



SPARTANLYNC CHANGE MANAGEMENT

TOOLKIT



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Executive Summary

A group of external change consultants have created this toolkit to help SpartanLync navigate its Salesforce CRM implementation. The organization does not yet follow a structured change management approach. This report introduces the ADKAR model as a practical framework to manage the transformation process from building awareness to sustaining reinforcement. The toolkit's comprehensive nature covering communication, training, stakeholder involvement, and resistance management aligns with SpartanLync's needs. It provides a structured strategy that can reduce oversight, guide adoption, and support employees throughout the change.

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Introduction

Purpose

By centralizing and modernizing its customer relationship management, SpartanLync is transforming the entire company through its use of Salesforce. There are Sales, Marketing, and IT business units that will be affected by this change. We aim to structure the change management plan and offer tailored support to all change phases.

Background

As of now, SpartanLync does not have a formal change management strategy in place. Jorge Cantor has been appointed as the primary point of contact and informal change agent, and our team has begun collaborating with him to bring this transformation to life. This presents both a challenge and an opportunity as we are building a roadmap from the ground up. This document outlines a step-by-step plan using Prosci's ADKAR model to raise awareness, build desire, grow knowledge, develop ability, and reinforce behavior across the organization.

Scope

Just as the Salesforce Change Management Toolkit attempts to address the changes from a process change perspective, it also addresses all aspects of the Salesforce implementation from this change perspective including communication, training, stakeholder involvement, risk management, resistance mitigation and performance tracking. It also includes all the detailed actions for each step of the ADKAR model, templates, forms, a communication strategy, a training roadmap, and a resistance response matrix. However, it is also specifically built for SpartanLync's internal component structure and business information needs.

Methods

The toolkit is based on established frameworks in industry leaders like Prosci and supported by academic sources, including Palmer, Dunford, and Buchanan (2022). It also incorporates insights from our initial meeting with Jorge Cantor at SpartanLync, with further validation provided during the follow-up discussion. All recommendations are informed by secondary research, stakeholder analysis, and peer-reviewed models to ensure both practical relevance and academic integrity.

Preview of Toolkit

This document includes:

- A complete ADKAR-based implementation plan, including long-term reinforcement tactics
- Stakeholder role and influence map
- Communication and training strategies
- Tools for managing resistance
- Risk mitigation strategies
- KPIs, timelines, and milestone checklists
- SpartanLync's internal stakeholder interview summary
- Practical templates, checklists, and forms for each ADKAR stage
- Manager interview insights and toolkit validation from SpartanLync

The objective behind this toolkit is to provide a well-structured, human centered and sustainable change plan to make Salesforce adoption successful at SpartanLync.

ADKAR Model Implementation

Step 1: Awareness (Helping employees understand the change)

Creating awareness involves clear messaging about the need for Salesforce CRM.

Activities include:

- CEO-hosted town halls to discuss Salesforce's importance.
- Weekly newsletters detailing benefits and implementation updates.
- Online portal featuring FAQs, project timelines, and benefits summary.

Checklist:

- Schedule CEO's awareness sessions (by April 20, 2025)
- Launch intranet resource hub (by April 25, 2025)
- Distribute awareness and perception surveys (by April 30, 2025)

Step 2: Desire (Encouraging employees to support the change)

To foster a desire to participate, the following actions will be taken:

- Open forums where employees voice concerns.
- Recognition programs rewarding early adopters.
- Managers are trained specifically in changing leadership skills to manage resistance effectively.

Checklist:

- Schedule employee engagement sessions (May 2025)
- Initiate recognition programs (from May 15, 2025)
- Deliver resistance-management workshops for managers (by May 10, 2025)

Step 3: Knowledge (Training employees about the change)

Ensuring employees understand Salesforce CRM:

- Role-specific training programs (Sales, IT, Marketing, Customer Service).
- Interactive Learning Management System (LMS) modules and resources.
- Regular live webinars and Q&A sessions.

Checklist:

- Develop role-based training materials (completed by May 5, 2025)
- Set up LMS platform (by May 10, 2025)
- Conduct pre- and post-training assessments (ongoing from May 15, 2025)

Step 4: Ability (Applying knowledge practically)

To enable employees to use Salesforce proficiently:

- Provide ongoing coaching and mentoring programs.
- Create Salesforce expert teams for immediate support.
- Conduct monthly performance reviews to monitor proficiency.

Checklist:

- Assign mentors and coaches (by May 20, 2025)
- Form Salesforce support team (by May 25, 2025)
- Schedule monthly performance reviews (starting June 2025)

Step 5: Reinforcement (Making change sustainable)

Sustaining long-term change by embedding Salesforce in daily routines:

- Continuous recognition of Salesforce "champions."

- Regular distribution of success stories.
- Percentage of active Salesforce users
- Average response time to client requests
- Number of support tickets resolved through Salesforce
- Transparent tracking of clear, measurable KPIs.

Checklist:

- Create recognition mechanisms (implemented by June 1, 2025)
- Publish monthly success highlights (ongoing from June 2025)
- Establish and monitor KPIs using interactive dashboards (from June 2025 onward)

Stakeholder Analysis and Roles:

The success of this implementation depends on clearly identifying stakeholders:

Stakeholder	Role	Responsibilities	Influence Level
CEO & Founder	Executive Sponsor	Provide strategic vision and overall support	High
Jorge Cantor	Change Manager	Lead daily implementation activities, manage teams	High
Sales Team	End Users	Participate in training, provide regular feedback	Medium-High
IT Department	Technical Support	Manage integration, support technical challenges	High
Managers	Facilitators	Provide team-level support, manage resistance	Medium-High
Marketing & Customer Service	Users & Advocates	Leverage Salesforce for customer insights and support	Medium
HR Department	Support Team	Aid coaching, manage employee experience	Medium

Communication Strategy:

- **Bi-Weekly CEO Town Halls** – Provide strategic updates, reinforce vision, and ensure transparency.
- **Weekly Salesforce Newsletters** – Share key milestones, success stories, and updates for Sales, Marketing, and Managers.
- **24/7 Salesforce Intranet Portal** – Centralized access to resources, documents, FAQs, and periodic updates.
- **Monthly Live Q&A Calls** – Enable real-time feedback, address concerns, and engage Sales, Marketing, Managers, and IT.
- **Multi-Channel Communication** – Ensure consistent, honest, and supportive interaction throughout implementation.

Training and Resource Plan:

- **Immersive May 2025 Workshops** – Hands-on training sessions to provide employees with in-depth Salesforce knowledge.
- **24/7 On-Demand LMS Modules** – Flexible, self-paced training available anytime for continuous learning.
- **Quarterly Refresher Webinars & Ongoing Support** – Skill checks, knowledge reinforcement, and always-available Salesforce technical support.

Resistance Management Strategy:

- **Education Sessions** – Clearly communicate Salesforce benefits to ensure employees understand its value.
- **Employee Feedback Loops** – Encourage engagement by actively listening to employee input during implementation.
- **Mentorship & Guidance** – Provide continuous support to build confidence and ease the transition.
- **Rewards & Recognition** – Motivate employees through incentives, boosting engagement and adoption.

Resistance Response Matrix

Source of Resistance	Root Cause	Response Strategy	Responsible Owner
Logistics Dept	Habitual process reliance	Job aids, shadowing Salesforce users	Jorge & Managers
Sales Team	Cultural differences	Peer champions, both English and Spanish-language FAQ	Department Heads
All departments	Fear of performance decline	Coaching and milestone celebrations	Jorge & HR

Risk Assessment and Mitigation:

Identified risks and mitigation strategies include:

Risk	Strategy	Responsible	Timeline
Employee resistance	Open communication and manager-led engagement	Jorge Cantor, Managers	Ongoing
Skills gap among employees	Regular skill assessments and targeted training	Training Team	Monthly reviews
Technical integration issues	Dedicated technical support team	IT Department	Weekly checkpoints

Extra tools: Risk tracking spreadsheets, mitigation response plans, and milestone dashboards will ensure effective risk management.

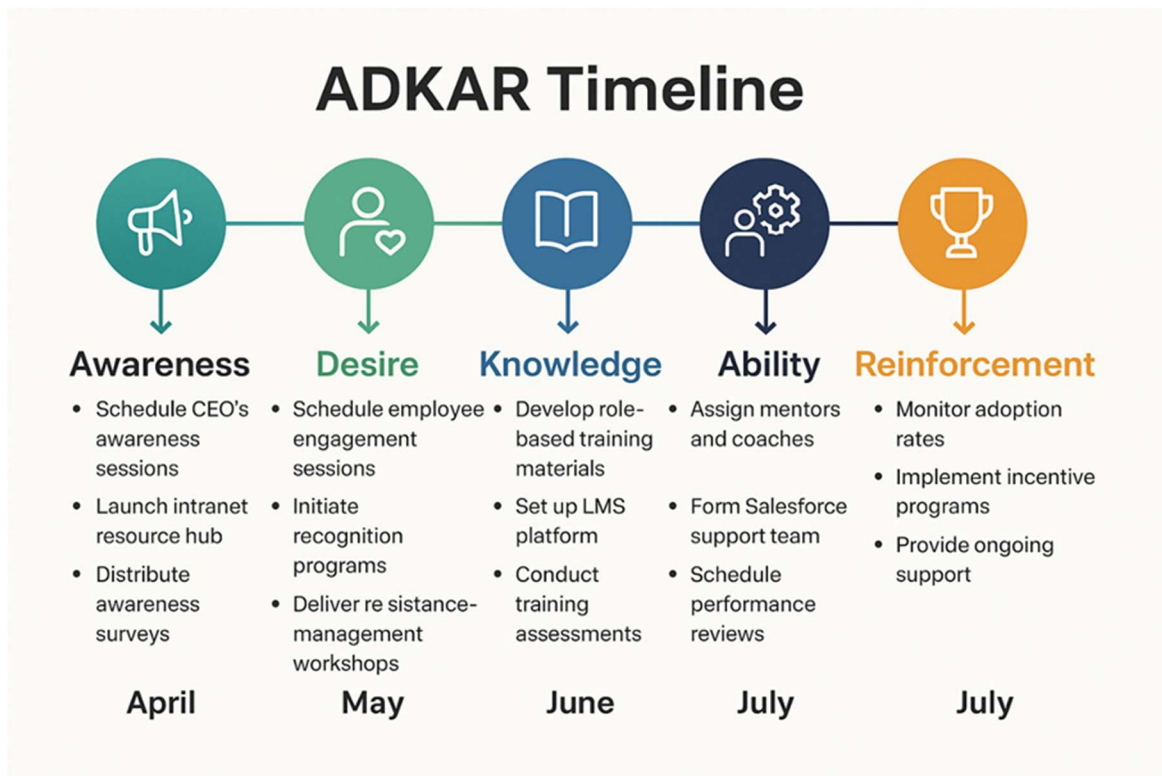
Milestones and Timeline:

Key milestones for tracking implementation progress:

- April: Communication and awareness campaign kickoff (CEO sessions by April 20, intranet launch by April 25, surveys by April 30)
- May: Training rollout, LMS go-live (Training material by May 5, LMS by May 10, assessments from May 15)
- June: Full Salesforce CRM launch (Mentor assignment by May 20, support teams by May 25, reviews start June)
- July onward: Continuous support, performance reviews, KPI monitoring (Dashboards and metrics active from June onward)

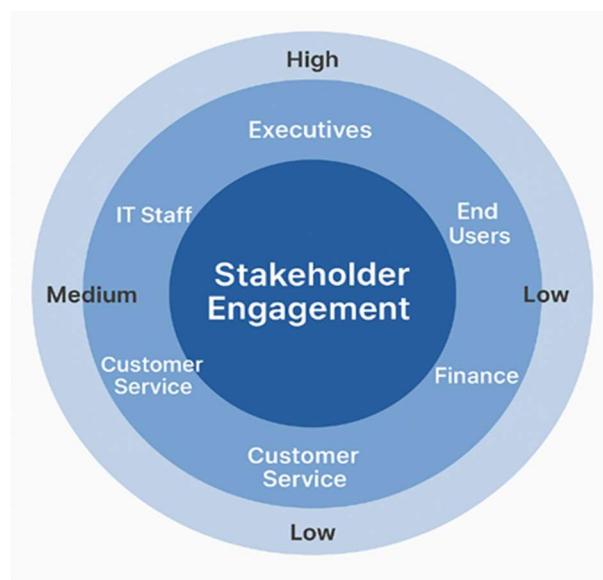
Visual Tools and Dashboards for Change Tracking

- **ADKAR Timeline Infographic: Roadmap from April to July**



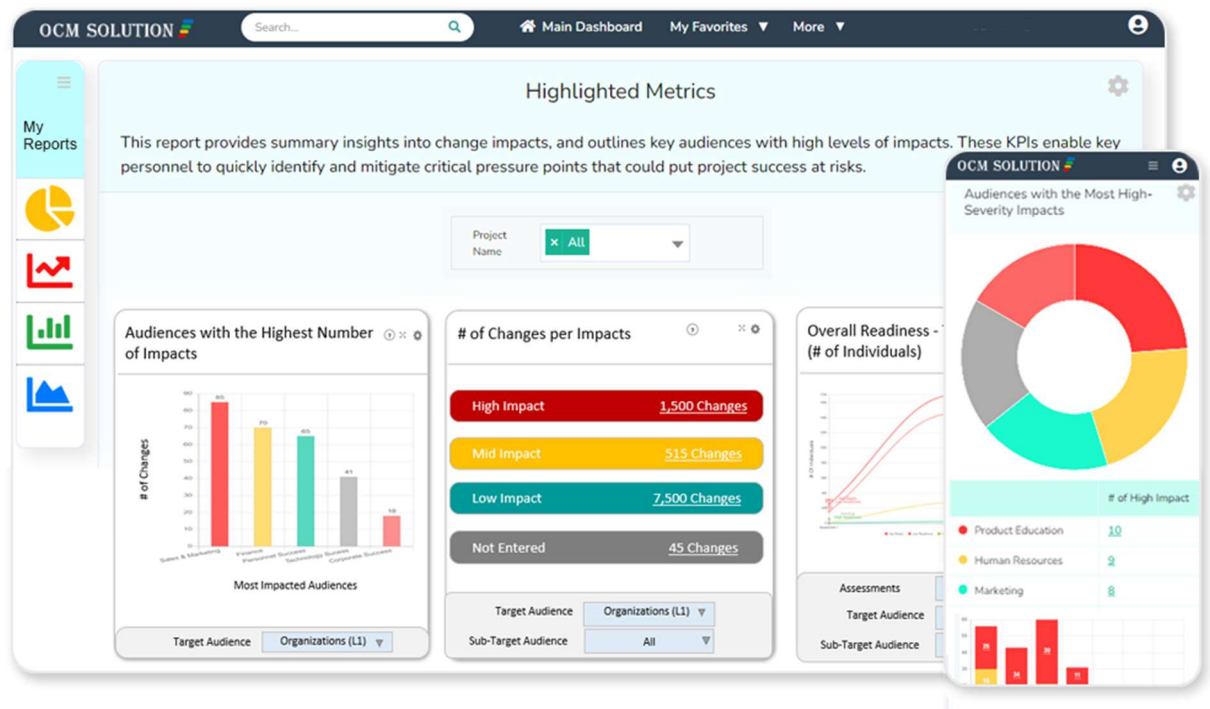
Source: Created by Final Project Team (2025)

- **Stakeholder Engagement Wheel: Visual map by influence level**



Source: Created by Final Project Team (2025)

- **Sample Change Management KPI Metrics Dashboard**



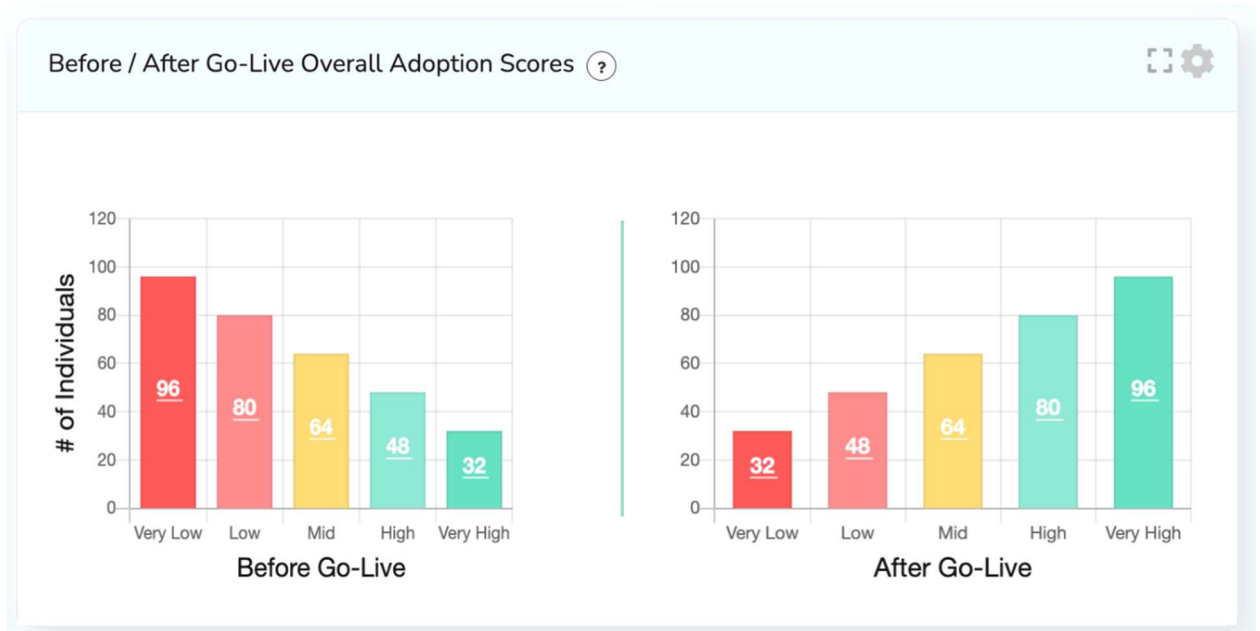
Source: OCM Solution (n.d.)

- **Sample Change Metrics and KPI Tracking**

	High	Mid	Low
Communications Success	✓		
Training Success		✓	
User Engagement			✓
Pre-Go-Live Readiness	✓		
Project Adoption		✓	

Source: OCM Solution (n.d.)

- **Sample Change Metrics and KPI Tracking**



Source: OCM Solution (n.d.)

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Appendix: Manager Interview Summary

Interviewee: Jorge Cantor, Key Account Manager, SpartanLync

Platform: Microsoft Teams

Meetings Held:

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

Purpose

To understand SpartanLync's approach to the Salesforce CRM implementation, gather leadership insights, and validate the proposed change management toolkit using feedback from the key stakeholder involved.

Summary

Jorge confirmed that SpartanLync is not currently using a formal change management model. The rollout of Salesforce has been underway with an informal, adaptive approach led largely by Jorge himself. He was brought into the process after the executive decision was made and now serves as the key bridge between leadership, the Salesforce provider, and internal departments.

At the time of our first interview, formal KPIs, milestone tracking, and structured training plans had not yet been defined. Jorge acknowledged these gaps and showed strong interest in our toolkit's structure. He appreciated how the ADKAR model helped frame the change in more manageable phases and saw value in using parts of the toolkit, especially around communication planning, stakeholder roles, and user readiness.

In the second meeting, Jorge emphasized that the toolkit was realistic and helpful, though not all parts could be applied immediately. He highlighted that SpartanLync's fast-paced environment would require flexibility in applying the model, shorter feedback loops, and more visible support systems. He particularly valued the stakeholder mapping, multi-channel communication approach, and role-specific training strategies.

Jorge's leadership style reflects a **Navigator-Coach** mindset. He prefers structured plans but adapts based on real-time challenges and feedback. He is actively working to shape the organizational culture around openness and collaboration, and places high importance on employee involvement and communication throughout the change process.

Note:

For full interview transcripts, toolkit validation questions, and detailed responses, please refer to the accompanying Manager Interview Document: Part B (Manager Interview).docx / pdf both are attached