Getting Started with Agile Release Management

This checklist is for the Salesforce administrator who wants to respond quickly and efficiently to change requests and new projects without sacrificing compliance and governance. It covers key areas to consider so you can start realizing the benefits of an agile methodology: establish a single source of truth, create frequent and smaller product releases, shorten response time, reduce post-production support, reduce cost, and ensure fewer errors during data updates.
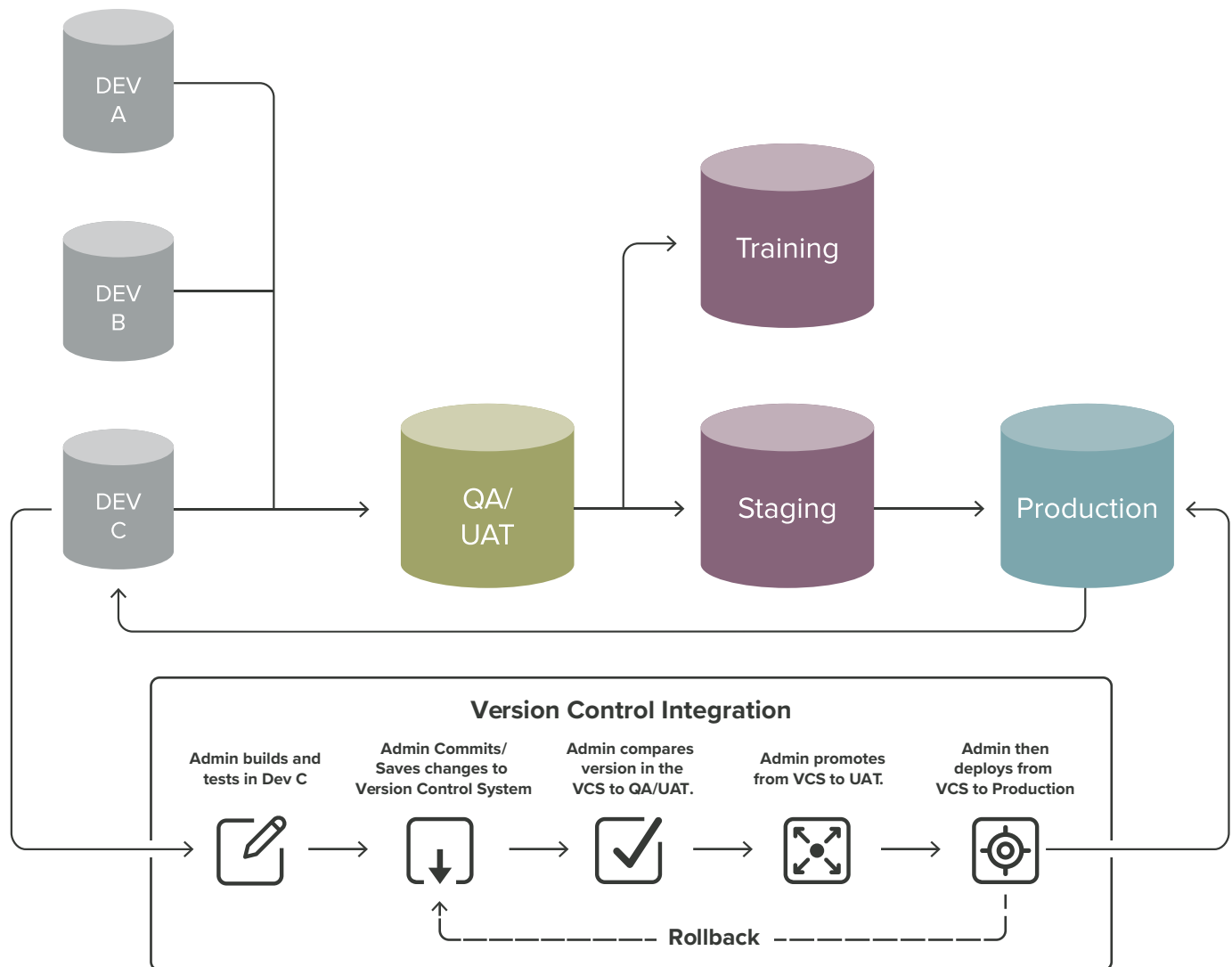
Use this checklist to take control of your backlog and convert your team into a well-oiled release management machine.

- [ ] Develop a release management checklist to plan ahead changes and deployments across your orgs. This can include:
    - [ ] Steps to prepare & create each environment (dev org, sandbox org, UAT, production)
    - [ ] Pre-deployment & post-deployment verification steps
    - [ ] List of task owners assignments & stakeholders
    - [ ] Process for submitting & triaging change requests & new requirements
    - [ ] Cadence for release (every two weeks, every quarter, etc.)
    - [ ] Process for ongoing testing, regression testing, and user acceptance testing (UAT)
- [ ] Implement an agile methodology by breaking out your teams work into time-boxed "sprints" so you can release smaller sets of changes on a more frequent basis
- [ ] Setup your sandbox structure by using specific orgs for each stage in your application development workflow (NOTE: Be aware of each org type storage limits & cost)
- [ ] Choose a version control system (VCS) to use as your source of truth for org change management.

PRO TIP: Check with your IT team to see which VCS your developers are already using. Some great ones include GitHub or BitBucket.

- [ ] Define a rollback strategy to protect your production org from unforeseen issues and faulty deployments
- [ ] Communicate the plan & invite others to participate in release reviews
- [ ] Implement a tool to automate relational data and configuration data deployments seamlessly between orgs. Look for:
    - [ ] Ability to move multiple objects automatically
    - [ ] Ability to maintain record relationships and record ownership across orgs
    - [ ] Reusable data set templates that can create missing fields or picklist values and obfuscate data
    - [ ] Automatic deactivation/reactivation for workflow rules, validation rules and Process Builder processes

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Release Management for Salesforce

The modern release management principles adopted by software development teams can also deliver significant improvements to the speed, frequency, and reliability of Salesforce changes when adopted by admins. Since each business has its own unique processes and requirements that evolve rapidly, administrators and developers need to make quick changes in order to keep up. They need to be, in a literal sense, "agile".

DEV A

DEV B

DEV C

QA/ UAT

Training

Staging

Production

Version Control Integration

Admin builds and tests in Dev C

Admin Commits/ Saves changes to Version Control System

Admin compares version in the VCS to QA/UAT.

Admin promotes from VCS to UAT.

Admin then deploys from VCS to Production

Rollback

GET A DEMO

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