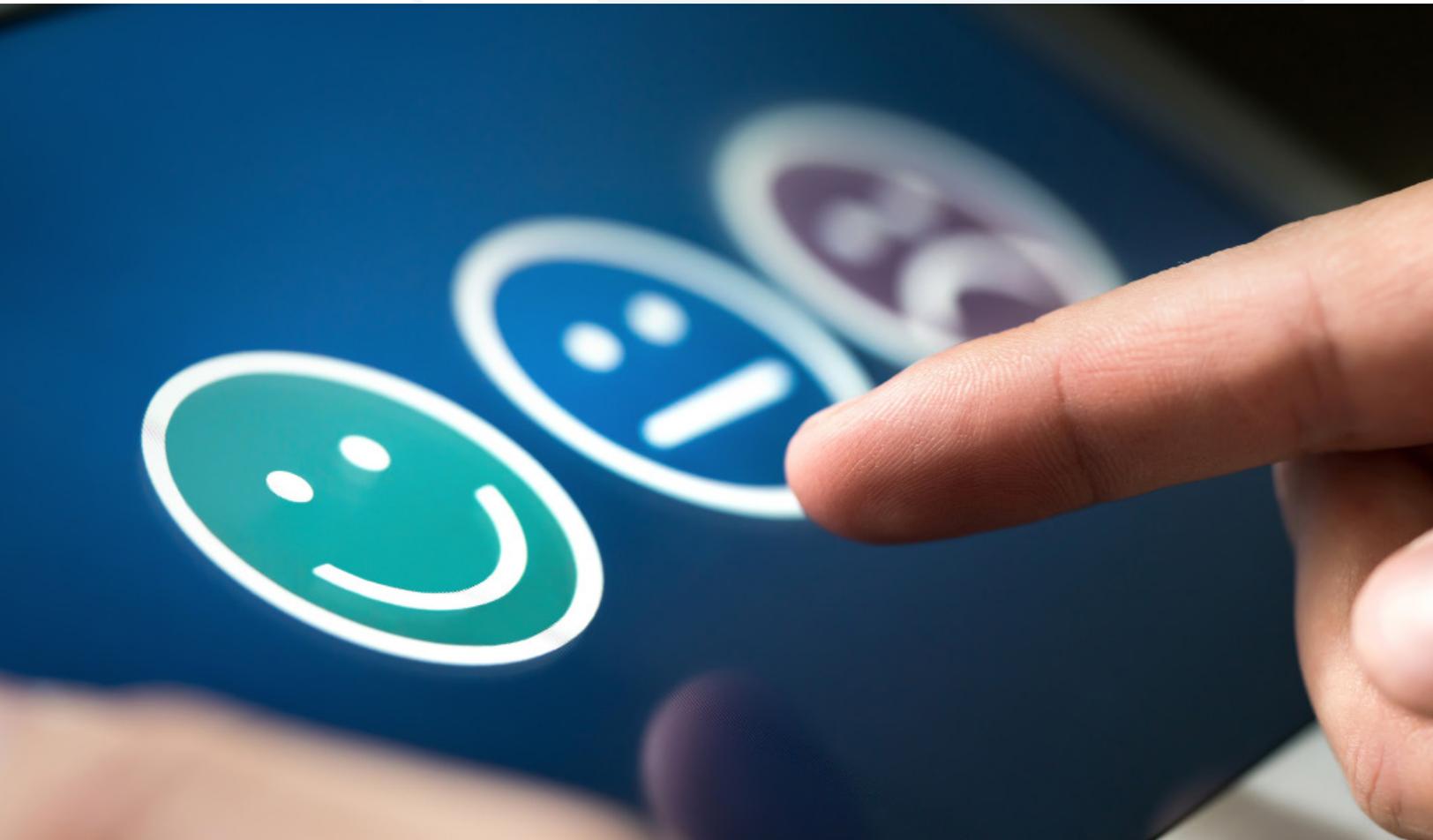




Driving Salesforce Financial Services Cloud Adoption at Banks

You've invested in Salesforce Financial Services Cloud (FSC), carefully defined requirements, and have begun to customize your FSC platform. Everything seems like it is on track for success. However, you can't shake a nagging concern around end user adoption.



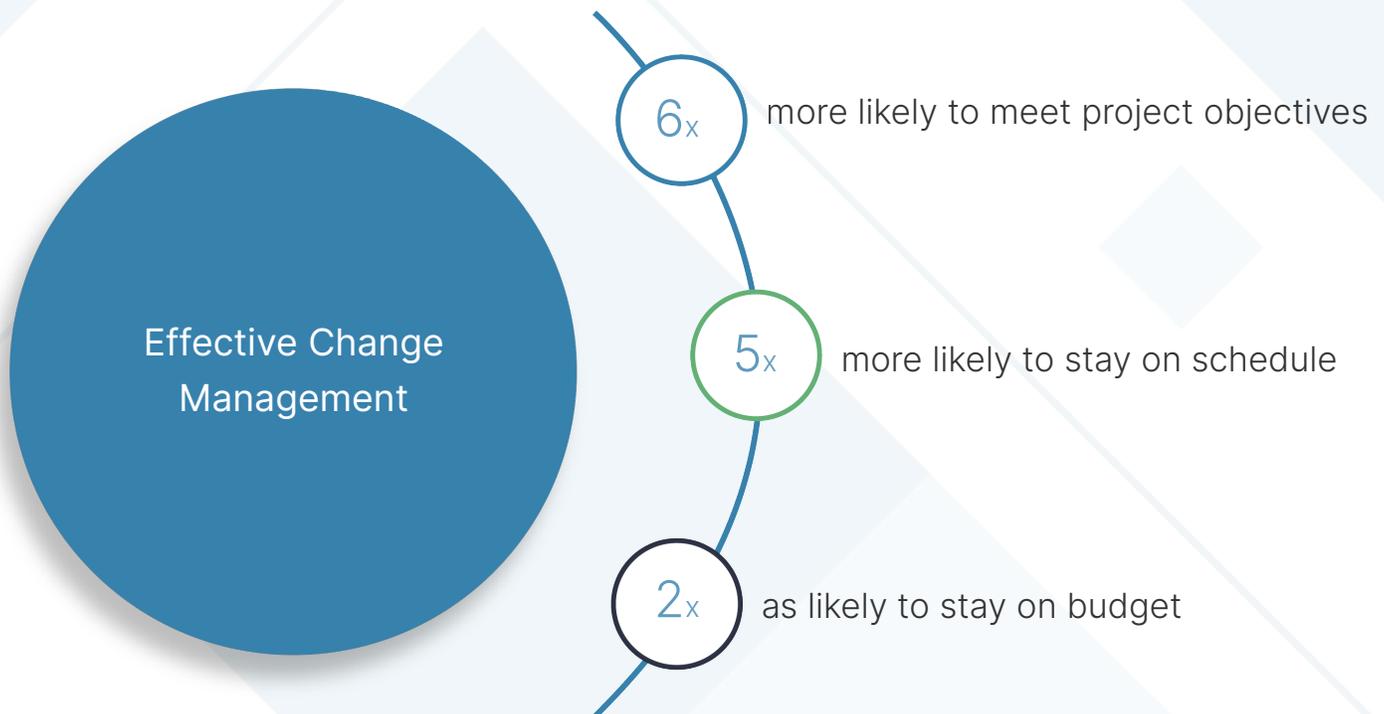
You know that, ultimately, your implementation will be judged by end user reviews. And those reviews are heavily influenced by the quality of the rollout and long-term adoption.

FINANCIAL SERVICES CLOUD ROLLOUT SUCCESS DEPENDS ON END USER ADOPTION *(not solely a well-built platform)*

While it may seem like common sense alone would influence end users to adopt the superior FSC tools that you are rolling out, we see many clients underestimate end user resistance. Our Salesforce implementation experience has shown that:

- End users tend to be invested in the current state where they are comfortable– even though they are aware that it is disjointed or lacking the features they need for top performance
- COVID has pushed end users to their limits, resulting in a craving for stability. This makes changing core processes and systems ever more challenging
- Managers are reluctant to drive accountability for adoption in light of the “Great Resignation”

While these success barriers are substantial, they can be overcome with strong change enablement practices. Research shows that projects with effective change management are:



Too often, the barrier to success is scope. When we see an FSC implementation project narrowly defined as a technical build, we advise our clients to step back and look at what needs to happen to achieve the ROI. Yes, the platform configuration is essential to delivering value.

However, the last mile between development and end user adoption is where the value lives.

To ensure your implementation lands successfully, we've included some best practices for change enablement throughout the journey.

GETTING FROM BUILD TO LAUNCH

Influence

1. Executive Sponsor
2. Sponsor Coalition
3. Success Owners
4. People Managers
5. Change Advocates

1

Communication

1. Audiences
2. Senders
3. Org-level Messages
4. BU-level Messages
5. Channels

2

Learning

1. Audiences
2. Current/Future Skills
3. Learning Path to Ability
4. Channels
5. Reinforcement

3

Change is Enabled and Sustained

ROI achieved on time and maintained beyond the formal change engagement



Start with the Influence Model

While the technology team is driving the process to define and build an FSC platform that fits your business processes, begin planning your launch and engaging your must-win audiences. In this stage, a common pitfall is to focus mainly (or solely) on end-user training. While training is essential to success, it is not the only factor. Our advice – step back and define:



What **success** looks like, and which metrics will demonstrate progress toward the target



What end user **behaviors** are necessary to achieve ROI and the defined success metrics (including nuances between user groups)

HOW MUCH?

How much of a change will these desired behaviors be for those end users (include considerations of process change, role change, and systems change)



Who formally and informally influences the attitude and behavior of those end users (this usually includes managers, business unit leadership, and the individual contributors who are most well respected by their peers)

Answering these questions enables your team to create an influence model. An influence model will define who has a stake in your project's success, how they should be engaged, and what roles you'd like them to play in the rollout.

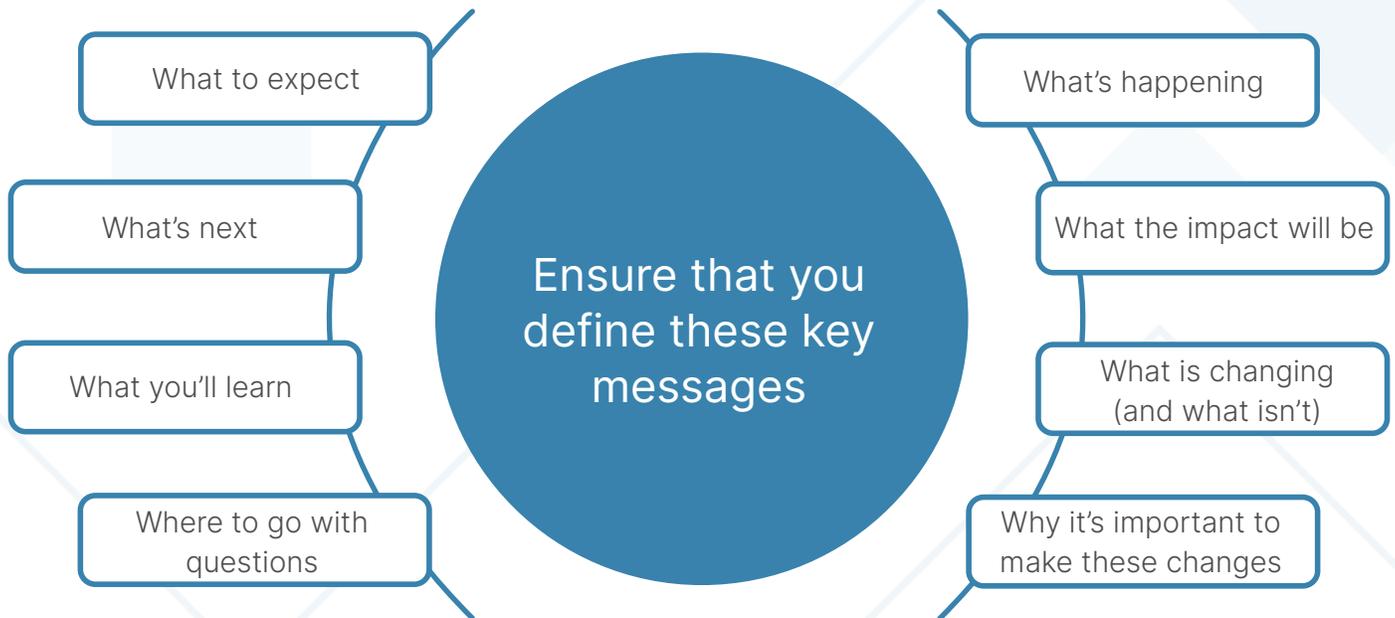
A good influence model will ensure that the broad stakeholder community is engaged prior to launch, has the opportunity to offer insights and feedback, and has a formal role (even if the action items are small) to ensure that their influence is deployed effectively within the organization.

This model should be defined prior to the training and communications plans so that the stakeholders are leveraged to deliver key change messages, build support for the future state, and promote and monitor FSC training completion.



Develop Communications and Training in Tandem

Your Salesforce FSC rollout communications and training should be mutually reinforcing. Start with your end users in mind: define the value and resistance themes you anticipate, and then what key messages will build value and address and overcome resistance. Engage your stakeholders to vet and validate your key messages to ensure they are effectively tailored to your end user audiences.



These key messages should be baked into communications across a variety of audiences and channels. Larger banking systems usually have strict guidelines on which channels can be leveraged for rollout communications, in which case, a combination of manager talking points (with manager preparation) and an intranet site can provide the right level of information access and personal influence.

Your communications should aim to build awareness and interest in participating in the change. A great way to land these messages is with a short awareness video featuring a well-respected executive. If you are able to include a preview demo in the exec video, all the better. Executive visibility and support across numerous touch points (such as an awareness video, quarterly meetings, and leadership meetings) is a key factor in influencing organizational behavior and reinforcing your core value messages.

Once end users are aware of the change and interested in participating in it, the next major questions revolve around training. As you approach your training planning, keep the following best practices in mind:

 CRAWL/WALK/RUN	 INSTRUCTOR-LED	 WALKTHROUGHS	 CHANGE ADVOCATES	 REPORTING
<p>Map your training modules across a crawl/walk/run spectrum, and launch accordingly (this helps prevent users from being overwhelmed, and allows for gamification if your learning platform allows for that)</p>	<p>Blend early stage instructor-led walk-throughs (which are largely an exercise in awareness) with bite-size in-app content delivered via Salesforce Lightning In-App Guidance; this can be monitored for usage and leveraged for custom reports (answering questions like: “Which training modules are trending this week/month? Which ones are not? What topics require more training support?”)</p>	<p>Utilize Walkthroughs functionality in Salesforce Lightning Experience to provide a hands-on step-by-step guide to enable a user to accomplish real work scenarios</p>	<p>Blend digital learning with a Change Advocates (a.k.a. Super User, Power User, Champion) program that aims to provide informal support and sustainment via peer-to-peer learning</p>	<p>Usage data and reporting is available on the Salesforce platform, and provides insights that can identify where platform adoption is strong or weak: this is a powerful tool to drive adoption accountability at the management level</p>

Finally, if your organization is moving from Sales Cloud to FSC, end users will view the new launch through their experiences with current Salesforce implementation. In these cases, convening end user focus groups will allow you to understand the existing attitudes toward Salesforce and identify key messages necessary to address end user concerns.

Relatedly, the pre-launch period is a great time to deploy an end user survey to measure satisfaction and uncover concerns prior to launch. This can serve as a baseline from which to demonstrate progress and success during the early launch and sustainment periods.

LAUNCHING FINANCIAL SERVICES CLOUD SUCCESSFULLY

There are two categories of activity to drive a successful launch of Salesforce FSC: end user engagement and influence model deployment. This is the point at which the influence, communications, and training plans are being put into action. Leadership focus will inevitably be on communications and training, but aim to establish influence as the third factor of the success tracking.



More specifically, ensure that the following key influence activities are facilitated and monitored:

Sponsor Support and Accountability

As part of the Influence Model, your executive sponsors should have established a coalition of leadership-level stakeholders to provide recommendations and insights during the pre-launch planning phase. Now, in the early launch phase, their role shifts to delivering key messages, monitoring performance, and formally and informally promoting end user adoption and feedback. Ensure that these leaders have the support they need to deliver on their responsibilities, such as providing talking points, overview slides, and ghost-written emails. Ask your executive sponsor to drive accountability among the coalition by adding agenda items or touch points for the coalition to share what they have been seeing and hearing regarding the rollout in their business units.

Manager Support and Accountability

Managers play a critical role in the adoption of Salesforce FSC. They tailor key messages to their department, share the value of the future state, set the expectations regarding process and system adoption, and serve as adoption success owners. Manager enablement best practice entails onboarding all impacted managers prior to launch, ensuring that they have a chance to provide feedback on the rollout both prior and post launch, and providing them with the communication assets that they need to drive adoption and manage resistance, such as resistance management talking points, business value talking points, what is changing/what remains the same talking points and one-pager collateral. If you've enabled dashboards to monitor platform usage, you can provide managers reports on usage in their departments, as well as comparative adoption metrics across departments to drive virtuous competition and highlight areas where additional support is needed and where success stories might be captured.

Change Advocates Management

Change Advocates are a powerful force in driving technology adoption. To support a successful FSC launch, provide them with a week-by-week colleague engagement playbook that they can tailor to their department's use cases. Create a community of support and accountability by facilitating a consistent forum to gather change advocate success stories, receive feedback about challenges, and provide coaching and answers to questions. These insights are key for informing targeted updates to training and communications in the early weeks of a rollout. Also consider drafting a recurring change advocate updates email to the group of direct managers, to ensure the change advocates leadership role in the FSC launch is visible to their managers, and that they continue to have their manager's support to invest time in the change advocate activities.

With the support of sponsors, managers, and advocates deploying their influence to drive the change, the requirements for any change team consist of delivering right-sized communications and easy-to-consume training. When designing and developing end user communications and training for Salesforce FSC launches, our approach bifurcates based on if the rollout is a net new Salesforce implementation, or if the organization is upgrading from an existing Sales Cloud implementation. The former is a more intensive new-system launch, whereas the latter is an upgrade launch. Both require careful planning and precision, but the difference in context requires a differentiated approach.

With a new-system Salesforce FSC launch, end users will be working to understand FSC's internal logic and user interface, which may be substantially different from their current state. The crawl/walk/run timeline should be longer than an upgrade timeline, and the organization should aim for a higher ratio of change advocates to end users than they would need for an upgrade. Training needs are especially acute for a new-system launch, and we've found that they are best supported with a blend of Salesforce Trailhead content and organization-specific content, especially for objects where customization is present.

During the early stages of a launch, a change team is in monitoring and support mode. The communications and training are already written, and now it is time to deploy and respond to any unanticipated challenges. Because a large-scale change involves coordinating efforts on many fronts, we find that a roll-up view of the planned events helps all the stakeholders to have a holistic view of the roadmap. Our roadmaps usually break out key assets and activities by swimlane, with a detailed key at the bottom. Here is a generic example of an FSC Launch Business Change Enablement Roadmap:



Key to assets and activities



MOVING FROM LAUNCH TO SUSTAINMENT

As the key communication and training assets and activities are being rolled out for your Salesforce FSC launch, it is important to keep sustainment activities prioritized. To ensure that adoption takes hold and FSC becomes embedded in core business processes, consider the following best practices for sustainment:



End User Voice (Direct)

Ensure that you remain attuned to end user sentiment related to FSC. Surveys are always a great way to measure sentiment over time, starting with a baseline prior to launch, and following up again after 1, 3, and 5 months. It is useful to combine that quantitative data with qualitative data from focus groups to round out the picture with success stories and pain points. Defining wins and challenges in the context of real work scenarios provide helpful details to those responsible for steering the course of the program.

Adoption success owners are defined as part of the Influence model in the planning stage of an FSC rollout. Their role is crucial not only at launch, but also throughout the sustainment period. Adoption metrics should be reviewed monthly with leadership stakeholders, including the success owners who are directly responsible for the results. Top performers should be asked to share insights on what is driving their success, and those with lagging metrics should be asked to identify their key blockers and any ways the implementation team can support their improved adoption. While this only needs to be a short monthly meeting, the regularity of the cadence, and the consistency of the agenda is a reliable way to drive sustained adoption and the associated ROI.



Metrics Monitoring and Follow-Up



Change Advocates

A strong change advocates program will set clear expectations from the outset regarding the time investment required over a set duration. A stair-step model is usually appropriate, where the highest time investment occurs at the launch, and that is stepped down substantially over the following months. It is useful, however, to keep the change advocates engaged over the sustainment period, even if only for a monthly checkpoint meeting to review adoption metrics, gather feedback, and share best practices. Consider recruiting your change advocates for a Power User program to drive the organization up the maturity curve by identifying opportunities for Salesforce FSC platform business process automation – positioning them to define and lead those future changes as well.

Many organizations find that sponsor networks and change advocate teams naturally grow into Salesforce Centers of Excellence. These can be an excellent means to sustain Salesforce FSC adoption, and to drive ongoing platform maturity. These centers can take many forms, and often develop capabilities over time. Because the term “CoE” can mean many different things to stakeholders, we find it helpful to articulate that CoEs can fulfill one or more of the following functions: share best practices, centralize FSC DevOps, provide guidance on core FSC competencies, and drive FSC platform innovation. If a Salesforce CoE seems like it may be a fit for your organization, a structured visioning and planning process will ensure you establish a structure that meets the needs of your organization.



**Center(s) of
Excellence**

FSC Adoption Made Easier With Certified Experts

Salesforce FSC has the potential to deliver real satisfaction results for users, clients, and the bottom line. But that hinges both on the quality of the platform design and deployment, as well as the quality of the end user adoption. Both the technical build and the adoption plan influence the success outcome. While the best practice summary above provides a solid outline to guide your rollout efforts, if you'd benefit from additional support, we're here to help. As experts in Salesforce FSC design, build, adoption and change enablement, we at Atrium help businesses implement the #1 financial CRM to achieve and surpass their target results.



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Delivers strategic stakeholder alignment, center of excellence executive advisory, and holistic business change enablement. Expert in planning and executing organizational influence models, adult learning strategies, and corporate change communications.

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