CRM User Adoption

Consistency is Key

"Tell me and I forget, teach me and I may remember, involve me and I learn."

~ Benjamin Franklin

Keep it Top of Mind

Quick tips and tricks via newsletter or email. Some have just text with a screenshot, others might include a short video or attached instruction page

- How to move a contact record to a new company
- How to create a new opportunity
- Importance of entering an owner for a contact record
- Explanation of how data is used and why it's important to accurately enter data

Have CRM Champions

To have the most successful CRM you will need at least one champion in an influential role backing your efforts to move the initiatives forward.

- **Have them lead by example.** If they're using the system and sharing what great things they are able to accomplish with the CRM, their excitement will be contagious and encourage buy-in.
- **Be the voice of authority.** When they lead meetings, encourage them to only use the CRM and no longer use old systems or spreadsheets. If old systems and spreadsheets are not allowed, they will stop being used.
- **Be the voice of celebration.** When you hit a milestone include it in the newsletter or send a company-wide email. Ask them to author the article or send the email.
- **Be the voice of accountability.** If users are not entering information or keeping their data up to date or using rogue Excel spreadsheet ask your champion to remind them of the company's commitment to the CRM process.
- **Cut out the negative.** If you know or hear of users that are bad mouthing the system have the champion contact them and tell them to stop it.

Identify your Users

It is important to know who will be using the system and how. To have the best user adoption and utilization rate, you need to customize the user experience. This can be accomplished by:

- Limiting what they have access to and allow only what is necessary for their role
- Ensuring they have the proper access (read-only, write, delete)
- Their first landing-page needs to be tailored to make their experience the most effective
  - » Least amount of typing, clicking and searching
  - » Having a recently viewed widget so the records they frequent are a simple click away
- Targeted training per user group
- Have an on-boarding process for new users based on their role

CRM success is dependent on how well people use it.
Effective training leads to increased user adoption and contributes to success. So what do you need to have successful CRM training that translates into bankable results?

- Consistency! Having a standing monthly session over a brown-bag lunch or a standard time is important for continuity and for users to feel supported and confident.
- Clear Objectives. Before the session share your training objectives and gain shared commitment to follow through and achieve them.
- Custom and Specific. Training should be tailored to the audience whether it's based on their role or their skill level.
- Why? Users need to know not only how the software works but how it relates to operational goals and processes. Tell them "why," not just "how."
- Champions. Having your champions speak or present during training is powerful.
- Engaging. If you have the ability to have each person on a laptop or tablet to be in the system and following along the adoption rate will increase.
- Q&A and Informal Chats. It's not always easy learning new procedures and feeling comfortable with them, especially in a group. Make sure there are informal and private opportunities for engaging in discussion about training.
- Food! Having food helps attendance and engagement whether it's a brown bag lunch, snacks in the afternoon or liquid courage to attend. Some companies have CRM training over happy hour and have "Learning Libation Sessions".

5 Common Training Mistakes that Derail your CRM Success
According to Patrick Lewis with Edgewater Fullscope, the five most common training mistakes organizations make that keep them from becoming a high performing organization are:

- Little to no training. Often, organizations don't train at all, or very little, because they assume that the software's going to be easy enough that their people are just going to get it, and understand it. That's a mistake; that's not how it works.
- Go-live only training. Sometimes organizations train just at go-live. With training is going to be specific to the software, the same way that they might train Word or Access, and that's all the training that their users get.
- No training plan. Even if a business delivers some level of good training at go-live, they don't have a plan for how their users are going to get better over time.
- No training validation. Another big mistake that companies make, is not having a method for gauging whether the users are actually understanding CRM. They haven't rolled training out in a way that they can validate that the users actually understand.
- Training that is not role-specific. We commonly see that businesses don't provide training that is specific to the person, to what they actually do in the organization. They might provide training, but its generic - the same for everybody, which won't drive you to the "best performing" category.

See full article at *https://blog.fullscope.com/blog/avoid-crm-failure-training-plan*

Build and Nurture a Culture of Change
Building a culture of change does not start at the top of your organization but rather it starts with you! It requires you to slow down to go FAST. Slow down, make a commitment to the process and doing things the right way. Do the work to know your firm's why, how your firm will use the system, what benefits it will bring your firm specifically, identify your champions, department champions and users. Most importantly document everything!

Once you are prepared, bring your champions into the loop and encourage them to join you. Remember actions are contagious so is excitement!

Now that your plan is well document, put your marketing strategy to work and market your CRM. Create a campaign around the benefits of your CRM, why the change and adoption of the system is necessary and what the users will gain. The key to this piece is to communication. Since everything is well documented communicate it to others.

Spend Time Preparing for Your CRM
Set your CRM up to be successful by spending time positioning it's arrival, roll-out, implementation or re-implementation. Remember, at the end of the day, the main purpose of marketing and business development to win and keep clients. All our efforts with a CRM need to be in line with that purpose.

Winning and keeping clients is accomplished when we make what we do all about them — the pursuit effort is handled as a courtship, our submittals address their needs, fears and desires, we stay in contact throughout the project life-cycle, we celebrate the project completion and remain a trusted partner well after the project ends in the hopes they think of us and only our firm for their next project.

A successful CRM system comes along side this goal to assist and optimize your efforts.

Still Want More?
Check out what last year's CRM Mind Exchange discussed
https://www.ckearneyconsulting.com/ckc-stories/buildbusiness2017