



The Enterprise Class
Guidance and Engagement Platform

Key Insight

How to Get Employees to Use Salesforce Correctly & Willingly in the Blink of an Eye

By WalkMe



As managers working in organizational environments, we often encounter challenges that arise from not using Salesforce effectively, continuously and accurately.

The most common challenges managers face are:

- Onboarding new employees effectively and training employees to be competent in Salesforce use immediately.
- Getting employees to adopt updates, new features, and business processes.
- The continuous and never ending calls for help and technical support, especially during periods of change.
- Freeing employees to focus on their work by not wasting their time on technical issues.

How do we overcome these challenges easily?

- 1. Don't overwhelm employees by trying to teach them everything they need to know. Begin by explaining how Salesforce contributes positively to the business. Then, take a gradual approach, beginning with teaching back office processes.**

Change is overwhelming.

Whether a new employee is trying to learn what will be their central software going forward, or a veteran employee training for a department-wide migration to Salesforce – we can all relate to this feeling of trepidation.

While Salesforce can help with both back and front office needs, I would suggest that you first actualize your back office changes, so you and your team have the opportunity to explore the progressions from the start – far from any customer confronting data.

From that point, you can rollout your front office changes, actualizing your request administration, client records, client access on the web, and site needs.

2. Turn Employees into Advocates of Salesforce

Resistance to change happens when people don't have all the facts, so, communication is key. Ask for employee feedback and show that you appreciate it, each step of the way.

Keep track of who your power users are and offer them a chance to test the platform first. You can teach them the software's features and capacities along the way, but it's imperative that they are on your side when rolling the system out.

3. Deliver Easy-to-Absorb, Impactful and Relevant Training

Another way to overcome initial lack of enthusiasm to Salesforce is to give the new users the necessary knowledge to operate the software with confidence. It sounds almost too simple, but knowledge equals confidence, which eliminates user resistance.

Make sure training is relevant, working toward each user's role and specific function.

Yet, the training itself cannot be something too abstract – it should be onscreen, and in the moment of need, showing the user how to perform the necessary steps to complete a key process.

4. Ensure Rapid Training and Correct Usage in the Long Term

Now, I want to talk about continued support after the initial training sessions have been completed.

Employees should be able to benefit from rapid onscreen access to information each time they need it, in order optimize Salesforce use.

Performance support software, which provides information in the moment of need onscreen and without having to open a new browser window or watch instructional videos, has seen increased adoption in the last couple of years. [WalkMe](#) for Salesforce is a great example here.

Real-time, step-by-step instructions help walk the user through the process when they inevitably forget their earlier training session.

Employees learn best by repetition, relevance, immediacy and specificity; Salesforce users are no exception.

Summary

Employees turn to helpdesk support when they encounter a problem, but this is certainly not an effective method for your company. Time is lost as employees are not performing the necessary tasks they are required to complete. A combination of easy to absorb, impactful and relevant training, coupled with performance support application integrated with Salesforce will help each user get the information they need in the moment they need it.

We all want the roll out of Salesforce to be as smooth as possible. That is, rapid onboarding, high user adoption, low resistance to change, and correct usage once the training ends.

We hope that these ideas will help your employees get accustomed to Salesforce easily and that they will yield better results over time.

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 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 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.