

# COACHING FOR THE SALESFORCE TRAINER

*Clarify your message. Communicate your processes.  
Simplify your training. Improve your operations.*

# WHAT YOUR BOSS EXPECTS OF YOU

You might be rolling out Salesforce to a department. Or maybe you've had Salesforce forever and you're just trying to improve adoption among a sales team. Or maybe you are responsible for training new employees.

However your responsibilities are defined, the bottom line is that you are responsible for helping your co-workers get the most out of Salesforce. **And you have to do it alone.**

On your own, you must identify the cause for poor adoption. You must prepare training materials. And you are expected to deliver training materials. All of which you are fully capable of doing--but it would be nice if somebody were there to work through the details with you.



# HOW CAN WE HELP?

You know Salesforce. You know your processes. And you probably know how to facilitate a meeting and a training session. So what good is coaching?

*"You asked really great questions that helped me think through the training, and explore new ideas on what outcome we are focused on."*

*"My training session went really well! Thanks for your assistance--it made a big difference!"*

*"I knew what I needed to do, but I just didn't know how to get started or how to do it! You helped me know how to begin, and what to do next. Once I got going, and you gave some direction, I was able to do it on my own."*



# ACCELERATE *YOUR* LEARNING

Experience is a really great teacher. If you were to put on 100 Salesforce training sessions, you would eventually have a really good idea on how to best prepare for, and deliver, your training.

But you don't have to wait that long--you can accelerate your learning, and put on great training sessions right now!

The truth is, **you already know how** to put on a great training session. Our clients tell us that they already have an idea of what they need to do, but they struggle getting started, and organizing a training session that flows the way they know it should. We help you organize your ideas so you can structure a training session that implements best practices, and dramatically improves how you train others.

You don't have to experience your own trial and error to learn how to put on a great training session.



*You can change your  
co-workers' performance*

# COACHING

*1 Training Session*

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\$997

- ▶ Prepare one training session for your users
- ▶ Unlimited coaching sessions (as long as they are related to your one training session)
- ▶ Each coaching session lasts one hour
- ▶ Modify/reformat current training material
- ▶ Deliver training that has an immediate impact
- ▶ Design job aids that will help users who are scared of change (and computers)
- ▶ Present slides that engage your co-workers
- ▶ Change user behavior with great

# COACHING

*Hourly*

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\$297/hour

- ▶ One hour coaching session
- ▶ Modify/reformat current training material
- ▶ Update training to have an immediate impact
- ▶ Re-design job aids that help users who are scared of change (and computers)
- ▶ Develop slides that engage your co-workers
- ▶ Change user behavior with great training

# WHICH PLAN IS RIGHT FOR ME?

When you already have a *training plan*, a slide-deck, and job aids, but you just want to run through your materials with somebody to make sure it flows well and will engage users, then the **hourly** option might be the way to go. You will only pay for the hour or two that it takes to run through your material, and receive feedback.

If you have *planned* a training session (i.e. have an outline of what you'd like to cover), but you aren't sure where to begin with the slides, documentation, or delivery, you might want to purchase **one training session**. This will give you unlimited coaching sessions to work through who your audience is, what processes you should cover, how you can cover them, and how to get the best performance from your co-workers.

The **one training session** option will help you create one training session to deliver to your co-workers.



## HAVE YOU EVER BEEN... to a bad training session?

What made it so bad? How can you make sure that your peer training won't go the same way that training went?

Generally, we have a lot of bad examples in our memory to draw from. And when we are asked to train others, we use those examples, and continue creating training materials that just aren't that helpful.

You and your coach can change that. By going through the coaching process, we will make sure that your training materials (and training delivery) are engaging, memorable, and focused on changing behavior.



One of the biggest challenges organizations face is not a lack of training - but rather, a lack of **effective** training.

*"Companies devote a lot of time, effort and money to corporate training—with little to show for it."*

- *The Wall Street Journal* Oct. 26, 2012

Effective training requires more than a PowerPoint slide deck with a few screen shots, or a live presentation of somebody clicking through screens for 2 hours. It requires an understanding of *why* employees are not performing, and a strategy to address the root problems--something your coach will help you navigate.



# THREE COMPLIMENTARY COACHING SESSIONS

Do you know many people who have a training coach? Probably not. This is a new kind coaching that sprouted up as our team consistently met with Salesforce Admin and Trainers who felt overwhelmed by having to train their co-workers.

Initially, our services included creating the training materials for our clients--but we realized that what Admins and Trainers really wanted was guidance through the training preparation stage (what should I cover? how should I cover it? how can I improve adoption?).

Since this type of coaching may be unfamiliar to you and your organization, we offer three complimentary coaching sessions so you can see whether you like the approach and the process.

If all you need are three 1-hour sessions, there is no obligation or pressure to buy more. We know that if you have a positive experience, you will call us again when you need to prepare a training sessions in the future.

# PRICING

How much money will it cost to prepare a bad training session?

How many hours will be spent creating a PowerPoint presentation that doesn't help your co-workers learn what they need? How many hours will be spent re-teaching your co-workers *after* the training is over (because they weren't paying attention)? How much money will be lost from not using Salesforce correctly, and losing sales opportunities?

Coaching sessions help you focus on what matters so you can get the most out of the time you invest in training.

Nonprofit organizations who have a tight budget will receive a 50% discount.



***You don't have to do it  
by yourself***

*For more details:*

*email: [sales@screensteps.com](mailto:sales@screensteps.com)*

*call: 1-866-275-7856 ext. 103*



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