CRM Success Series
User Adoption Planning

How User Adoption Planning Can Lead to Successful CRM Implementations

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Introduction

CRM systems have come a long way over the years*. It seems like labeling them now as* ***CRM [Customer Relationship Management]*** *is about as sensible as calling a car a* ***"Horseless Carriage"****.*

CRM systems are an outgrowth of SFA [Sales Force Automation] and were largely implemented by companies to help manage their sales-force, revenue pipeline, customer contacts, and to some extent their sales process. No doubt, many companies still use them this way. That's fine, but doing only that greatly under-utilizes the product's capabilities and value. Further, companies that just use CRM for those tasks find the product to really not deliver value and generally the sales force using the product find it more of a burden than a help.

Today's CRM Systems are more closely aligned to an ERP system and a Business Process Improvement System than they are to a CRM system. The systems are extremely capable of being configured to automate many process tasks operationally within the organization while providing detailed ***"real time reports"*** along the way. This can be invaluable to companies interested in improving operations, reducing costs, and creating a much richer experience for their customers .

Introduction (continued)

Multiple Sales Processes - All organizations have multiple Business Processes executing in parallel. This is true for sales processes too. Not only do sales organizations typically have several sales processes that have different sales cycles, they have different process steps. For example, we may have one sales process which has a cycle of one day and is essentially a **stock to dock cycle** and we can have another cycle that is six months long and requires a **total solution sale**.

Many companies view the sales process as a process that is discreet from the rest of the organization. They are not. They begin with Customer Acquisition [Marketing] move through a fulfillment phase, and end with customer service and back office operations such as accounting. *Reporting occurs at every step along with work flow and task management*.

The first steps are to install the processes as they exist today and then work to improve them one at a time. Really a lot of work but well worth the effort.

CRM – Why are we doing it?

You would think this is an obvious question but so many companies fail to ask it completely or understand the business drivers behind the decision. If you don't have clarity from the beginning, the project will surely fail and users will never really adopt the system.

Whether you're just beginning to examine possible solutions or trying to recover a failed project, this is a good place to start.

Interviews with Senior Executives and 'C' level Staff is where you should start whether they think a CRM system would involve their organization or not. They can offer valuable insights. A few areas to consider:

- Do they know what today's CRM Systems can do? Surprisingly many executives don't. This is partly due to the rapid capability growth of these systems over the last few years.
- What problems are they interested in solving in their individual groups. Don't limit their answers to what they think apply to a CRM System. Remember, CRM Systems can offer great value through reporting, process improvement, and real time visibility to users , customers, and vendors.
- Do you see your group as a user?
- How do you perceive a system like this will provide value to the company and your organization?

Quick Tip: Document all responses then return for a group meeting to review the answers. Document & publish results.

What are our Goals?

Beyond the typical goals of increased revenue, cost reduction, and process improvement, what are our goals for a system short and long term? At this point you should have a clear and realistic set of expectations.

Is the organization buried under a mountain of tasks and data? Can the organization operate more efficiently?

Consider how you could envision the organization growing 20% over the next year without increasing staff. Perhaps other goals….

This is the time to begin engaging users.

Share the organizational goals. Ask them for solutions. Document their largest problem and process area concerns. Find out what the users would like to be doing and projects they'd like to implement if they only had more time.

Get Them involved!

Who will be using this product?

Management Users - - Fact – if management doesn't use the product, no one will.
That means that senior execs use the product and reports during staff meetings. They use it every day! They ask and measure user adoption and performance often. Executives lead by example. These are great reporting tools that can give you and awful lot of information on process, problems, and performance (KPI's). AS AN EXECUTIVE SPONSOR YOU NEED BE USING THE PRODUCT! LEAD BY EXAMPLE!

Decide who will be using the product and get them involved.

Have each department create a list of users and how they will be using the product. This includes Marketing, Customer Service, Operations, Sales, Senior Staff, and Finance. While these Systems typically charge per licensed user, at this point you don't want to exclude any potential users.

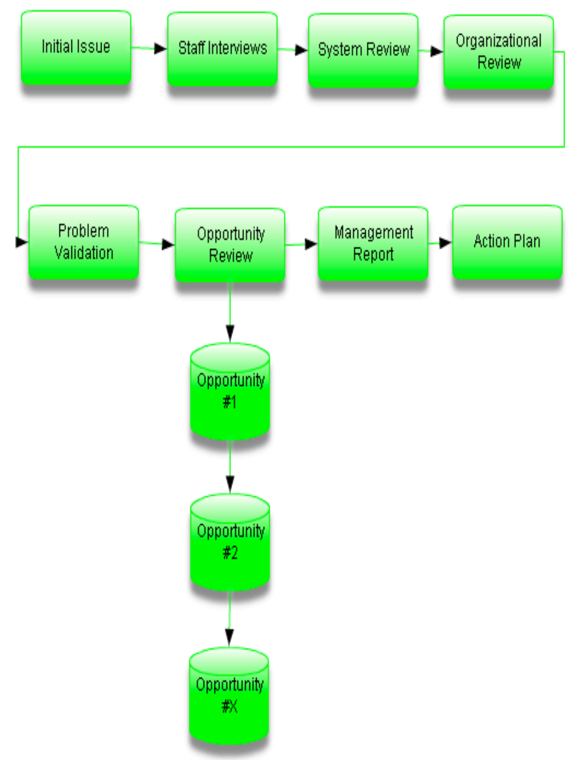
USER ADOPTION will occur in phases, that will generally align with the Product Implementation Plan. The initial Users will be part of the Implementation Team.

What are our Data and Information needs?

So you think you know your Business Process?

Trust me, you'd don't. To be fair you probably have a good idea, but the *"devil's in the details"* as they say. The users are the ones who really know.

Interview everyone who will be using the system from the CEO to the person on the shipping dock. Create Business Process Maps for precisely how they perform their function. Not only will this give you and accurate understanding of how the business operates, but importantly, you will uncover where people get their data and information and how they use it. ***You need to find all of the data sources, no matter how small or insignificant they may seem at the time. Organizations often have data scattered throughout that management is not aware of.***



If people use certain process and tools in their day to day activities, unless you account for them and integrate them, they will continue to use them regardless of whether they use the new system or not.

Find the Data! Get the Process right!

What CRM Solution is right for our Organization?

Vendor Interviews & User Adoption

It's finally time to look for an appropriate vendor. This is **The Precise Time** that you need to get **the User Community involved**. They absolutely need to be part of the decision process if you hope to get them actually using it.

Not all users will agree on a vendor choice. That's human nature. But they need to be involved so they can envision how they would use it in their particular function. You will find that for some use cases, various CRM vendors will provide better solutions than others. No one will fulfill everyone's needs out of the box.

Quick Tip
Have someone running these meetings {presumably a Project Manager} who can help facilitate questions & concerns, and keep them moving in a positive direction. Be sure that prior to vendor presentations, vendors are given the use case requirements list from all so they can provide a meaningful product demo.

Note: Some people find it difficult to interact in these type forums. A good facilitator will ensure that their issues are addressed.

Do we need an Integration Partner?

Yes, you probably do.
Your Users and Staff already have enough on their plate. Couple that with the fact that more often than not a successful CRM Implementation will require integration with various EXISTING SYSTEMS and Business Processes to be truly effective.

In many cases, you may need more than one!

- An integrator specializing in User Training and System Administration of the particular CRM System you're choosing.
- An integrator specializing in creating software interfaces to the variety of internal and external systems that you currently use.

These are different skill sets. Additionally, you will need to have Internal Resources who will be trained on System Administration and customization. There will be on-going internal administrative activities required to maintain these systems.

Importantly, customization on a user by user basis is often required and desirable. You want to make the user as comfortable with the system as possible.

Reporting – These systems come out of the box with 100's of standard reports. A job of the System Administrator is to create customized reports on a user by user and on-going basis. **Needs change**!

How and When Do We Involve our Users?

Phase I Team

By now you have User Representatives involved from all departments who participated in Vendor Selection for the CRM System itself plus all of the Integration Partners. This team will stay directly involved throughout the entire lifecycle of the implementation. They will act as the key stakeholders, implementation architects, and solution evangelists. This team will assist with User Training during the other phases.

Phase II Team

This group will generally be the majority of the remaining User population. Each person should have a trained mentor they can go to for help learning and using the system.

Phase III – Executive Team

The Executive Staff begins using the system on a daily basis. They communicate this to the entire company. Further, they use the product in meetings and in their business processes....the system becomes integrated into their day to day activities.

The product is now operational, although will require on going maintenance, feature integration or enhancement, and user requested reports or customizations.

User Training

So when do users get all of this training?
Users get their training on four different occasions at a minimum.

- They receive training as a group, typically by department. This is done by the CRM Vendor Integration Partner under the supervision of the Project Manager and the Internal System Administrator.

- They are given access to CRM Vendor supplied Product Training. Most vendors offer training modules on-line as part of the purchase. **Users are expected to complete this training.**

- They receive individual training, usually about 1-2 hours each by the CRM Vendor Integration Partner.

- They receive 1-2 hours training each by the Internal System Administrator. This training is usually scheduled after about 2-3 weeks of use. The purpose here is for the System Administrator to review how they are using the system and help with any problems they may be experiencing. At this point, the System Administrator will be gathering information for future customizations and reports the user may need.

Management Training

The Management Team needs to be trained and become aware of the systems capabilities.
Most CRM systems offer a variety of Reports and Functionality that are designed specifically for Management. Most offer executive dashboards that can be customized to fit a particular individuals needs. Management reporting requirements tend to change and grow the more they use the system and become familiar with the systems capabilities.

Additionally, functionality exists for the busy executive. For example, many vendors now offer interface applications for mobile devices. Couple this with email alerts, and the traveling exec can be well apprised of significant developments in real time. Alerts can be created for trigger events like a forecast item posted that exceeds a certain threshold or on daily closed sales.

The information is in the system and can be delivered to execs many ways. When an employee accomplishes a task, send them a compliment and let them know you're using it. That goes a long way toward Adoption and Reinforcement.

The Management Team should be well aware of the document management sharing functionality of these systems. Items like marketing templates, sales proposals, email forms for customer service, standard contracts, NDA, etc, can all be stored and shared throughout the system.

Reporting

Reporting capability is one of the most important aspects of any CRM System. Reporting is ultimately what makes these systems powerful and should be a key driver in the decision to implement a CRM system. Internal Reporting requirements should be carefully examined against system functionality. *Make sure the evaluation team reviews this thoroughly.*

CRM Systems can be a central repository for corporate information, historical and transactional. In addition to the obvious benefits to management for measuring business and individual performance they can be invaluable to users to help them focus efforts, collaborate with peers, and improve their own performance.

As overall performance improves, employees will be able to see it's effect in their reports. Management will be able to **measure** it in the form of increased revenue, reduced costs, and importantly, the organizations ability to scale operationally.

On-going Operations

As with any Enterprise Class System, companies need to be aware that there will always be a need to maintain, upgrade, and enhance the system's capabilities.

- You will have on-going training requirements whether they're for new employees or existing employees with new use cases.
- Integration with other systems takes time. Bringing existing system integration functionality online will happen in phases on a system by system basis. Integrating with new Enterprise Systems will occur and in fact, be evaluated prior to even being purchased.
- Actual CRM Systems themselves are growing rapidly enough that rolling out new features and functionality to the user community can occur several times per year.

Summary

User Adoption Issues are often cited as the cause for CRM Failures rather than a manifestation of other underlying implementation issues*. Involving the user community early in the process and planning properly can cause User Adoption to be a measure of success rather than failure..*

As with any Enterprise System implementation, in order to succeed you need to:

- ✓ Have a solid plan
- ✓ Communicate the plan
- ✓ Get all stakeholders involved and committed from the beginning
- ✓ Execute the plan

Project Recovery

Projects don't always succeed initially. If you have a failed implementation, all is not lost. You can always recover.

- ✓ **Have an Assessment performed independently**
- ✓ **Create a Project Recovery Plan**
- ✓ **Start this entire process again from the beginning of this e-book [should be faster the second time around]**

About Ken Mulcahy – Emerging Technology Partners

Ken, through Emerging Technology Partners, delivers Web and Interactive Marketing Services. From strategy to custom-development, from inception to selection to implementation, our professional services focus is designed to execute your project from start to finish, or to extend your existing in-house or outsourced capabilities. Revenue and Operational efficiency are key focus. Core capabilities include:

Analytics, CRM, E-Commerce, Integration, InBound & OutBound Marketing, Process, SEO, Strategy.

Prior to starting ETP, Ken held executive roles at OSS (Open Source Software) Startups; VP Sales & Business Development, CEO & Board Chairman, and Eastern Regional Sales Manager. Other experience includes senior Sales roles at GE, North American Manager for Marconi Instruments, Director of Marketing at Eaton, and Senior Member Technical Staff.

Ken lives in Western Connecticut with his wife Patricia and Family. When not traveling on consulting assignments, Ken is active in his community with volunteer work. Ken has served on several corporate boards in the past and currently volunteers and is a Board Member with Wind Over Wings, a Raptor Rehabilitation Center in Clinton,CT. “Conservation through Education”

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