

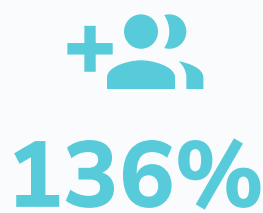
FEATURED CUSTOMER



# SVG achieves seamless Salesforce onboarding and training



decrease in CRM training time



quota achievement from new hires



employee Net Promoter Score

Spring Venture Group (SVG) implemented Userlane to automate the onboarding and training of employees on Salesforce. The result? Reduced training time, and higher employee productivity.



*By shortening the amount of time we have to spend learning the intricacies of a system, and enabling our sales team to master systems through Userlane, we reclaim our most valuable commodity and asset – time.*

MATTHEW APPLEQUIST, SR. DIRECTOR, SALES TRAINING AT SPRING VENTURE GROUP

## The customer challenge

SVG is an industry-leading health insurance brokerage firm. They are driven by a clear-cut mission - to protect the health and financial well-being of their customers while setting a new standard for employee and customer experience.

At SVG, the sales team relies on [Salesforce](#) to streamline their operations. With hiring cycles occasionally involving up to 1,000 employees, they required a smooth onboarding process for Salesforce. Their goal is to ensure technology doesn't get in their way, but becomes the way. With an extensive training program and onboarding process, employees have faced immense challenges. They sought a solution to [streamline training](#), allowing them to devote more time to their core expertise: assisting customers in selecting tailored plans that perfectly suit their needs.

# How we helped

After a successful migration from Salesforce Classic to Lightning, SVG needed to find a solution that would ensure smooth training for all go-to-market employees. Their core focus is to empower the sales team with ample time for selling by minimizing "non-selling tasks," which includes tool training.

The key objectives for SVG were:

## 1. Smooth migration

In 2020, the entire go-to-market team faced the crucial task of transitioning from Salesforce Classic to Lightning, and they were determined to find the most effective method for this shift. Their primary goal was to enable employees to adapt and learn Lightning as quickly as possible, ensuring a seamless and expedited learning process for all future hires.

## 2. Efficient onboarding and training for new hires

With annual hiring seasons spanning anywhere from between 200 to 1,000 sales representatives, SVG needed to find a way to make the onboarding process more productive and reduce the time it took the employees to learn tools.

## 3. Free up employee time

Empower the sales team by minimizing "non-selling tasks," which includes tool training, allowing them to reach their quotas.

# The results

With the support of Userlane, SVG has streamlined their employee onboarding and training processes and increased the productivity of employees.

1

### 83% decrease in CRM training time

With Userlane's [interactive guides](#), SVG has reduced the Salesforce training time from 18 training hours to 3 training hours

2

### 136% quota achievement from new hires in first month post-training

More efficient, on-demand training has enabled employees to spend more of their time in training focusing on sales-specific tasks. SVG has seen training classes averaging 136% of their quotas out of training.

3

### 100% adoption of Salesforce

With an improved training program, SVG has witnessed a significant increase in Salesforce [adoption](#), with employees effectively utilizing the tool to its fullest potential

4

## 83 Employee Net Promoter Score (eNPS)

SVG's training programs currently maintain an outstanding 83 Employee Net Promoter Score (eNPS) from its employees, a remarkable increase compared to 2020 (57) when Userlane was not yet implemented.



*Userlane has provided our employees with control over their learning experience, which is something all adult learners appreciate. Enabling them to learn at their own pace has saved us invaluable time in training. Collaborating with the Userlane team has been a delightful experience, as their brilliance, attentiveness, solution-oriented mindset, and unwavering honesty create an extraordinary partnership.*

**MATTHEW APPLEQUIST, SR. DIRECTOR, SALES TRAINING AT SPRING VENTURE GROUP**