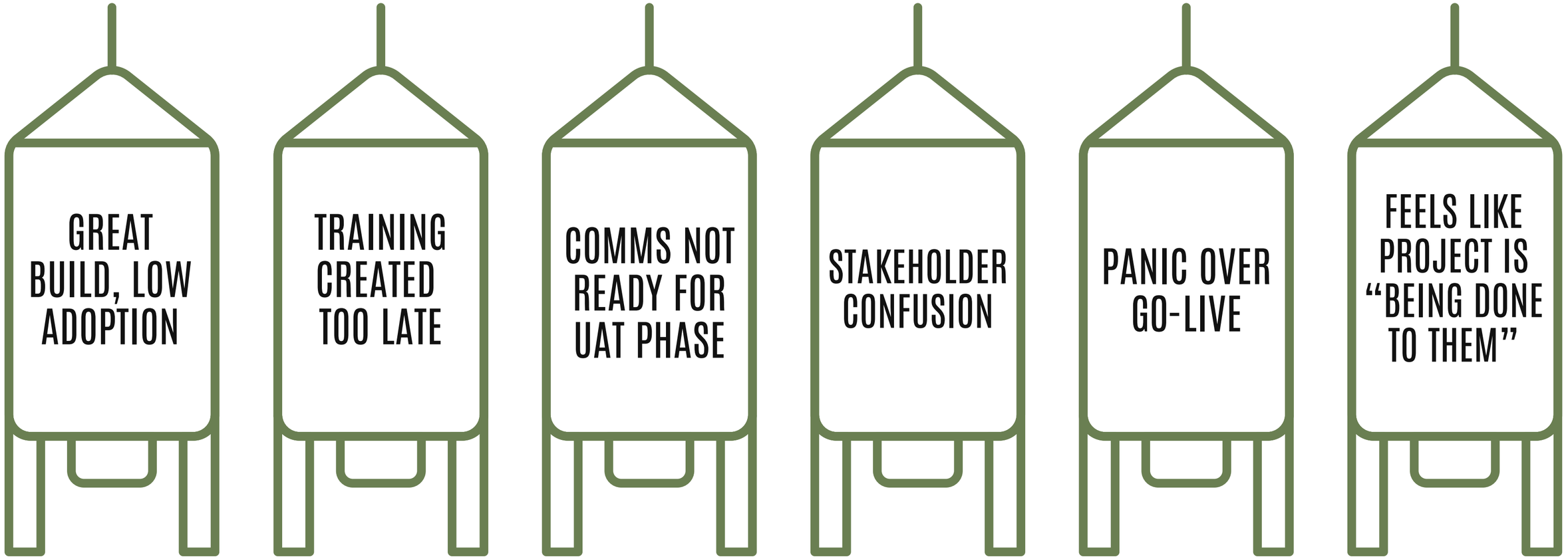





# FIRST FRIDAY: SEASON 2

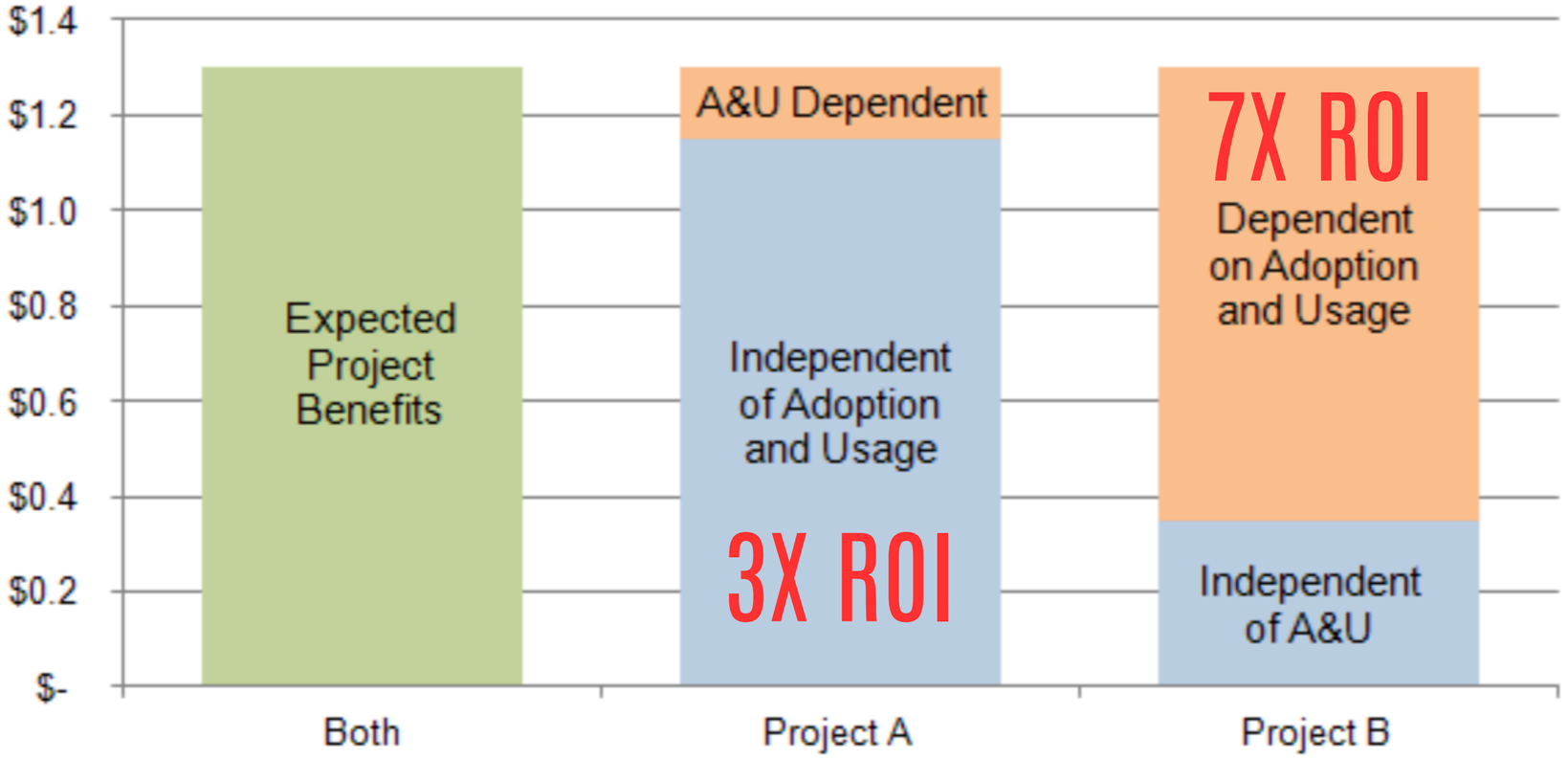
## CHANGE MANAGEMENT FOR ROI

# THE BREWERY OF CHANGE MANAGEMENT HELL



# STARTING TO DEFINE CHANGE ROI

## Different projects have different adoption & usage (A&U) benefits




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



## Change Calculator

Every Salesforce go-live has a productivity cost. This calculator puts a dollar figure on it and shows what change management investment returns.

Artichoke Consulting LLC /



# FIRST FRIDAY: SEASON 3

## From Theory to Action

### Building the First Friday Toolkit

# FIRST FRIDAY SEASON 3

- Friday Dec. 4: Requirements
- Friday Feb. 5: Build/Demo
- Friday March 5: UAT
- Friday April 2: Go-Live
- Friday May 7: Steady State

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# Episode 1

## Discovery & Planning

# WHAT IS CHANGE MANAGEMENT IN DISCOVERY & PLANNING?



## DEFINE SUCCESS

What outcomes, and which metrics, prove the change worked.



## DEFINE IMPACT

Who and what is affected, and how much risk the change carries.



## DEFINE APPROACH

The vision, strategy, communication and resources to get there.

# KEY ACTIVITIES: FROM CHANGE TO VISION & STRATEGY

DEFINE THE CHANGE

CONDUCT AN IMPACT ASSESSMENT

IDENTIFY STAKEHOLDERS

## VISION & STRATEGY

A clear, motivating vision, and a strategy covering objectives, timelines, resources andsuccess metrics.

# KEY ACTIVITIES: CONTINUED

| | |
|---|---|
| ASSESS RISKS & PLAN MITIGATION | Identify risks and mitigation strategies, including the ten aspects of change management for individuals. |
| DEVELOP A COMMUNICATION PLAN | Explain the purpose of the change and keep everyone informed throughout. |
| ESTABLISH SUCCESS METRICS | Define success before implementation so outcomes can be measured. |
| ALLOCATE RESOURCES & BUDGET | Set the resources, budget, roles and responsibilities that support the change. |
| COORDINATE WITH OTHER PROCESSES | Align with IT processes such as configuration management for one consistent view of the environment. |

# KEY ACTIVITIES: CONTINUED

| ACTIVITY | TOOL OR TEMPLATE | WHAT IT PRODUCES |
|---|---|---|
| Define the change | Problem statements; 4Ps; current/future state | What, why, desired outcome |
| Impact assessment | There are formal tools, but many require paid access. 4Ps can give a broad start/scope | Impact by group, process, system |
| Stakeholders | Stakeholder map: Org charts; Miro; Lucidspark; Canva; Simply Stakeholders; some Salesforce-native tools; PowerPoint; Visio; RACI | Who to engage, how, and when |
| Vision & strategy | Vision and CM strategy: 4Ps; BRD | Objectives, timeline, resources |
| Risks | Risk and mitigation log; Prosci 10 Aspects | Ranked risks with owners |
| Communication | Often in the project plan; Marketing collab | Audience, message, channel, timing |
| Success metrics | Metrics scorecard; SF reports; Performance reviews | Baselines and targets |
| Resources & budget | Roles and budget plan | Owners, effort, funding |

# DEFINING CHANGE MANAGEMENT ROI BEFORE YOU BUILD



## QUANTITATIVE METRICS

Measurable targets set beforeimplementation, such as adoption and usage.



## QUALITATIVE METRICS

Stakeholder confidence, readiness and sentiment about the change.



## COST & IMPACT

Connect the resources and budget invested to outcomes and results.

# ADKAR: WHAT DISCOVERY & PLANNING BUILDS

ADKAR

AWARENESS:  Why the change is needed

DESIRE: Buy-in grows from a shared vision and trust

KNOWLEDGE: What is changing and how.

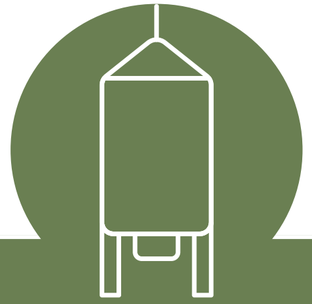
ABILITY: Later phases

REINFORCEMENT: Later Phases



These activities also set the stage for user adoption and usage.

# THE PM'S ROLE: ONE INTEGRATED PLAN



## WHEN CM IS SILOED

- Great build, low adoption
- Training created too late
- Comms not ready for UAT
- Stakeholder confusion
- Panic over Go-Live
- Project feels "done to" the business



## WHEN CM IS INTEGRATED

- Intentional rollout
- Clear expectations
- One program plan showing interdependencies

# DISCUSSION

# FIRST FRIDAY SEASON 3

- Friday Dec. 4:
- Friday Feb. 5:
- Friday March 5:
- Friday April 2:
- Friday May 7:

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