PSC White Paper

Address CRM Adoption Issues Before They Occur

Dealing with user adoption issues before they occur is key to a successful CRM deployment

If there is one thing successful companies in today's market have in common, it is that they know and understand their customers better than their competition does. A key element to reaching this heavily sought customer relationship "utopia" is an effective Customer Relationship Management (CRM) system that not only takes advantage of the latest technology, it is embraced by the employees using the system as part of their daily routine. As many top executives and sales managers will attest, getting their employees to adopt and embrace a CRM system is much more challenging than identifying and purchasing the latest and greatest CRM technology.

A 2009 study conducted by CSO Insights and posted on their website at www.csoinsights.com revealed that approximately 41% of the companies surveyed reported CRM adoption rates amongst salespeople at 75% or below (adoption being defined as actively using the systems regularly as part of their daily work flow) and roughly 22% had adoption rates at 50% or lower. In essence, nearly a quarter of the companies in the study have less than half of their salespeople using CRM as part of their daily routine.

So, your company is ready to take on a new CRM initiative. How do you avoid the CRM user adoption issue that has plagued companies since CRM was first introduced to the market?

Jim Davidson, President of Nueterra Equity Partners, summed it up well when he said "Soon after rolling out CRM, we realized how many more people in the organization were actually impacted by CRM and adoption became an immediate issue. If we could do it over again, we would have involved the broader community that CRM affects in our up-front preparation."

How does a company proactively plan for user adoption issues?

As with any purchase and/or implementation of a new software product meant to have a strategic impact on your company, the approach should be structured, sponsored at the executive level and the following considerations should be incorporated into your CRM selection and deployment planning process.

Make "Ease of Use" a Critical Factor when Evaluating CRM Solutions

Is the "look and feel" similar to the applications users are already using on a daily basis? How intuitive are the tasks your salespeople will be performing the most? Will the CRM system integrate well with the e-mail and calendaring system currently being used at your company?

Support of Front-Line Management

Has front-line management bought into the vision executive management had when they approved an investment in CRM? Were managers with direct reports who will be asked to use CRM involved in the selection process? If these key individuals have not bought into the value the new system will bring to the company, they will not effectively promote it and the result will be a CRM deployment that falls far short of executive management's expectations.

Executive Sponsorship

Does executive sponsorship for deploying a CRM system exist? Knowing that management at the very top of the organization is in support of CRM and is sponsoring the implementation of a new system can be key in increasing a company's adoption rate. Mention of the CRM initiative in company communications such as a quarterly newsletter sends a great message and can greatly increase "buy-in" across the company.

Furthermore, when capabilities of the CRM system that can be tied directly to the company's strategic plan and stated long-term vision are communicated by top management, the impact on the user community can be deep and long-lasting.

It's all in the way we listen.®

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PSC was built as an alternative resource for organizations that believe they deserve greater attention than what they would typically receive from the very large global firms.

Our areas of expertise include enterprise systems, systems integration, collaborative supply chain solutions and business process improvement.

We focus on solutions that help our clients achieve their strategic business objectives.

Our process begins in the way we listen, and ends with our clients experiencing a greater return on their investment.

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Understand and Address "Pain"

Identify specific pains your sales force, marketing department or customer service team experiences today. How will the new system address these pains and make their jobs easier? Highlight these advantages and place them at the forefront of your communications about the new system.

An example of this may be placing data at the fingertips of a salesperson during a customer meeting that he or she previously had no readily available way to access. This could turn into better customer service or uncover opportunities to up-sell to an account, which in turn, means more income potential for the salesperson. Find these potential scenarios and promote them heavily every opportunity you get. Ultimately, eventual users will be clamoring for the new system before it is deployed.

Map Business Processes

Understand the business processes in each of the areas of your organization that will be required to use the new system. Do significant gaps exist between the way they do their job today and the processes associated with the software? The more customer-facing personnel are asked to change the processes they have become accustomed to, the less likely they will be to adapt to the new system.

Involve the Right People

Are all of the appropriate functional areas of your organization represented during the selection process? CRM has become much more than a sales force automation tool. The functionality available in today's CRM solutions crosses into many areas of the organization including Marketing, Customer Service and Finance. Having stakeholders from each of the departments impacted by the new CRM system involved in the selection and planning process can be key in addressing potential adoption issues down the road.

Gradual Roll-Out

Roll out functionality and required usage incrementally. If users feel overwhelmed during their first training session and feel that using the new system will take too much effort, you will find yourself immediately fighting an uphill battle when it comes to adoption. When determining what capabilities to introduce in the early stages of the roll out, try to find a nice balance between processes that are not too complex and ones that provide a high level of perceived value to the users. This effort can be tricky and deserves appropriate attention while planning for a CRM deployment.

Identify the Future "Power User(s)"

Regardless of what type of software is being rolled out to an organization, a "Power User" will almost always emerge. This is the person that embraced the new software from day one, recognizes the value and possesses the motivation to learn all of the "ins and outs", tricks, and short cuts of the new system on their own. Other users recognize this person's high level of knowledge and seek him or her out for assistance in addressing issues and learning more of the available features of the new software.

Efforts should be made to attempt to identify who within the organization will most likely take on the role of "Power User". Involve these people early on in the deployment planning process, give them early access to the system and allow them to explore and provide feedback. Let them know they will be relied upon as a "go to" resource during and after the deployment. These "Power Users" can become a valuable asset when it comes to promoting the value of the new CRM tool across the organization.

If you are fortunate enough to find multiple people that fit the "Power User" description, form a "Power User" or "Early Adopter" group. Let them test the system and provide feedback and suggested modifications prior to deployment.

CRM is not an IT Initiative

Your Information Technology department will play a crucial role when it comes to system up time, system access and system performance, but don't expect IT to make decisions that require an understanding of your sales processes. A common mistake made by several companies is to place the responsibility of a CRM initiative in the hands of IT. Yes, CRM involves software and everything associated with installing it and making it available to the user base, but first and foremost, CRM is a culture change – a change in the way your company does business. Representation from IT is essential in the selection and deployment planning process, but ownership of the initiative should lie in the hands of the department most impacted by the new system.

Furthermore, a perception amongst the user community that CRM is driven by IT can be a recipe for long-standing CRM adoption issues.

End User Training

Is comprehensive training part of your deployment plan? The proper amount of training prior to turning salespeople loose on the new system not only increases the likelihood of their acceptance, it will help ensure they are using all, or at least a greater percentage, of the capabilities available in the new system.

When conducting training sessions for end users, it is always better to use real company data rather than canned data supplied by the software vendor in their demo version. The employees will relate better when they see the familiar data and they will begin to visualize themselves using the new system.

"Big Brother" vs. Productivity Tool

Probably the biggest complaint by salespeople in organizations challenged with CRM adoption issues is that CRM is an administrative burden and its primary purpose is to report activity to management. A primary goal of any CRM deployment should be to avoid the impression that "CRM is there so management can keep an eye on me". Of course, the ability to audit salesperson activity, view the details associated with specific sales opportunities and the many reports available through a CRM system has a lot of appeal to management. However, a conscious effort should be made to strike a balance between communicating requirements for CRM usage by management and the promotion of advantages to the salesperson. Examples of these advantages might be improved preparation for prospect meetings or shortened sales cycles (all tied to increased income).

Although CRM systems are used by multiple functional areas within an organization, most companies find that salespeople tend to be the biggest resisters when it comes to adopting CRM. Understanding and addressing this from the beginning will be key in improving your chances of a high acceptance rate. Involve salespeople as much as possible during the selection and deployment planning process – make them feel like a "customer".

Carrot vs. Stick

Several methods have been tried and tested when it comes to motivating employees to use CRM to it's fullest potential. The age old question of enticing employees to use the system through some kind of reward or recognition program or forcing them through some sort of mandate is one many companies deal with.

One popular method used by companies is to tie the payment of commissions to CRM usage. As an example, a company could instill a policy that states no commissions are paid on a sale until the opportunity is completely closed in CRM. Other companies have found that publishing pipeline reports or sales results within the company only using data that comes straight from the CRM system motivates salespeople to enter information timely and accurately.

If you do choose the route of tying commissions to CRM usage, make sure the policy is clearly defined and avoid leaving any room for interpretation. Again, understanding this will be an issue that needs to be addressed prior to deployment and setting the rules up-front will generate much better results than trying to fix the problem after the system is already in use.

Bad Data In = Bad Data Out

How good is your data? Whether you are migrating from a legacy CRM system or implementing CRM for the first time, no system is effective when it is fed bad data. Examine the databases where sales and customer data currently reside. Is the data current? Is there a great deal of duplicate records? Do you find that the most reliable data resides locally on salespeople's laptops?

An investigation into potential data issues prior to embarking on a CRM implementation is a must. Learning about wide-spread problems with your data post-CRM deployment is a sure killer to any hopes you have for high user adoption.

On-Going Education

Have a plan in place for continuous learning. You have done everything right. Your implementation is viewed within the organization as a success and user adoption appears to be at a very high rate. Don't let the good vibes fizzle out. Make sure a platform exists for on-going training. If a new enhancement to the system becomes available, promote it to the user community. Some examples from other companies include periodic e-mails from the CRM Administrator containing useful CRM information, an FAQ or CRM "Resource Center" on the company intranet. There is even a recent example of a company sending "tweets" via Twitter to a CRM user community containing "CRM tips and tricks".

Track Usage

Once deployed, regularly audit CRM usage. The earlier you identify an adoption issue, the easier it will be to address. Identifying those within the organization resisting the new system and gaining an understanding of what lies behind their hesitancy will be very helpful as well. Set adoption benchmarks early in the deployment and track results against the benchmarks. If you are experiencing upticks in user adoption, communicate this to the user base. Ultimately, you can create an environment where adoption of the CRM system becomes contagious.

Conclusion

Adoption issues are a brutal reality when it comes to deploying CRM, but don't let that stop you from making the change. Knowing what these issues will most likely be before you get started and addressing them head on will significantly increase your chances for a high adoption rate. The benefits and measurable return on investment that can be experienced from a successful CRM deployment are too great to ignore. With a realistic outlook and some proactive planning, your company can become a CRM adoption success story.

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