

CASE STUDY

Lightning adoption through gamification

Healthcare-Adjacent Nonprofit · San Francisco, CA · March 2017 – December 2019

Program Management

Change Management

CRM Implementation

Dreamforce 2018 & 2019

SITUATION

Healthcare-Adjacent Nonprofit is a healthcare-adjacent nonprofit whose grantees focus on some of the most sensitive social issues in California — domestic violence, economic inequity, and underserved communities. When Jacqueline joined as Information Systems & Special Projects Manager in 2017, the organization had recently adopted Salesforce as its CRM platform, but usage had stalled at below 25% across staff.

A conventional change management push — mandatory training sessions, compliance reminders, top-down pressure — felt misaligned with the organization’s culture and mission. Staff were deeply purpose-driven, and a heavy-handed approach risked eroding the trust that made the team effective.

APPROACH

As Salesforce Administrator, Jacqueline had visibility into staff activity on the platform — when people logged in, which features they used, and how long they engaged. She used this data not to police behavior, but to design a lighthearted adoption program that met people where they were.

Drawing on her instinct for servant leadership and a deep read of the team’s culture, she chose an unlikely theme: Harry Potter. The logic was deliberate — the story’s themes of community, belonging, and doing good in a complicated world resonated with a mission-driven nonprofit audience.

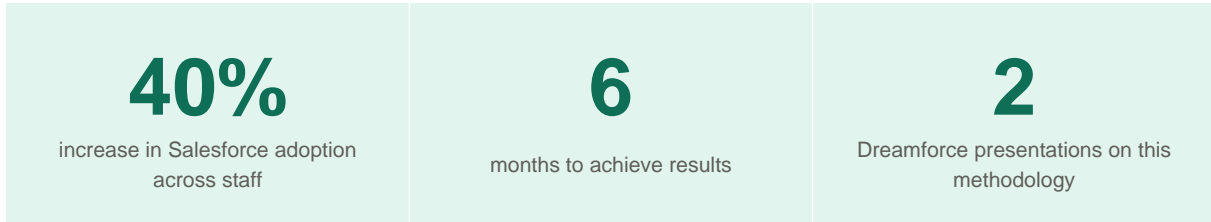
“My desk became Platform 9¾ — a place where any staff member could stop by for personalized, one-on-one walkthroughs of the platform, no judgment, no pressure.”

The program included:

- Time-boxed platform visits tracked via Salesforce admin tools, with rewards tied to login frequency and feature usage depth
- Points and badges awarded for completing specific actions within Salesforce, scaled by difficulty

- Friendly team competitions and challenges to encourage peer-to-peer engagement with the platform
- Platform 9¾ drop-in sessions at Jacqueline's desk for individualized process walkthroughs and hands-on coaching
- Tangible rewards and recognition for milestone achievements, keeping motivation high without performance pressure

RESULTS



Within six months, Salesforce adoption increased by 40% — from below 25% to well above the majority of staff. Beyond the numbers, the program shifted the organizational culture around technology: staff began to see the platform as a tool that supported their mission, rather than an administrative burden imposed on them.

The methodology was recognized by the broader Salesforce community. Jacqueline was invited to present the gamification approach at Dreamforce — Salesforce's global annual conference — in both 2018 and 2019, sharing the model with thousands of nonprofit and enterprise practitioners.

KEY TAKEAWAYS

- Context-sensitive change management outperforms generic playbooks — the Harry Potter theme worked because it was designed for this specific culture
- Admin-level platform visibility, used ethically, enables data-driven adoption strategies without surveillance culture
- One-on-one coaching (Platform 9¾) addressed the human barrier to adoption that group training sessions miss
- Intrinsic motivation (belonging, fun, recognition) drives more durable behavior change than compliance mandates