

## CRM Initiative White Paper

### Topic: Getting your Sales Team on board with CRM

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#### Introduction

Usually the biggest concern among management teams attempting to rollout a new CRM (Customer Relationship Management) system to their employees is how to “get” them to use it. In even a perfect world, this task can be not only overwhelming but unless it’s planned out and well orchestrated, the unsuspecting Sales Manager will fail miserably in getting their sales team on board with their newly selected CRM system.

#### From the Top

Most senior managers have very busy schedules. Often the mentality is “I’m too busy to be involved in this project.” This is usually one of the top reasons for CRM failure. Why? Simple. If upper management isn’t concerned with this project, nor will the sales team. That is not to say that senior management needs to be involved with every detail; it means that the sales team **MUST** have the impression that this project is extremely important to upper management and is critical to the success of the business.

#### The Assumptions

I’ve spoken with many managers and senior executives about kicking off their CRM project. Most, if not all, assume that their people will use the new system “because we say so”. While this is good theory from a hierarchical standpoint, this mentality is not only unrealistic but a recipe for disaster. We’ve found that most sales people are very independent-minded, free-spirited and a little egotistical (that’s why they’re in sales). Attempting to force them to use a new system simply will not work.

#### The Customer

First things first. The actual “customer” in this project is going to be your sales team. The logic is simple. If your customers don’t like your product, they won’t use it. If they don’t use it, you won’t get all that data you’re hoping to use in the new system. Of course the major difference between an actual customer and your sales team is that you don’t pay your customers to use your product! More about incentive plans later.

#### The Sales Pitch

You heard right. In order to roll out a successful system, you’ll need to get your sales hat on because you’re going to have to sell this change to your own sales staff (the customer). Most employees (and most people for that matter) will be resistant to change unless they see a **value** and/or personal benefit in making a change. It’s this value that will be the major focus of the CRM system rollout. The value will come in many forms (increased sales, less weekend work, more sales time, less communication breakdown with other employees and customers, faster access to important information, etc). The bottom line is that if your sales team is sold on the system and the expected benefits, they will start using it and you’re on your way to an incredibly successful rollout.

## The Announcement

This is the first and most critical step in assuring that you'll have a successful rollout. The "CRM Initiative" must be **in writing** and must be **formally** introduced to the team. All too often, a common mission statement and objective is not defined and so no one has a clear idea of just what changes are coming and why they're important. Here's a sample CRM Initiative statement:

### ***Our need for a State of the Art CRM System***

*There are now more demands on our sales department than ever before, not only to win more business, but also to win the right business from the right customers. In addition to these responsibilities, our sales department needs to work with the rest of the organization to ensure the customer experience is consistent and service standards are met and exceeded wherever possible. To achieve these targets Sales can no longer act as a separate unit to the rest of the business, nor approach the marketplace without a structured well thought through process.*

*We have been searching for a best of breed product to unite our disparate leads generation and sales cycle/forecasting systems. We have found a new system, which will meet our immediate and long-term needs. Our goal is to roll out this new system by January 1, 2001. We will be soliciting feedback from everyone as the system is designed and implemented.*

*John Smith, Chairman and CEO*

## Getting the Team involved

In order to get acceptance from the sales team (customer), it helps to make sure that they are a part of the final system design. Take two people from your sales team and put them on the project team. One person should be your top sales producer and the second should be your most computer experienced sales person. Get these two on board and you have your CRM cheerleaders.

## The initial Rollout – KISS

You've heard it a million times – Keep it Simple Stupid. This could not be more appropriate for the initial rollout of a new CRM system. If the initial rollout fails because it's too complicated or if the team doesn't "get it" it will fail. What we're looking for in Phase I is called "the quick victory". In other words, we want to be able to make a statement at the end of Phase I that the system is up and running AND it's being used. We will then be able to cross the chasm to the next phase and build on the initial system. So make your priority lists and then decide in which phase each element would be appropriate to introduce and when. This will accomplish two things. First, you'll accelerate your rollout timeline (CRMnow!). Second, your sales team will be able to learn and digest the changes more easily. Be sure to continue soliciting feedback for future enhancements and additions.

## The Daily Groove

First and foremost, make sure you've lined out a daily groove for how your salespeople will interact with the new system. Your initial phase might include usage of the system to track contact with customers and prospects, appointments, call history and lead tracking. Line out exactly what they'll be doing step by step in order to accomplish Phase I objectives. Phase II may include opportunity management, sales process, selling methodology and pipeline forecasting. You may find that rolling out a new CRM system will force you to identify and actually formalize your sales process for the first time! This can be a huge benefit for not only current salespeople but new trainees as well.

## Training, Training and more Training

Training is normally the single most overlooked requirement in CRM system deployments. Why is training so important? You must keep in mind that, most salespeople are working outside the corporate environment. Most are either on the road, working out of hotel rooms or working from home offices. Salespeople have a tendency of feeling left out and isolated from an IT viewpoint. There is a truly disconnected world. It is this factor which makes formal training not only necessary but critical to the success of the system rollout. . To make it easy, we recommend the following phased training approach:

**Initial Training** - On-line, self paced training through the web. On-line training enables the salesperson to learn at their own convenience and will let management know who's been through the training and how well they understand the content via on-line testing.

**Classroom Training** - We know first hand how difficult it can be to bring together your entire sales staff at one time. This can usually be accomplished by coordinating CRM training with a national sales meeting. Caution: Be sure to allow at least 1-2 days for classroom CRM training and do not allow other agenda items to infringe on this time. Remember, your CRM system is not just another software package to learn, it is the absolute foundation and infrastructure for which everyone's performance will be measured (salespeople by sales management, sales management by senior management, senior management by investors).

**Follow-up Web Training** - Schedule monthly follow-up "webinars" which will provide continuity from the previous training sessions and give your sales team a chance to interact and ask follow-up questions.

## User Types

So you've rolled out the new CRM system (it's really easy to use and provides instant productivity gains and benefits). However, as previously discussed, the change will probably not happen overnight. In order to accelerate the acceptance, it's a great idea to provide incentives. Not everyone will need an incentive. In fact, before we go further let's examine the four types of users you'll most likely find in your new system rollout:

**Type 1: The techno geek** – This user will lead the way. He or she is considered an early adopter of technology and new systems and embraces innovative changes in the interest of possibly improving their efficiencies and productivity. No incentive needed here.

**Type 2: Steady as she goes** – This user is neutral and/or indifferent. He or she has been using some type of system for years and may even be very comfortable. This is the type of user who is more likely to adapt to the new system with the right type of incentive.

**Type 3: The Superstar or "Lone Wolf"** – Be ready for battle. This user may be one of your top producers and is in no need of any new "CRM system or whatever you call it" to make their quota. This user will also need an additional incentive.

**Type 4: The Saboteur** – While they don't always exist in every rollout, be sure to identify this user early on. This user is a renegade, is very fearful of "big brother" and normally treats all company data as if they own it. They will fight any new system, which requires them to become part of the mainstream and share their information. No incentive plan or "sales pitch" is going to convince them to get on board. Unless they're a top producer, the incentive plan may have to be "our way or the high way". Otherwise, this one person could potentially drag the whole project down.

## Incentive Plans - Rewards vs Discipline

Obviously, a rewards or incentive program is a much more positive way to encourage acceptance than discipline. Rewards can come in many forms (a trip to Hawaii, a cash bonus, perks, awards at company functions, etc.) Some reward program examples:

- Visibility Award – Person who has been most proficient in updating the system with opportunities for pipeline/forecasting sales.
- Pipeline/Forecast Accuracy Award
- Most appointments set/completed Award
- Most calls completed Award
- Most system activity Award – Person who's shown the most activity in updating customer profile information, notes and other data

Take one guess at how the winner will be determined. The information will all come **from** the CRM system. Therefore, if it's not **in** the system, it **doesn't get counted**. This alone is a great incentive for your team to accelerate the usage of the system.

Discipline – You will need to be prepared to draw the line on compliance. If incentives don't work for some of the above mentioned user types, it's time to consider making the usage of the system a part of the employee performance appraisal. Add a section to performance reviews, which covers usage of the CRM system and rate accordingly. This process is becoming standard in many companies. At some point the line will have to be drawn in the sand. People who refuse to use the system need to be dealt with before the "cancer" spreads to others.

## The Finish Line

Rolling out a CRM system is like running a race. But the race is a relay. If you can't successfully pass the baton on the first transfer (initial rollout), you'll never make it to the finish line. The most important thing to remember is that a successful CRM system involves three things – Process, People and Technology. You must get all three things right in order to cross the finish line as a winner!

Chris King is founder and managing partner of CRMnow and has been involved in CRM and SFA rollouts to organizations since 1983. For more information on this topic, email him at [cking@crmnow.com](mailto:cking@crmnow.com).

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