

Transforming with Impact: Leveraging Change Management for a Distinctive Salesforce Journey

Kaiser Permanente is an innovative healthcare company with over 200,000 employees, dedicated “to provide high-quality, affordable health care services and to improve the health of our members and the communities we serve.”



KAISER PERMANENTE

The organization, however, faced some serious challenges in establishing a robust growth platform, and optimizing its sales account management processes. They also developed a need for finance processes and governance expertise. To put it another way, says Tiffany Newhouse of Newhouse Project Consulting (NPC), “they needed to enhance their sales planning and performance system to be more evidence-based and data-driven.”

NPC is a dynamic Salesforce partner consultancy, specializing in organizational development, change management, and digital product delivery. “We worked closely with Kaiser Permanente to tailor their Salesforce license to precisely align with their unique needs, particularly in sales and account management,” Tiffany says.

Her team’s approach was to draw upon their organizational and change management expertise, to implement that evidence-based and data-driven approach. The strategy involved restructuring their Salesforce processes, training the workforce, delineating clear roles and responsibilities, and cultivating a culture of accountability and collaboration among Kaiser Permanente’s workforce,” Tiffany says.

The change management strategies implemented by NPC were designed around the concept that Kaiser Permanente employees understood the rationale behind Salesforce products, and actively embraced and championed the changes. “By aligning Sales Cloud and Service Cloud with Kaiser Permanente’s business objectives,” Tiffany explains, “we were able to drive significant improvements in sales performance, financial management, and account management effectiveness.”

It was a success. Kaiser Permanente experienced increased productivity and improved efficiency in sales operations, enabling it to achieve more with its existing resources. With a more data-driven approach to sales and account management, Kaiser Permanente was better positioned to capitalize on growth opportunities in the competitive healthcare industry, leading to sustainable business growth and success.



“Our change management strategies fostered a culture of accountability, collaboration, and continuous improvement within Kaiser Permanente,” Tiffany says. “Employees were actively engaged in the Salesforce adoption process, leading to greater buy-in and improved morale in using the Salesforce product.

“This cultural transformation,” she says, “laid the foundation for sustained success and organizational growth.”

**A narration from;
Tiffany Newhouse**

Implementing Salesforce Solutions for Data-Driven Performance



Challenge

Kaiser Permanente, an innovative healthcare company with over 200,000 employees, faced challenges in establishing a robust growth platform and optimizing its sales account management processes. Additionally, they required expertise in finance processes and governance. Operating in a challenging and competitive industry, they needed to enhance their sales planning and performance system to be more evidence-based and data-driven.

Solution

We worked closely with Kaiser Permanente to tailor their Salesforce license to precisely align with their unique needs, particularly in sales and account management. Drawing upon our organizational and change management expertise, we implemented evidence-based and data-driven approaches to enhance sales and account management planning within Salesforce. This comprehensive approach involved restructuring their Salesforce processes, training the workforce, delineating clear roles and responsibilities, and cultivating a culture of accountability and collaboration among Kaiser Permanente's workforce. Our change management strategies emphasized that employees understood the rationale behind the Salesforce product and actively embraced and championed the changes.

The specific Salesforce products that were utilized to address these challenges include:

- Sales Cloud & Service Cloud. By aligning these Salesforce products with Kaiser Permanente's business objectives, we were able to drive significant improvements in sales performance, financial management, and account management effectiveness. Additionally, our change management initiatives ensured the smooth adoption of these solutions across the organization, ultimately contributing to Kaiser Permanente's overall success and growth.



Result

Kaiser Permanente experienced increased productivity and improved efficiency in sales operations, enabling it to achieve more with its existing resources. With a more data-driven approach to sales and account management, Kaiser Permanente was better positioned to capitalize on growth opportunities in the competitive healthcare industry, leading to sustainable business growth and success. Overall, our change management strategies fostered a culture of accountability, collaboration, and continuous improvement within Kaiser Permanente. Employees were actively engaged in the Salesforce

adoption process, leading to greater buy-in and improved morale in using the Salesforce product. This cultural transformation laid the foundation for sustained success and growth in the organization.

