

CRM Systems: **IF YOU BUILD IT, WILL THEY USE IT?**

Organisations pour tremendous amounts of time, resources and money into Customer Relationship Management (CRM) systems with high expectations of increased sales, better customer service and improved operating efficiency. The right CRM system can deliver on those goals – but only if one key component is accomplished: user adoption.

Here is a sobering fact: over 50 % of CRM projects fail to deliver the expected returns, often due to low user adoption.

The greatest single contributor to CRM project success is getting users on board. Ask yourself these questions: How will this CRM implementation benefit our team? Will this CRM implementation make life easy for the users?

Users must understand the benefits and use the system on a daily basis to improve their productivity. Your organisation must ensure the CRM platform is designed specifically to meet the needs of your users, to communicate the benefits, ensure they understand how to use the system and secure their buy-in.

Lack of user acceptance and internal support is a sure-fire way of seeing CRM initiatives falling short of expectations in the form of wasted project costs and demotivated team members.

With decades of experience in CRM deployments, we have noticed some trends – common barriers to user adoption that nearly all businesses face. This guide lists the top 5 user adoption challenges organisations contend with and best practices for overcoming them.

“What’s in it for me?”

Solution: Tailor your platform to user needs

Many CRM implementation plans don’t start with a discussion about user needs – even though they should. It is best practice to make user adoption and ease-of-use priority one.

What users need in a CRM system varies depending on their role and function:

Sales

Ensuring the CRM platform reflects individual salespeople and their own unique selling cycle is a key milestone; information such as keeping up-to-date on opportunities, which leads have been qualified, the next step in the cycle, tracking follow-up communications, forecasting and more. The right CRM platform helps salespeople hit their revenue targets, reduce sales cycles, convert leads to sales and increase their commission.

If your CRM system doesn’t accomplish these goals, users will lose confidence and stop using the platform. They will fall back on legacy systems and manual processes.

On the other side of the coin...

An effective CRM sales solution is a comprehensive lead management tool. Having easy access to solid, reliable and trusted data in their pipeline, sales reps are able to quickly get any customer information they need, all in one system.

CRM delivers transparency and clear visibility of sales cycles by tracking each prospect through every step of the selling pipeline from initial lead to purchase. A comprehensive lead management tool helps companies turn more leads into revenue.

Sales administration

If sales teams spend hours every week on administration tasks, it’s an expensive drain on productivity. Imagine the extra opportunities that could be won each month if sales administration absorbed less time.

An effective CRM strategy liberates sales staff from the burden of admin tasks by minimising, or even removing, repetitive processes that steal time from the working day but contribute little to profitability. For example, the sales team no longer has to manually create records, key in data or send forms to accounts for processing. An effectively implemented CRM strategy will result in these tasks being managed automatically.

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In addition, a CRM dashboard provides personalised views of relevant data. With more time, salespeople are able to analyse and easily see real-time reports with visibility into information that was never before available without spending considerable time and effort to aggregate the data.

Marketing

In the past, marketing was viewed as an ambiguous cost that couldn’t be measured or tracked. Today, despite sophisticated databases, many marketers still can’t easily assess or quantify the success of their efforts. The inability to substantiate results impacts marketing budgets.

Creating and executing new campaigns is easier to justify when marketing can capture measurable results. When your CRM system is architected correctly, marketers can demonstrate solid reports on leads generated, opportunities converted, close rates and ROI. Comprehensive marketing reporting and analytics provides transparency into marketing metrics, thus providing a clear view of how marketing and sales activities contribute to the company’s bottom line.

With better metrics on how campaigns are performing, marketing has insight into how to improve campaigns. Setting campaign goals and benchmarking results opens doors to new possibilities in marketing effectiveness.

The most nimble CRM applications are those that can be integrated with other tools including marketing automation software and e-marketing platforms.

With a CRM system, marketers are able to create compelling and high-impact campaigns: Planning activities, developing contact lists, organising campaigns, implementing programmes and measuring the results. Where marketing previously had to run campaigns manually, they can now run automatically.

Because they have more details readily available than ever before, marketers can segment contacts to run personalised

campaigns and reap higher conversion rates. The result: More campaigns can be run with fewer people, and deliver more qualified leads to sales.

Customer service

CRM arms service reps with customer information, case management, service history and support knowledge, giving them the tools to deliver consistent, efficient service that enhances customer loyalty and profitability.

With a professionally implemented CRM system, service representatives are better equipped to address a customer issue because all the detail they need is instantly available in a single interface. They do not have to access multiple systems, which saves time and ensures a swift resolution to service issues and requests.

Automating service processes with a CRM system enables you to assign, manage and resolve support incidents with automated routing, support ticket queuing and escalation of service requests, along with case management, service level agreement management and auto-response e-mail. With all details available in one place, CRM systems make everyone accountable for customer service.

Reps are able to provide responsive, personalised service that increases case resolution and ultimately reduces customer churn. Unprecedented access to data transforms the customer's overall experience. Customers quickly and easily get what they need to ensure they have a pleasant and amazing experience that competitors will struggle to match.

When service reps see they have more tools and information at their disposal, they will be increasingly motivated to use the platform, because they recognize that CRM will help them do their job better and deliver superb service.

“It’s not relevant to how I work.”

Solution: Get cross-functional feedback up-front.

CRM is a company-wide strategy that involves any group who interact with the customer either directly or indirectly. With the goal of improving user adoption, the most effective way to understand what users need is simply to ask. Involve users from the start. By including employees in the process, your organisation does not impose the new CRM system on users, but rather enables the front-line employees to drive the change.

To ensure all user groups are considered, the build process should incorporate both vertical and horizontal knowledge from within the company – key users from project stakeholders to cross-functional employees who are firmly entrenched in day-to-day tasks. Ask questions about how CRM helps in their day-in-life activities; what steps seem unnecessary and what changes or enhancements would make their jobs easier.

80% of executives say customer-facing strategies are high on their corporate agendas

- Source: *Strativity Group*



By first understanding existing frustrations as they relate to data management and automating processes, the consultancy partner you work with is able to design practical and functional CRM solutions. Through user testing and pilot programmes, invaluable input is gained – data that can make the system built for the way users need it to perform.

For example, service teams are unlikely to need access to marketing campaign functions while sales teams probably won't need access to marketing project tasks. These options can be hidden from users groups. Displaying only the functionality users need prevents them from being overwhelmed and confused by too many irrelevant options. A CRM interface can extend beyond individual user personalization. It can be designed to dynamically adapt by role.

A CRM deployment shouldn't necessarily simply replicate current processes. The goal is to develop improved, more efficient processes. As a result of user input, a CRM system can be built with enhanced processes, refined approaches and richer information that entuses users, streamlines tasks, increases user productivity and ultimately improves ROI.

Improved processes fostered by CRM can even reduce employee churn and be used as a basis for attracting high calibre staff.

“Why do we need to change?”

Solution: Have a communications strategy in place

Sell the system internally

Change management is a big deal in any organisation. With change comes resistance. Many employees are set in their ways, comfortable with predictable routines and familiar tools. They see no need for change. Behind some mindsets are “we've always done it that way” while others fear change.

Your workforce builds an opinion about the system before they ever use it. Some organisations mistakenly assume a new CRM platform will sell itself once the solution is rolled out, their message being, “We've got this great new CRM platform that everyone is going to start using. You will love it.” Unfortunately, it's not that easy.

Lead by example

Successful CRM projects need visible buy-in from the top. Strong leaders will communicate the bigger picture, convey why change is needed and how it will positively impact the organisation as whole. Promote the CRM platform as an integral part of the company culture. Position it as an ongoing, value-driven process that is continually fine-tuned to benefit the entire organisation.

Threats to CRM Success



Forrester found the most significant barriers to be:

- **Slow user adoption: 49%**
- **Inadequate attention paid to change management and training: 36%**
- **Difficulties in aligning the organisational culture with new ways of working: 15%.**

- Source: Forrester

It requires a change in thinking and a change in behaviour. Leaders must be willing to lead by example to demonstrate how CRM helps every level of the organisation. A consistent positive attitude on the leader's part inspires others. It is imperative that leaders are early CRM adopters themselves. Buy-in occurs at the highest levels of the company and filters down through the ranks.

Keep users in the loop

Keep users informed as the system nears completion, continuing to communicate how CRM will directly impact them. Before launch, stress that ongoing support training is available to guide them. Explain that trainers will work with them until they feel comfortable on their own. Then, follow up systematically to ensure that the change is happening. After the CRM 'go live,' schedule post-implementation sessions with teams and individuals. Gather user feedback and use this as the basis to apply CRM tweaks and begin prioritizing new requirements.

"I don't have time to learn a new system."

Solution: Designate specific days and times for training

It is important that users' first experience be positive. If employees don't learn how to use the system, it sits, untouched. Employees fall back into their old ways of finding information in disparate systems and using manual processes.

Employees can't be given a one-hour course and expect to know how to use the CRM system. A leading package like Microsoft Dynamics CRM may be intuitive to any Office user, but don't assume training is not important. Dynamics has specific nuances and functions that require in-depth training, customised to the employee's role in the organisation.

Demonstrate the CRM system's importance by allocating time for training sessions. It is important that plenty of notice is given and individuals can focus purely on the training without interruptions. Employees shouldn't feel like training is delaying their work. Schedule training sessions for employees at all levels, and plan staff coverage when needed.

Have a partner that stands by you

Many consultancies will deploy a CRM system and leave you to your own devices, never to be seen or heard from again.

Project leaders need to think beyond and invest beyond the CRM system introduction training. Take into consideration on-going needs and training that supports users throughout the lifecycle of the CRM project. To accomplish this goal, choose a proactive partner who is available to support you at every step and who fully understands your business and user challenges.

Introduction training is key for basic familiarization of CRM menus, navigation and essential processes. After implementation, you can work with your consultancy partner to rollout further training that will develop users' skill beyond the basics.

More advanced CRM topics and role-specific training builds confidence and user competence, ensuring that their experience with CRM remains positive and keeps pace with their expectations.

Total number of sales organizations leveraging CRM increased to 83%

- Source: CSO Insights' Annual Sales Performance Optimization Study '14



Leave training and support to the experts

With a professional CRM consultancy firm that offers managed support services, your employees have access to the training and support they need, anytime they need it. The initial knowledge they gained should be topped up with regular sessions to introduce and master more CRM functions, or recap learning points, helping them to achieve incremental gains with each session.

Ensure courses can be delivered face-to-face or remotely and be scheduled as hourly or full day sessions. Employees can also get assistance via ongoing email, telephone and remote dial-in support. Managed support service enables your organisation to regularly book "bite-size sessions" with their regular consultant who knows their system.

A managed agreement includes training hours to ensure that users have the resources they need to get the most from CRM, acquire new skills and unleash the potential of their CRM package.

Because CRM training hours are included in each managed agreement, users can quickly schedule additional tuition and consultancy advice without needing to apply for additional budget or raise a new purchase order.

Technical support

When users have a problem, they want answers right away. Ensure CRM technical support is always available via multiple sources and channels. Make it easy for users to connect with the right person and the right knowledge at the right time to answer their service needs.

Running a help desk probably isn't your organisation's core competency, and your resources are best focused on revenue-generating tasks. An inclusive Managed CRM support service alleviates the burden of technical help from your business, while at the same ensuring your employees have all the assistance they need. A CRM consultancy partner who offers managed services will ensure your CRM system is running smoothly, minimize downtime, answer user questions and help you ensure CRM fulfills its potential.

Because managed support has a bank of consultancy hours, CRM administrators and authorised users can quickly allocate these resources to deal with changes that go beyond routine technical support. This time is already held in your account so it can be immediately allocated for your CRM partner to complete these tasks. There's no need to get approval or apply for more budget. This is an ideal solution to help organisations evolve their CRM package over time.



7 of the top 10 Fortune 500 companies use Microsoft Dynamics.

Dynamics CRM serves more than 4 million users and over 40,000 organisations.

Microsoft Dynamics CRM is deployed in over 80 countries.

- Source: Microsoft

Make sure your CRM solution is future-proof, scalable, agile and flexible enough to keep pace and adjust to changing needs.



“The requirement has changed. CRM is no longer meeting my needs.”

Solution: Review & implement change requests

As we've demonstrated, CRM projects don't end when a new system is first implemented. They evolve over time in response to changing business strategies, shifts in operations, new opportunities and user requirements.

The solution is to future-proof your investment. Your system should be scalable, agile and flexible enough to keep pace and adjust to meet changing needs. Even though an initially successful implementation of CRM can bring early payback the initiative can still fall short of expectations if the system doesn't adapt to change. Scalable CRM systems, like Microsoft Dynamics, can easily handle adding new functions, customising existing processes or integrating with other data sources, all of which leads to long-term ROI.

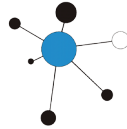
User adoption success

Using the afore-mentioned techniques will help you focus on lowering operational costs to ensure your CRM investment positively impacts your bottom line. These practises also greatly improve user adoption. Working with Preact, you can rest assured if we build it, they will use it.

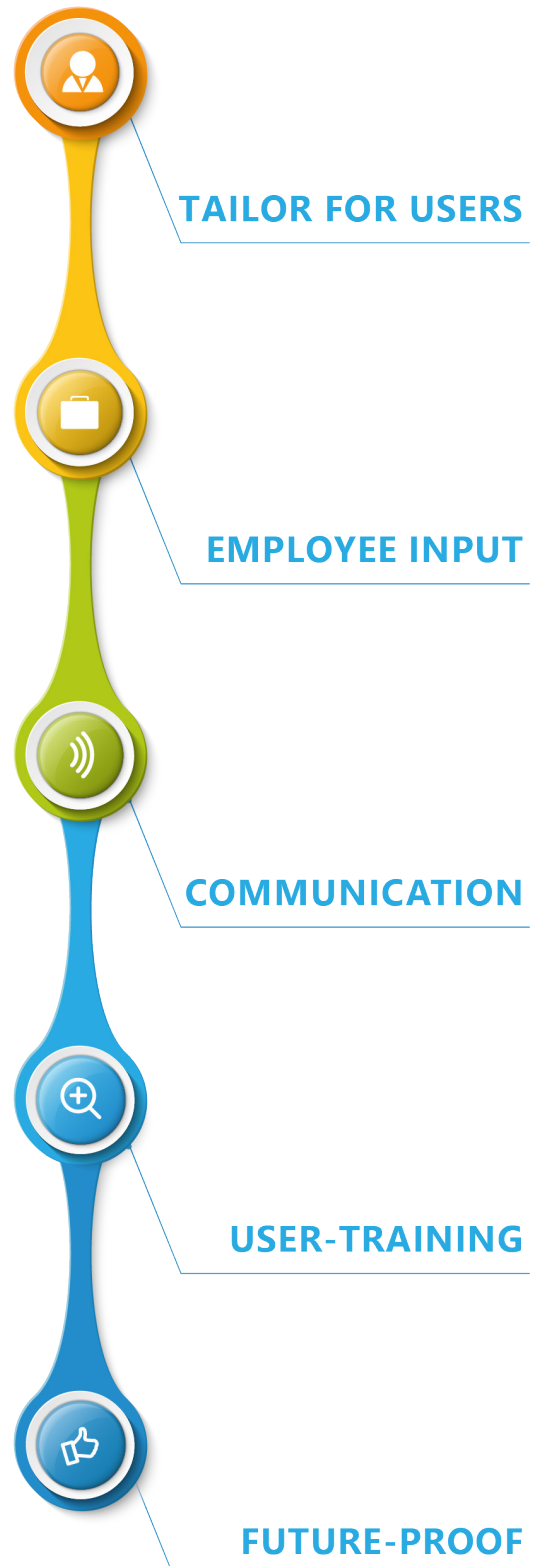
Don't settle for "good enough"

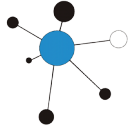
If you have an existing CRM system that isn't delivering the results you need, a professional consultancy firm can help you achieve much more. Whether your system was implemented by Preact, or another party, it is essential to have easily accessible, reliable and expert advice to ensure your CRM system runs smoothly. We can protect your investment by developing and enhancing your present platform. This can involve upgrading to a newer version to activate new features and customising the database so that teams can benefit from a wider breadth of CRM functions e.g. configuring automated processes and reporting across more business areas.

The right CRM system can deliver on goals such as: increased sales, better customer service and improved operating efficiency – but only if one key component is accomplished: user adoption.



5 Steps to Secure CRM User Adoption





Preact Connects Teams to a Single Unified CRM Solution



Sales

- Lead Management
- Opportunity Manager
- Pipeline Forecasting
- Sales Automation
- Quote Management
- Sales Goal Tracking



Marketing

- Campaign Management
- Email Marketing
- Lead Scoring
- Event Management
- Marketing ROI Analysis
- Contact Profiling



Service

- Case Management
- SLA Support
- Account Management
- Service Automation
- Customer Portals
- Contact Management

About Preact

Preact is a Dynamics CRM consultancy and a Microsoft Gold Certified Partner.

Our entire implementation, development and training team are certified technology specialists. Implementing CRM solutions since 1993, our team is one of the most experienced in the UK. Our aim is to help you achieve outstanding success from your CRM strategy.



Preact Microsoft Dynamics Expertise

Specialising in Microsoft Dynamics CRM platform deployment

No matter where you are in the project lifecycle – just starting or already have Microsoft Dynamics CRM in place and looking to get more out of it, we can help.

Getting great results is easy if you partner with Preact. We are with you every step of the way, from evaluating your needs to designing a custom tailored CRM system that matches your unique business processes.

Proven methodology

With our unique implementation methodology, during scoping we take the time to understand how your business operates and to provide a solution that best fits your needs. Preact understands the inter-workings of Microsoft Dynamics and its powerful capabilities. Therefore, we are able to configure and deploy a CRM system that has capabilities beyond your expectations...beyond what you knew was even possible. Your system is custom tailored to your business and designed to improve productivity and get the most from your investment.

Future proof your investment

Without adoption, what is built at the outset can quickly become obsolete. Preact helps you future-proof Dynamics CRM. Your system will be scalable, agile and flexible enough to keep pace and adjust to meet changing needs. Deployed in the cloud or installed on-premise, Microsoft Dynamics fits each unique business requirement and adapts as your people, priorities and infrastructures change.

User training

Our training is carried out by a Microsoft-certified expert who will introduce your entire team to Microsoft Dynamics and empower them to attain the skills, confidence and enthusiasm they need to use the system effectively to do their jobs better and be more productive. Our team of award-winning Microsoft certified Gold CRM Partners are experts in technology but they also know how to describe it to novices in ways that are easy to understand. No tech-speak.

We offer job role specific courses for salespeople, customer service representatives, the marketing team and other core functional teams who will use Dynamics as a key part of their job. But training doesn't end when the deployment begins. Our managed support offering gives employees access to the training and support they need, anytime they need it. They can top off their initial knowledge up with ongoing sessions to learn and master new CRM functions, or recap learning points.

Testimonials

"We have always been extremely satisfied with the work Preact carry out for Mencap. They provide excellent advice for our organisation's changing needs with a wide range of support, both technical & training, and they are always open to new ideas."
- Mencap

"Preact have consistently delivered a high level of customer care and attention to detail. I find their team to be professional, knowledgeable, credible and responsive. Their technical knowledge of the Microsoft Dynamics platform is second to none."
- Ramsac

"We've always found Preact most helpful and have really benefited from their CRM guidance and advice."
- John Lewis Partnership

"All the Preact team are very responsive and helpful whenever we need CRM advice and support."
- Mitsubishi Contract Motoring

Managed Services

Develop your Dynamics CRM database without incurring high upfront costs by choosing our premium managed support service.

Managed support from Preact is a fully bespoke agreement that adapts to your requirements and budget. Choose how many consultancy hours you need and allocate CRM tasks on-demand.

Phase your deployment, or simply take your database and CRM results to the next level by scheduling consultancy hours and complimentary training. You may decide to use your allotment for additional training, consultancy, development or technical support.

You always have the flexibility to consume hours how they will best serve their needs – and you have to option to increase the allotment of hours per month, or reduce based on your needs.

Achieve CRM success

Don't let poor CRM implementation hold your business back. Professional CRM implementation can take your business to the next level.

We offer expert help with all CRM related requirements including project scoping, database development, CRM integration, user training and technical support.



Breadth of CRM Solutions

Leading CRM applications like Microsoft Dynamics are highly scalable and there are numerous considerations that need to be taken into account when implementing a new system in order to secure user adoption. To demonstrate the scope of CRM we've illustrated a sample of these solutions below:

