

The Art of Implementing Change:

Armed with a robust user training and adoption strategy, A Fortune 500 global leader in virtualization technology executes a successful global Salesforce deployment in just 2 weeks.



Project Highlights

Client: A Fortune 500 Company, a provider of virtualization software with 2,000+ sales personnel

Challenge: Replace existing CRM with Salesforce across 32 locations in 20 countries

Solution: JPW's Adoption Playbook - a strategic, phased approach to change management

Our client, a Fortune 500 Company is a leader in virtualization and cloud infrastructure, delivering award-winning solutions that reduce IT complexity and enable more efficient, agile service delivery. With more than 190,000 customers and 25,000 partners worldwide, this growing company needed a customer relationship management (CRM) solution that could meet the changing needs of its global sales and engineering force. This Fortune 500 Company chose to replace its current system with the premier CRM application, Salesforce, and turned to JPW Consulting over one of the "big four" consulting firms.

The Challenge: Enterprisewide Deployment within an Aggressive Timeframe

With the rapid growth our client was experiencing, its salespeople were performing at maximum capacity—and the company's outdated CRM system, Siebel, was failing to keep in step. End-users faced multiple issues with Siebel, including slow and unreliable VPN connections, a poor user interface and insufficient reporting capabilities. Moreover, the company's service engineers worked in a separate system and were not integrated into the full sales cycle. Salesforce would address these issues as well as give management vital access to real-time sales pipeline data.



Training Highlights

- Trained 2,000 people in 32 locations in 20 countries around the world in 2 weeks.
- Provided Manager kick-offs and Super User support for each training session
- Trained around the volcanic activity that essentially shut down Europe
- Training occurred across multiple cultures and languages

Our client's initial transition to Salesforce enabled its channel partners and customers to access and update information on a partner portal. The next step was to implement an internal platform for complete integration, which would represent a sudden and dramatic change to end-users in the form of new tools and working processes. After seeing JPW Consulting at a tradeshow, our client hired JPW Consulting to help introduce Salesforce to its enterprise and drive broad user acceptance.

"Lack of end-user adoption is the main reason technology initiatives fail," says John Wurch, CEO of JPW Consulting. "Implementing a system like Salesforce directly affects how account execs, sales reps and service engineers capture sales information and manage their pipeline on a daily basis. As a result, the company's transition needed to be made quickly and efficiently, with a defined strategy for managing the changes end-users would experience in order to ensure their participation."

JPW was challenged to help deploy Salesforce across the company's entire sales infrastructure, a change that would impact over 2,000 personnel across 32 locations in 20 countries and span multiple cultures, languages and time zones. It all had to be completed within an aggressive two-week timeframe, and with minimal disruption to business as usual.

Getting the message out...

To generate excitement about the upcoming rollout, artfully crafted email campaigns were regularly sent to our client's users promoting the values and benefits of Salesforce—for them and the company as a whole. This positive message of change was reinforced through meetings, Intranet portal updates, message boards and executive communications.

Project Objectives

- Replace Siebel with Salesforce across entire global organization within 2 weeks
- Ensure users are proficient enough to minimize sales process disruption
- Document company's sales processes
- Integrate service engineers within the sales cycle
- Drive widespread end-user participation and commitment

The Solution:

A Comprehensive Change Management and Training Program

Using the JPW Adoption Playbook®—a formal, phased plan to drive project adoption—JPW Consulting implemented a comprehensive change management and training program for the global Salesforce rollout. During Phase 1 of the program, by directive of the client, end-users would be provided with essential Salesforce training to give them basic skills by the go-live date. Specific Role-Based Training would occur in a follow-up session (Phase 2) once users were already live in the system.

Business Benefits

- Rapid adoption of new technology with minimal business impact
- Promoted adoption of sponsors, management, and end users
- Developed user adoption metrics with which the company could effectively monitor ROI.

Phase 1: Basic Skills Training

After analyzing the company's readiness for change, JPW defined a strategy for communicating and managing the transition to Salesforce. To facilitate this process, a Change Management Team was assembled with individuals from JPW as well as their own managers, end-users and technical staff. A comprehensive Change Management Plan was created, which mapped out the overall strategy for delivering the core project information. The plan provided flexibility that would allow each company division to tailor the delivery of the project marketing and training materials to their unique needs.

The Communication and Training Plans

A vital component of preparing for any Salesforce rollout is the development of a comprehensive Communication Plan. For our client, the goal of this plan was to build awareness about the upcoming changes, convey project timelines and milestones, demonstrate the value of Salesforce to the various user groups, and help prepare managers for their roles as change leaders for the new system. The Communication Plan was designed to reach users through direct email campaigns, top-down team-level presentations, executive-level communication and the company's Intranet portal.

Given the very aggressive timeline with which the implementation and training were to take place, the company requested that a broad, unified Salesforce Training Plan be developed; one that would provide enough knowledge for users to effectively document their sales progress and report on their pipeline. This program would be delivered live in a single four-hour session, featuring the following essential components to ensure end-user success:

- A detailed slide presentation
- A detailed custom training script
- Hands-on live system training led by a JPW Salesforce trainer
- A complete End-User Manual
- Concise Quick Reference Guides (QRGs)
- Cheat Sheets and Frequently Asked Questions (FAQs)

SFA Highlights

- Easy to navigate with user friendly functions
- Clear link between Leads and Opportunities
- Full Collaboration between all members of the sales team
- Powerful, Easy, and Completely customizable Reporting Tools
- SE Activities in same system and visible to entire sales team
- Access Salesforce through any available browser
- Custom Views can be set up to view your teams data
- Single Sign-on for access to Salesforce



SFA 亮点

Salesforce.com 是一款客户关系管理应用程序，于 2009 年引入 VMware。我们目前已经进入第 8 阶段。正在将 Salesforce 应用程序引入更多特性和功能。下面是 Salesforce 的一些亮点：

- 功能具备用户友好性，易于导航
- 潜在客户与业务机会之间明确关联
- 团队成员之间可团队协作
- 具备功能强大的报告工具，能够制作自定义的报表
- 最佳工程中的各项活动在单一系统中完成
- 可通过任意可用浏览器访问 Salesforce
- 可设置自定义视图来查看团队的数据

When English is the Foreign Language

A trainer's job is to communicate ideas. That's not always easy when English isn't the native language. With our client's global Salesforce rollout, JPW provided not only localized training materials, but also native language trainers where necessary.

What's in it for Me?

The business benefits are fine for the executives and project sponsors, but what about the actual sales people and system engineers? A key component of the communication plan is showing them the clear values of Salesforce. JPW's discovery process sought to identify just that and then targeted information in communications and training reinforcing these key benefits.

As the rollout date approached, the Change Management Team began by initiating the Communication Plan. JPW designed a presentation for Sales VPs to deliver to executives and senior managers, highlighting expectations and process changes. Managers were given a presentation to deliver to their sales teams, informing them about the upcoming implementation, impacts to their daily tasks, and changes to sales/business processes. A multi-week, e-mail branded campaign for end-users was created to generate interest and highlight system benefits, and a dedicated Intranet page provided overviews and links to training materials.

In the weeks prior to the rollout, JPW also trained a global team of Super Users, who became Salesforce and business process leaders for their locations. Managers and support staff both received online training, with manager classes specially designed to highlight process overviews, reporting and dashboards, and system benefits.

The Rollout and Training

Just prior to the global rollout of the new system, JPW conducted a massive, coordinated effort to deliver on-site training to 32 locations in 20 different countries and 17 time zones, utilizing only 25 trainers over the course of seven business days. This plan was nearly thwarted when a volcano erupted in Iceland during the week of the scheduled rollout, severely impacting air travel throughout Europe. However, following proper project management methodology for contingency planning, JPW was prepared to reallocate trainers or substitute as needed. Trainer travel plans were adjusted accordingly and where participants could not attend, live meeting links were established in order to successfully complete training.

At the training rollout, all sales roles were trained on site, kicked off by the local Sales Manager and immediately followed by a recorded video from the company's VP of Sales, who reemphasized the key benefits as well as expectations for the users and the company. JPW trainers then delivered hands-on training embedded with business process information. Previously trained Super Users assisted with training logistics and provided local business process expertise outside the scope of knowledge of the trainer. The combination of experienced trainers, powerful presentation techniques and business-savvy Super Users created the optimal learning environment for users.

To reinforce each Salesforce training session, users were also given a complete packet of customized support documentation created to cross-reference and reinforce their new knowledge. These included preprinted Quick Reference Guides, a complete user manual and an FAQ sheet.

Overcoming Obstacles

Complete travel disruption occurred during the week of training when an Icelandic volcano erupted, cancelling flights across Europe. Contingency planning and nimble resource allocation ultimately allowed JPW to successfully deploy trainers to all client locations according to original project expectations.



“I’ve had multiple reps come to me with glowing feedback on our trainer. Her extremely positive and patient attitude worked really well with the team and made the four-hour session seem shorter. Her flexibility to stay on another day and run another training class for us at short notice was also very much appreciated.”

- **Company Salesforce Super User, Ireland**

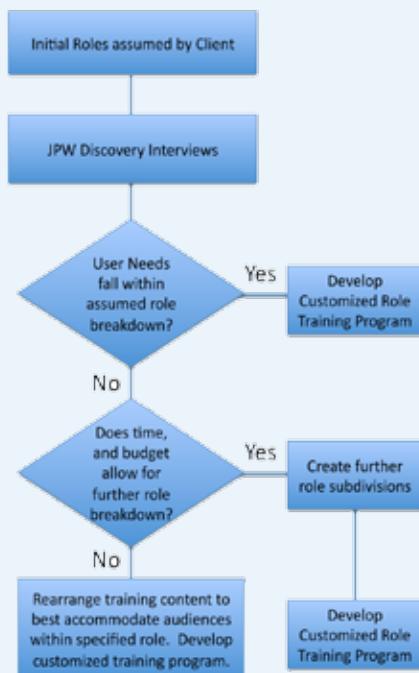
Reinforcing Change

Immediately after their initial training, users were administered online proficiency tests by JPW to reinforce the concepts they had learned and to evaluate the training. Training materials and FAQs collected during training were posted on the company’s Intranet portal for all users to access. JPW also provided additional online virtual class trainings and recorded training for users who were unable to attend the live training, and as reinforcement to those who had.

JPW consultants compiled information from all training sessions for our client so that an Adoption Gap Analysis report could be created, highlighting training feedback, adoption metrics, requirements for system enhancements, and requests for additional user reports.

Following training and the collection of initial user feedback, the client immediately began working on quick system fixes and bugs as well as visibility and access corrections. To ensure that positive momentum was retained, users were continually kept up to date regarding the status of changes.

Refining the Roles Through the Discovery Process



Phase 2: Role-Based Training

Designed to reinforce and augment the training supplied during Phase 1, the Role-Based Training (RBT) was customized to the various key organizational roles and their respective needs. The training mapped existing and new key business processes for each role to the accompanying functionality in the Salesforce system. JPW once again utilized the JPW Adoption Playbook model to implement RBT programs geared for specific users.

The Discovery Process

An intensive discovery process was the first and most critical step in developing effective RBT for the Salesforce rollout. This process began with interviews with the Project Team, which allowed JPW to make rough determinations as to what distinct roles would need to be considered for customized training. Five roles were identified: Account Executives & Inside Sales Reps, Global Sales Executives, Account Executive Managers, Service Engineers, and Channel Sales Reps.

Interviews were conducted with Super User Project Team members familiar with each role from a business perspective to help broadly define user roles, responsibilities, and known job functions and lay the groundwork



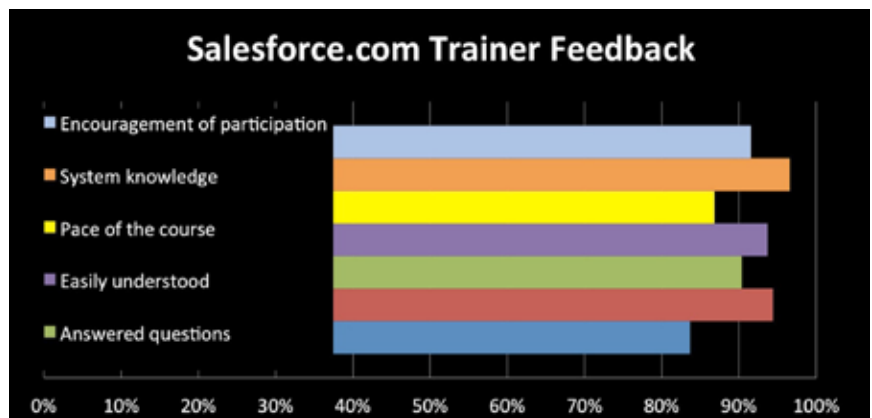
for appropriate discovery questions. Following this, interviews with a panel of select user group members were scheduled to gather specific information about each role in each of the three geographical regions (Americas, EMEA, APAC). The goal of these interviews was to deep-dive into “a day in the life” of each user, where JPW probed all areas of their job function and processes.

Discovery: Understanding Role-Based Needs

- Daily workflow activities
- Collaboration needs
- Integration with other company systems
- Reporting requirements
- Documentation and archiving needs
- Likes/dislikes of old system

The Training Program

The information obtained via discovery was incorporated into the development of a comprehensive Role-Based Training Program. Delivered virtually to control costs, this program used real-life examples and scenarios tailored to the role being trained. In conjunction with a live, hands-on training session, a Power Point slide deck was used to convey key business process information, Salesforce integration with external systems, a high-level overview of the sales process, suggested configurations, and other key information not easily displayed in Salesforce itself.



Reinforcing Change

In addition to the RBT training sessions, JPW provided our client with detailed role-based QRGs, User Manuals, FAQs, and step-by-step examples of creating role-specific reports and views taught in the class.

Its training team was also provided with training scripts, so they could continue delivering Role-Based Training to new hires or those who missed the initial training. Additionally, JPW delivered video recordings of the RBT classes and additional stand-alone topical training subjects, which would allow users to refresh or expand their Salesforce knowledge at will.



“Gave some insight into the sales side of the system, which I would not know otherwise”

- User (Sydney, Australia)

The Results: Rapid and Widespread End-User Adoption

With the assistance of JPW Consulting, our client company was able to successfully replace its existing Siebel CRM system with Salesforce across all of its locations worldwide. The highly customized, dual-phase change management approach utilized by JPW allowed the firm to effectively meet the client’s complex training needs as well as its restrictive timeframe.

According to John Wurch, CEO, “The complexity of a Salesforce rollout demands an organized, committed plan to create a bridge between cutting-edge technology and existing business infrastructure. Our strategy goes beyond teaching; it’s about working with a company to understand how the new technology will affect job functions, benefit end-users, and meet long-term company goals. The fact is that maximizing your ROI with Salesforce only happens when your people are able to make the most of it. Until then, it’s just another business expense.”

“JPW gave the client company and its salespeople the proficiency to hit the ground running with Salesforce and bypass a lot of growing pains. Now it’s up to them to leverage the power of this technology to drive the organization forward and improve their business results.”

Business Benefits Realized by the Fortune 500 Company

- Rapid adoption of Salesforce technology with minimal business impact
- Widespread adoption of sponsors, management and end-users
- Developed user adoption metrics with which the company could effectively monitor ROI

About JPW Consulting

JPW Consulting is a professional services consulting firm. Our mission is to provide premium-quality training and consulting tailored to each client's business and workflow. Our priority is to ensure client satisfaction by devising and implementing innovative solutions within each client's desired timeframe and budget. At JPW, "Turning Knowledge Into Action" is our driving vision.

Our competitive advantages include the strength of our personnel, our flexibility and scalability to meet the needs of clients in a rapidly changing work environment, and our track record of achieving—and often exceeding—our clients' objectives.

We take pride in our proven ability to:

- Analyze the needs and risks of a project and develop an optimum solution;
- Manage a project successfully at every step of the project life cycle;
- Develop, document, and deliver training in the most effective way possible;
- Contribute to the development of an organization's staff and management; and
- Ensure overall client satisfaction with our efforts, from start to finish.

JPW's experienced consultants specialize in developing programs around a company's culture, current needs, and existing knowledge base. We assist clients in aligning their practices and standards with PMI® and the Project Management Body of Knowledge®. Our training yields immediate results.

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