

Release Management Document Template

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SALESFORCE RELEASE MANAGEMENT PLAN

Release ID	[RELEASE_ID_PLACEHOLDER]
Release Version	1.0
Release Date	[SCHEDULED_DEPLOYMENT_DATE]
Release Manager	[RELEASE_MANAGER_NAME]
Last Updated	
Status	DRAFT

Executive Summary

Release Scope	[BRIEF_DESCRIPTION_OF_CHANGES]
Deployment Approach	Big Bang
Deployment Window	[START_DATE_TIME] to [END_DATE_TIME] (Estimated Duration: [X_HOURS])
Key Objectives	<ul style="list-style-type: none">• [] [OBJECTIVE_1]• [] [OBJECTIVE_2]• [] [OBJECTIVE_3]
Business Impact	Positive Impact: [DESCRIBE_BENEFITS] <ul style="list-style-type: none">• Risk Level: LOW• Rollback Risk: LOW
Success Criteria	All components deployed successfully to Production <ul style="list-style-type: none">• All smoke tests passed• Zero critical defects in Production• User acceptance sign-off obtained• Performance metrics within acceptable range

Stakeholder & RACI Matrix

Key Stakeholders

Stakeholder	Role	Responsibility	Contact
Release Manager	Release Lead	Overall release coordination and execution	[EMAIL/PHONE]
Development Lead	Development Owner	Code quality and deployment readiness	[EMAIL/PHONE]
QA Lead	Quality Assurance	Testing and validation	[EMAIL/PHONE]
Business Owner	Business Sponsor	Business requirements and sign-off	[EMAIL/PHONE]
Infrastructure/DevOps	Technical Support	Environment management and GitHub Actions	[EMAIL/PHONE]
Change Management	Change Control	CAB approval and communication	[EMAIL/PHONE]

RACI Matrix

Activity	Release Manager	Development	QA	Business Owner	Infrastructure	Change Mgmt
Release Planning	R/A	C	C	C	I	C
Environment Preparation	I	C	C	I	R/A	I
Code Deployment	C	R/A	C	I	R/A	I
Testing & Validation	I	C	R/A	C	I	I
Risk Assessment	R/A	C	C	C	C	C
CAB Approval	C	I	I	C	I	R/A
Deployment Execution	R/A	C	C	I	R/A	I
Post-Deployment Testing	I	C	R/A	C	I	I
User Sign-off	C	I	I	R/A	I	I
Rollback (if needed)	R/A	C	C	I	R/A	I
Lessons Learned	R/A	C	C	I	C	C

Legend: R = Responsible | A = Accountable | C = Consulted | I = Informed

Data Backup & Snapshot Procedures

Pre-Deployment Backups

Environment	Backup Type	Backup Date/Time	Backup Location	Verified By
SIT	Full Snapshot	[DATE/TIME]	[LOCATION]	[NAME]
UAT	Full Snapshot	[DATE/TIME]	[LOCATION]	[NAME]
Production	Full Snapshot	[DATE/TIME]	[LOCATION]	[NAME]

Backup Verification Checklist: - All backups completed successfully - Backup integrity verified - Backup restoration tested (at least in non-prod) - Backup location documented and accessible - Backup retention policy confirmed

Owner: Infrastructure/DevOps | **Completion Date:** [DATE]

Dependency Mapping with Other Teams

Internal Dependencies

Dependency	Team	Impact	Mitigation	Status
[DEPENDENCY_1]	[TEAM]	[IMPACT_DESCRIPTION]	[MITIGATION_PLAN]	[PENDING/CONFIRMED]
[DEPENDENCY_2]	[TEAM]	[IMPACT_DESCRIPTION]	[MITIGATION_PLAN]	[PENDING/CONFIRMED]

[DEPENDENCY_3]	[TEAM]	[IMPACT_DESCRIPTION]	[MITIGATION_PLAN]	[PENDING/CONFIRMED]
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External Dependencies

System/Service	Dependency Type	Contact	Confirmation Status	Notes
[EXTERNAL_SYSTEM_1]	API/Integration	[CONTACT]	[CONFIRMED/PENDING]	[NOTES]
[EXTERNAL_SYSTEM_2]	Data Feed	[CONTACT]	[CONFIRMED/PENDING]	[NOTES]
[EXTERNAL_SYSTEM_3]	Service	[CONTACT]	[CONFIRMED/PENDING]	[NOTES]

Dependency Confirmation Checklist: - All internal dependencies identified and documented - All external dependencies identified and documented
- Dependent teams notified and confirmed ready - Contingency plans in place for critical dependencies - Dependency owners have signed off

Owner: Release Manager | **Due Date:** [DATE]

Risk Assessment & Mitigation Strategies

Risk Register

Risk ID	Risk Description	Probability	Impact	Risk Score	Mitigation Strategy	Owner	Status
R001	[RISK_DESCRIPTION]	[H/M/L]	[H/M/L]	[SCORE]	[MITIGATION]	[OWNER]	[OPEN/MITIGATED]
R002	[RISK_DESCRIPTION]	[H/M/L]	[H/M/L]	[SCORE]	[MITIGATION]	[OWNER]	[OPEN/MITIGATED]
R003	[RISK_DESCRIPTION]	[H/M/L]	[H/M/L]	[SCORE]	[MITIGATION]	[OWNER]	[OPEN/MITIGATED]

Common Salesforce Deployment Risks

Risk	Probability	Impact	Mitigation
Data Loss During Migration	Low	Critical	Full backup before deployment; test restore procedures
Integration Failures	Medium	High	Pre-deployment integration testing; fallback APIs
Performance Degradation	Medium	High	Load testing; performance baseline comparison
Incomplete Data Migration	Medium	High	Data validation scripts; reconciliation reports
User Adoption Issues	Medium	Medium	Training; documentation; phased rollout if possible
Rollback Complexity	Low	Critical	Documented rollback procedures; tested in non-prod

Risk Assessment Sign-off: - Risk register reviewed by all stakeholders - Mitigation strategies approved - Risk owners assigned and confirmed - Contingency budget allocated (time/resources)

Owner: Release Manager | **Due Date:** [DATE]

Deployment Phase

Deployment Timeline & Schedule

Deployment Window: [START_DATE] [START_TIME] to [END_DATE] [END_TIME]

Estimated Duration: [X] hours

Deployment Approach: Big Bang (All environments sequentially)

Deployment Schedule

Phase	Environment	Start Time	End Time	Duration	Owner	Status
Phase 0	QA	[TIME]	[TIME]	[DURATION]	[OWNER]	[PENDING]
Phase 1	SIT	[TIME]	[TIME]	[DURATION]	[OWNER]	[PENDING]
Phase 2	UAT	[TIME]	[TIME]	[DURATION]	[OWNER]	[PENDING]
Phase 3	Production	[TIME]	[TIME]	[DURATION]	[OWNER]	[PENDING]

Step-by-Step Deployment Procedures

Pre Deployment Steps

	Item	Register By	Jira ID	QA	SIT	UAT	PROD
1				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Deployment Steps

1. **Trigger GitHub Actions Pipeline**
 - Navigate to GitHub repository
 - Go to Actions tab
 - Select "Salesforce Deploy - DEV" workflow
 - Click "Run workflow"
 - Confirm deployment parameters: [PARAMETERS]
 - Monitor pipeline execution in real-time

Post Deployment Steps

	Item	Register By	Jira ID	QA	SIT	UAT	PROD
1				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication Protocol During Deployment

Pre-Deployment Communication

24 Hours Before Deployment: - [] Send deployment reminder to all stakeholders - [] Confirm maintenance window - [] Provide deployment contact information - [] Remind teams of their responsibilities

Email Template:

Subject: [RELEASE_ID] Deployment Reminder - [DATE] [TIME]

Dear Team,

This is a reminder that we will be deploying [RELEASE_NAME] on [DATE] from [START_TIME] to [END_TIME].

Deployment Details:

- Release ID: [RELEASE_ID]
- Environments: DEV QA SIT UAT PRODUCTION
- Estimated Duration: [X] hours
- Release Manager: [NAME] - [CONTACT]

Please ensure:

1. Your team is available during the deployment window
2. You have reviewed the release notes
3. You are prepared for your assigned responsibilities

For questions or issues, contact: [RELEASE_MANAGER_EMAIL]

Thank you,
Release Management Team

During Deployment Communication

Deployment Status Updates: - Send status update every [X] minutes - Include current phase and progress - Report any issues or delays - Provide estimated completion time

Status Update Template:

[TIME] - Deployment Status Update

Current Phase: [PHASE_NAME]
Status: [IN_PROGRESS/COMPLETED/DELAYED]
Progress: [X]% complete
Estimated Completion: [TIME]

Issues: [NONE/DESCRIBE_ISSUES]
Next Steps: [DESCRIBE_NEXT_STEPS]

Release Manager: [NAME]

Post-Deployment Communication

Immediate Post-Deployment (Within 1 Hour): - Send deployment completion notification - Report success or issues - Provide next steps - Confirm support availability

Deployment Completion Template:

Subject: [RELEASE_ID] Deployment Completed - [DATE]

Dear Team,

The deployment of [RELEASE_NAME] has been completed.

Deployment Summary:
- Release ID: [RELEASE_ID]
- Status: [SUCCESSFUL/ISSUES_ENCOUNTERED]
- Completion Time: [TIME]
- Duration: [X] hours

Deployed Components:
- [COMPONENT_1]
- [COMPONENT_2]
- [COMPONENT_3]

Next Steps:
1. [STEP_1]
2. [STEP_2]
3. [STEP_3]

For issues or questions, contact: [RELEASE_MANAGER_EMAIL]

Thank you,
Release Management Team

Escalation Communication

If Issues Encountered: - Immediately notify Release Manager - Notify Business Owner - Notify CAB (if critical) - Provide issue description and impact - Recommend action (continue, pause, rollback)

Escalation Template:

Subject: [URGENT] [RELEASE_ID] Deployment Issue - [DATE]

ISSUE DETECTED:
- Issue Description: [DESCRIBE_ISSUE]
- Severity: [CRITICAL/HIGH/MEDIUM]
- Impact: [DESCRIBE_IMPACT]
- Affected Component: [COMPONENT]

Recommended Action: [CONTINUE/PAUSE/ROLLBACK]

Reason: [EXPLAIN_REASONING]

Awaiting approval to proceed.

Release Manager: [NAME] - [CONTACT]

Rollback Plan

Rollback Decision Criteria

Rollback is initiated if:

- Critical defects found in Production
- Data integrity issues detected
- Performance degradation beyond acceptable thresholds
- Integration failures affecting business operations
- Security vulnerabilities discovered
- Business decision to rollback

Rollback Decision Authority: Release Manager + Business Owner

Rollback Procedures

Pre-Rollback Checklist

- Rollback decision approved by Release Manager and Business Owner
- Rollback impact assessed
- Backup verified and accessible
- Rollback team assembled
- Communication plan activated
- Stakeholders notified

Rollback Execution Steps

Step 1: Stop Current Operations

1. Notify all users of rollback
2. Disable integrations (if necessary)
3. Stop any running processes
4. Prevent new transactions

Step 2: Restore from Backup

1. Access backup location: [BACKUP_LOCATION]
2. Verify backup integrity
3. Initiate restore process
4. Monitor restore progress
5. Verify restore completion

Step 3: Validate Rollback

1. Verify all components restored
2. Verify data integrity
3. Test critical functionality
4. Verify integrations operational
5. Confirm system stable

Step 4: Resume Operations

1. Enable integrations
2. Notify users of rollback completion
3. Resume normal operations
4. Monitor system closely

Rollback Timeline

Step	Activity	Duration	Owner
1	Stop operations and notify users	15 min	Release Manager
2	Restore from backup	[X] min	Infrastructure/DevOps
3	Validate rollback	30 min	QA
4	Resume operations	15 min	Release Manager
Total	Estimated Rollback Time	[X] hours	

Rollback Decision Tree

ISSUE DETECTED

Is it CRITICAL?

YES Immediate Rollback
Notify Release Manager
Notify Business Owner
Execute Rollback
Document Issue

NO Assess Impact
Can it be fixed quickly?
YES Attempt Fix
Implement fix
Test fix
Monitor

NO Rollback
Execute Rollback
Document Issue

Is it acceptable to continue?
YES Continue with Monitoring
Monitor closely

NO Rollback
Execute Rollback

Post-Rollback Activities

After Rollback Completion: - Confirm system operational - Verify data integrity - Notify all stakeholders - Document rollback reason -
Analyze root cause - Plan remediation - Schedule re-deployment

Post-Rollback Communication:

Subject: [RELEASE_ID] Rollback Completed - [DATE]

Dear Team,

The deployment of [RELEASE_NAME] has been rolled back due to [REASON].

Rollback Summary:

- Rollback Initiated: [TIME]
- Rollback Completed: [TIME]
- Duration: [X] hours
- Status: Successful

Current Status:

- System: Operational
- Data: Verified and Intact
- Integrations: Operational

Next Steps:

1. Root cause analysis in progress
2. Remediation plan to be developed
3. Re-deployment scheduled for [DATE]

For questions, contact: [RELEASE_MANAGER_EMAIL]

Thank you,
Release Management Team

Appendices

Environment Details

SIT Environment

Property	Value
Org ID	[ORG_ID]
Instance	[INSTANCE]

URL	[URL]
Admin User	[USERNAME]

UAT Environment

Property	Value
Org ID	[ORG_ID]
Instance	[INSTANCE]
URL	[URL]
Admin User	[USERNAME]

Production Environment

Property	Value
Org ID	[ORG_ID]
Instance	[INSTANCE]
URL	[URL]
Admin User	[USERNAME]

Reference Documentation

- **Salesforce Deployment Guide:** [\[LINK\]](#)
- **GitHub Actions Documentation:** [\[LINK\]](#)
- **Salesforce CLI Documentation:** [\[LINK\]](#)
- **Organization Standards:** [\[LINK\]](#)
- **Security Policies:** [\[LINK\]](#)
- **Change Management Process:** [\[LINK\]](#)
- **Incident Management Process:** [\[LINK\]](#)