10 tips for a successful training plan

Having a terrific training plan is a huge step toward getting Salesforce CRM off to a great start. After all, user adoption is the single most important ingredient in success. With more than 1.5 million users raving about Salesforce CRM, our customers confirm the importance of training when it comes to adoption. We've talked to those customers—across industries and around the world—to come up with the following 10 best practices for creating a successful training plan:

Abstract

Get an overview of the key ingredients that will make your training plan a success.

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1. **Set expectations** – To your users, Salesforce CRM is all new, so your first task is to give them an overview and to set expectations—what *they* can expect from the application and what *you* expect from them. If possible, involve your executive sponsor in this presentation to highlight his or her support and the importance of Salesforce CRM to your company.
2. **If it's not in Salesforce CRM, it doesn't exist** – It's a good idea to set this expectation right away—otherwise, you lose key advantages such as giving managers visibility into the pipeline and doing accurate forecasting. Have your executive sponsor deliver this training segment as well to show that you mean it.
3. **Be clear about how users are measured** – Have clear metrics to let users know how they'll be measured. For example, set target dates by which users must make changes, managers must review the funnel, and when pipeline reports will be pulled. Other metrics include how often users log on and how many objects they create. We suggest that your executive sponsor also deliver this segment.
4. **Answer "What's in it for me?"** – Don't just make demands—get people excited as well. The best way to do so is to show how Salesforce CRM will make life easier—for example, with less administrative work, easier reporting, around-the-clock access, a clear view of the sales funnel, or easy forecasting. Ask one or more respected power users to deliver this training segment.
5. **Provide hands-on training with real-life scenarios and data** – Don't make users figure out how hypothetical data applies to them. One way to get people excited is to let them see *their* data in the application, to show firsthand what Salesforce CRM can do for them. Be sure you clean your data and develop day-in-the-life scenarios your users will recognize as theirs.
6. **Reinforce your processes** – Treat Salesforce CRM as an opportunity to roll out more effective processes that make life easier for users. For example, introduce a new Opportunity process that uses the application's Lead functionality to get leads directly from the Web and into the application.

Best practice

7. **Help users learn the lingo –** Create cheat sheets with Salesforce CRM terminology, simple overviews of your processes, and step-by-step summaries of the most important processes. These job aids will serve as handy, easy-to-use references. Also consider giving users a head start by using the free online course as a training prerequisite.
8. **Offer incentives –** Motivate your users to dive right in with contests, incentives, and a little competition. For example, you could award a $500 prize to the first users to create 15 new Accounts or generate a pipeline report. Money is a great motivator for sales users, but so are prizes such as iPods or iPhones. You can also use a leader board in the application to show how individual users compare in adoption to generate some healthy competition.
9. **Get feedback –** Be sure to leave time for Q&A and ask people for their opinions. To get off to a good start, it's important to clear up any confusion and to find out what's on your users' minds. Make it a priority to try to incorporate feedback into the application—and then be sure to communicate those changes to show users that they have a say in how the application works.
10. **Provide follow-up training**. Some people think you train users once and you're done. But successful training isn't a one-shot effort. Be sure to follow up after a few weeks because by then, your users will have a new set of questions. A great way to provide follow-up training is to recruit enthusiastic users to follow up with their peers and use what they find out to create highly targeted mini-training for various user groups.

Providing great training isn't difficult, but it does require planning, effort, and an ongoing commitment. Use these tips to help you create and execute a training plan that works!

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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