

Building Salesforce Skills

Financial Services Company



Challenge

A provider of wealth management, asset management, and banking implemented Salesforce to build deeper connections with customers.

- The client wanted to drive end-user adoption of the new tool, maximize utilization, and ensure a timely return-on-investment.
- With more than 2,000 users, the stakeholders wanted a custom learning solution to reflect its unique business.
- The envisioned solution included engaging content, short eLearning modules, and interactive animations to build excitement.

The client was still adding new functionality to Salesforce and required a partner with experience working in an agile development environment with iterative releases.



Solution

TEKsystems Global Services collaborated with the client to develop a custom eLearning solution, using our best-in-class model.

- Created a sophisticated opening module to introduce the initiative and describe the vision of the program.
- Included videos, knowledge-based quizzes, and an interactive timeline animation.
- Developed two 3D “day in the life” simulations focused on the critical Chatter and Knowledge Management capabilities.
- Delivered a series of microlearning modules to explain core Salesforce functionality.

Results

TEKsystems Global Services delivered a series of 22 three-to-five-minute microlearning modules to quickly train users.

- We designed the modules for users to complete in sequence or assist them while performing specific tasks to support their performance. The microlearning was part of the client’s overall OCM strategy.
- The short, effective training enabled the client’s team to quickly learn the key functionality and establish stronger relationships with the firm’s customers.

The client achieved rapid end-user adoption, strong utilization, and high satisfaction, which helped them quickly meet the targeted return-on-investment.

The microlearning helped
prepare over 2,000 users
to maximize the client’s ROI.