The Enterprise Class
Guidance and Engagement Platform

White Paper

How to Increase Salesforce User Adoption

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Introduction:
The Power of Certainty –
The Importance of Simplicity in Effective Salesforce User Adoption & Implementation Strategy

Choosing and purchasing the right business software are important decisions within the life of any enterprise

- 50% of project had cost overruns
- 60% did not meet their schedule
- 60% did not receive half of their expected benefits

INTRODUCTION - THE CHALLENGE:

Choosing and purchasing the right CRM are important decisions within the life of any enterprise company.

Yet, once you've decided on Salesforce, discussion and strategizing turns to how to effectively implement the software and to onboard new users. To be clear, we are talking about a difficult, complex and time-consuming process, one which is far from a guaranteed success. Even in the cloud era, when cloud-based software like Salesforce has become a dominant force in enterprise software, the implementation process isn't a walk in the park. For example, here are some statistics related to ERP and cloud-based ERP implementation success rates:

Success Rates: *ERP & SaaS-based ERP Implementation*

Panorama consulting ERP (26% cloud) success rate survey from September 2012 to January 2013:

- 50% of project had cost overruns
- 60% did not meet their schedule
- 60% did not receive half of their expected benefits

Diginomica draws this conclusion from other observations:

In reality, the cloud hasn't changed the difficulty of bringing new practices into any organization and bringing team members up-to-speed with new ways of working.

They cite the main reason as lack of skills with the products and lack of professional services from these new companies due to

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the fact that these are young companies who have not had time to grow that part of their business.

Furthermore, 63% of CRM initiatives fail, according to the results of a survey – conducted by Merkle Group Inc. - of senior-level U.S. based executives.

PURPOSE OF THIS PAPER:

So with the challenges well-known, once you have selected Salesforce as your next CRM platform for your sales, marketing and customer engagement efforts, what is the best-practices approach to ensuring a successful implementation? How can you align the new platform and product with the rest of the firm's business and IT strategy?

Sort the workload based upon what is most important, taking into consideration benefit versus cost

This white paper will present a roadmap to effective Salesforce user adoption and implementation. Along the way, we will present a series of steps that are necessary during the implementation process. We will also explain how WalkMe, an enterprise-class guidance and engagement platform, will assist you in more easily and successfully onboarding new Salesforce users, and make sure they can focus on using the Salesforce productively, relieved on wondering HOW to operate each function. We hope you find it valuable and that it will help bring your team toward new heights.

We'll go into detail in a moment, but to begin, let's look at just a couple of starting points:

Keep it Simple; Focus on What is Important; Dump the Rest

The best approach is the simplest approach. One can look at the field of statistics and adopt the Pareto principle (also called the 80/20 rule) or look at rapid development methodologies like Agile or Scrum. These approaches say not to spend time on every desired feature. Peripheral or nice-to-have functions do not yield measurable gains over sticking with what is most important.

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Focus is important when going through complex processes, introducing new software until now unfamiliar to your team members, enable them to keep an eye on the prize and learn the essential elements, while saving less common processes and less critical knowledge until later on.

Focus on Effective User Onboarding and Knowledge Management

It's important that training your team members on how to use Salesforce is, on the one hand, as fast as possible, but also that it leave a lasting impact. Part of the challenge of user adoption on a new software is, on the hand, fear – that is the uncomfortability of having to learn something new and unfamiliar. From the other side, the way to get over that fear is through good communication and training users in how to use Salesforce in a way that doesn't overwhelm them with too much information right away, as well as delivers key knowledge when they need it the most. Knowledge equals confidence, and you are responsible for fostering that confidence. The idea of the Pareto principle is very much relevant to Salesforce onboarding and knowledge management in the long term – focus on what is most important. How to best ensure that happens we will discuss in more detail.

Anything pushed to the side could be tossed out completely

The Take Away:

The take away from these methodologies and the Pareto principle is to sort the workload based upon what is most important, taking into consideration benefit versus cost. Keep a list of the most common and critical business processes (work tasks on Salesforce) that users will have to perform. As one selects tasks and assigns resources given timelines, anything pushed to the side could be tossed out completely. This helps to keep the process of adopting and implementing the new software simpler, thus more likely to succeed.

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Salesforce provides a development, test, and production environment

Data Migration & Conversion

Plan Data Migration

The project needs to plan what data needs to be migrated to Salesforce and how. The architect can lead this effort with input from the developers. Salesforce includes a bulk loader or web services interface, so programmers can load data into the new system without having to write something overly complicated.

Based Upon Gap Analysis: Bolt-ons & New Environments

Salesforce should provide a development, test, and production environment where the team can work on extensions to the product and work with the SaaS vendor to install any bolt-on third-party solutions and do unit and functional testing. Gap analysis should have been completed in the vendor-evaluation stage to figure out what additional software is needed for the business. Salesforce has partnered with lots of companies that offer such bolt-ons.

People are human, and they learn by repetition and through practical application of the knowledge transferred to them. It would be better to give, say, one day of training every two weeks so that the employees are exposed to the new system in digestible chunks.

Strategize Training

The Basic Principle:

Keep Training Short; Do Not Give it Too Early; Give a Test at the End

Continuous Learning:

Training does not just mean sending employees to a training class early in the project and then dropping that. Even if classroom training is less of your focus, implementing more e-learning in the initial training period, it's important to remember that training should be ongoing and frequent. 'Continuous Learning' as it is sometimes referred to in the world of employee

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training. In other words you need to adopt a strategy towards training.

Proper Timing:

Close monitoring of user success, particularly in the early stages – provides a good analysis

Too much information, given all at once and too early, will just make people forget what they have learned, when the software goes live. People are human, and they learn by repetition and through practical application of the knowledge transferred to them.

A better strategy would be as follows. Give a short, initial training period, focusing only on how to perform a few key processes, getting onboarded, and to focus on the big picture sales (or marketing or customer success) strategy. But do NOT focus too much on getting every process right immediately. As mentioned, forgetting as soon as the initial training period ends is an issue.

Once the initial training period ends, focus on a **performance support** strategy. Performance support technology helps to put forward the accurate information and admittance to that information into the hands of your personnel, at the most appropriate time as and when it is required by them. Performance support technology is basically aimed at arming your workforce with some tools so as to increase their output on the whole and help them to successfully perform the job assigned to them. It is objected to provide the most suitable quantity of task leadership, help and efficiency benefits to the employee exactly at the time of need.

Instead of extensive classroom sessions and long video tutorials, employees are placed on the front lines and work a typical day. They are then given tools that help them tackle practical tasks and learn how to address them in real time, exactly in the moment of need. There are certain programs out there that are designed for this specific purpose, and can be paired with other training techniques to promote a faster learning phase.

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Bonus Tip:

Utilize software like WalkMe, which provides direct and onscreen assistance in the exact moment of need on Salesforce. WalkMe provides a series of real-time instructions that enable the user to successfully learn and perform any Salesforce task, no matter how complex. This allows user to get up to speed to begin working quickly, while still being able to quickly and simply retrieve necessary information when they need it.

Due Diligence:

There needs to be due diligence, meaning give a test, to make sure people have been paying attention. Close monitoring of user success, particularly in the early stages – provides a good analysis of what seems to be working well and where there remains room for improvement.

Make sure that training directly correlates to task performance.

Demonstrate Value:

A key point though is to make sure that training directly correlates to task performance. Make sure it is not too theoretical or complex. Keep it simple and directly relevant to everyday tasks. In that way, managers and employees will succeed.

Rewards and Gamification

Let's examine how to use rewards and gamification to increase your team's embrace of Salesforce.

Implement Gamification Principles:

One of the most powerful ways in which you can boost adoption is by implementing gamification principles through an app. For instance, Hoopla allows you to provide a video scoreboard for

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your users in which they get ranked in real time. This will greatly help enhance team performance, as each user will gain recognition and will be more determined to participate into work activities.

Make the Adoption Fun:

You can easily encourage the Salesforce adoption by keeping users engaged throughout the process. One of the best ways to do this is through a creative training game, such as Tic Tac Toe (in which you divide the users into teams and ask them questions about Salesforce' functionality 'till someone wins), Jeopardy (in which you divide users into groups of 2 or 3 and ask them about different topics until one group standoffs from the rest), or Poker Hand (in which users receive a card for posing or answering questions, and the one who earns the best poker hand wins)

Create a Rewards Program:

Another way in which you can boost the Salesforce user adoption and self-service is by creating a reward points program. Such programs will help you both encourage and track the users' progress throughout the year. For example, you could award the users with a login percent rate above 80 with 10 points per month. Then, the users should be able to cash in the points they accumulated at a specific web site.

Boost the Team Spirit:

One of the most effective approaches for increasing the user adoption is by breaking them up into small groups and having them to meet at regular intervals. On these times, users will provide you with their feedback and improvement suggestions. Use the ideas you obtain for them to create case studies, and then implement the best group idea. The winning team should receive a prize, such as tickets to a soccer event or a free dinner.

Reward Mentorship:

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Another effective strategy is to assign different mentors to your current teams. The mentors should boost teams' morale and help them get accustomed with the new CRM program. Then, you may reward the mentors which had good team results with a free lunch with the executives, in which their visibility will be increased.

Increasing the Salesforce' user adoption using gamification and rewards is a great way to contribute to a happier team and positive long term results – when done right. Always remember that making it fun works best when you are also making it easier. Using technologies that simplify Salesforce experience is the perfect complementary ingredient for successful self-service adoption.

The Power of Collaboration

Next, let's look at the importance of "collective efforts" to propel Salesforce adoption, as well as a common mistake that we highly recommend avoiding in getting your team to embrace Salesforce.

1. Help your team understand the Salesforce lingo – Many users will feel intimated by the new CRM platform at first. Besides the initial training, you can also help you users get better accustomed to it by providing them access to different online resources. For instance, the Salesforce Community allows users to search for new ideas, ask questions and interact with a vast array of Salesforce experts. Use smart onboarding tools to help your team train as they do their Salesforce activities. It is easy precisely because it is "learning on the go".

2. Give your employees' the chance to speak – You should try to let everyone in your organization share their opinion about the new program. This way, you actually give them a chance to come up with new ideas which will only improve their work life,

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thus ultimately leading to an increased Salesforce user adoption in your company.

3. Make use of Chatter – One of the best way to promote real-time user interaction and to increase the collaboration between employees is by using Chatter. Therefore, you have to create specific Chatter groups for each of your company's departments, and give employees' the chance to ask questions, provide feedbacks and share documents. You could also create an incentive program which will allow those who share valuable content to become top contributors in your company. Also use Chatter polls for a better understanding of users' feedback.

4. Get the adoption right – It's important to reinforce users the idea that they have to live with Salesforce right from the standard. Make sure you outline the opportunities this CRM program opens up for them, and the way in which facilitates collaboration between your company's departments.

5. Avoid highlighting those who don't use Salesforce – You might think that a wall of shame could positively increase the user adoption inside your company, however, on the long term, things are exactly the opposite. This type of peer pressure is geared towards negative tendencies, so why not try to make users understand the CRM's benefits instead? Ask them questions and make sure that you understand which their expectations are.

The WalkMe platform also provides a valuable tool to complementation traditional documentation, by providing a long-term self-help tool for users to receive direct assistance, without having to break from momentum to wait or search for help.

Documentation & Support

The Basic Principle:

Build Documentation into Signoff Process; Use Social-media as Support Tool

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Build it In:

Most people do not like to do documentation, so it should be built into the signoff process.

Social Media:

The documentation system should include a social media type interface, so that it becomes a tool for ongoing support. This lets people post questions and issues online and have coworkers or vendor support people respond using a Facebook like presentation. That is easier than using the phone and more reliable than email.

When the system goes live, it is necessary to deploy a monitoring system

Returning to WalkMe, platform also provides a valuable tool to complementation traditional documentation, by providing a long-term self-help tool for users to receive direct assistance, without having to break from momentum to wait or search for help.

Monitoring & Analytics

Monitoring:

Deploy a monitoring system for uptime and security.

When the system goes live, it is necessary to deploy a monitoring system to make sure that all the interconnected applications are working within thresholds and are up and running and not being hacked.

Use analytics to measure performance, to spot trends, and to make forecasts

Analytics:

Use analytics to measure performance, to spot trends, and to make forecasts

Bonus Tip: WalkMe Analytics also provide comprehensive monitoring and analysis of user performance in software onboarding.

The transactional data that the system accumulates over time is a treasure trove of information that can be used to find statistical anomalies (meaning operating outside norms), spot trends, and make forecasts. This helps with business strategic planning and

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can determine whether the system is operating in optimal fashion and delivering promised improvements in productivity.

Bonus Tip:

WalkMe Analytics also provide comprehensive monitoring and analysis of user performance in software onboarding. Which tasks have they required assistance? How long did it take for them to master that function? How many steps were required? WalkMe Analytics is an indispensable tool in finding these answers, and as a result, will enable managers to customize performance assistance to meet each employee's needs.

Conclusion: Bring it All Together

Testing is paramount; document, training, and ongoing support are critical. One

In sum, implementing Salesforce is best done by following the best practices adopted by other businesses and organizations and keeping it simple. There is the need for executive sponsorship and steering committee oversight. One needs a strong team leader. Because a new system needs to be integrated with other systems, there needs to be a systems integration effort. Testing is paramount; document, training, and ongoing support are critical. One should deploy software to monitor the system for reasons of security and reliability. Finally, the data accumulated over time should be subjected to analysis, so that it can yield valuable business insights.

About WalkMe

WalkMe provides a cloud-based platform designed to help Salesforce managers to guide and engage employees through any online experience. WalkMe simplifies Salesforce usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. WalkMe removes the barriers of entry from other CRM systems, and increases user productivity while

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lowering helpdesk requests, and reducing onboarding and training time and costs.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage.

As a result, both during the initial training Salesforce orientation process and beyond, managers can empower their users so they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid errors through even the most complex processes.

WalkMe also removes the barriers of entry for employees using other CRM systems by easing employee agony over changes in their daily routine and cuts the learning curve for new Salesforce users.

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