

# Driving Salesforce Lightning Adoption Across a Global Enterprise with 100% Remote Resources



### Case Study:

John Wurch  
CEO  
JPW Consulting

### Industry:

World's Largest  
Insurance Broker

### User Count:

8,500

### Locations

Worldwide

## Overview

A Fortune 100 global client approached JPW to increase overall adoption as they transitioned approximately 8,500 users across nine regions globally from Salesforce Classic to the new Lightning platform. The Lightning migration offered a chance to re-engage users who had otherwise only used Salesforce to the minimum mandated standard by redesigning the platform to better support the new sales journey as defined by Sales Leadership KPIs.

JPW's mandate was to remotely partner with client resources to **design and develop an on-demand digital and virtual learning program** that ensured end-user adoption of Salesforce Lightning. The JPW adoption approach leveraged our communication, training and reinforcement best practices from our proven adoption playbook to ensure effectiveness.

## Client Objectives



- Create a comprehensive Change Management Program with a combined team of JPW consultants, implementation team and internal client resources.
- Engage the organization at all levels with 100% remote resources without sacrificing outcome effectiveness or stakeholder / sponsor / SME engagement.
- Build a targeted persona-based communication plan to be executed by client resource teams.
- Build engaging training programs focused on day-in-the-life workflows and aligned with the company sales journey.
- Facilitate and prepare regional coordinators to deliver targeted training to their respective regions and countries.
- Continue to reinforce the platform's success after post go-live training has been conducted to maintain the adoption lift.

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## Approach

### Communications:

Build a Communication plan for leadership and end-user awareness communications focusing on increasing desire and anticipation in advance of the training.



- Campaign focused approach
- What's-in-it-for-me based messaging by audience
- Clear guidance on sender, style, and message timing

### Leadership Engagement:

- Dedicated leadership engagement strategy
- Targeted leadership communication approach
- Effective leadership communication messaging



### Training:

Design training that aligned the user's day-in-the-life and company sales journey with the features and best practices specific to Lightning



- Designed both virtual instructor-led training and supportive on-demand eLearning programs
- Incorporated relevant situational use cases
- Designed short targeted learning sessions
- Designed and prepared client to deliver end-user training via a two week Train-the-Trainer

### Reinforcement:

- Designed support and escalation paths
- Defined training and associated communication approaches
- Provided guidance on post go-live adoption measurement and mapping to KPIs
- Developed feedback approaches to determine gaps and future program suggestions



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## Results

