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Insider Tips to Boost CRM Adoption

Customer relationship management (CRM) software can dramatically enhance the selling process — helping organizations win profitable customers and better serve existing customers by:

- Connecting salespeople to prospects.
- Organizing information.
- Managing post-sales tasks and projects.

In particular, architecture, engineering and construction (AEC) firms — which heavily rely on relationships to win projects — can benefit from a CRM. Features designed to store key relationship data and leverage past project experience give firms the opportunity to develop marketing and business development processes that increase revenue.

But like any amazing, earth-shattering technology, it is only as good as the people who use it.

Your business, team or organization can have the best CRM software on the block — with all the bells and whistles — but unless they buy in and actually use it, it won't do you any good.

To help you develop a successful adoption plan, we compiled advice from three CRM implementation specialists. Below are their thoughts on what makes implementation successful.

Technology: The great internal divide

Technology has reached a point at which we take it on faith that a new tool will always improve efficiency and simply employing the technology should produce new business. This might have been true when CRM first hit the scene, but as the system has evolved, so should the way you introduce it.

Each employee must receive the tools and training they need to generate greater efficiency through proper introduction of CRM technology and implementation of the platform. Continued advancements in technology — CRM included — often create skills gaps, and the AEC industry is not immune to those gaps. Addressing technological disparities at your firm is key to effectively implement a new CRM solution.

Addressing barriers and finding motivators: Keys to any successful adoption

Monica Moore, Implementation Specialist at Cosential, bases her adoption strategy on the Technology Acceptance Model — a well-researched theory on how and why users accept new technology.

The Technology Acceptance Model suggests that when presenting users with new technology, a number of factors determine their decision about whether they will use it, and if they will, how and when. It is imperative to first understand the barriers that prevent adoption, before trying to address the motivators to take it on. The barriers are based in addressing two areas of importance:

1. The system's usability.
2. Perception of its usefulness.

The system's usability is contingent upon its ease of integration with current internal systems (i.e. whether the data is clean) and a straightforward, strategic system setup. When training new users on the new system, it is imperative to not phrase the training process as a required event, but rather just highlight why this system will improve their day-to-day and encourage wider career development. This, in return, will mold how users perceive its usefulness.

After addressing the barriers to adoption, the users will have an intent to use and you can employ motivators. Motivators are action items that encourage users to factor the CRM system into their daily work schedules and routines.

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Examples include:
- Leadership recognition of system use.
- Setting reminders/alerts in the system.
- Building the system into your business processes.

Moore believes that by first understanding the audience's level of technology acceptance, you can figure out how open or resistant the group is to this kind of change. This will grant insight on the proper direction to take throughout the entire adoption process — and the best ways to encourage that adoption along the way.

There is no "I" in CRM — increasing adoption as a team

Involve and they will evolve on adoption

Engaging all key users, in some capacity, from the start is the initial component necessary to get everyone using the new CRM. Look at it as sort of an internal grassroots campaign. Identify those who lead the departments in each area of the business, and invite them to be a part of the process from the get-go — allow them to evaluate the system before it is even introduced to the group as a whole, so key stakeholders from every department have a voice driving initial investment and future adoption.

People don't deal well with surprises within an organization and appreciate clear communication and transparency. By getting them involved at the onset, they will be aware of the imminent changes coming down the pipeline, and they can ask the proper questions and inform and prepare their teams in advance.

Through this plan of open engagement and involvement, you will build a solid team of adoption drivers. This will grant them a firsthand look at how it impacts their business unit directly and can address issues before they can become a larger department problem. Each business unit has its own set of barriers and motivators in regard to adoption, so it is helpful if you can understand those right out of the gate.

Establishing a system administrator: The advocate of adoption

Once you have identified the key department players, it is time to find a leader of this pack, or at least a clear owner of this project. This process calls for identifying and establishing a system administrator. This individual should be a cheerleader type — one that is all in on CRM and has a good reputation within the firm. They will be the face of getting the system up and running — from initial set-up to training all users. They pass on the keys of the CRM kingdom within the organization, grant permissions and make necessary modifications.

When identifying the administrator, it is imperative to keep a few things in mind. Aside from being pro-CRM, they must also be a well-rounded representative of the business. They will need to know all the different aspects of the operation so they can understand the CRM needs of

each department. Without the proper background business knowledge, it will be difficult to see how each part impacts the business in its entirety. Finally, they need a basic understanding of technology — particularly business systems and databases.

One part of the process in particular where this would come into play would be when establishing integrations. Integrations are responsible for transferring data between existing solutions — including enterprise resource planning (ERP), accounting and project management systems — and the new CRM. If your system administrator does not have a working knowledge or working relationship with the finance team, it can be difficult to get that part of the process implemented and appropriately adopted. In short, the administrator has the ability to break down each business unit and simplify how it plays into the whole.

Integrate and communicate adoption at every level

While the system administrator and initial engagement team is put into place to direct the implementation and adoption process, every good adoption campaign must also ensure communication happens at every turn. The administrator might be the project owner, but every good owner also needs a spokesperson — or spokespeople — if you will. System administrators more than likely aren't the direct leaders within the organization, so they can need a little encouragement and additional motivation coming from the top.

When it comes to encouraging CRM adoption, you can never communicate too much. Without taking away from their day-to-day duties, encourage company leadership to promote and discuss the why of this process. From operations and staff meetings to company newsletter announcements, create bullet points that promote the system benefits to generate early engagement and initial interest. Employees love things that can make their life easier — so urge leadership to communicate these points early and often to eliminate the element of surprise.

Training: The ultimate adoption investment

Aside from leadership investment, training is essentially the most important part of increasing CRM adoption within an organization. As stated previously, the technology is only as good as the people who use it. Training them properly and painlessly is a must.

While this is the most important investment of the process, expect pushback. The reality of the situation is that people are busy, and asking them to take time out of their already busy workloads will be quite the uphill climb. With that being said, it is necessary the system administrator understands they cannot take a one-size-fits-all approach to training. It is imperative to meet the employees where they are and customize the training to fit their specific needs.

Stephanie Fortner, Implementation Specialist at Cosential, thinks the best approach involves integrating the training into what they already do. Whether that means providing periodic lunches with a side of learning or short half-hour sessions within meetings, you bring the training to them — without burning them out in large chunks of time that take away from doing their other job duties. The key to any successful training program involves consistency without information overload.

The training should not only provide an overview of what they will need to know, but also offer plenty of time for hands-on interaction. Allowing them to familiarize themselves with the CRM's various functionalities and see firsthand what capabilities it provides will help them understand the long-term value.

Reward positive user behaviors

The adoption process does not end once the training is complete. In many ways, it's just the beginning. While users might have all the tools to start using the new CRM, you need a strategy to keep them engaged. Chaz Ross-Munro, Implementation Specialist at Cosential, believes in the power of positive reinforcement.

Encouraging any positive action often requires a little upfront incentive, so don't be afraid to reward those who are pioneering this process. You could reward those who do a particular activity within the CRM or even recognize those at your staff meetings that have done a great job in entering records for the week. When staff members see others practicing good user behavior, they will naturally follow along.

If it's not in the CRM, it didn't happen

Just like it's important to reward good behavior, you also have to integrate ways to discourage the bad.

Ross-Munro encourages a carrot-and-stick approach to encourage continual adoption. Don't acknowledge leads or opportunities that don't appear in the system. Have senior management exclude talk of any sales leads or opportunities unless they can be found in the CRM.

The intent of this practice is to drive employees to use the CRM as their starting point rather than trying to play catch-up and neglecting to use the system altogether.

Visualize, report and repeat

As users begin to adopt and understand how the CRM fits into the bigger picture, be sure to continually track the progress. Users need to know what kind of impact they are having as they use the system, and you need to identify any remaining pain points. Once training is complete, two key components can help identify what is being done well and what struggles persist in the adoption process:

1. The dashboard.
2. Maintenance reports.

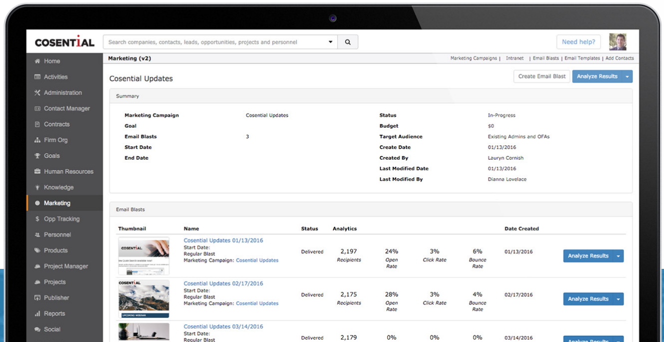
The CRM dashboard is a great widget to call attention to key insights and make them available to all users once they are familiar with the system. The dashboard provides real-time business event snapshots, from which users can measure and develop analytics for business reporting. This can give a quick overview of company- or department-wide progress and allow users to view data in a variety of ways. The more they can visualize how this will make their work life easier, the more inclined they will be to adopt.

Building maintenance reports into the adoption process is a great way to understand how users are interacting with the system and ensure they're including all necessary information with each entry. Implementation specialists encourage introducing reporting early on to quickly establish a consensus on what information is necessary and what is not. The goal of this practice is to only spend time on what is necessary for that particular business operation.

With the appropriate visuals and weekly report reviews, the system administrator and department leaders can track what each user is currently working on and follow up with users who are slower to adopt. This offers not only accountability on an individual basis, but incites all users to approach this effort as a team.

Rome wasn't built in a day — your CRM won't be, either … but that's OK

There's no question implementing an effective CRM adoption program isn't easy. It takes time and resources. Resistance will come in a variety of forms at several levels of the organization, but with proper planning and execution, you could build some of the system's biggest cheerleaders to date.



The overall goal of the adoption process should be about building an infrastructure of training and reinforcement, from top to bottom, from before you select a product to long after you sign the contract. Yes, the system you buy makes a difference, but the success or failure of a CRM adoption depends, more than anything, on the workplace culture that surrounds it.

Learn how Cosential works with firms to create an implementation plan that drives adoption.

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