

Salesforce User Adoption Services



USER ADOPTION: THE KEY TO YOUR IMPLEMENTATION SUCCESS

Humans are creatures of habit, routine-based beings who like consistency in their personal and work lives. Imagine, then, what happens when an organization implements a new technology and expects everyone to embrace a different way of doing things with little, if any, focus on user adoption.

It has been found that employee resistance can be the number-one barrier to a successful Salesforce implementation project. Why invest so much time, energy, and cost into a deployment only to have it fail because of people-related issues? User adoption is essential to success, regardless of the size, complexity, or geographic footprint of your rollout.

“Studies consistently show that 70 percent of change programs fail to achieve their goals, largely due to employee resistance and lack of management support.”

– McKinsey & Company

MANAGING THE “PEOPLE SIDE” OF YOUR SALESFORCE DEPLOYMENT

Among the most important factors for driving overall business value—and often one of the biggest hurdles to achieving success—is the extent to which users adopt new behaviors and ways of working. Leveraging a proven set of tools, methods, and Salesforce-specific standards will enable impacted users to be ready, willing, and able to adopt Salesforce.

Whether your project is being led by Salesforce Services, your internal team, or with an implementation partner, Salesforce User Adoption Services can custom-build a program to meet the needs of your implementation. Taking a structured approach to managing change will accelerate user adoption, remove barriers, and pave the way for generating the greatest possible value from your Salesforce investment.



THE FOUR KEY COMPONENTS OF SALESFORCE USER ADOPTION SERVICES

1 Change Readiness and Communications

Communicating project goals, benefits, and new ways of working while enabling user awareness, understanding, and readiness for change is critical to overall success. We will work with you to:

- Initiate a Change Management Strategy that identifies impacted individuals and groups, then develop a strategy to build support, advocacy, and ownership over the success of your Salesforce implementation.
- Conduct an Impact Assessment to identify key changes and user benefits that will accompany your project.
- Develop and deploy a communication plan to help prepare your organization for change.

2 Stakeholder Engagement and Support

Without the right level of stakeholder involvement, user adoption can be difficult to achieve. In order to ensure key people are informed and involved each step of the way, we partner with you to:

- Identify and interview vital individuals to gain alignment on your project objectives and engage them in supporting organizational adoption.
- Establish a Salesforce Champions network to build grassroots support and advocacy.
- Develop a structured plan for engaging individuals and groups throughout each phase of your project to enable ongoing success.

3 Adoption Measures

The ability to measure use of Salesforce is among the most critical factors for driving successful and sustained user adoption. To achieve this, we work with you to develop:

- A set of custom metrics to enable the proactive monitoring and management of user adoption, and link application usage to your overall business performance goals.
- Manager training to support leaders in incorporating adoption metrics into their management approach.
- A structured plan for implementing and managing adoption metrics.

4 Custom End-User Training →

It is essential that users can realize the full functionality of a specific Salesforce implementation in order to drive adoption and achieve the highest ROI. Together, we will develop and execute the four components involved in a Salesforce Custom End-User Training program:

- **Training Planning and Management.**
After a detailed needs analysis, a customized training plan is developed based on your organizational goals, business processes, and your unique applications.
- **Customized Course Content Development.**
Role-based training content tailored to the needs of each of your unique Salesforce roles. Includes What's In It For Me (WIIFM) value propositions, Day in the Life-based, hands-on training exercises, and skills check development activities.
- **Training Delivery.**
To your identified end users, providing the materials, tools, and knowledge required for them to perform all functions needed within your specific instance of Salesforce. Includes face-to-face or virtual instructor-led training, on demand or blended learning, and Train the Trainer.
- **Post Training Support.**
Includes quick-reference guides, how-to videos, or pre-recorded tutorial videos, floor-walks, or "Ask the Expert" clinics held onsite or virtually.

"Incorporating change management into our rollout approach enabled us to effectively engage key stakeholders, leaders, and users to build awareness and understanding and promote adoption well before conducting hands-on training."

CARRIE WATSON

Salesforce Project Leader - Mutual of Omaha



Learn More

Want to explore how User Adoption Services can help support your project success? Contact your Salesforce Training Account Executive to discuss a program developed exclusively for your needs.



The fun way to
learn Salesforce

LEARN

Learn at your own pace, from our experts, and your peers.

EARN

Earn points, badges, and skill-based credentials that grow your resume.

CONNECT

Connect with fellow Trailblazers to learn, inspire, and blaze new trails.

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