

WIIFM WORKBOOK

How to use this workbook

This workbook is designed to help Learning & Development (L&D) professionals capture the most critical processes for each role in their organization. By aligning technology, workflows, KPIs, and SME expertise, L&D teams can create high-impact, role-specific training materials that drive adoption and ROI.

Instructions

- Fill out this workbook once per role.
- Complete each section with input from role experts and process owners.
- Use iorad or similar capture tools to document workflows and turn them into interactive tutorials.
- Store and organize your new training content for easy access in knowledge hubs or cheat sheets. 📄

Section 1: Role Identification



Why This Matters:

Understanding the roles within your business is the foundation for effective training, technology adoption, and process optimization. Not all roles require the same level of enablement—some directly impact revenue, efficiency, or customer satisfaction more than others. Focusing on high-impact roles first ensures that your training efforts drive measurable business outcomes.

Best Practices for Identifying Key Roles:

1. Start with Core Business Roles: 📄

- Focus on the roles that are essential to business operations, such as Sales, Customer Success, Support, Operations, and Product Management.
- These roles interact with multiple technologies and have measurable KPIs, making them ideal candidates for streamlined workflows and tech adoption.

2. Prioritize High-Impact Roles First:

- Look at who directly affects revenue, customer retention, or operational efficiency.
- Example: Sales reps who manage pipeline data in a CRM impact revenue forecasting. If they don't use the system properly, leadership can't make accurate business decisions.

3. Align Role Selection with Business Goals:

- Are you focused on scaling customer adoption? Start with Customer Success roles.
- Need to improve sales execution? Focus on Account Executives and Sales Managers.
- Want to enhance internal efficiency? Target Operations and IT roles.

4. Identify Common Pain Points & Learning Gaps:

- What tools does this role struggle to use effectively?
- Where do inefficiencies slow down their ability to perform?
- What tasks are repeatedly done incorrectly, leading to rework or lost productivity?

Role Identification Example:

Category	Details
Role Title	Sales Manager, Customer Success Manager, Product Manager, etc.
Department	Sales, Customer Success, Operations, IT, etc.
Primary Responsibility	Describe the role's core duties and scope of work.

Start Your Role Identification Here:

Category	Details
Role Title	
Department	
Primary Responsibility	

Section 2: WIIFM (What's in it for Me?)

Why This Matters:

Training and technology adoption initiatives are more successful when employees understand the personal benefits. The WIIFM (What's In It for Me?) approach addresses this by demonstrating the job-specific value of new processes and tools, increasing employee engagement and adoption, which leads to better business outcomes.

Best Practices for Writing Effective WIIFM Statements:

1. Keep it Role-Specific & Actionable

- The statement should be highly relevant to the role. Focus on how it impacts daily tasks and personal success.
- Example: Instead of *"Using the CRM helps track deals,"* say: *"By logging my deals in Salesforce, I can better forecast my pipeline, helping me meet my quota and earn commissions faster."*

2. Tie it to KPIs and Business Goals

- People care about what they're measured on (KPIs), so WIIFM should link directly to those outcomes.
- Example for Customer Success Manager: *"By tracking customer training completion in the LMS, I can proactively prevent churn, improve my NPS score, and hit my retention targets."*

3. Show Immediate & Long Term Benefits

- Address both short-term wins and long-term impact (career growth, performance improvement, incentives).
- Example for Support Rep: *"By following the ticket escalation workflow in Zendesk, I can resolve cases faster, reduce repeat issues, and improve my CSAT score—making my job less stressful and my performance bonuses more achievable."*

4. Make it Personal & Avoid Jargon

- Speak in a way that resonates with the role. Avoid technical jargon that doesn't connect to their day-to-day.
- Example for Sales Rep:
-  *"By leveraging automation in the CRM, data accuracy will improve, leading to better reporting integrity."*
-  *"By using the automated email sequences in Salesforce, I can follow up with leads faster and spend more time closing deals instead of writing emails."*

Formula

'By using [technology/process] effectively, I can [achieve X], which helps me [meet KPI or business goal] and makes my job easier by [eliminating pain point].'

Example for a Sales Manager

"By using Salesforce correctly to track pipeline and update deal stages, I can improve forecasting accuracy, which helps me hit quota more consistently and reduces time spent chasing data."

Now, write the WIIFM statement for this role on the next page using the formula above.

WIIFM Statement

Section 3: Key Technologies Used

Why This Matters:

Every role relies on specific technologies to perform its job effectively. When employees don’t fully adopt these tools, productivity suffers, mistakes increase, and business goals are harder to achieve.

By identifying the core technologies each role depends on, you can ensure they have the right training and resources to use these tools efficiently—leading to better performance and measurable business impact.

Best Practices for Identifying Key Technologies

1. Focus on Essential High-Impact Tools

- Identify the must-have tools for this role—not just the ones they “could” use.
- Example: A Sales Manager relies heavily on CRM software (Salesforce) for pipeline management, but might only occasionally use a reporting tool.

2. Connect Each Tool to a Business Purpose

- Define why this tool is important and what would happen if it wasn’t used properly.
- Example: “If customer support agents don’t use Zendesk correctly, tickets pile up, customers wait longer, and satisfaction scores drop.”

3. Align Technology to KPIs

- Each tool should support specific goals (revenue, retention, efficiency, etc.).
- Example: A Learning Management System (LMS) supports training completion rates, which directly impacts customer retention.

4. Ensure Employees Know Where to Get Support

- Identify who owns each tool internally (IT, Operations, RevOps, L&D).
- Provide access to help docs, tutorials, and SME contacts to support adoption.

Example Technologies:

Category	Purpose for role	Business impact if not properly used
Salesforce	Track sales pipeline and deal progress.	Inaccurate forecasts, lost deals.
LMS	Deliver customer training programs.	Low adoption, increased churn.
Gainsight	Monitor customer health & expansion.	Missed renewal opportunities.

Now list the key technologies used by this role:

Category	Purpose for role	Business impact if not properly used

Section 4: Core Processes, Challenges, and Workflows

Why This Matters:

Technology is only as effective as the processes and workflows that support it. Employees need clear, structured processes to ensure consistency, efficiency, and measurable success. When workflows are inconsistent, people waste time, mistakes happen, and KPIs suffer.

Best Practices for Identifying & Documenting Processes:

1. Focus on High-Impact, Repetitive Workflows

- Identify the core processes that drive performance in this role.
- Example: A Sales Manager's most critical workflows might include lead qualification, pipeline reviews, and forecasting.
- A Customer Success Manager might focus on customer onboarding, training engagement, and renewal forecasting.

2. Map Out Challenges & Bottlenecks

- Ask: What slows this process down? Where do mistakes happen?
- Example: If customer onboarding is inconsistent, it may be due to lack of a structured process in the LMS, unclear responsibilities, or poor tracking.

3. Standardize & Optimize Workflows

- Define how the process should be done correctly to drive efficiency and accuracy.
- Ensure workflows are aligned with KPIs and supported by proper training and documentation.
- Example: If support ticket handling times are too long, the process might need better training or automation.

4. Document Best Practices Using Capture Tools

- Create step-by-step tutorials for each critical workflow. ([see iorad here](#))
- Ensure each tutorial is bite-sized (under 25 steps) and easily accessible in a knowledge hub or cheat sheet.

Identify the Most Critical Processes for This Role:

What are the key processes this role follows to achieve their goals?

Process Name	How it Works	Challenges & Execution
Example: Sales Forecasting	Reps update CRM weekly. Data reviewed in pipeline meetings	Inconsistent updates, inaccurate predictions
Example: Customer Onboarding	Customers are guided through training in LMS	Low completion rates, delayed adoption

Now list the key processes for this role:

Process Name	How it Works	Challenges & Execution

Section 5: Aligning Processes to KPIs

Why This Matters:

For processes to drive real business impact, they must be tied to Key Performance Indicators (KPIs). When employees understand how their workflows directly influence measurable outcomes, they are more likely to follow best practices and use technology effectively.

This section helps you map each process to its corresponding KPI, ensuring alignment with business goals and making success measurable.

Best Practices for Aligning Processes to KPIs:

1. Link Each Process to a Measurable Business Outcome

- Every workflow should have a clear impact on a KPI.
- Example: A Sales Manager's pipeline review process directly affects forecast accuracy and quota attainment.

2. Identify the Technology that Supports Each KPI

- Define which system is used to track and measure success.
- Example: Customer onboarding completion in an LMS impacts customer retention and churn rates.

3. Define How Success is Measured

- Each KPI should have a tracking method (reports, dashboards, feedback loops).
- Example: Support ticket resolution time can be measured in Zendesk reports.

4. Focus on the Most Important Metrics

- Avoid tracking too many KPIs—focus on the ones that truly matter.
- Example: A Customer Success Manager should prioritize renewal rates over vanity metrics like logins.

Connect Processes to KPI Impact

How do these processes influence business outcomes?

Process Name	Technology Used	KPI Impact	Measurement
Example: Sales Forecasting	Salesforce	Quota attainment, pipeline accuracy	Sales reports, rep feedback
Example: Customer Onboarding	LMS	Adoption rate, churn reduction	LMS training completion data

Now map the key processes to KPI impact:

Process Name	Technology Used	KPI Impact	Measurement

Section 6: Technology & Process Owners (SMEs)

Why This Matters:

Every tool and process needs a clear owner to ensure consistency, troubleshooting, and optimization. Without defined ownership, employees may struggle to get the right support, and adoption rates decline.

By mapping who owns each technology and process, you ensure that employees know where to go for help, updates, and best practices—leading to faster issue resolution and stronger adoption.

Best Practices for Identifying Technology & Process Owners:

1. Assign Clear Ownership for Each Technology

- Who manages system configurations, access, and training?
- Example: A Revenue Operations team may own Salesforce setup, permissions, and automation.

2. Define Who Owns Workflows within those Technologies

- Who ensures processes are followed correctly?
- Example: A Sales Enablement Manager may oversee CRM usage best practices, ensuring reps log deals properly.

3. Ensure Owners are Easily Accessible

- Provide contact info or internal resources so employees can get support quickly.
- Example: If a CSM struggles with Gainsight, they should know exactly who to contact in the Customer Experience team.

4. Keep Ownership Updated as Teams Evolve

- Roles change—review ownership quarterly to avoid gaps in responsibility.

Pro Tip: If ownership is unclear, ask:

1. Who controls system settings and permissions?
2. Who is responsible for process execution and best practices?
3. Where do employees currently go for help with this tool or workflow?

Technology	Owner/SME	Contact Information
Example: Salesforce	Revenue Operations	revops@company.com
Example: LMS	L&D Team	L&D@company.com

Now map the key processes to KPI impact:

Technology	Owner/SME	Contact Information

Section 7: SME Workflow Extraction & Documentation

Why This Matters:

Even with the right tools and processes, employees need clear, step-by-step guidance to execute their workflows correctly. Subject Matter Experts (SMEs) hold valuable knowledge, but if that expertise isn't documented, it leads to inconsistent execution, inefficiencies, and reliance on tribal knowledge.

By capturing best practices using [iorad](#) or similar tools, you create bite-sized, repeatable training resources that ensure employees follow workflows correctly—leading to faster onboarding, fewer mistakes, and better tech adoption.

Best Practices for Capturing & Organizing Workflows:

1. Use SMEs to Document High-Impact Workflows

- Identify which workflows are most critical for performance.
- Example: A CSM should document the renewal forecasting process in Gainsight.

2. Keep Tutorials Bite-Sized & Role-Specific

- Tutorials should be under 25 steps to stay digestible.
- Example Tutorial [here](#)

3. Organize Tutorials by Process & Outcome

- Name tutorials clearly based on their use case.
- Example: Instead of "Using Salesforce," title it "How to Track Referral Champions in Salesforce."

4. Store & Embed Tutorials for Easy Access

- Centralize tutorials in a cheat sheet, LMS, or internal knowledge base.
- Example: Link tutorials directly inside Salesforce, Gainsight, or Slack.
- Example tutorial library for embedding [here](#)

Pro Tip: If you're unsure what workflows to document first, ask:

1. Which tasks require frequent retraining or troubleshooting?
2. What processes have the biggest impact on KPIs
3. Where do employees commonly make mistakes or ask for help?

By systematically capturing and organizing SME knowledge, you create a scalable, self-serve training system that drives efficiency, consistency, and adoption.

Fill in the details below for the selected role:

Tutorial Name	Process Covered	Tutorial Link
Example: How to track referral champions in Salesforce	Sales Forecasting	[link]

Now document the key tutorials for this role:

Tutorial Name	Process Covered	Tutorial Link

Action Plan for Implementation

1. Complete this workbook for at least 3-5 key roles.
2. Gather SMEs and document best practices.
3. Organize tutorials into a central resource (cheat sheet, LMS, Intranet, etc.).
4. Track adoption and refine as needed.

