



INSURANCE CASE STUDY

Overview

JPW Delivers White-Glove Instructor Led Training (ILT) to 8600 Users at one of the largest mutual life-insurance companies in the United States. A CRM solution was needed that would support their internal technology upgrade initiative, and they wanted to consolidate information in one application vs. the multiple applications they were supporting at that time. They knew a white glove training experience was needed to ensure adoption.

Challenges

Supporting too many separate applications with separate workflows for the employees to effectively manage.

Information was all over the place and needed to be centralized.

Fallen behind on technology to enable the business.

Workforce was spread out in locations across the country.

Solutions

Integrate/implement Salesforce Lightning with the proper support to ensure a smooth transition.

Map technology to business processes to understand what processes are supported by what application and how processes worked utilizing Salesforce to train appropriately.

Make Salesforce the single source of truth across the organization and utilize Salesforce Mobile.

Utilize professional facilitators that know Lightning to marry their current processes with the tool.

Include WIIFMs in the training content to ensure the content was relevant.

Results

JPW successfully led the training effort and rolled out training for over 8600 users on Lightning in Q1 2017 across the United States.

Additional training (eLearning) was developed for refresher and new hire training.



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