



A GEARSET CASE STUDY

color

How Gearset helps the Color Consultancy team release faster and smarter

“We’d definitely recommend using Gearset. I go back long enough to know the full pain and suffering of change sets. Since adopting Gearset, we’ve removed all those issues from our release management process.”

Color Consultancy, a leading cloud implementation partner working with Salesforce, wanted a modern DevOps tool to help them manage their increasingly complex deployments. Since using Gearset, the Color Consultancy team have improved their reporting process, completed more successful deployments than ever and sped up their entire release process.

“These guys at Gearset understand the problems Salesforce users face. I did struggle with a few IDE tools, but decided they weren’t for me. We’re huge believers of configuration over code. As our team grew, it made sense for us to look for the right tool. That’s when we found Gearset.”

SIMON EDWARDS

Salesforce Consultant, Color Consultancy

Summary

Color Consultancy helps organizations make the most of the business cloud. Through their Salesforce offering, the Color Consultancy team manages complex Salesforce environments for a diverse range of clients with industry-specific requirements. But with their release management process hamstrung by change sets, the team needed a user-friendly tool that suited their preference for clicks over code. Working with their clients' orgs, the team needed greater visibility over org changes and detailed audit trails of their deployments. Using Gearset's powerful org comparison and change monitoring features, the Color Consultancy team's deployments are less risky and their release cadence has greatly increased as a result.

Background

Color Consultancy was founded in 2013 and, as a leading cloud implementation partner, delivers Salesforce solutions to clients across a range of industries. A huge part of the team's mission is to help companies implement Salesforce and customize the platform to suit specific business needs quickly, and without code.

Rather than relying on limited first-party tooling like change sets, Color Consultancy wanted an efficient way to manage their client's large orgs and complicated deployments. It was clear the team needed to look for a powerful DevOps tool to manage their customers' development process.

We caught up with Simon Edwards, Salesforce Consultant, and Will Roberts, Delivery Manager, at Color Consultancy to find out how Gearset has improved their release management process.

The Problem

As Salesforce consultants, the Color Consultancy team regularly deploy between client orgs. Working with a range of customers means Simon and Will are used to inheriting messy legacy orgs.

Before adopting Gearset, the team relied on change sets to push changes between their clients' orgs. Like many Salesforce users, they found using change sets to manually deploy components frustrating, error-prone, and time consuming. With many years' experience with Salesforce, Simon and Will know all too well the pain of change sets. "In change sets you have to choose each component one by one, which is incredibly tedious," Simon recalls.

Without a clear picture of their changes, any issues during deployments would massively slow down the release process.

"When a change set goes wrong, you don't always really understand why. So it's easy to lose four or five hours of development time unpicking it."

Realising they needed a more reliable release management tool to wrangle their clients' deployments, Simon and Will began to search for an alternative.

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How Gearset is helping

Since using Gearset, the team's deployments are easier and faster, and the org comparisons have given Simon and Will much greater insight into the structure of their Salesforce environments. "It's really useful being able to compare orgs. We can see which components are where, and whether the latest features have been deployed from sandbox to prod," commented Will.

This visibility into their client orgs, the ability to select components granularly for deployment packages, and Gearset's problem analyzers are

a huge asset for the Color Consultancy team. Will remembers how Gearset made deployments easy, even when he was new to Salesforce:

“When I was getting to grips with Salesforce, I was still confused by the different types of metadata. Being able to filter metadata in Gearset, and the way it flags potential issues, makes it painless - even if you’re not 100% certain of all the Salesforce infrastructure and complexities of what metadata requires what.”

As consultants, having a clear audit trail for their clients’ orgs was crucial for the team. Gearset keeps a complete deployment history and log of every comparison run, so it’s easy for Simon, Will and the team to identify and understand what has happened to their clients’ orgs: when a change was made, and why. This transparency isn’t possible if you’re still using change sets, and it’s helping them keep a tight audit trail of every release.

“The reporting functionality within Gearset has been really useful for us. We can quickly review PDF reports with a complete breakdown of everything in that deployment. We can even pinpoint right down to the smallest field change. I think I’d pull my hair out if we still used change sets!”

Gearset’s change monitoring has also been instrumental for surfacing a detailed audit trail of configuration changes in Simon and Will’s clients’ orgs. With daily snapshots of their orgs, the team is able to clearly see how their orgs have changed, and quickly identify any abnormalities.

“We use it to keep an eye on any changes within orgs, and to keep an oversight. We’ve set the filters up in Gearset, so if we see any big changes we can look into it. We can spot disasters coming and spot potential issues cropping up ahead of time which is really great.”

The ability to validate deployment packages within Gearset is another standout feature for the Color Consultancy team. “Gearset’s validation before you deploy is really valuable to us,” Will explains. Gearset’s problem analyzers reduce the risk of deployment failure, identifying problems and suggesting solutions before completing a deployment. And if an unwanted change is made, Simon and Will just use Gearset’s rollback to revert to a

previous state. This safety net takes the risk out of deployments, helping increase the team's release cadence and enabling them to deliver without the stress of change sets.

On top of this, Gearset's integration with git makes it easy to work with version control. The team are able to quickly migrate metadata between their repositories and Salesforce orgs, and the intuitive UI means they can easily follow version control best practices, too.

"Using Gearset, it's easier to deploy between orgs and - if you're using source control - git repos. It means we can keep our source of truth up to date really easily."

As well as using Gearset to manage their clients' metadata deployments, the Color Consultancy team have also found the data deployment tool and data masking functionality invaluable:

"Gearset's data deployment tool makes our dev sandboxes really powerful and relevant. It means your developers can work with real org data in context, and make informed decisions at every stage of production. If you don't have sight of example data you can make all sorts of assumptions which may not particularly be correct."

Would Color Consultancy recommend Gearset?

As early adopters of Gearset, with over 1,024 successful deployments and 107 successful data deployments, Simon and Will understand how different life is with Gearset. Moving away from the limitations of change sets, Color Consultancy's release process has been streamlined by Gearset, freeing up the team's time to work on exciting new features for their clients. So, would they recommend us? "The answer is definitely yes," says Simon, "these guys at Gearset just completely understand the problems Salesforce users face, and how to solve them."

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.