



WEALTH MANAGEMENT CASE STUDY

Overview

JPW facilitates transition to Salesforce for a large private Trust that oversees more than \$140 billion for over 2,500 families, foundations, and endowments. They are headquartered in New York City and have 19 regional offices elsewhere in the world. They went through UAT with a pilot group and needed to move forward with an adoption and training program to support their SFDC rollout. It was important that the 650+ end users had the ability and desire to utilize the system when it rolled out. The roll out followed a wave format over several months with approximately 1-2 locations going each week.

Challenges

- Four roles needed training: Senior Executives, Account Assistants, Wealth Advisors, Client Advisors, along with 2 back-office groups: Help Desk and Data Operations.
- 657 total users across 18 locations needed to hear the same message.
- The largest locations would need heavy attention: NJ (175 users) and NYC (223 users).
- Change was difficult for many of the users and there was some resistance, especially since they would also be receiving new telephony systems at around the same time.
- They needed a comprehensive adoption and training program to support their SFDC rollout due to the level of change.
- The entire company needed to be rolled out in a short time frame.

Solutions

- JPW gained an understanding of business processes and how they related to their customized version of Salesforce.
- A Salesforce Essentials course was developed to introduce everyone to Salesforce functionality and benefits from a high level, plus customized role-based training that is most relevant to each user group.
- Training was delivered in a high touch, white-glove manner to ensure low resistance.
- Training was done in waves: The first wave of training included the most relevant topics and training for each end user group for both SF, as well as the telephony system. The second wave of training introduced the same users to more advanced functionality and benefits.

Results

- JPW Salesforce Training manager developed a customized training program and rollout program to meet their needs.
- JPW Salesforce experienced facilitators successfully trained the work force.
- Training was completed on-time and on budget.



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