SPARTANLYNC CHANGE MANAGEMENT

MANAGER INTERVIEW

SpartanLync
TECHNOLOGIES

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By:
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Interviewee: Jorge Cantor, Key Account Manager, SpartanLync

Platform: Microsoft Teams

Meetings Held:

- First Meeting: March 25, 2025
- Second Meeting: April 7, 2025

First Meeting (March 25, 2025): Understanding the Change

We met with Jorge Cantor, Key Account Manager at SpartanLync, to understand how the organization is approaching its Salesforce CRM implementation. Our goal was to gather insights about the current system, reasons behind the change, the key challenges ahead, and how prepared the teams are. Jorge walked us through the decision-making process, department dynamics, and initial reactions from staff. These insights helped us create a practical and relevant change management toolkit for SpartanLync.

1. Question: Background & Context

- **Could you briefly describe your role and responsibilities regarding the Salesforce implementation? Why is your organization choosing to implement Salesforce? Are there specific challenges you're addressing or strategic goals you're aiming to achieve?**

Jorge's Response:

Jorge explained that the decision to implement Salesforce came directly from SpartanLync's founder and CEO. The company had been relying heavily on Excel for day-to-day operations and had even outsourced marketing functions like email campaigns. There was a clear need for a modern CRM system to improve efficiency.

Although Jorge wasn't part of the initial decision, he was brought in to help lead the implementation because of his previous experience with Salesforce. His role includes assessing whether the platform fits the company's workflows, providing feedback from different teams, and acting as a bridge between leadership and operational staff.

One major challenge is resistance to change, especially from senior employees who have been using the same systems for years. Jorge is working closely with them to make the transition less overwhelming. Another challenge is managing the cultural differences in a diverse team spread across Canada, Mexico, Colombia, Australia, the US, and India. Aligning workflows and expectations across these groups takes extra care and communication.

Strategically, the company wants to automate repetitive tasks, improve cross-department collaboration, and use data more effectively. For example, in forecasting and stock management.

2. Question: Nature and Scope of the Change

- **Which areas of your organization will be most significantly impacted by the Salesforce implementation? Is this change incremental (minor adjustments) or transformational (significant restructuring) for your company?**

Jorge's Response:

Jorge said the sales team will feel the biggest impact. Since they'll be responsible for capturing and managing leads, entering accurate data, and using the system daily, their role is central to Salesforce's success. That information will also be used by finance and logistics for inventory planning and decision-making.

Logistics and engineering teams will also need to integrate their processes into the new platform. However, Jorge emphasized that this isn't a complete transformation overnight. They've decided to go with a gradual rollout to reduce risk. By continuing to use Excel alongside Salesforce in the early stages, teams have a safety net while they get comfortable with the new system. Daily meetings with the Salesforce provider help troubleshoot and align expectations.

3. Question: Organizational Readiness

- **Have you assessed the organization's readiness for adopting Salesforce? If yes, how did you perform this assessment? If not, what indicators suggest your organization might be ready (or not ready) for the implementation? Have you identified any immediate concerns or gaps in readiness (skills, resources, cultural alignment)?**

Jorge's Response:

At first, Jorge wasn't confident the organization was ready. There was clear resistance from several departments, especially among long-tenured employees. Many were comfortable with their current tools and hesitant to change.

To address this, Jorge took a personal approach. He spoke one-on-one with department leads to understand their concerns. This helped him build trust and start shifting mindsets. He noticed that once people felt heard and involved, they became more open to the idea of change.

The biggest readiness gap was cultural. Sales staff, for instance, are great at engaging with clients but often dislike reporting tasks. Jorge knows this mindset will be a hurdle and that training will need to go beyond technical use, it also has to shift attitudes.

4. Question: Anticipated Challenges and Risks

- **What potential challenges or risks do you anticipate during the Salesforce implementation? Are there particular groups or roles that may resist or struggle more significantly? What might pose the biggest threat to a successful implementation of Salesforce?**

Jorge's Response:

Jorge mentioned two big risk areas: resistance from the logistics department and time delays. The logistics team has been doing their work a certain way for years, and they're hesitant to change how they operate. Meanwhile, the sales team faces challenges tied to culture and communication across regions. Different working styles and speeds can make it hard to align.

The biggest overall threat, though, is time. Jorge shared that new issues keep coming up in daily meetings, like the need to configure price books or license additional features like Salesforce's AI tool "Instinct." These discoveries often lead to delays and additional costs.

5. Question: Training and Resources

- **Do you plan to provide training or resources to support employees transitioning to Salesforce? If yes, what kind of training or resources have you initially planned? If not yet planned, what barriers are there to providing such support?**

Jorge's Response:

Jorge explained that formal training sessions for everyone at once wouldn't be practical, it would slow things down. Instead, he and the CEO decided to cascade the training by department. They would meet with each team (like logistics and sales) separately and explain how Salesforce applies to their roles.

He also mentioned that Salesforce offers built-in virtual sessions and support tools, but these are mostly self-service. That's a concern because not everyone is comfortable learning this way. To help bridge this gap, Jorge said he and the CEO are personally meeting with team supervisors to make sure training is prioritized. The supervisors are expected to encourage their teams to carve out time and follow a shared training plan.

He acknowledged that switching from Excel to Salesforce is a big leap. "It's very different," he said, and realistically it could take a couple of months for people to fully adjust. Because of this, he's committed to introducing the system gradually to avoid overwhelming anyone. "I don't want to feel pushy with my team," he added.

6. Question: Communication

- **How have you communicated (or plan to communicate) the Salesforce implementation to your employees? Which communication channels (e.g., team meetings, email, intranet, town halls) are typically most effective in your organization?**

Jorge's Response:

Jorge shared that communication so far has been direct and informal. He holds quick meetings with different teams - logistics, engineering, and sales to keep them informed.

After each meeting, he sends follow-up emails that summarize key points and assign responsibilities. This helps avoid confusion and ensures everyone is aligned on next steps.

At this stage, there are no formal feedback channels like surveys. But Jorge agreed it would be a good idea to create one. He wants people to feel comfortable speaking up, whether that's to express concerns, suggest improvements, or flag what isn't working. "We need to make sure that everyone is fine to raise their hand and say, 'Hey, I don't think this is working well,'" he said.

7. Question: Leadership and Support

- **What level of involvement will your leadership (executives, managers) have in supporting and driving this Salesforce implementation? What specific roles will leaders play throughout the process?**

Jorge's Response:

According to Jorge, the CEO and founder made the initial decision to purchase Salesforce and handle the contract. After that, most of the responsibility shifted to Jorge himself, especially for the sales team's implementation. "They're basically handing it over to me," he said.

He now serves as the main link between the executive team, Salesforce provider, and internal departments. His job is to ensure that the system fits each team's needs and that people feel supported through the transition.

When one of the student interviewers referred to him as the "Product Owner," Jorge laughed and agreed: "Yeah… it's like a PO. I'm kind of a bridge." That phrase captures how he sees his role connecting people, gathering feedback, and making sure things don’t fall through the cracks.

8. Question: Measuring Success

- **What initial criteria or performance indicators are you planning to use to measure the success of Salesforce implementation? Have specific milestones or key performance indicators (KPIs) been set?**

Jorge’s Response:

Jorge was upfront in saying that KPIs and milestones haven’t been set yet. While there’s recognition that they’re important, the company is still early in the process. “We haven’t set any milestone yet,” he said, “but I know we have to.”

He noted that Salesforce likely has internal tools or templates that can help them build out KPIs. Right now, though, success is being tracked informally through daily check-ins and team feedback. The main goal is making sure employees feel comfortable using the system and that resistance starts to ease. Formal metrics will likely come once they’re further along in the rollout.

Summary of our first Meeting

Our conversation with Jorge helped us better understand SpartanLync’s current reality. Although the Salesforce implementation was already underway, it lacked formal structure. Jorge had taken on a leadership role with limited support, doing his best to balance executive expectations, team concerns, and technical demands. Key takeaways include:

- Salesforce was chosen by leadership to modernize operations and automate workflows.
- Jorge, though not part of the initial decision, is now leading the rollout across teams.
- No formal KPIs or structured change plan existed at the time of our meeting.
- Cultural resistance, training needs, and time delays were identified as major barriers.

This input was vital in helping us develop a targeted Change Management Toolkit that considers both the technical and human sides of change at SpartanLync.

Second Meeting (Date: April 7th, 2025) - Toolkit Validation & Feedback

The purpose of the second meeting was to present Jorge Cantor with the completed Salesforce Change Management Toolkit and gather his feedback on how it could support SpartanLync's ongoing implementation. We aimed to understand which parts of the toolkit aligned with the company's operations and culture, and where adjustments might be needed. In addition, we explored Jorge's approach to leading change using the "Images of Change" framework from Chapter 2 of Managing Organizational Change to better understand his leadership style in practice.

Section 1: Feedback on the Change Management Toolkit

1. **Now that you've had a chance to review our proposed Salesforce Change Management Toolkit, do you feel this type of structured approach would be useful for SpartanLync? Why or why not?**

Jorge's Response:

Yes, I do think your toolkit would be useful for SpartanLync, especially as a reference guide for someone like me. The structure you've created helped me see all the moving parts in one place - communication, training, stakeholder involvement, and resistance planning, which is something I've been managing more intuitively until now.

That said, we probably won't use every part of the toolkit exactly as you laid it out. Since the decision to move forward with Salesforce has already been made, and we're already in the middle of rollout, it's hard to go back and apply the process step-by-step. But your work helps us validate what we're doing right, and it gives me ideas on where we can tighten things up, like maybe being more consistent in how we communicate across teams or setting up more structured feedback check-ins.

2. **Are there specific elements of the toolkit that you believe align well with how your organization operates?**

Jorge's Response:

Yes, several parts of your toolkit really do reflect how we're trying to operate, especially in terms of communication and training. The stakeholder map was one of the most useful tools, it helped clarify roles and made me realize we need to be more intentional about defining who's responsible for what during the implementation.

The communication strategy you laid out also felt realistic. We already rely on quick meetings and follow-up emails, and your multi-channel approach aligns with what we're doing. It was helpful to see that we're on the right track, and I liked the idea of layering different formats like Q&A sessions and newsletters, those are things I might start adding gradually.

The LMS-based training plan and role-specific learning paths also stood out. We're currently doing more informal department-based training, but your plan showed how we could standardize it a bit more without overwhelming people. I especially liked how the toolkit allowed for department-specific content while still keeping everyone aligned.

3. **Which parts, if any, do you think would need to be adapted to fit SpartanLync's culture, structure, or teams?**

Jorge's Response:

There are a few areas that I think would need some adjustment to work well at SpartanLync. For starters, our company culture is pretty fast-paced and informal. So, while your toolkit is well-structured, we'd probably need to simplify some parts to match how our team's work. For example, timelines would need more flexibility, we often make decisions quickly based on what's happening in the moment, so locking everything down too early might not work for us.

Also, we don't have a dedicated HR or change management team. That means a lot of the responsibilities outlined in your plan, like tracking resistance formally or rolling out detailed assessments would fall on a small group of people, often while they're juggling other tasks. We'd need lighter versions of those tools or maybe combine them with existing processes.

Another thing is technical support. Your plan assumes that employees will seek help if they need it, but in our case, people are less likely to speak up unless support is really visible and accessible. So, I'd probably pull out that part of the plan and make it more prominent like a visible "go-to" system for help and reminders.

Finally, I liked your feedback loop suggestions, but we'd probably use something more casual than surveys at first, maybe direct check-ins or anonymous email forms until people get more comfortable.

4. **Does your organization currently follow a formal change management methodology (e.g., ADKAR, Kotter's Model, Lewin's Model)? Or is it more informal?**

Jorge's Response:

We don't currently follow a formal change management model at SpartanLync. To be honest, before this project, I hadn't really worked with frameworks like ADKAR or Kotter. Most of what we're doing is based on experience, instinct, and a lot of day-to-day problem-solving.

That's why your toolkit was eye-opening. It gave me a clearer structure to think about change not just as a task list, but as a people-centered process. I liked how ADKAR broke it into simple stages like awareness and reinforcement. It helped me see where we're strong and where we're missing steps, like not doing enough around tracking reinforcement or measuring readiness.

I'm not saying we'll follow ADKAR exactly right now, but I'll definitely be using parts of it, especially the way it helps break down communication and support planning. It's something we can build on as we grow.

5. **Have you seen a similar change process work or fail in past roles? What made it succeed or struggle?**

Jorge's Response:

Yes, I've experienced both success and failure with change efforts in previous roles, especially when working with CRMs like Salesforce in different industries. What I've seen is that the outcome almost always comes down to how well people are brought along not just how good the technology is.

When change failed, it was usually because people weren't involved early enough. For example, in one company, we rolled out a new system without really explaining the why behind it or listening to feedback from the teams using it. As a result, people didn't trust the process, and adoption lagged for months.

On the other hand, when change went well, it was because leadership communicated clearly and often, and teams felt like they had a say. We took time to train people properly and created space for ongoing support. Your toolkit reflects those same ideas communication, stakeholder involvement, and ongoing reinforcement and I think that's why it stood out to me.

So yes, your approach aligns with what I know works from experience. The challenge is always keeping people engaged once the initial excitement fades and I think your toolkit gave some helpful ideas on how to do that.

Section 2: Images of Change - Understanding Jorge's Change Leadership Style

(Adapted from Chapter 2 of Palmer, Dunford & Buchanan)

1. **When leading change, do you prefer having a detailed plan and timeline, or do you allow flexibility as things evolve?**

(This helps determine if Jorge aligns more with a Director or Navigator image.)

Jorge's Response:

I definitely prefer having a clear plan and timeline. It gives structure and helps keep things from getting too chaotic, especially when multiple departments are involved. But at the same time, I've learned that plans can't be too rigid things change fast, especially in tech projects like this.

So, I use the plan as a baseline, but I try to stay flexible. For example, we had to shift a few milestones because of unexpected pricing upgrades or integration delays. If I stuck strictly to the original timeline, the team would've felt overwhelmed. So, I adjust as we go, based on feedback and what's actually happening on the ground.

Assessment:

Jorge shows traits of a **Navigator**. He appreciates structure but recognizes that not everything is controllable. He adjusts plans in real time to keep things moving and realistic.

2. Would you describe your role in change as more of directing and making decisions, or guiding and helping people make sense of change?

(This distinguishes between Director, Coach, or Interpreter images.)

Jorge's Response:

I'd say it's a mix of both. There are definitely times when I have to make decisions and give clear direction especially when something technical needs to move fast or a deadline is close. But most of the time, I'm more focused on guiding people through the change.

A big part of my job right now is helping different departments understand why we're making the shift to Salesforce, how it benefits them, and what their role is in making it work. I spend a lot of time listening to their concerns and translating technical features into something they can connect with. I don't just want them to follow orders, I want them to believe in the process.

Assessment:

Jorge exhibits a **Coach** style. He provides direction when needed but puts emphasis on helping teams understand the change, making him more relational and supportive in his approach.

3. **Do you believe change outcomes can be fully controlled with the right strategy, or do external forces and unpredictability play a large role?**

(This helps uncover whether he sees himself as a Caretaker or Navigator.)

Jorge's Response:

Even with the best strategy in place, I don't think change outcomes can be fully controlled. There are always external factors new information, technical issues, staff concerns, even budget surprises that shift the direction of the rollout. We've already experienced this with Salesforce. For example, we discovered after starting that some advanced features like Instinct AI would require extra licensing, which affected our budget and timeline.

That said, I still believe in having a plan. But I also believe you have to respond to what's happening in real time and stay adaptable. You can't assume everything will go as expected. That's why I make sure we leave room for course correction and continuous feedback.

Assessment:

Jorge aligns strongly with the **Navigator** image. He sees strategy as necessary but not all powerful. He embraces uncertainty and builds in flexibility to manage it.

4. **What role do you believe organizational culture plays in managing change? Do you try to shape it actively or manage around it?**

(Useful to see if Jorge leans more towards a Coach or Nurturer image.)

Jorge's Response:

I think culture plays a huge role in whether change works or fails. You can have the best plan and the best tools, but if your team isn't open to change, it won't stick. That's why I focus a lot on culture on making people feel safe to ask questions, speak up when something's not working, and share feedback without fear.

I actively try to shape the culture around the change. For example, I've made it a priority to approach people directly, not just send out memos. I want them to feel like they're part of the process not that it's something being done to them. If we can create a culture of openness, collaboration, and support, then the rest becomes a lot easier.

Assessment:

Jorge fits the **Coach** image here. He believes culture can and should be shaped to support change and takes an intentional, people-focused approach to leadership.

Summary of our Second Meeting

In our second meeting with Jorge Cantor, we presented the full Salesforce Change Management Toolkit and asked for his feedback on how it fits SpartanLync's current rollout. Since the company had already started implementing Salesforce without a formal change model, this session focused on how the toolkit could support Jorge's ongoing efforts and fill existing gaps.

Jorge found the toolkit very useful, especially as a reference for someone. While he made it clear that SpartanLync wouldn't use the entire plan step-by-step, he appreciated the structure and said it helped him think more clearly about communication, stakeholder alignment, and training. He highlighted the stakeholder role map, multi-channel communication strategy, and training roadmap as the most practical and immediately relevant tools.

That said, he also pointed out that some elements would need to be adapted to SpartanLync's fast-paced and lean structure. He recommended more flexibility in timelines, simplified tools that could be run with limited resources, and more visible technical support systems. He also emphasized that feedback mechanisms need to be informal at first like quick check-ins or email prompts rather than structured surveys.

From a leadership perspective, Jorge's responses reflected a **Navigator-Coach** hybrid style. He values structured planning but also knows how to adapt when things don't go as expected. He balances giving direction with helping his team understand and engage with the change. He actively works to shape the culture by creating openness and trust, rather than managing around it.

Next Steps Agreed Upon (Second Meeting):

- Review feedback from the Change Management Toolkit and make any necessary adjustments.
- Continue with training sessions and regular communication to ensure everyone is informed and comfortable with the Salesforce implementation.
- Develop and finalize KPIs and milestones to track progress and measure success.
- Maintain flexibility and openness to feedback to ensure a smooth transition.

Post-Meeting Follow-Up (Second Meeting):

- Sent a personalized thank-you email to Jorge, expressing appreciation for his insights.

Thank You for Sharing Your Insights on Change Management at SpartanLync

Andres Serna Chavez <Andres.SernaChavez@edu.sait.ca> Today at 10:39 AM
To: Jorge Cantor; Cc: Prajwal Nagaraj; Peggy Mackey; Priya .; Ranjani Boominathan

Dear Jorge,
On behalf of our entire team: Prajwal Nagaraj, Peggy Mackey, Priya, Ranjani Boominathan, and myself, Andres Serna Chavez, we would like to sincerely thank you for taking the time to speak with us about the Salesforce implementation at **SpartanLync.**
Your openness in sharing both the challenges and opportunities you've encountered during this transition was incredibly insightful. We especially appreciated your perspective on managing resistance to change, addressing cultural differences, and the importance of gradual implementation and hands-on leadership. Your role as a key link between departments and leadership is truly commendable, and your balanced approach to both structure and adaptability has given us a clear and practical view of what change leadership looks like in action.
The conversations from both of our meetings have significantly enriched our understanding of real-world change management, and your feedback on our proposed toolkit was invaluable. It was encouraging to hear that many components aligned well with **SpartanLync's** operations, and we're excited that it could support your ongoing efforts.
Please feel free to stay in touch, and we would be happy to support your change journey in any way we can. We've also sent you a connection request on LinkedIn to continue building this professional relationship: 🔗 Jorge Cantor LinkedIn
Thank you once again for your time and thoughtful contributions.

Warm regards,

Andres Serna Chavez
On behalf of the MNGT-252 Team
Southern Alberta Institute of Technology (SAIT)

- Team decided to connect professionally via LinkedIn to maintain ongoing communication and relationship building.

References:

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