

KVP BUSINESS SOLUTIONS

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DAIRY · 90-DAY ADOPTION PLAN

Improve Salesforce Adoption

A 90-day playbook for dairy leaders whose field reps, distributors and service teams aren't using Salesforce the way the business case promised. Built on KVP's Adoption & Enhancement Services (AES) — the same approach we used to lift one client from <20% to 85% adoption in a single quarter.

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Adoption & Enhancement Services (AES) for Dairy

WHY ADOPTION FAILS IN DAIRY

Your CRM is fine. Your people aren't using it.

Almost every dairy Salesforce programme we audit has the same shape: Sales Cloud was implemented two to four years ago, the platform technically works, but adoption hovers between 15% and 40%. Beats are missed. Orders still come via WhatsApp. Distributor data drifts. Reports stop being trusted.

The root cause is rarely the technology. It's a combination of badly designed screens for field reality, missing local-language support, weak incentives, and a leadership team that stopped looking at adoption dashboards.

<20% → 85% ADOPTION LIFT	60% PRODUCTIVITY GAIN	90 days FIRST MEASURABLE SHIFT	4 sprints AES CADENCE
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From a real KVP AES engagement

A fashion retailer (very similar adoption pattern to dairy field sales) went from below-20% adoption to 85% in one quarter, with a 60% sales-productivity gain and restored leadership confidence — without re-implementing Salesforce.

01 - The 7 adoption blockers we see in dairy

01	Screens designed for HQ, not the beat Reps need 3 fields, not 30. Lengthy layouts kill in-store speed.
02	No offline mode Rural beats lose signal. Without robust offline, the app gets abandoned by week 2.
03	Language gap Field reps in Tier-3 markets don't operate in English. Local-language UI is non-negotiable.
04	Distributor data drift When SAP, DMS and Salesforce disagree, distributors stop trusting the data — and the platform.
05	Manager dashboards that nobody opens If RSMs and ZSMs aren't using adoption & beat dashboards weekly, nobody else will.
06	No incentive linkage If commissions and schemes are calculated outside Salesforce, reps will stay outside Salesforce.
07	Change-fatigue from the original go-live Reps remember the painful go-live. Re-launching needs visibly different tone, training and tooling.

02 - The KVP AES framework for dairy

AES — Adoption & Enhancement Services — is KVP's structured approach to rescuing under-used Salesforce orgs. It runs in 2-week sprints across four workstreams, all measured against a single adoption KPI.

Discover	Re-design	Re-engage	Measure
Adoption audit, persona shadowing, dashboard review	Page layouts, mobile flows, language packs, offline scenarios	Distributor & rep retraining, manager rituals, gamification	Adoption KPIs, leading indicators, weekly leadership huddle

The single KPI that matters

Active Daily Reps (ADR) as a percentage of deployed reps. If ADR isn't on the leadership dashboard every Monday, no other metric will move.

03 - Your 90-day adoption plan

Use this as your week-by-week working plan. KVP runs each phase end-to-end, but the framework works equally well for in-house teams who want to drive AES themselves.

DAYS 1–14 · Audit & baseline

- Run adoption analytics — login, pages used, abandoned actions
- Shadow 6–10 reps across 3 archetypes (urban, rural, modern trade)
- Interview 5 distributors and 3 RSMs
- Publish baseline ADR + a top-10 friction list

DAYS 15–35 · Re-design the daily 20 minutes

- Strip page layouts to the essential 5–8 fields per object
- Rebuild mobile beat flow: open → visit → order → close
- Add local-language labels (regional roll-out)
- Fix the 3 most painful integrations with SAP/DMS

DAYS 36–60 · Re-engage the field

- Run regional re-launch with field videos (not slides)
- Introduce manager-of-the-week and rep-of-the-week boards
- Deploy a daily WhatsApp adoption nudge to RSMs
- Run distributor portal masterclass (1 per region)

DAYS 61–90 · Lock in the rituals

- Move commission, scheme & beat-bonus calcs into Salesforce
- Make the Monday adoption huddle non-negotiable
- Publish month-on-month ADR + productivity KPIs
- Plan phase-2 enhancements based on rep feedback

04 - The rituals that lock in adoption

Adoption isn't a project; it's a habit. These five rituals are the difference between a Salesforce org that quietly drifts back to 30% adoption and one that stays above 80% three years after go-live.

Monday 30-minute leadership huddle

Sales head + IT + AES lead review ADR, top-5 friction tickets, weekly enhancement backlog.

Wednesday distributor pulse

Sample 5 distributors live; capture portal friction; close the loop within 48 hours.

Field Friday

Each RSM does one in-the-market beat with a rep using only Salesforce — no spreadsheets allowed.

Bi-weekly enhancement sprint

AES squad ships small, visible improvements every two weeks. Reps see Salesforce changing for them.

Quarterly business review

Re-baseline KPIs, refresh personas, retire features nobody uses, plan next quarter's roadmap.

05 · The adoption scorecard

Track these KPIs weekly. Anything else is noise.

KPI	What it measures	Target
Active Daily Reps (ADR)	% of deployed reps logging ≥ 1 productive action / day	$\geq 85\%$
Beat adherence	% of planned visits actually completed in-app	$\geq 80\%$
Lines per productive call	Average SKU lines captured per visit	+25% on baseline
Order via app	% of secondary sales captured via Salesforce vs other channels	$\geq 90\%$
Distributor portal usage	% of distributors placing orders via portal monthly	$\geq 70\%$
Service SLA on cold-chain	% of freezer service tickets closed within SLA	$\geq 90\%$
Time-to-resolution (rep tickets)	Median time AES squad resolves a rep-raised friction	<5 days

Recommended further reading

- [The Power of AES — Adoption & Enhancement Services](#) (KVP Insights blog)
- [From Sparse to Full Potential — Restarting your Salesforce Org](#) (KVP Insights blog)
- [Maximising Salesforce ROI](#) (KVP Insights blog)

Want a free 60-minute adoption audit for your dairy Salesforce org?

KVP's AES team will run a quick login & usage analysis on your org, shadow two reps, and come back with the top 5 things blocking adoption — plus an indicative 90-day plan to fix them. No commitment.

kvpcorp.com/industries/dairy · hello@kvpcorp.com

This adoption plan is informed by KVP Adoption & Enhancement Services (AES) engagements across dairy, FMCG and retail — including a fashion-retail programme that lifted Salesforce adoption from below 20% to 85%, with a 60% sales-productivity gain.