9 steps to effective change management

Your users have lots of ideas and requests for functionality. And salesforce.com releases new features three times a year (see "6 steps to making the most of each release"). Because you can't do everything at once, how can you make sure you focus on those product enhancements that most effectively drive user adoption and have the biggest impact on your organization—and your users' day-to-day jobs?

Here are 9 steps toward a successful change management and product release strategy:

1. Get a strategy
2. Collect input
3. Get a sponsor
4. Define scope and impact
5. Prioritize
6. Configure and test
7. Communicate and train users
8. Deploy
9. Follow up

Abstract

By continually enhancing your application, you'll improve adoption, broaden usage, and improve your user's overall experience.

To make sure you're making those changes that will have the biggest impact on your business, you need a product release strategy that will "bubble up" those enhancements that will keep your application—and your users—performing at their peak.

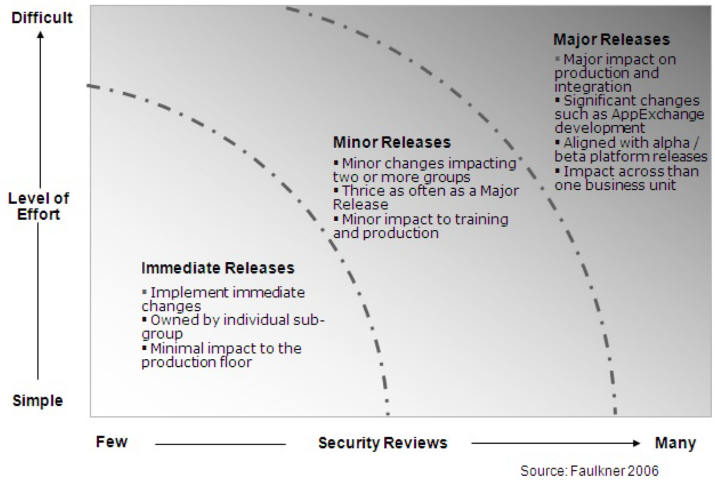
By Sharon Bartol

Step 1: Get a strategy

A core tenet for initial releases is "keep it simple." You can always add features and process improvements after the application is live. And let's be honest—not every request should be incorporated into your deployment. The scope and level of effort may be too great, the request may not align with your business goals, or the change may have a negative impact on some users.

To determine which user requests—and/or seasonal release features—you'll implement, you need a strategy. Part of that strategy is to identify which changes can be made quickly and easily, and which need to be reviewed and approved by your change management group. Below is an example of a release management strategy that categorizes changes into three types of releases, depending on whether they can be made quickly or should be scheduled for future releases. In most cases, features from the seasonal releases are quick to implement and could be released immediately.

Best practice



Step 2: Collect input

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

- 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 3: 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 the communication plan and help define the message to your users to drive adoption.

Step 4: Define scope and impact

Once you have a list of enhancement ideas, determine the level of effort, 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. To make those decisions, consider using the voting capabilities of salesforce.com's ideas functionality to give users a voice in this process.

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.

- Use the Eclipse IDE to manage configuration changes.
- Use a browser and Eclipse Cloud Deploy to manage Force.com code (Apex), schema, Force.com pages (Visualforce), and other changes between your sandbox and production environments.

If you're not sure which option is right for you, check with a technical resource at salesforce.com.

Step 9: Follow up

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. This approach helps to keep your releases fresh and timely—you'll always deliver those features that will make the biggest difference to your user community.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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