

Try It, You'll Like It



Nailing end-user buy-in has been a long-standing challenge for organizations that decide to implement a CRM system. This white paper will provide an overview of some of the most common employee pitfalls encountered during a CRM implementation and will demonstrate how change management and a well-planned training program can ensure end-user compliance and software adoption.

Failed CRM implementations aren't new, and have bedeviled the industry for years. Incompatibilities between people, processes, and technology have always been and continue to remain a concern. Despite a decade of industry advice and best practices, C-level executives continue to run head-on into end-user rejection and failure.

It's a CRM all-time classic: A business decides to upgrade its CRM capabilities with a new application. It performs due diligence, finds the best system, and lays out the money for implementation and customization. Six months or a year later, however, some employees are still working on spreadsheets, paper, or by abacus. They won't use the new CRM suite.

Jeff Schumacher, a partner in McKinsey & Company's sales and marketing practice, warns that implementations "will continue to fail" if adoption and training is not addressed from the outset. And that failure to adopt can occur even when expense isn't much of an issue. Research firms such as Gartner and Forrester calculate that training costs roughly 20 percent of a company's total CRM budget, and between \$500 and \$1,000 per employee. Furthermore, any revenue savings from lack of training will be more than offset by the amount of time and energy management will exert when it's required to carry a "stick" to force acceptance as opposed to using a "carrot" to encourage it.

### **Pushmepullyou: Change Management**

So how can a manager encourage employees to use the new CRM tools? The key is change management, and one important technique, according to Schumacher, is to speak to the value the new system will provide. "End-users need to understand the system's value, because that's what drives change management," Schumacher says. "Simply put, people don't like change. If they

### **Tips and Pointers.**

- **Emulate best practices.**  
Nothing turns employees off like being forced to do their jobs differently for no obvious reason. Study your top sales and service people, then weave their best practices into your CRM system through customization and training so they can be emulated company-wide.
- **Train early, train often.**  
Give your employees as much time as possible to learn the new application. They don't like change any more than other people do, but the sooner you begin, the sooner they realize they're a part of the process and the quicker they will realize the benefits. Repeat and augment training as necessary to keep those skills fresh.
- **Get support from the top brass.**  
If management doesn't believe in the new system, why should the employees? Many times the difference between a successful CRM strategy and a huge waste of money is a leader who motivates the rest. Once they're hot on the idea, you need to keep them committed, so communicate with them regularly.

don't understand how it's going to make their life better, then they aren't going to care about it. When they understand its value, that's the best way to get pull among a group of users." Ease of use and the potential to make life easier is a winning combination, and establishes an atmosphere where success and inertia can be contagious.

In addition, management must consider the needs of its workforce and the elements it wants from the implementation. The people who use the tools are the ones who will determine their ultimate place in the organization. "Talk to your team to see what they want or need," says Andy Dreisch, vice president of support and training at SugarCRM®. "Give your people the right tool, or customize the system so it becomes the right tool."

The end result is a solution end-users are looking forward to, or curious at the very least, and management that's dangling a carrot as opposed to whip-lashing employees to use the software with a stick, a moral-busting and energy-draining experience for any manager, says Denis Pombriant, managing principal of CRM analyst firm Beagle Research. "There's only one thing people hate worse than change, and that's being forced to change," he says.

### Training Best Practices

If change management is the battle plan, training represents its exaction, and will make or break a CRM implementation. The problem with training is that most companies don't do it correctly, not enough, or worse, not at all. Financially, make sure to allocate anywhere between 15 to 25 percent your project's budget towards training to ensure that the CRM investment is not a waste.

Ideally, train the project team first on basic, out-of-the-box functionality. This assists with analyzing gap analysis, business requirements, and mapping business processes. Next, train administrators and trainers on the software, which serves to setting up the CRM solution for end-users. Finally, train end-users on the customized solution prior to rollout, allocating

enough time to allow management to receive end-user feedback that will guide any final customizations/changes to the solution.

In addition, remember it's important to establish relationships with end users from the very beginning, introducing them to the CRM solution to establish a firm foundation, and then looping them into the rollout process to display how the solution makes their jobs easier, all the while incorporating the aforementioned end-user feedback into the training and customization procedures.

Pilot programs are also a top recommendation of experienced implementers as well. The key, according to industry pundits, is not biting off more than you can chew. "Pick something you want to accomplish and go after it," Schumacher says. "Hit one or two of the major pain points, then move onto the next one." Proving the value of the new system also allows management to point to one group of users who have gotten measurable benefits from the new tools, making success contagious. It also leads to a more positive training environment and helps to create the aforementioned "pushmepullyou" effect.

Another benefit is the insight you gain from testing the system on a small subset of users. Rather than risking an all-or-nothing situation when you go live, you can leverage an environment where you can see what works and what doesn't, making adjustments as you go. The alternative to this "test tube" approach is a phased, or staggered rollout, which relies on introducing a few new functions company-wide, and add more once users have digested the first batch and achieved some level of comfort.

So, in summary, make training a first and foremost priority, keeping end-users top-of-mind. That way, their feedback can be looped into the rollout process and acceptance of the new solution assured, while management will maintain a clear vision of the project's progress and direction. The time and financial resources spent on training will only breed an atmosphere of acceptance, and ensure long-term success for the future.



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