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Templates for routine Biz Tech communications

Business Technology Communications team

Questions or suggestions for this guide and our process?
Fill out our feedback form or
reach out to Jillian Wilschke, jwilschke@salesforce.com.

July 31 meeting recording here.

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Background
"What's happening to the routine comms process?"

If you've ever requested routine comms via the

[Biz Tech Comms Operations - Intake Form](#) for any of the following:

Power shutdown/network upgrade maintenance

Monthly Fin & Int Systems, Hyperion, EDW maintenance

Monthly non-sox server patching: Windows

Monthly non-sox server patching: Linux

Concierge maintenance

We have a new process that will empower you and your team to complete this comm from start to finish!

Note: Please continue to request comms through [our intake form](#) for all other comms.

Background

"How does this benefit me?"

Be empowered.

We trust you to complete comms for your maintenance work, and we made it easy with this guide.

Stay aligned.

Have control over every aspect of your maintenance work from start to finish.

Move quickly.

We know maintenance windows are sometimes last minute. Now you can get the word out faster.

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1. Start here: Templates for each routine comm

Click the link below to open a Google doc containing your template

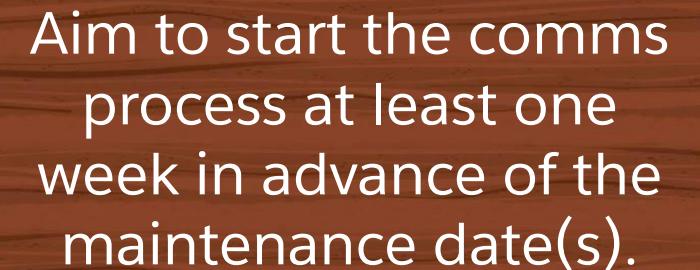Power shutdown/network upgrade/wireless refresh maintenance

Monthly Fin & Int Systems, Hyperion, EDW maintenance

Monthly non-sox server patching: Windows

Monthly non-sox server patching: Linux

Concierge maintenance

Each template contains instructions specific to the comm, but don't stop there! The instructions continue below.

Aim to start the comms process at least one week in advance of the maintenance date(s).

2. Check your work

Have a teammate double check your work

When you've inserted your information in your doc and feel comfortable with your draft, we recommend having another teammate look over your draft for accuracy. **It's best practice to have another set of eyes review and approve of your comms.** Make sure you and a teammate double check specific details like the correct date and times of maintenance, for example.

Not sure how to share your draft? Click the blue "share" button in the top right of your Google doc, insert your teammate's name or email address, give them the permissions they need (view, comment, or edit) and click "done."

3. Confirm CAB approval

Head to Supportforce with your CAB case number

If your comm requires CAB approval, check to make sure CAB has approved before you plan to post.

If CAB has not been approved yet, **DO NOT** post your comm to Chatter. Stop here and come back to finish the steps when CAB has been approved.

Why is CAB approval important?

The "Change Advisory Board" (CAB) ensures that your change doesn't interfere with other scheduled work and change freezes. If you communicate to users without CAB approval, there's a risk you may have to backtrack and inform them the change is no longer happening or has moved.

4. Post to Chatter

Triple check your comm and CAB approval, then post!

1. Navigate to Chatter
2. Search for the Chatter group you'll post to
3. Once in the Chatter group, in the "post" section, click "Share an update"
4. Copy and paste ONLY the comms you want to post from Google doc draft you created (don't share any directions from the doc or additional information that isn't the comms
5. Click the blue "share" button in the bottom right corner of your screen, and congrats! Your Chatter post is live.
6. @ mention any groups and/or individuals in the comments who need notification that you've posted the comm. Check your Google doc draft to see what groups we suggest in our template. Be sure to tag Jillian Wilschke in the comments, too.

Note: Since you posted the comm, you'll automatically receive an email notification for everyone who comments on your Chatter post. Do not "mute" the notifications of your Chatter post. It's important that you see what groups are being tagged and help field any questions that come through the comments.

"I posted to Chatter and need to edit it. How do I fix it?"

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If there's a **small edit** to change:

Edit something like a typo or the format by navigating to your Chatter post > click the drop down arrow in the top right corner of your post > click "edit" and adjust the comm where needed > click "save."

"I posted to Chatter and need to edit it. How do I fix it?"

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If the **time, date, or location** of your maintenance has changed:

1. Navigate to your Chatter post > click the drop down arrow in the top right corner of your post > click "edit"
2. Adjust the information you need to in the comm > copy and paste the following sentence to the top of the Chatter post, adding in the new, time date or location: ****Update: This maintenance has been rescheduled to time X.m. to time X.m. date of week, month date time zone.**** > click "save"
3. Copy and paste that sentence you added to the beginning of your Chatter post to a new comment on your post, and @ mention the original group of people and groups you @ mentioned when you originally posted. Commenting and tagging the original groups is important to ensure everyone receives the update.

"I posted to Chatter and need to edit it. How do I fix it?"

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If the **maintenance has been postponed,** but there isn't a new time and date yet:

1. Navigate to your Chatter post > click the drop down arrow in the top right corner of your post > click "edit"
2. Copy and paste the following sentence to the top of the Chatter post: ****Update: This maintenance has been postponed. Stay tuned here for the updated time and date coming soon.**** > click "save"
3. Copy and paste that sentence you added to the beginning of your Chatter post to a new comment on your post, and @ mention the original group of people and groups you @ mentioned when you originally posted. Commenting and tagging the original groups is important to ensure everyone receives the update.

Questions?

Email or ping Jillian Wilschke