

IMPLEMENTING COPADO IN THE PUBLIC SECTOR

Copado is a leading DevOps platform specifically designed for Salesforce. It enables organizations to automate and streamline development processes.

By adopting Copado, public sector agencies can achieve greater efficiency, collaboration, and security throughout their Salesforce projects.

This paper summarizes the benefits of implementing Copado in the public sector, the challenges organizations may face during the implementation process, and best practices to ensure successful adoption. Understanding the potential advantages, obstacles, and recommended strategies, is key to informed decisions about implementing Copado—driving digital transformation and optimizing Salesforce deployments.

We start with a case study, summarizing our experience implementing Copado with a U.S. financial regulator.

Case Study: **Implementing Copado** with a U.S. Financial Regulator

PROBLEM STATEMENT

A U.S. financial regulator faced challenges in maintaining and updating its complex software systems. The manual deployment process was slow and prone to errors, leading to delays in software releases and inefficiencies in operations. The agency needed a way to automate the deployment process, streamline collaboration, and provide comprehensive tracking capabilities. The agency also needed to move from the ADO change-management system to a more robust system.

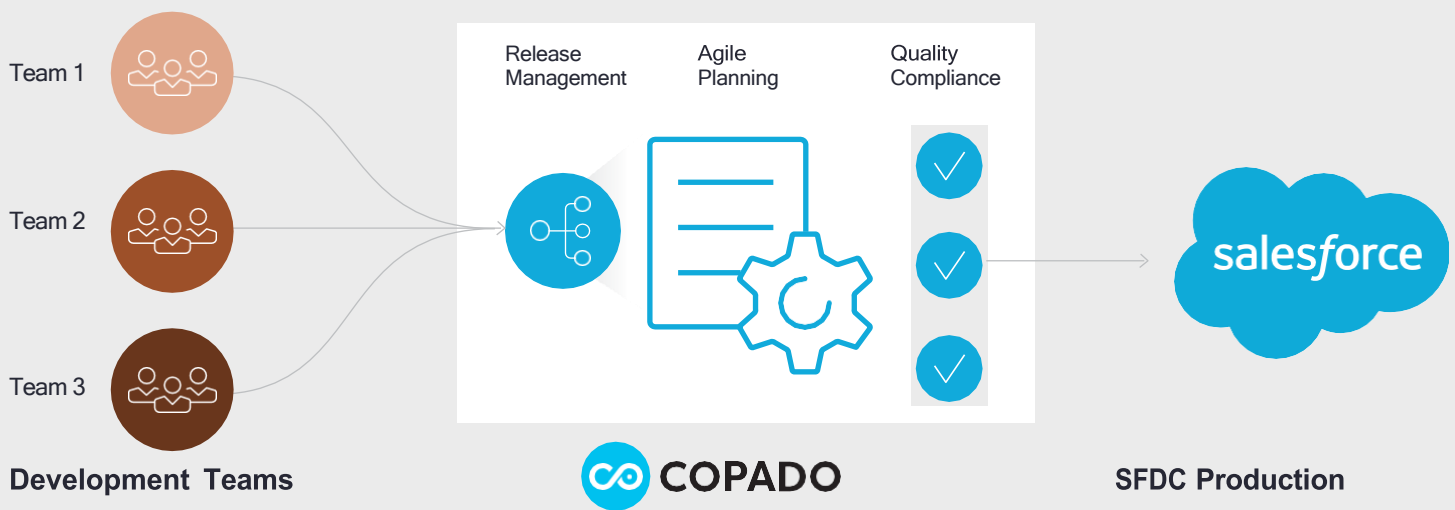
SOLUTION

A U.S. financial regulator implemented Copado as its primary CI/CD platform. Copado's automated deployment capabilities allowed the agency to streamline the release process, ensuring faster and more reliable deployments. The platform's collaboration features enabled teams to work together seamlessly, improving coordination and maintaining consistency across projects. And Copado's logging and tracking capabilities enabled the agency to gain valuable

insights into deployment successes and failures, leading to continuous improvement in software development processes. Migration from ADO to **Copado Plan** was also viable.

ITC Digital Solutions helped the FIDC modernize the release process and take advantage of Copado--improving efficiency, streamlining collaboration, strengthening security, and performing weekly deployments. ITC Digital Solutions also used a variety of Copado training videos and materials to brief new team members and demonstrate the features and benefits of Copado.

COPADO IMPLEMENTATION WORKFLOW



Challenges

As the public sector increasingly looks to embrace digital transformation, agencies face a range of unique challenges.



OBJECTIVES	CHALLENGES
Efficiency	Difficulty in integrating Copado with existing complex or outdated legacy systems requiring significant effort and resources, comprehensive assessment, and careful planning.
Collaboration	Managing change in a bureaucratic organization. It is crucial to address change-management challenges systematically, involving key stakeholders throughout the implementation process.
Security	Ensuring adherence to data privacy and regulatory compliance standards by conducting thorough risk assessments, implementing appropriate security measures, and establishing clear protocols for data handling and access.
Budgeting/ROI	Multiple stakeholders weighing the return on the investment (ROI). Effective communication, training programs, and ongoing support are essential to help individuals and teams adapt to the changes brought about by Copado.

While the benefits of adopting Copado are evident, it is crucial to acknowledge and address the challenges that may arise during the implementation process. Doing so ensures a smooth transition and maximum value from this powerful tool.

NOTE ON CHALLENGES

Integrating Copado with legacy systems can be complex and requires careful planning. For example, public-sector agencies must give particular attention to data privacy and compliance considerations to protect sensitive information.

A U.S. financial regulator faced a number of challenges with security-groups approvals—resulting in longer-than-anticipated implementation

time. Additionally, a U.S. financial regulator did extensive research and fit-gap analysis before proposing the solution. Recognizing and addressing these challenges made the implementation more effective. It is important to approach challenges proactively, seeking innovative solutions and taking advantages of best practices, for example, in sometimes-difficult back promotions.

Benefits

Copado’s benefits in a public-sector organization are numerous, and significant.



OBJECTIVES	BENEFITS
Efficiency	Automation capabilities—such as code deployment, testing, and release management—streamline development processes, reduce manual errors, and save valuable time and resources.
Collaboration	Expanded and improved teamwork comes from features such as version control, code review, and merge conflict resolution. And Copado’s integrated project management capabilities enable teams to plan, track, and manage the progress of development projects.
Security	Robust security features ensure data protection. Organizations can implement automated security checks, code scanning, and vulnerability assessments to identify and address potential security risks in real-time.
Transparency	Logging and tracking features provide analysis for data-driven decisions to optimize processes and gain efficiency. Copado’s advanced analytics and reporting features provide valuable insights into development, velocity, and release cycles, enabling organizations to identify bottlenecks and areas for improvement.

NOTE ON BENEFITS

By providing a centralized platform for collaboration, Copado ensures that all team members have access to the latest information and can work together in a coordinated manner, reducing delays and improving overall project outcomes. And the gains in security enable teams to deliver high-quality services and solutions while ensuring the protection of valuable data.

Best Practices

A few of the rewarding practices for successful implementation of Copado.



ACTIVITIES	KEY PRACTICES
Assessment and Planning	Conduct a comprehensive assessment of current processes, systems, and requirements involving key stakeholders. Develop a detailed plan outlining objectives, resources, and timelines.
Engagement of Stakeholders	Involve decision-makers, department heads, and end-users throughout the process. Address concerns and incorporate their insights into the plan.
Incremental Adoption & Training	Start with a pilot project for a small-scale implementation. Conduct comprehensive and targeted role-based training for different departments. Provide ongoing support and feedback mechanisms.

IN SHORT

Implementing Copado in a public-sector agency can revolutionize software development and release practices, leading to increased efficiency, collaboration, and security. By addressing challenges head-on and following best practices, the organization can integrate Copado into their workflows

smoothly, ultimately benefiting both the agency and the citizens they serve. With the right approach and commitment, Copado can transform the public sector’s ability to deliver high-quality software solutions that meet the needs of the ever-changing digital landscape.