



CASE STUDY | CISCO MERAKI

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Nghi Lam, Salesforce Analyst, Cisco Meraki

Cisco Meraki wanted to streamline their Salesforce release management with automation and version control, while fostering greater collaboration between their development teams. By adopting Gearset they have created a unified process which has delivered impressive results.



Meraki



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NGHI LAM

Salesforce Analyst, Cisco Meraki

Summary

Cisco Meraki, an industry leader in the IT space with over 200,000 customers around the world, had been looking for a way to move beyond change sets for their Salesforce release management. They wanted to enable greater collaboration between teams, introduce version control, and remove error-prone manual steps. Gearset has provided a unified platform for their developers and admins alike, saving time and increasing cross-team collaboration. The end result? More effective teams, and faster project delivery.

Background

Founded in 2006, Meraki has grown to become an industry leader in the IT space, with over 200,000 customers and one million active networks and counting around the world. Their comprehensive set of solutions includes wireless, switching, security, communications, EMM, and security cameras, all managed through Meraki's web-based dashboard interface. This allows their customers to seize new business opportunities and reduce operational costs.

Meraki has three Salesforce development teams supporting over 1,200 end users across the business. These teams manage the development, release, and maintenance of their entire Salesforce estate. Meraki had been using change sets since implementing Salesforce, and were interested in the benefits of adopting version control.

We caught up with Nghi Lam and Matthew Gordon, Salesforce Analysts on Meraki's Sales Ops team, to find out the challenges they were facing and how Gearset has helped.

The problem

Like many Salesforce customers, Meraki began by using change sets to move metadata between sandboxes and production. With three internal teams working across multiple sandboxes in weekly sprints, and increasingly complex projects, they began to run into issues, as Nghi explained:

“Before we went hunting for something like Gearset, we managed any new configuration through a deployment spreadsheet, which categorised changes into pre-, post-, or change set steps. We manually created a new spreadsheet per week for each release. We would run the deployment steps across staging and then production, as there was no version control in place. Some steps would be done manually in the UI, and some with change sets. We would then send out an email listing the changes that were deployed.”

Manually tracking changes was slow and error-prone. With developers working in parallel across developer and staging sandboxes, stepping on toes was common, and work was prone to being overwritten. This made testing difficult, and resulted in a general lack of visibility into the changes being made and what the state of each org was at any point in time.

Looking to improve, Meraki decided to implement version control via GitHub. Version control has numerous benefits over in-org development, such as providing a single source of truth for deployments, a platform for handling conflict resolution, and enabling parallel development streams. It had the potential to be a great step forward for the team, so long as they could successfully integrate both their developers, who were used to working with GitHub, and their admins, who were less familiar with it, into their new process.

To enable effective use of version control, Meraki needed a new deployment tool which could:

- Automate manual deployment steps
- Integrate with version control
- Increase collaboration between developers and admins

Reducing the barrier between admins and developers was a priority, as Nghi explained:

“We work closely with the developers in other teams, and wanted to be able to collaborate on a single process. They wanted to use version control to track their changes. From an admin perspective, the pain required to gather all the changes into a change set was becoming unmanageable. We were looking for a tool which would allow us to collaborate with the developers and integrate with GitHub, but also be user friendly.”

Co-incidentally, their search lined up with the biggest Salesforce event of the year: Dreamforce. When they saw a demo of Gearset, its usability and feature set immediately stood out.

“I saw a demo of Gearset and brought over everyone else from the Salesforce team to see what it could do. I think we had 3 or 4 demos over the week!”

Keen to ensure they picked the best tool for the job, Meraki evaluated a range of deployment tools, including Salesforce DX. They tested each one against their key requirements of automation, version control, and collaboration. Gearset proved the best tool for the job, providing not only the features they needed, but crucially the usability to enable its rollout across the teams.

“We evaluated all the tools on the market, including Salesforce DX, alongside Gearset. The usability of Gearset was one of the biggest reasons we chose it over the others. Gearset allows us to quickly find differences and work with our developers to get them deployed.”

How Gearset is helping

With Gearset and GitHub in place, Meraki began a large new implementation project. The improvements over change sets were obvious.

“Deployment of the salesforce components went smoothly. For once, the most difficult parts were not on the Salesforce side! The biggest change is that we’ve now integrated GitHub. In previous projects, I’ve had less control over what went into Salesforce. There have been situations where I’d be handed a change set, and I wasn’t sure exactly what was going into Salesforce. With Gearset I have a lot more control.”

Beyond increasing visibility into the changes being made, Gearset has helped Meraki create a more automated process, using continuous integration to manage deployments from version control to testing environments and speed up the testing cycle. One of the biggest wins for the team is that Gearset allows a seamless handoff between developers and admins as changes move down the release pipeline.

“Our developers commit the changes they want into a developer branch. I then move across changes such as custom fields into the branch using Gearset. We then do a second commit to a staging branch which is then auto-deployed to our staging environment using a CI job in Gearset.”

Gearset has given the team the flexibility to work in the way that suits them best, while providing a standardised process for releasing and tracking changes - developers work in version control, while the admins make changes directly in the sandboxes. This has increased visibility between the typically disparate developer and admin change processes and helps the teams work more effectively together.

“There’s now more flexibility for all of us to work the way we want. Developers can commit code and I can then test it automatically. It allows me to collaborate a lot more with the developers and have greater visibility into the changes being moved across.”

The developers have also found the simplicity of Gearset a reassurance when working with their business critical systems.

“We’ve had feedback from the developers that when they use Gearset they actually know what it’s doing! With the other tools, for example, there are multiple clicks and I’m not sure how they’re integrated with Salesforce. There was one case where I tried a data loader, and it created new fields in my sandbox that I didn’t know about. When I found that I was thinking, wait, are they taking my information?! Those kind of things where you don’t know what’s going on in the background is alarming for a user, especially when dealing with customer information.”

Matt agreed.

“Gearset’s interface is very intuitive. I can understand what it’s doing from the get go.”

As with any new process, the team had questions on how to best leverage Gearset and GitHub. On the occasions where they’ve needed it, Nghi and the Meraki team have been impressed by the level of support provided by the Gearset team.

“You guys are so supportive with any problem that I have. If I ask a question or raise a feature request, there’s a lot of support on-hand. Gearset is more customer focused in the design and the support than other tools I’ve seen.”

Would Cisco Meraki recommend Gearset?

With well over a thousand deployments under their belt and Gearset fully integrated into their development flow, would the Meraki team recommend Gearset to other Salesforce development teams?

“Yes, definitely! Gearset is way ahead of the game in terms of the features we want, and with the usability too. It allows us to find differences in our environments, gather them quickly, and work with the developers in version control to get them rapidly deployed.”

Find out how your business could save time and money by switching to Gearset. Visit www.gearset.com for more information and to start your free 30-day trial, or email team@gearset.com to arrange a demo.