

Blended Learning and Lightning Expertise Solve Adoption Challenges

CASE STUDY

Fortune 100 insurance leader successfully rolls out Salesforce's new Lightning user interface to 8,600+ users in Q1 of 2017, using blended learning approach to training.



JPW CONSULTING
Your Adoption Partner



BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

CLIENT

Fortune 100 mutual life insurance company

CHALLENGE

Deliver uniform Salesforce training and foster motivation among 8,600+ sales agents located across the US.

SOLUTION

Phased, highly effective, blended learning experience, available to all learners

OBSTACLES

Short timeline

Lack of system expertise

Learner resistance to change

Flexible adoption requirements

RESULTS

Over 8,600 agents successfully trained in Q1 of 2017

27 trainers

40+ states

Fortune 100 client

8,600+ end users

3-month rollout

THE PURPOSE

This case study will demonstrate how a comprehensive, customized blended training approach, utilizing highly experienced facilitators and resources, helped one of the largest US mutual life insurance companies overcome their challenges to successfully rolling out Salesforce Lightning to all of their agents.

THE PROBLEM STATEMENT

This write-up addresses the challenges of delivering uniform Salesforce training, to 8,600+ sales agents across the United States, in less than three months, while fostering learning motivation.

BACKGROUND

The objectives of the client, a Fortune 100 insurance leader, were to transition all of their 8,600+ sales agents from their fragmented CRM systems, to a unified CRM system, and to ensure the platform was positioned for success. After careful analysis, the client chose [Salesforce Lightning over other competing CRM solutions](#). The Lightning experience provided the best overall features to facilitate their team's business needs. However, they still anticipated enterprise-wide adoption challenges and user resistance, due to the large training scope, and the unique traits of their learners, especially since they were looking to accomplish a staggered release over just three months and allow for a flexible system adoption timeline for established agents.

The client was looking for a way to deliver highly effective training, with a consistent message to all the users, across all locations, during a rapid rollout. They also wanted the training to be engaging so that it held the user's attention, while imparting the knowledge and skills the users needed to perform their daily functions and tasks.

CHALLENGES

The main challenge was to deliver the largest rollout of Salesforce Lightning in insurance industry history, within one quarter.

The client's short and aggressive training rollout timeline imposed extra challenges to delivering effective training and adoption, as it resulted in

BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

larger than ideal class sizes and single day onsite training, which resulted in a long day of learning, and little flexibility in scheduling. Ensuring that all agents received the same training experience would also be challenging, since they were located throughout the US. The client also lacked Salesforce Lightning experienced facilitators to deliver the training. The learners' resistance to change was also an obstacle that needed to be addressed.

The training and adoption solution would have to overcome timeline obstacles, focus on a combination approach to learning, include multiple delivery methods, and provide a uniform experience for learners throughout the country.

THE SOLUTION

The solution called for a multifaceted training and adoption plan. As a result, a jointly engineered, phased training solution was developed in alignment with the client's culture, practices, and standards. This solution included a strategic blend of onsite, instructor-led training (ILT) and eLearning. ILT was to be uniformly delivered at each client office across the US and, when possible, tailored to the learners' role and experience level. For a blended approach, comprehensive engaging eLearning was developed as well. The eLearning would be available for those who did not attend the ILT, or as reinforcement of what they learned originally once they were ready to adopt the system. Short eLearning demos were also created to allow for practice and long-term reinforcement.



To achieve the ROI the client was expecting, and to realize enterprise-wide adoption, in addition to the training addressing the audience's varying role-based needs, and experience levels, it had to anticipate areas of resistance, and provide for a way to overcome them. Since the training demonstrated how Salesforce Lightning links the prospect to customer process and provides real-time pipeline updates, to further overcome resistance, it was recommended that the content also communicate the "WIIFMs" or "What's in it for me?" for the learners. This information, which was gathered during discovery, was recommended for inclusion in the training content wherever possible, to make it more engaging and relevant to the learner. Additionally, commonly asked

BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

questions and user survey feedback were routinely incorporated within the trainer scripts to anticipate the learner’s needs. The result was a more engaging training content, based on the “day in the life” perspective of the agent.

The next critical solution involved uniformed on-site instructor-led training delivery across the country, during a rapid deployment period. In order to accomplish this, over 25 highly experienced facilitators were engaged to deploy in multiple locations each week, over the course of 3 months. Resistance was overcome through flexible and expert facilitation, peer to peer support, engaging the audience with anecdotal storytelling, and encouraging hands-on learning.

Ahead of the training delivery, comprehensive onsite trainer preparation was key to delivering this uniformly consistent training message to all users. This included designing and delivering a detailed Train-the-Trainer program which ensured message consistency, delivery style, and immersion into client terminology and culture. Message consistency insured that each user received the same client approved perspective on the project and how to execute activities in the most efficient way. Immersion into client culture helped facilitators be more in tune with the user’s day to day world and added credibility to the material being presented.

The facilitators then traveled across the country, presenting the instructor-led training classes on site, following detailed training scripts, so that the same message was delivered to all learners. The training was based on the day in the life of the agent beginning with a new agent meeting a prospect at a social networking event. The training followed the model agent’s activities, as they navigate Salesforce. The agent’s journey reinforces how Salesforce can streamline their work effort and increase productivity through practical, real world scenarios that agents can immediately relate to and apply. In the context of instructor-led training classes, the comprehensive journey was structured to include an opening value proposition, demonstration, hands-on practice time, and discussion. As a result, many obstacles were overcome with flexible and expert facilitation of peer to peer support, engaging the audience with anecdotal storytelling, and encouraging hands-on learning.

Additionally, the audience of sales agents had a wide range of experience levels, with some brand new to the industry and others with 30+ years of experience. This experience level differentiation was a key factor, as experienced agents required a custom approach in leveraging the Lightning UI to



BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

nurture their current book of business, and novice agents required a different approach in utilizing the Lightning UI to *build* a book of business. The facilitators delivered these two tracks of learning tailored to each group.

As a comparable alternative to instructor-led training, on-demand eLearning modules were developed using Storyline. For the eLearning, there was a coordination on the part of instructional designers, graphic designers and developers to design and create over four hours of interactive, engaging, journey supported content, in consumable learning segments ranging in length from approximately 20 to 40 minutes. Each segment was based on a particular part of the agent's day, and the related actions they would go through using Salesforce Lightning. The eLearning allowed Agents to access the training as needed through the client's LMS, and could be used for initial learning, or as supplemental practice or reinforcement of the on-site training. Additionally, 30 short micro-learning modules were developed, following a "Show Me, Let Me Try, Test Me" format, which allowed for demonstration, practice, and self-assessment of each critical process in Lightning. These snippets of learning made it easy for learners to access just the topics or processes they needed, so they could get back to work quickly.

“ *The JPW team is 'top-shelf' and consummately professional; I feel very secure knowing that we will be working with them on this roll-out.* ”

—Office Sales
Training Manager

BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

THE RESULTS

JPW Facilitators executed and maintained uniform delivery with consistency, sustaining a high level of performance across the duration of the training rollout. This level of excellence could be considered challenging to sustain, however, JPW road warriors tirelessly traversed over 40 states, delivering the same content, at the same time, from Rhode Island to Alaska and Hawaii. The JPW team of digital designers and developers contributed no less effort in delivering engaging eLearning modules that would serve as both new hire and refresher training post-rollout. With coordination from our eLearning project managers, we delivered dynamic, interactive eLearning content, supported by an organic user interface. Initial feedback for the blended, journey-based approach has been positive. Learners appreciated the sense of involvement and ownership in the process. Resistance to change dramatically reduced with acknowledgement of their busy professional roles; they felt validated as key players and thus trusted in the Salesforce CRM solution.

This audience of sales agents formed a connection with the realistic, role-based scenarios and chance to engage in authentic practice in a sandbox environment. Feedback for eLearning included appreciation on behalf of agents for the ability to access training anytime, anyplace, which is harmonious with the on-the-go salesperson lifestyle. Learners also expressed appreciation for the differentiated design of the eLearning; those that needed the full course could access the complete set of modules, while those who needed to learn about a single topic, or a quick refresher could access the short snippets. In rising to the task, analyzing the individual needs, and overcoming the obstacles, superior training was delivered, and user learning and adoption was high.

As a result, the Company and JPW Consulting continue to partner on multiple training projects.

“*Whatever you did to prep your trainers to be ready for the training was fantastic!*”

—District Office Manager

BLENDED LEARNING AND LIGHTNING EXPERTISE SOLVE ADOPTION CHALLENGES

JPW AND THIS PROJECT

In looking for a Salesforce adoption partner, the Company chose JPW. We were selected as a part of the team because of our experience creating blended training solutions which artfully combine ILT and eLearning. We were also chosen because of our seasoned personnel and capacity to deliver meaningful and coherent training solutions for large scale Salesforce rollouts.

Since 2005, JPW has been an official partner with the world's #1 Customer Relationship Management (CRM) solution, Salesforce. We have been trusted by leading companies to apply our proven adoption playbook to deliver some of the most ambitious and successful rollouts in Salesforce history. Our clients maintain confidence in us because we offer comprehensive solutions. We blend Salesforce knowledge, change management expertise, scalable instructor led training (ILT), eLearning development capacity, and a respect for our clients' needs, to develop a truly customized training approach that is modern and meaningful.

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.

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.

To learn more, please visit us at www.jpwconsulting.com
or contact us at **(877) TeamJPW (877.832.6579)**
or info@jpwconsulting.com.