



CASE STUDY | MCKESSON

“With Gearset we have a fast, automated deployment pipeline which pushes changes into production throughout the week. My life has definitely gotten easier!”

McKesson, a Fortune 5 company, wanted to manage their Salesforce environments more cohesively and effectively. Since adopting Gearset, McKesson have introduced a more efficient way to track changes, sped up their release cycles, and brought the power back to their developers and admins.

“Before Gearset I was terrified to even touch anything that had something to do with a deployment - I couldn’t imagine ever running one. With Gearset it’s very straightforward and easy to use, it was just one or two walkthroughs and I felt comfortable using it.”

MONICA THORNTON

Salesforce Admin, McKesson

Summary

McKesson is a Fortune 5 company, and the largest and oldest healthcare company in the US. The McKesson Medical-Surgical group were tired of complicated and lengthy Salesforce deployment processes, and were looking for a change to improve their release cadence and manage changes more efficiently. They wanted to empower their developers and admins to automate and schedule releases efficiently, bring their parallel streams of development in sync, and start delivering more complex deployments in much less time. McKesson have utilized Gearset's powerful automation to increase their deployment velocity and release more effectively and quickly.

Background

McKesson is the oldest and largest healthcare company in the US, dedicated to creating a world of better health through supplying award-winning resources, health care systems and technology. As part of that mission, the McKesson Medical-Surgical group supports the health of businesses through offering more products, distribution services and clinical resources than any other medical supply distributors.

Having adopted Salesforce 5 years ago, the Medical-Surgical group's deployment pipeline consisted of 3 Salesforce environments: a developer sandbox, a staging environment and production. A team of 13 developers and admins along with DevOps Architect and acting release manager, Matt Avitable, use these environments to manage their releases and to support over 2,500 active end users. While their homegrown deployment system worked fairly well to begin with, they wanted to find a simpler, more sustainable process to manage changes, avoid conflicts, and speed up their deployment process.

We caught up with the McKesson Medical-Surgical team to find out what challenges they had been facing with their release management and how Gearset has helped.

The Problem

Like many companies, the McKesson team started out by using the first party deployment tools provided by Salesforce. While these worked well for small changes between a limited number of environments, Matt and the team soon realised they didn't provide the power or scalability that they needed for a more advanced release process.

"We ended up getting to a point where deploying or preparing for deployment was taking anywhere between 6-12 hours each on average, and it was just painful. A couple of 3am nights too many and it hit a tipping point where we said, "we have to do something!""

Matt Avitable, DevOps Architect

Looking to create a better process, the team decided to develop a homegrown deployment system to promote changes between their environments. Consisting of a mixture of in-org development, change sets, and the Force.com migration tool, backed by Bitbucket and Bamboo, it was complicated to manage and led to Matt becoming a single point of failure for their releases.

"There weren't many people that had that bandwidth to maintain or extend the process, so I ran the weekly deployments on Friday nights. It was a lot of work, and it was bad to have a single point of failure. Our deployments were getting more complicated and we wanted to get the release management capabilities back to the teams, so we could deploy more often."

Matt Avitable, DevOps Architect

The process allowed admins to make fast, ad-hoc click changes in production, while more complex changes such as Apex and Lightning were performed in developer sandboxes, to be released weekly. Although this worked for a time, the disparate development streams meant that Matt and his team found it difficult to know where changes were taking place, resulting in merge conflicts and situations where admins and developers were overwriting each other's work.

“The big problem was that admins were still deploying click changes in production. This allowed Admins to deliver value quickly – a good thing – but merging developer code with the ad hoc changes in production was difficult. We ended up with a lot of merge conflicts and it became unsustainable. We needed a way to keep the admins fast while coexisting with a weekly release cycle from our developers.”

Matt Avitable, DevOps Architect

Additionally, the team were using spreadsheets to track which changes were being promoted to each environment. Keeping these sheets up to date while admins and developers worked in parallel development streams was tricky. The resulting lack of visibility made it easy for work to be overwritten and for deployments to fail because of missing dependencies. This slow, error-prone process proved exasperating for Vinod Agrawal, one of the team’s Salesforce developers:

“If we forgot to include one of the changes to deploy, when you tried to deploy it, it would fail because you missed a dependency and you’d have to go back, clone that change set, add that dependency and do the whole process all over again. The approach was frustrating... if you have a lot of components it could take a really long time.”

Vinod Agrawal | Salesforce Developer

Over time, the team found it increasingly difficult to manage their deployment pipeline and to keep track of all the changes being made. The resulting numerous late-night deployments and accidental overwrites encouraged Matt to recognise that it was time for a change in their release management. Matt decided to look for a third party tool that could help revamp their release management process but would be easy to use for both admins and developers. After evaluating a number of deployment tools, the team decided to choose Gearset.

“We wanted it to be easy - we wanted the tool to be as intuitive as humanly possible. Many tools on the market weren’t intuitive or required that you modified your Salesforce instance for installations. The simpleness of Gearset was a big selling point for me.”

Matt Avitable, DevOps Architect

Gearset's simple licensing structure, predictable costs, and package-free installation also appealed to Matt.

"I evaluated Gearset alongside the other tools on the market, and I much prefer Gearset's licensing structure. With Gearset we can pay a flat rate and add as many orgs as we wanted."

Matt Avitable, DevOps Architect

How is Gearset helping

After choosing Gearset, Matt and the team began to devise a new process for their deployments. Their ambitions for automation, faster deployments, and improved team collaboration suddenly seemed in reach.

"With Gearset in hand, we were ready to speed up our deployment pipeline. We can allow our admins to do their quick changes in a lower environment rather than prod, we can set up CI jobs to push changes every 4 hours for them, then of course we can run a regression test between staging and prod, and we can get the safety that version control affords us with the metadata backups that Gearset provides."

Matt Avitable, DevOps Architect

With Gearset and their new release process in place, the McKesson team began to take back control of their Salesforce environments. Rather than spend valuable time on complicated, technical processes, Gearset's intuitive interface helped the McKesson team quickly track and deploy changes in a way that worked for them. Swift implementation and easy-to-use features brought the release management capabilities back to the team, as Monica Thornton, one of the Salesforce admins, explained.

"Before Gearset I was terrified to even touch anything that had something to do with a deployment... It was just a whole other magical world. I couldn't imagine ever running one. But with Gearset I was actually really excited. It's

very straightforward and easy to use. It was one or two walkthroughs and I felt comfortable using it."

Monica Thornton, Salesforce admin

Gearset's org comparisons have given Vinod, and the other developers and admins, much better visibility into what goes into each release through being able to review line-by-line differences in metadata. The team can easily compare their environments before deploying, see what changes exist to avoid overwrites, and ultimately keep their orgs in sync. This has reduced their reliance on manual change tracking documents and removed the chance of human error blocking a release.

"Before Gearset we would use a Salesforce change set, and we'd have to keep track of every single change in order to add them to the change set. But with Gearset's diff feature you can easily see the differences between your source and target org. We no longer have to keep track of everything that has changed, so we can just click those checkboxes and add them to the deployment - it's a massive time-saver for us."

Vinod Agrawal, Salesforce Developer

In just a few months, Gearset has helped the McKesson team revolutionize their release management. The team now push more changes throughout the week, work more cohesively, and keep the parallel streams of development in sync to prevent accidental overwrites.

"Our admins are now making declarative changes out of prod, which is great. We have Continuous Integration (CI) jobs to push click changes every 4 hours throughout the week. We're extremely pleased with the progress we've made with Gearset so far."

Matt Avitable, DevOps Architect

As well as streamlining the overall deployment process, Gearset has enabled the team to spend less time preparing each release, and Matt has more time to focus on developing features for his end users.

“Running Gearset deployments is a huge improvement over what used to be done - it was time-consuming before. With Gearset we have a fast, automated deployment pipeline which pushes changes into production throughout the week. When we use Gearset to compare and deploy changes between Salesforce orgs, it’s a simple process of validating and scheduling the deployment - my life has definitely gotten easier!”

Matt Avitable, DevOps Architect

As with any new process, sometimes the team have questions about how best to set up their deployments or utilise Gearset’s features. Whenever the team reach out, they’ve been impressed by the responsive customer support.

“As far as customer support goes, it’s always been great. Your team has always been super responsive to me. Whenever we have been wanting new features, all of a sudden they seem to magically appear, which has been really really helpful - it’s been great timing.”

Matt Avitable, DevOps Architect

Would McKesson recommend gearset?

Looking back over their new release process and the changes they’ve implemented by switching to Gearset, would Matt and his team at McKesson recommend Gearset to other teams looking to improve their release management?

“As a release manager, I’ve definitely been happy with Gearset. It’s intuitive, easy to use and a real time-saver. I would highly recommend Gearset to any team looking to dramatically improve their release management.”

Matt Avitable, DevOps Architect

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.