JPW CONSULTING
Your Adoption Partner

BEYOND ROLLOUT: COACHING TO KPIs

Learning how to coach and measure to behaviors that align to your business KPIs using adoption dashboards is key to an organization's success.

Always Keep In Mind...

Adoption starts at the leadership level. The most successful Salesforce user teams have leaders who manage only by data and reports in Salesforce.

Translating KPIs to behaviors and actions is a continually evolving process. Today's metrics for success may not be adequate for next year, or the year after. Raise the bar incrementally to achieve the desired behaviors.

Recognition is a powerful motivator. Drive adoption and leverage your people's competitive nature with an incentive program.

5 Step Process To Translate KPIs to Behaviors and Actions

1. Define KPI
It must be well defined and quantifiable; communicated throughout every part of your organization; crucial to achieving your goal; and applicable to your line of business.

2. Identify Supporting Behaviors
Focus on successful sales behaviors (e.g. Accurate pipeline management, Sales Efficiency, Closing Skills, etc.).

3. Quantify Success Thresholds
One size does not fit all. What is considered a successful user behavior will often vary by persona and role.

4. Develop Dashboards To Measure Users Against Goals
Provide a consolidated view of performance metrics across a wide range of areas; define leading and lagging indicators, and trend performance over time.

5. Coaching and Training
Walk the talk, report out of Salesforce; schedule coaching sessions; insure your teams are trained and prepared; reinforce goals and progress, and celebrate successes and best practices.

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