

9 Steps to Effective Change Management

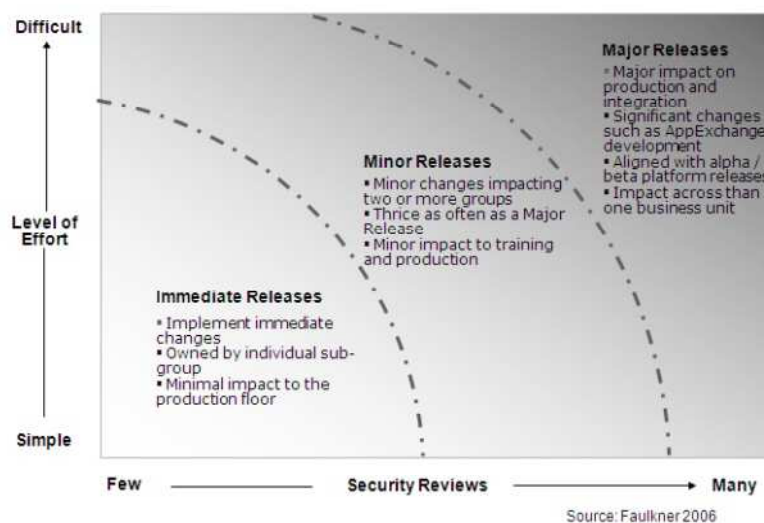
Your end-users have a lot of ideas and requests for Salesforce functionality. And salesforce.com produces three seasonal releases (Winter, Spring, Summer) per year. Because you can't do everything at once, how do you focus on the product enhancements that most effectively drive user adoption and have the biggest impact on your organization—and your users' day-to-day functions?

Here are 9 steps to for successful change and seasonal release management:

1. Get a strategy
2. Engage an executive sponsor
3. Collect input from end-users
4. Define scope and impact
5. Prioritize
6. Configure and test
7. Communicate and train
8. Deploy
9. Follow up & Support

Step 1: Get a strategy

A core tenet for initial deployments is “keep it simple.” You can always add features and processes after the application is live. It is impossible to incorporate every change request into your deployment – the level of effort may be too great or the request may not align with your business goals. When the steering committee meets to determine which change requests and seasonal release features will be implemented, you need to have a strategy to determine the level of effort required. Here is an example:



Step 2: Get a sponsor

Having an engaged executive sponsor is key to an effective change management process. The sponsor will help guide the change management group by defining the process and establishing strategic objectives. The sponsor should also contribute to communication plans and help define the message to your users to drive adoption.

Step 3: Collect input

There are lots of ways to get feedback and ideas from your end-users—the important thing is that you **do it!** Here are some features of Salesforce CRM that will help:

- Create a Chatter Group for your end-users to capture ideas, feedback and questions. Post links to Training, process documents, FAQ and other helpful resources in the left sidebar. Added bonus: you'll find users will start helping each other and answering questions, which frees up time for you!
- Use the Ideas functionality of Salesforce CRM to create a two-way communication channel between your change management group and your user community. Users love it—they can always see the latest status of their Ideas; for example, Under Consideration, Approved, or Rejected.
- Use the Case object to capture internal enhancement requests. You can collect all the information you need to evaluate the request. Then use the built-in report and dashboard functionality to monitor the number, type, and frequency of specific requests.

Step 4: Define scope and impact

Once you have a list of enhancement ideas, determine the scope and impact of each idea. For global or cross-functional deployments, it's critical to align processes between functional areas. These processes should be reviewed by the change management group to avoid negatively affecting other functional areas. This step also provides an excellent opportunity to engage with your users. It's a good idea to scope out the proposed features with a specific use case in mind and to shadow your users' day-to-day routines to predict the effects of any changes.

Step 5: Prioritize

Incorporating every enhancement request and idea is just not feasible. That's why defining the overall impact is important in helping the change management group and sponsor decide which enhancements to implement, which to target for a later date, and which to reject. For those requests that get approved, use a change management application to track the progress, status and next steps of your project.

Step 6: Configure and test

Depending on your Salesforce edition, you'll have access to one or more sandbox environments with a copy of your production data. You can use the sandbox to configure and test any enhancements and changes before deploying them to your production environment. This step is critical to a smooth and surprise-free deployment.

Step 7: Communicate and train users

Don't derail your new release by not having a communication or training plan. Set employee expectations about the upcoming changes, such as when they'll happen and how users will be trained. And be sure to answer the question, "What's in it for me?"

- Take advantage of your sandbox environment to provide a real-life training environment for your users. Depending on the complexity of your release, you have several training options, including online training from salesforce.com and the release notes. For complex implementations, consider hands-on classroom training. For very simple implementations, an email notification or FAQ document may be enough. Check out all the training options available through salesforce.com.

Step 8: Deploy

Once your new release is configured and tested and your users are trained, it's time to push your new release to your production environment. The Force.com IDE is a powerful client application for creating, testing, editing and deploying Force.com applications, application components, Apex code and Visualforce pages. Please refer to the developer.force.com website for more information.

Step 9: Follow up & Support

Finally, measure the success of your new release and identify areas you can enhance in the future. After you deploy, reconnect with your power users or survey a broader base of your user community to start the cycle again.

And it is important to have a Support process in place when your end-users need support or have a technical question. Check if your I.T. department uses a help desk application; or use the Cases object in Salesforce to capture end-user issues; or ask your salesforce.com Account Executive about Remedyforce, a cloud-based I.T. help desk application developed on the Force.com platform.



Corporate Headquarters

The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices

Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700