

How to develop a comprehensive training strategy

Survey after survey shows that training is one of the top things you can do to make Salesforce CRM a success. Whether your company is large or small, whether your business processes are complex or simple, training has a huge effect on user adoption and user productivity.

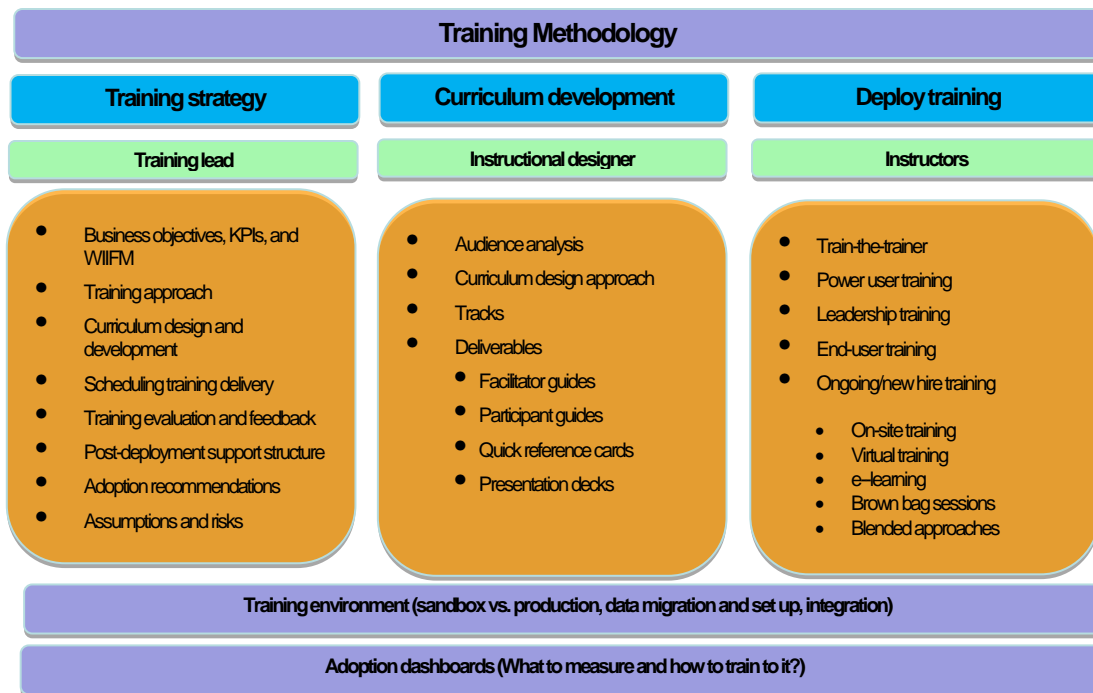
How should you proceed? The Best Practice document “[10 tips for a successful training plan](#)” gives a quick overview of suggestions you won’t want to miss. This document provides a more comprehensive framework for all your training needs and takes you through the topics related to the following stages:

- Developing a training strategy
- Developing your curriculum
- Deploying and delivering your training

Abstract

Training is one of the most important investments you can make. Find out how to do it right.

By Andi Michaels



Best practice

Develop a training strategy

The training strategy summarizes the overall plan. It captures business objects, documents key requirements and pain points, identifies challenges, and outlines the types of training as well as the actual training delivery schedule.

It's critical to get involved early in any Salesforce CRM project to understand the overall goals of the implementation—and to learn about your users' challenges and pain points. At this stage, designate a training lead to work with the project team. As you develop your strategy, keep the following points in mind:

■ Organizational readiness and communication planning

- As soon as possible, create a communication plan that specifies what information will be sent and when. At a minimum, you should tell users what changes will come, why, and when.
- Consider the different roles and business units. Do you need specific materials and training for each audience? Also, if you're working with a global deployment, be sure to consider cultural differences.
- Be creative in your messages: Consider using your marketing department to make it something users look forward to. Think about where users are located to determine what approach works best from a delivery perspective. Can you leverage the Internet? Can you take advantage of upcoming national sales meetings?
- As you plan, don't forget to include "what happens after training?" Include a post-deployment support plan that identifies what users will be measured on and where they can go for help. Plan in continued support; for example, brown-bag sessions and monthly tips & tricks emails are excellent ways to keep users engaged and provide ongoing training.

■ Training environment

Work with the project team early to discuss what environment you can use to train your users. For example, does your organization have a sandbox environment or do you need to train in the production environment? Also consider the following issues:

- Ask the project team what data can be made available for training. If you can't get actual data or all the data, ask to get data that's as close to "real life" as possible so you can use the most powerful and relevant examples. Try to find the "wow" factor by including key reports and dashboards that show how life will get better with Salesforce CRM.
- Do you need to consider integration points with back-end systems, such as automatically populating account information from an SAP system? If you're using a sandbox environment, is it set up? Make the training experience as true to the user's actual work experience as possible.

■ User adoption

You should focus on adoption from the start. Decide early what metrics to measure; it will influence how you plan your training. Also determine early on whether users are willing to adopt and make sure you have management support to enforce use of the system, if required.

- To track adoption, take advantage of the free [Adoption Dashboards](#) on the AppExchange to follow adoption trends and intervene if necessary. This information lets you track whether users are using the app and using it correctly—and helps you better coach users, as needed. You can tweak these dashboards to meet your specific needs.
- Consider implementing a super-user program to provide additional support toward your adoption goals. Citrix used performance managers to help with training delivery and provide additional assistance after go-live.

Develop your curriculum

Start with an audience analysis to make sure you develop the right materials for the right users. At this stage, designate an instructional designer to develop your training materials. Then decide what your deliverables will be. And always keep in mind this burning question: “What’s in it for me?” Your curriculum should answer that question.

As you develop your training materials, keep these considerations in mind:

- **Make the most of existing materials.** Get an inventory and make that information available to your instructional designer.
- **Successful training tends to be scenario-based,** rather than focusing on features and functions. Try to follow the work processes of your users to make the training relevant.

Your materials should match the learning style of your users. The following materials are tried-and-true approaches:

- **Facilitator guides** – Include detailed instructor notes on what to emphasize, details of timing, and so on. Be sure to map these guides to your participant guides.
- **Participant guides** – Provide end-to-end, detailed training documentation. Interactive, hands-on exercises are a great way to provide realistic training.
- **Quick reference cards** – Give users something to use when they’re on the job. Use the cards during training for reference and consider publishing them online later.
- **Slide shows** – Use such presentations to give your users the big picture. And remember: Keep it simple!

Deploy and deliver your training

As you get ready to start training, consider what type of training you need, how many users must be trained for each role, and how many days until the application is ready to go-live. Based on this information, decide how many instructors you need. Be sure your instructors have training experience. Ideally, they should also have experience in the user role they’ll be teaching.

Depending on your user roles, consider any combination of the following types of training:

- **Prerequisite training** – Create awareness and excitement with simple 5–10-minute “teaser” recordings that explain what’s coming, project goals, and of course, “What’s in it for me?” Consider using an inspirational video clip of a popular executive, or someone else people admire, to discuss how Salesforce CRM will make life better.
- **Train-the-trainer** – If you have internal trainers and need to train many users, this is an effective approach in which you train those trainers to deliver the materials you developed.
- **Leadership training** – Regardless of the size of your company and your management team, adoption is always higher when management promotes Salesforce CRM by showing they have the necessary knowledge to hold their teams accountable.
- **End-user training** – Hands-on training is perfect for making training personal, relevant, and interactive. The ideal classroom size is 1 instructor to 15–20 participants. If it’s not possible to present “live,” interactive, on-site training, use virtual training and turn over the mouse to give participants hands-on experience with a demo scenario that gets them involved and active.

- **Brown-bag sessions** – Use these formal or informal sessions to keep the conversation going. You can answer questions, follow up on training topics, discuss new features, or whatever makes sense for your business and your users.



For More Information

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