SuperOffice

Get everyone on board with your CRM software

How to Get Your Organization to Fall in Love with Your CRM Software

Introduction

CRM (Customer Relationship Management) is a **philosophy and strategy** that centers around building better customer relationships. CRM software helps a business learn more about its customers' needs and behaviors in order to develop stronger relationships with them. After all, good customer relationships are at the heart of business success.

If customer relationships are the heart of business success, then CRM is the valve that pumps a company's life blood. It helps the business to connect people, processes, and technology to gain insight into the behavior and value of customers. This insight allows for streamlined sales and marketing processes, improved customer service, additional cross-sell and upsell opportunities, improved close rates and overall increased profitability. Sounds like a panacea, doesn't it?

On the surface, this seems like quite an easy sell to all the people inside your organization. "You guys use this great CRM software we bought and everything will get rosier. You'll experience increased work productivity and efficiency. The company will create better customer relationships. We all make more money." Unfortunately, it's not that easy.

Many companies are surprised by the slow or low rates of end-user adoption encountered after deploying a CRM solution. Many executives believe that it's the solution, itself, which will attract users to use it once the solution is rolled out and everyone gets training. But, CRM success inside a company is much more than just end-user training.

In this white paper, we will go through some of the known pitfalls that stand in the way of CRM success. We will also share some practical and useful stories from several customer who have created a CRM success story inside their company.

We hope that the information and inspiration in this paper will help you along the path to experiencing a successful adoption of your CRM system.

Why Do CRM Projects Fail?

One of the things you may hear about CRM projects is how often they fail. In a recent survey, US-based Merkle Group Inc.[1] estimated that 63% of projects in large organizations fail.

That is a very high number and certainly one that can make you consider if CRM can actually be the success you want it to be.

However, the same survey also showed that the organizations who had successfully implemented CRM also saw clear benefits and real business value.

So how do you make sure that you also get to reap the benefits and avoid project failure? Research has shown that there are a number of reasons for ill-fated CRM projects:

- **Lack of adoption among users** and few consequences for not using the CRM system once it was implemented
- **Lack of clear ownership** of project and customer insights
- **Lack of management bandwidth** and executive sponsorship
- **CRM not being an IT priority** compared to other areas

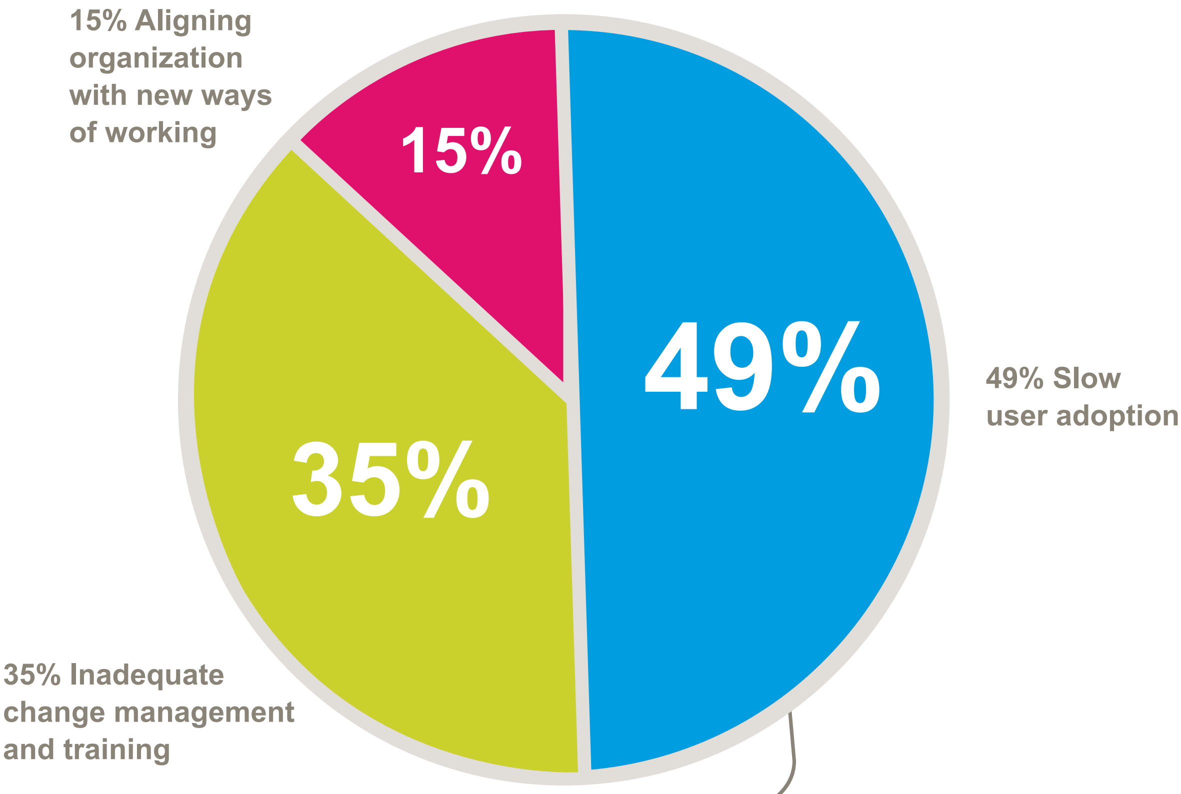
According to a large survey conducted by Forrester Research [2], "people" issues are the biggest challenge to a successful CRM implementation. These "people" issues fall into three distinct categories, where slow user adoption is by far the most distinct challenge.

See next page for chart.

1 Merkle Group Inc., July 2013. Survey among 352 senior-level, U.S.-based executives in $1+ billion organizations regarding their company's CRM initiatives

2 "How to Risk-Proof Your Culture for CRM", Forrester, 2009

"People issues" in relation to implementation of CRM



Let's face it. No one likes change. And, when you introduce a CRM system which keeps track of all information, people start to think that you're trying to keep tabs on them. It's human nature that makes end users resistant to change although a transition to a new CRM system can be a huge improvement in a work place.

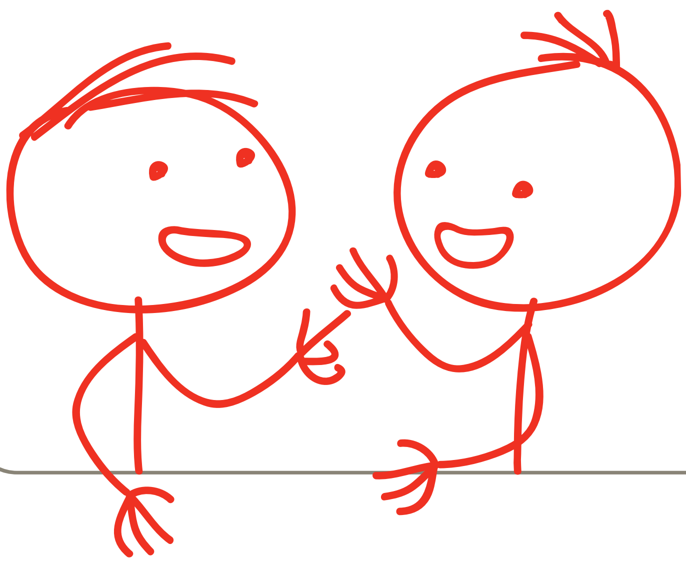
7 True Stories of Ensuring CRM Success

It's always interesting to do research for a white paper. But, what is even more interesting is to hear stories from the trenches – real stories from real customers. As part of the research for this paper, we asked some of our customers what they have done to make their CRM project successful.

The stories they came back way with give concrete ideas for how to:

- **Create executive buy**-in to ensure that all decisions are aligned and that the entire organization is involved
- **Demonstrate the ROI** of using CRM to secure the right funding for the project and to make the benefits tangible
- **"Sell" CRM internally** and displaying the benefits for the users to make sure that it is seen as a tool that can help them
- **Involve users** closely and make them a part of the project to be certain that the system gets the right features and fits their needs
- **Turn users into ambassadors** so that the new system will be well received throughout the organization
- **Launch the system** with a splash to be certain that and all users are aware and that they adapt to the new ways of working

Many of their stories speak directly to the research about why projects succeed, and we hope that the inspiration from our customers can be a useful tool for you to launch your own successful CRM initiative.



Customer Story #1

Make sure everybody understands the need

What do you do when you are in an established organization that could benefit tremendously from CRM – but where nobody knows it yet? At TNS NIPO in the Netherlands, Helena Klok found some answers

TNS NIPO is one of the biggest market research companies in the Netherlands with more than 200 employees. Their customers are both private and public organizations.

At TNS NIPO, there is not a separate sales organization as in many other companies. Instead sales is an integrated part of the work in the research teams. But until recently, there was not a systematic CRM practice in place. When Helena Klok joined as Marketing Director, it didn't take long to see that there was a need to do something.

The need for CRM

Helena explains that the mindset in an organization like TNS NIPO is very much on current projects with existing clients. That means that consultants work a lot with the customers of today, but there is less attention on bringing in the projects of tomorrow. "There is no sales culture", Helena says.

"When we analyzed the customers that had left us during the previous 12 months, we saw a pattern which we hadn't been aware of: While we were busy with the existing large customers, many of the new mid-sized customers had left us again, because we hadn't been paying enough attention to their needs. It was actually revenue lost due to poor handling of the relations with these customers".

We had to make it apparent to the consultants that we needed to work much more systematically on our customer relationships."

"One practical example of how we did this was to let the consultants register their customer contacts in a big Excel sheet. They were positive about the concept of registering contacts, but hated the Excel-sheet. They felt the need to register much more information about the customer contacts."

First impressions last

Because many of the users had no previous experience with CRM, Helena also knew that the roll-out of the system had to be thought through. She already started with the training as a way of selling the whole concept internally:

"I knew that it was important that their first experience was as positive as possible. And it is already during training that users build an opinion about the system. So I took time to plan it carefully", Helena says.

"I took the time to sit down and go through the training material and I even translated and rewrote it in Dutch. I also carried out the training sessions myself, making sure that everybody got a good introduction and a great first experience. All in all it took me 30-40 hours, but it was time extremely well spent – and I have met all the users of the system, which gives a tremendous overview."

Helena's tips for success

- **Make sure that you have established a clear need for CRM within the organization before you start**
- **Pay attention to training**
- **Involve management in a way that is visible to everybody**

TNS Nipo

Customer Story #2

Involve the users as early as possible

Find the right way to involve the users in the development phase. This piece of advice we hear from several of our customers. Here are some examples from three of our customers

Implementing CRM is always a change process – and users need to feel that they are involved and that the new system is helping them, not just the company. One of the ways to achieve this is to involve users very early in the design process of the new system.

Done in the right way, user involvement can help to build positive expectations and drive adoption once the system is rolled out. As these examples show, this is true whether you're an international corporation, a smaller local business or in the public sector.

Pilot development before full rollout
The City of Drammen Service Office reaches to some 65,000 citizens. When introducing CRM as a tool to keep track of questions and requests from citizens, they wanted to make sure that the employees were not "scared away":

"We chose an approach where we started with pilot roll-outs, making sure that everything worked in a small scale before we moved on to the full implementation. This, of course, took more time, but today we see that our employees actually see the value in using the system", he says.

Building the solution to simplify user tasks
Involving the users was also at the heart of an initiative in a company that needed to restart their CRM activities:

Leithe & Christiansen is a large electrical services company in Oslo, Norway. With thousands of customers and orders to keep track of every year, CRM has become crucial for the success of the company, but getting to that point has required some adjustments. Stig Hansen who is a Project Manager at Leithe & Christiansen says:

"So we decided to restart our CRM activities – both from a technology perspective and the way the users worked. We had a lot of focus on involving the users. We held workshops where the aim was to identify places where we could simplify their daily work. With their input, we really wanted to open a new world for them where all the extra possibilities in the system came into play".

Surveying users to understand needs
For Intelecom, a provider of software and communication solutions for call centers, the issues around user adoption were also quite clear:

"We are almost 250 people in four countries and we have had CRM for many years, but we were not using it enough. So we conducted an internal user survey to understand what the users really wanted and used that as a starting point for the whole project", Petter Dahl who is a Manager in Intelecom explains.

Tips for success with user adoption

- **Consider making a pilot roll-out before the full scale launch. This way you get valuable knowledge about user preferences and concerns**
- **Involve users in workshops and interviews to find ways that CRM can simplify their current work day**
- **Survey users as part of the initial needs assessment to make sure you cover their concerns and involve them in a valuable way**

Intelecom

ELEKTROENTREPRENØR Leithe & Christiansen a.s

Treat your internal users as customers

How to keep users informed to ensure that the roll-out of a new CRM system becomes smooth and easy

Koninklijke Saan is a logistics service company in the Netherlands that offers services including crane hire, industrial relocations and removals.

The company had been working with CRM for some time and had more than 30,000 contacts in their existing system, but the time had come to replace it with a new system that would scale better for the future.

At the time, Edwin Saan was Director of IT in Koninklijke Saan, and he knew that it was crucial for the success of the project to keep the future users in the loop throughout the process. “Keeping the users informed is important to ensure that the system is well received in the organization”, Edwin says.

Keeping the users constantly updated

The project team did a number of things to ensure that users were constantly taken by the hand. First and foremost, they developed an internal newsletter format:

“We wanted to have an internal newsletter that we used to support the implementation. We thought of it as an ongoing story that would gradually get the users on board”, Edwin explains.

“The first newsletter was pretty much setting the scene, explaining the background, explaining the concept behind the new CRM and making it clear what we wanted to achieve. The following newsletters would then go into detail with various topics that described the system and the process of implementing it”.

The newsletter made sure that all users were on the same page – and that they were ready for the roll-out. And the team supported this even further with the training and the launch activities:

“We planned the training so it was as close to launch as possible. Users got to understand how the system worked and were ready to start working from Day 1. And on launch day we made sure that everyone from the implementation team was present, going around and talking to the users and answering questions”, Edwin explains.

Edwin’s tips for success

- **Plan the internal communication well and keep the users in the loop throughout the process**
- **Build your communication around the purpose and the vision for the system – and gradually add information**

Customer Story #4

Make CRM as simple as possible

As a startup, you have the luxury of establishing CRM from the ground up. But how do you make sure that everyone in the organization works in the same way – and that customers experience it as positive? In Norway, a telecom company came up with a model for that

Named after the Norwegian national bird, Dipper is a new player in the Norwegian telecom market. The company focuses solely on servicing small and medium-sized businesses and seeks to be a new and fresh alternative to the traditional players.

When Dipper's managing director, Cecilie Vanem, started the company in early 2013, she had a clear vision that she wanted to create a company that was truly customer centric. A company where the customer experience would be so great, that customers would recommend Dipper to other customers.

Making CRM simple

"First of all, I wanted us to work with CRM in a way that was crystal clear and actionable for the sales force. Often sales people can have a hard time letting go of leads, eventually spending too much time with existing leads instead of identifying new opportunities", Cecilie explains.

"Secondly, I wanted customers to experience that it was easy and fun to build a relation with us. We really want to be the telecom that customers recommend."

In telecom, customers are often locked in by long contracts and break-clause fees. Dipper offers full freedom from all of this – but customers will often have to wait to be released from their previous contract before they can sign on.

For this purpose Dipper has built a playful concept they've dubbed the "The Egg Incubator". The incubator is a database for future customers that are willing to shift to Dipper at specific date. When talking to customers, sales reps will actually ask customers if they want to be put in the incubator, making the CRM practice into something tangible and fun. And which of course also makes it easy to process and forecast future sales.

Another opportunity for potential customers is to become "flirts". This database is for those that are not yet ready to make the shift to Dipper, but who might be ready to receive news and offers. So if potential customers decline to be put in the incubator, they are asked: "But is it OK that we flirt?" Most leads find it hard to decline…

Cecilie's tips for success

- **Develop a clear and simple model of which type of customers you have and use the model to guide your CRM activities – both for employees and customers**
- **Use CRM to make sales cycles short and clear so that it helps the entire organization to prioritize what they are doing**

dipper

Launch with a splash to change old habits

A Danish wholesaler of auto parts wanted to make sure that the employees understood that CRM is not only about a system – it's also about working in new ways. So they came up with a way to communicate that in a very clear way

Au2parts is one of the leading suppliers of auto parts in Denmark. As a wholesaler their customer base is more than 4,000 auto repair shops that are visited by Au2part's sales staff.

Over the years the company had experienced that sales people had developed their own individual tools for managing their customer portfolio, and there was a strong need for a common and more standardized way of working.

With a new CRM, Au2part wanted to introduce a new way of structuring the way customer visits were planned and carried out. The goal was to ensure that sales reps in fact visited the right customers at the right time – and that they were able to provide much better service to customers.

Making the change: "We fired all of the sales people"
When IT manager Asger Poulsen was put in charge of the project, he had no doubt that it would be a barrier to make everybody use the system from the beginning: "We knew that it would be difficult. Not everybody wanted to use the system. Or maybe they would forget to use it. We had to make it clear to them that this was a new way of working."

"When we held the kick-off event for the new CRM system, we came with a clear message: As and from today, you old jobs as sales representatives no longer exist. You are now the customer managers of this organization. Your task is not to sell – your task is now to serve our customers in a way that makes them really want to do business with us."

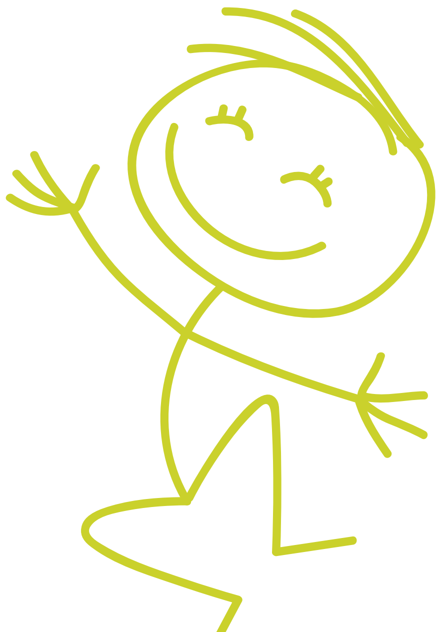
"Of course we didn't formally fire and re-hire people, but we tried to really make the point that this was a new position with new responsibilities", Asger explains.

The reaction was quite positive. For many this was actually seen as a step up from being just a sales guy. Almost like a promotion. And the sense was that now we were really changing our approach.

"When you do a change like this it's important to signal that this is something you do to give better tools to every individual in the company – not a way to give managers better tools to monitor their employees. And I think we were able to make that clear to everybody."

Asger's tips for success

- **Make a big splash when rolling out CRM to ensure that everyone starts working in new ways**
- **Communicate clearly that this is a practical tool to help employees**
- **Follow up systematically to ensure that the change is happening**



au2parts

Customer Story #6

Make CRM indispensable

You will often hear that CRM needs top management support to become a success. Here is a perspective from one of our customers that is living up to that promise

Howeni Eurosafe is a Danish supplier of security equipment. The company has existed for more than 50 years and is now expanding internationally. The company's managing director, Steen Brahe Bonke, is a good example of what it means to have management support behind your CRM initiative.

He sincerely believes that CRM is a must-have – and that users are obliged to use it. Where many organizations may tend to think of ways to convince their users of the benefits, Steen is more direct:

"You have to make it a rule. Employees HAVE to use the system. I would almost say that it's a breach of contract if my employees don't use the tools that we provide", he says.

It may sound harsh, but in many ways, it is actually a given for employees because at Howeni Eurosafe they have worked hard to make CRM completely indispensable:

"It's quite simple: We only use one system. There's only one calendar and only one place to keep log of your activities. You can't sell anything or create a delivery without the order being in the system. We even use it for error handling and quality assurance. In this way, the CRM is 100% business critical to us. And we have accepted that and based the development as a company on it", Steen says.

"When you work this way it becomes quite motivating for employees", he adds with a smile.

Listening to the users' needs

Of course, you also have to listen to what the users want and to find way to make it a tool for them – not just the company, Steen emphasizes:

"It shouldn't be a system just for the sake of the system. If you are able to make to have the system support exactly the functions that the users need in their daily work – in a fun and intuitive way – there is no doubt that you will increase productivity", he says.

Steen's tips for success

- **Make it obligatory to use the CRM**
- **Listen to the users' needs and simplify the functions that really matter to them**
- **Make education and training a management responsibility**

HOWENI EUROSAFE

Customer Story #7

Don’t fight too hard to convince all users

In the struggle to get all users on board, you may find that you are struggling too hard. Accept that there are a few users that you won’t win over and focus your attention on the rest, says one of our customers in Sweden

Saint-Gobain Ecophon is a world-leading provider of sound absorbing solutions. With 750 employees throughout the world and almost 200,000 contacts in database, CRM is at the core of the organization.

To begin with, Saint-Gobain Ecophon had introduced CRM on a country-by-country basis, allowing for independent systems in each country. This meant that each market had a solution that worked for them, but it also meant serious drawbacks: The solution was growing to become too complex in many places, and it was not possible to create a best practice across markets.

“We decided to merge all the local solutions into a singular solution”, says CRM application leader Richard Kerry. “Our goal was to make the complex solutions more simplified.”

“This was a big change management operation and you need this to be led from the very top of the organization. In our case, the push for simplification came from our CFO and CIO – and it required commitment from the general managers in all the markets.”

“Our focus was really to keep it simple. Before, setting up a project could mean filling out 40 fields – this is now down to 10. This also means that people now use the system more. So it’s actually the less you ask for, the more you get.”

Accept the exceptions

Though the roll-out has been a success, Richard makes a point about not getting too caught up trying to make everybody use the CRM: “In theory, you want everybody to use the CRM, but you need to have some level of acceptance. You shouldn’t get too hung up about the 1 percent of users that you can’t win over. For instance, we have one guy in one of our markets that is close to being retired. He doesn’t like to use the computer and therefore he doesn’t use the CRM
– but he is probably still one of our best sales reps.”

Luckily, most of the employees can’t work without the CRM now. It has been a priority to support people on the road can work seamlessly with those in the back office. Together with a strong focus on training, this has meant that the users are generally all using the system.

Richard’s tips for success

- **Aim to bring all users to the platform, but don’t get so obsessed about it that you end up alienating the users**
- **When working across geographies, adapt the things that are important (for instance languages), but go for a model where everybody works in the same setup**

Ecophon® SAINT-GOBAIN

6 Tips to Boosting CRM End-User Adoption

We have found that the best way for organizations to “boost” and then “sustain” high CRM user adoption is to develop and implement a comprehensive user adoption strategy. Many CRM failures occur when organizations only focus on the “on-time” and “on-budget” delivery of the technology, but neglect the necessary actions to drive and maintain user adoption over the life of the system.

It is important to recognize that user adoption is all about changing user behaviors, it is not about technology. The skills and methods you use to change behavior are very different than those required to build and deliver effective CRM systems. This means that the people who lead and manage your CRM system implementation may not be (and probably are not) the right people to lead the user adoption program.

Here are some (though not all) key elements of a CRM user adoption program:

1. Involve users from the start

As we mentioned above, people resist change. It is a common instinct in the human nature. Reasons can be fear of the unknown, of more work, of unwanted changes in daily tasks. If you can make the unknown known, then it takes out all the uncertainty. So, involve the end-users who will use the system. Clearly demonstrate to those involved how the new system will benefit them. Ask for user feedback. Be sure to listen to the feedback, and incorporate suggestions when appropriate.

Remember, you purchased the CRM for the users, and therefore it’s important to consider their opinions. By doing all of this, you can reduce uncertainty, clarify misunderstandings and promote support for the decisions made.

2. Choose a CRM ambassador

Appoint a person in your company who is an ambassador for CRM. This person can be responsible for creating routines and guidelines, ensure data quality, and follow up users if they have questions or are doing something wrong. When needed this person can facilitate a work group to come up with best practices, and document the results. This person needs to be an expert in the system, and have a certain authority in the company to be able to carry out the CRM initiative. The CRM administrator is a good choice for this role.

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3. Create a routine guide

A CRM routine guide outlines what kind of information the users should capture in the CRM system, how, and who is responsible. It also reinforces the actions and behavior you want your end-users to take in order to achieve business goals.

Be sure to update this routine guide continuously to reflect changes, either in the CRM due to upgrades, or new routines you have decided on. The guide should also be easily accessible for the users. A few good places to keep it could be on your intranet, in a central project in your CRM, or in a shared drive.

4. Make sure the system is easy to use

The CRM should make life easier for the users, not harder. Therefore, the CRM administrator in your company should tailor the solution to reflect the way your users work and not the other way around.

Users hate interfaces cluttered with irrelevant information, so leave only those choices your team will need today. You can add more later, if needed.

5. Train your employees

Set aside time for training your employees. You might even want to create specific training for the various business processes. For example, a marketing professional should learn how to register and follow up leads, whereas a sales person needs to know how to create a sale and follow a set sales process.

Administrators should be able to answer user questions, and should receive training that is more extensive. Administrators should also learn to configure the solution and other administrator-related tasks.

Keep in mind that a CRM system holds many features, and learning them all in one go can be hard. Therefore, an on-going process with more frequent and shorter sessions is better than one long training session. Offer repeated training as time passes; when the basics are in place and well known, move on to more advanced features and processes.

6. Reward users

Review how your employees have used the CRM system and think about rewarding those who use it well. The reward system is a great way to get everyone moving in the same direction.

For example, you could look at how many outbound calls a person has registered in the system, how many leads he or she has converted into a sale, and how accurate their data entry is. Then you could reward the best ones, and make known to others what they did to achieve this reward.

Conclusion

Implementing an effective CRM adoption program is not easy and it does take time and resources. But, with a commonly reported CRM failure rate near 63%, it is clear that organizations need to take action to protect their CRM investments. By following some of the tried and true best practices above, we are sure that you will come far.