



learning
solutions

Learning Course Development & Training



CLIENT

International IT Solutions
& Managed Services
Provider

INDUSTRY

IT Services

SKILLS PROVIDED

ILT, Learning Analysis,
Courseware Development,
Professional Development,
Train the Trainer, Custom
Learning Solutions,
Communications Plan,
Instructional Designers,
Graphic Designers,
Learning Strategists

An international IT solutions and managed services provider was looking to implement Salesforce® as their new customer relationship management (CRM) platform.

THE CHALLENGE

As part of a larger initiative to modernize and standardize their business operations, the company decided to migrate from multiple legacy CRMs to Salesforce®.

The migration from the legacy CRMs to Salesforce® was a massive project, affecting Account Executives (AE), Service and Solution Architects (SA), Sales Support Representatives (SSR), and their respective leadership. All key stakeholders needed to be shown the value in adopting Salesforce® and the new processes, and trained to use the new platform to maximize its benefits. Training sessions needed to accommodate 600 employees in 8 locations. Virtual sessions were included for those unable to travel to the training sites.

“ Judge Learning Solutions quickly produced excellent custom training materials to support our Salesforce rollout. They provided trainers who were knowledgeable, engaging, and willing to adapt to learners’ needs and changing schedules. ”



THE SOLUTION

A Judge Learning Strategist worked with the company's team to conduct a training needs analysis, producing a customized role-based training roadmap.

The training roadmap outlined in-depth solutions to achieve project goals, as well as the associated benefits and trade-offs of the recommended solutions. It recommended training topics and approaches, along with strategies for driving Salesforce® and new process adoption throughout the organization, and providing ongoing performance support.

JLS developed a complete custom instructor-led program, which included creating presentation slides, training data, demo scripts, facilitator guides, participant guides, hands-on practice activities, and job aids. Topics and materials were personalized to address the needs of several distinct groups: sales executives, sales support staff, solution architects, administrative resources, and executives.



THE RESULT

The Judge Group created the necessary materials, selected the right trainers, and conducted several training sessions while continuously incorporating feedback from the company.

JLS used their access to a deep database of contractors to find the perfect experienced Salesforce trainers to lead the sessions. Judge held train-the-trainer sessions to introduce the trainers to the nuances of the company's highly customized configuration and the needs of the learner groups. At the same time, Judge was attending meetings with key stakeholders to ensure the training covered their most important concerns.

To increase excitement for the transition and drive adoption of Salesforce®, Judge created a motion graphic video to introduce the training at a national sales meeting. After receiving feedback on the pilot sessions, JLS conducted a second train-the-trainer session and created additional job aids, some of which are now used as reference guides.

The trainers were able to leverage their deep knowledge of Salesforce and hands-on preparation with the company data to provide engaging, effective experiences throughout training delivery.

JLS began working with the company in December 2016 and ran pilot sessions in March 2017. Judge completed training sessions for all locations in August 2017.

Want to learn more about the solutions we
can provide to your company?

Call Judge at (800)650-0035
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