



One of the largest UK insurance companies selected Optimum to train their sales team on Salesforce.com.

Salesforce.com is a web based on-demand customer relationship management (CRM) solution. It enables users to track the sales process effectively from wherever they are and manage their sales accounts over the web.

Ensuring user buy-in

Previously the sales team had been accustomed to a large degree of autonomy in the way they worked and managed the sales process. With the roll out of Salesforce.com came a significant change in their working practice as well as the requirement for the system users to get up to speed on the functionality of a new product. It was recognised early on in the design phase of the training program that the users might feel that the transparent and clearly documented processes and performance measures were intrusive. To challenge this perception it was important to show people the individual benefits that using Salesforce.com could offer. The sales team needed to be reassured that the purpose of Salesforce.com was not to monitor them but to make their life easier by enabling them to work in a dynamic and responsive environment where everything they needed was at their fingertips. Conveying this message was at the core of the approach taken by Optimum.

Tailored user development programme

The overall programme consisted of a multi-step approach with each stage designed to make the user more confident with the new processes and the software. To kickstart this process a webcast was given by senior management to introduce everyone to the project. Salesforce.com was already being used in North America so they were able to provide real life examples of the benefits that were being achieved. The bigger picture was clearly laid out, which was important in breaking down any barriers to learning before training commenced.

The next step was to introduce the users to Salesforce.com and give them a tour of the software so they could build some familiarity with it and start to discover the positive features. An e-learning module was used to highlight the benefits to the users and the ease with which they would be able to use the software.

Optimum also devised and ran a series of half day classroom training sessions across the UK. People travelled to a local hub and, by training people with their colleagues, this enabled them to share working practices and successes. The classroom sessions comprised tailored exercises to give learners the opportunities to run through all the tasks they would need to perform and to build their confidence for when they returned to their normal working environment. This was supported with a series of quick reference cards that covered all of the key activities. By creating these in A5 format they could easily fit in a laptop bag and be available to the user wherever they were working. Optimum also provided the users with a CD containing a copy of the detailed user guide, which could be referred to if they needed step-by-step guidance.

To keep the users engaged and their knowledge fresh they had access to a learning version so they could work through some exercises prior to the “go live”. This encouraged them to build confidence at their own pace. Finally, Optimum provided a telephone support service to trouble shoot any issues during the rollout period.

Long term benefit

By providing a tailored and user focused development programme to fit the specific needs of the client, Optimum ensured that the system “go live” was positively received by the sales team who were receptive to the change. This was reinforced by the supporting documentation that will ensure they will continue to see long term business benefit from the new CRM system.

Call us now for more information on:

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