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## CASE STUDY

# TRAINING FOR EMPLOYEE ADOPTION AFTER CRM CONSOLIDATION

As part of a larger initiative to modernize their business operations, a global IT solutions provider wanted to migrate from multiple legacy customer relationship manager (CRM) systems to Salesforce®.

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### **THE CHALLENGE:** **Training employees on a new CRM**

For the successful migration from multiple legacy CRMs to Salesforce®, all key stakeholders needed to be shown the value of adopting the new platform, then trained to use it in order to maximize its benefits. Training on the new CRM would be delivered to over 600 employees across eight locations so they could learn how to use the platform to manage customer lifecycles and build customer relationships, as well as utilize its sales and marketing capabilities.



### **THE SOLUTION:** **A managed services approach**

The company partnered with Judge Learning Solutions (JLS) to develop training and manage the implementation of the new CRM. JLS took a managed services approach to address the challenges across the talent development lifecycle to ensure a successful rollout and fast adoption of the new software by 600 employees in eight locations.

First, a JLS learning strategist conducted a needs analysis and investigated possible solutions for driving Salesforce® and new process adoption in order to develop the training. JLS then developed a role-based training roadmap and strategies for providing ongoing performance support. In partnership with the company, JLS managed training implementation logistics and additional program vendors. Finally, the JLS team developed a complete instructor-led program personalized to address the needs of several distinct groups, including selecting and preparing trainers, designing and developing comprehensive materials and job aids, and supporting the program with multimedia marketing materials.



### **THE RESULT:** **Successful CRM adoption and continued training**

JLS identified the best solution, designed and developed program materials, and managed the training implementation while continuously incorporating feedback from the company. To drive the adoption of Salesforce®, JLS created a motion graphic video to introduce the training at a national sales meeting. JLS identified exceptional trainers and held train-the-trainer sessions focused on the nuances of the company's highly customized needs. The trainers leveraged their deep knowledge and preparation with the company data to provide engaging, effective experiences. As a result, the new CRM was fully adopted, and employees continued training with updates and new Salesforce® features.