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A Recommended Approach to CRM User Adoption

By Karen Schwartz

CRM Adoption Best Achieved with Positive and Personal Reinforcement

You've heard it many times: If you want to effect change in your organization, getting users on board is absolutely necessary to ensure success. Implementing *Customer Relationship Management software* is no different. Mitigating user adoption challenges during **CRM software implementations** should be part of the advanced planning performed by all project managers and steering committees. With changes to customer strategies, business processes and staff responsibilities, proactive change management can make the difference between CRM success and being lumped into the all too cited CRM failure pool.

Early and pervasive user acceptance is not only one of the biggest indicators of success, it is a mandatory precursor to success. If your sales people, marketers, customer service representatives and other users buy into your CRM software implementation, the initiative has a much better chance of succeeding.

But what does user adoption mean, exactly? Here's what it doesn't mean—it doesn't mean a grudging acceptance of inevitable change. Even though you might seemingly achieve your goal at first glance—after all, users are using the system, right?—if they aren't doing so enthusiastically, you'll fail, albeit more slowly than if they hadn't accepted it at all. Staff who are simply going through the motions without the motivation and intent to achieve key strategic benefits are simply passing time and delaying the CRM software benefits. Force just won't work for the long term and trying to make it work is like death by a thousand small cuts.

When it comes to CRM software implementations, most experts believe that motivation is a better method than the "do it or else" approach. That means doing whatever it takes to get users to WANT to use the CRM system. If motivation doesn't work, you can always play hardball, but there are many more positive ways to get what you want and disciplinary actions should be held in reserve until all other methods are exhausted.

First, get users involved at the very beginning of the CRM software implementation project. Involve stakeholders from every affected department and location from the start, listening to their feedback and incorporating their suggestions when appropriate. Educate and explain how the customer management system will be relevant to their day-to-day work life and at the same time empower the enterprise to better achieve its customer relationship management business strategy. Not only will this method help ensure that users' needs are being met, but it makes participants feel part of the process and positions them as champions within their departments as the project progresses.

Keep users informed as the system nears completion, explaining how their roles and work processes will change. Focus on the gains they will see, such as less time incurred for mundane tasks, timely access to better information, how better opportunity management can lead to improved sales win rates or how better forecasting will lead to larger commissions, etc. Many implementation veterans and CRM consultants articulate specific WIFFM (What's In It For Me) to each user role or user community. By aligning specific benefits such as task automation, access to information, and improved personal productivity (which leads to higher personal rewards), users are much more inclined to more quickly and enthusiastically embrace the system.

Once the system configuration is complete, don't shortchange the value of training. It's absolutely worth the time and money. Focus on the business processes users will handling instead of the technicalities of the system. Several shorter sessions tend to be more valuable than one long session. And tailor the training to the department, making it as hands-on as possible. This is no time for a one-size-fits-all approach.

Many seasoned consultants also suggest the notion that a "power user"—a tech savvy user who has traditionally been an early adopter and a team player—can help persuade others to follow suit. That makes a lot of sense; it's not always viable to have a team leader or trainer available every step of the way, and users are often more amenable to accepting advice or following the lead of a peer.

Even if you have followed these suggestions, you may still get push-back. Resist the urge, at least for a bit longer, to mandate change. Try stronger motivation, in the form of compensation. Compensation can be a huge motivator, whether in the form of bonuses, raises, promotions or even much smaller carrots, like free lunches or time off. Incremental incentives also can work, like rewarding employees who use a specific new feature the most during a given week, or to the sales rep who enters prospects in the new system the fastest. And even data entry personnel are fair game; a $100 bonus for the highest data quality in the division may be a good incentive for the staff person and is quite valuable to the CRM implementation effort.

If all else fails, mandate change. After all, you didn't move to a CRM software solution only to have stubborn

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> Early and frequent user participation during the implementation is key to subsequent user adoption. Keep users informed as the system evolves, explaining how their roles and work processes will change. Focus on the gains they will see, such as less time incurred for mundane tasks, timely access to better information or how better opportunity management can lead to improved sales win rates and larger commissions. Many seasoned CRM consultants articulate specific WIFFM (What's In It For Me) to each user role or user community. By aligning specific benefits such as task automation, access to information, and improved personal productivity (which leads to higher personal rewards), users are much more inclined to more quickly embrace the system.

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