

SALES ORGANIZATIONS



# Your Roadmap to CRM Adoption & Training Readiness





## Table of Contents

Introduction	3
Why is CRM Adoption so Low?	4
8 Steps to Successful CRM Adoption	7
Getting Training Ready	9
Brining It All Together	11

## Introduction

From better forecast accuracy to accelerating revenue via pipeline, there are many benefits a sales organization can enjoy from a client relationship management (CRM) platform. **Yet 40% of CRM customers report having an adoption rates above 90%<sup>1</sup>.**

Why? Because most sales leaders fail to understand that implementing a new CRM is more than just making a purchase and telling the sales team they're going to be using new software. They fail to communicate to the sales team how the CRM will contribute to the long-term growth of the company and the role they will play in making it happen.

So, how do you flip the narrative to make sure that your CRM adoption is successful? What steps must you take to get your sales team on board with a new system? And how do you ensure the proper use of the tool and demonstrate its value?

These are the question we set out to answer in our eBook. Our goal is to help you create a CRM adoption roadmap that will help you reach your target business outcomes. You'll learn why most sales organizations fail, the eight steps to successful CRM adoption, and the vital role training plays in ensuring CRM stickiness.

**Let's get started.**

## Why is CRM Adoption so Low?

As a sales leader, it's easy to get caught up in the allure of a new CRM. The promise of generating more revenue and accurately predicting sales targets is enough to guarantee its purchase. You're so excited about the new features that you forget to think about how the new tool will impact your sales team.

So, when CRM usage starts to wane, and the tool fails to live up to expectations, what do most sales leaders do? They rip it out and replace it with another. But if there is one thing we've come to find out, it is that low CRM adoption is rarely about the tool. It's about people.

### A Shift in Perspective

In a survey of 500 CRM users by Really Simple Systems, 83% of senior executives explained that their biggest challenge was getting their staff to use the software<sup>2</sup>. The question then becomes, how do you get your people on board with using a new tool?

Unlike an ERP, where you're dependent on its use for billing and invoicing, there is no incentive for people to use CRM. After all, you can carry on doing the same function with spreadsheets, emails, and notes. The problem with that is that it's not practical, or visible to the organization, and it's prone to human error. Therefore, if you want your CRM adoption to be successful, you must change your approach.

Whether its Salesforce, Sugar, or Microsoft Dynamics 365, all CRM platforms do the same thing. They help your sales team track customer interactions, pull customer insights

---

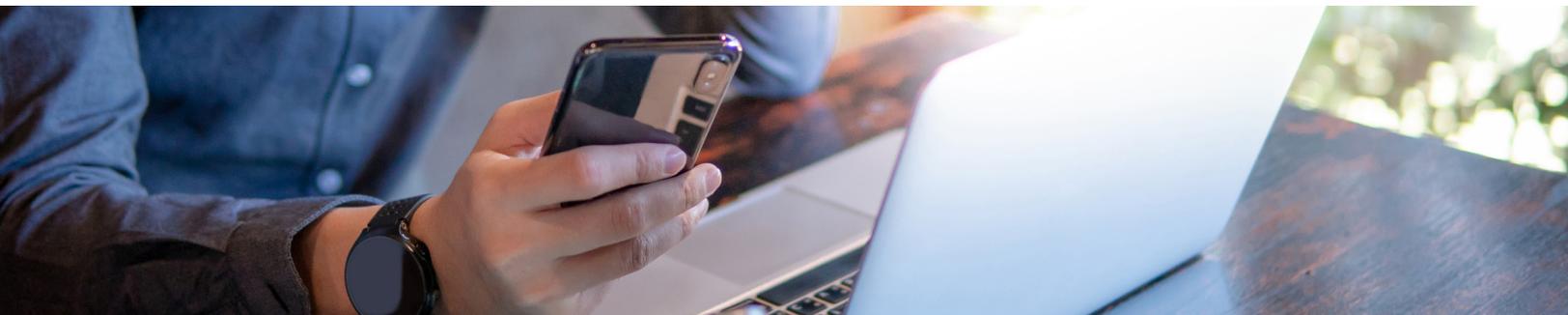
83% of senior executives explained that their biggest challenge was getting their staff to use the software

Really Simple Systems

---

to identify new sales opportunities, and facilitate communication with new and current customers.

The common mistake is that sales organizations view CRM as a once and done deal instead of an ongoing initiative. One that requires a leadership mindset, communication, and training to ensure its long-term use. It's this difference in CRM approach that sets a low-performing organization apart from a high-performing one.





### The Difference Between Low-Performing and High-Performing Organizations

In low-performing organizations, sales leaders view CRM as a magic bullet. The focus is on what the tool can do, and not how the tool will facilitate the execution of the company's business strategy. Once the implementation is complete, the project is usually handed off to IT.

This is where things start to go downhill. The meetings that used to take place with the project team come to a halt, and no further training after the initial session is planned to reinforce adoption. Eventually, the business side goes back to what they were doing, and soon CRM usage slows or stops.

In contrast, a high-performing organization sees CRM as an ongoing initiative. There is no end or start date. They understand the importance of obtaining company-wide involvement if they want employees to embrace the system. Sometimes a change in management is necessary to make it happen.

Knowing that the initiative must come from the top down, they build their project team on a three-tier system. Leadership forms the first layer of the project team structure. Subject matter experts (SMEs) are the second layer and are usually considered the core team. This is because SMEs know the business processes that must be incorporated into the system. Finally, you have your administrators or IT as the third layer.

### 3 Tier Project Team Structure

-  Leadership
-  Subject Matter Experts
-  Administrators (IT)

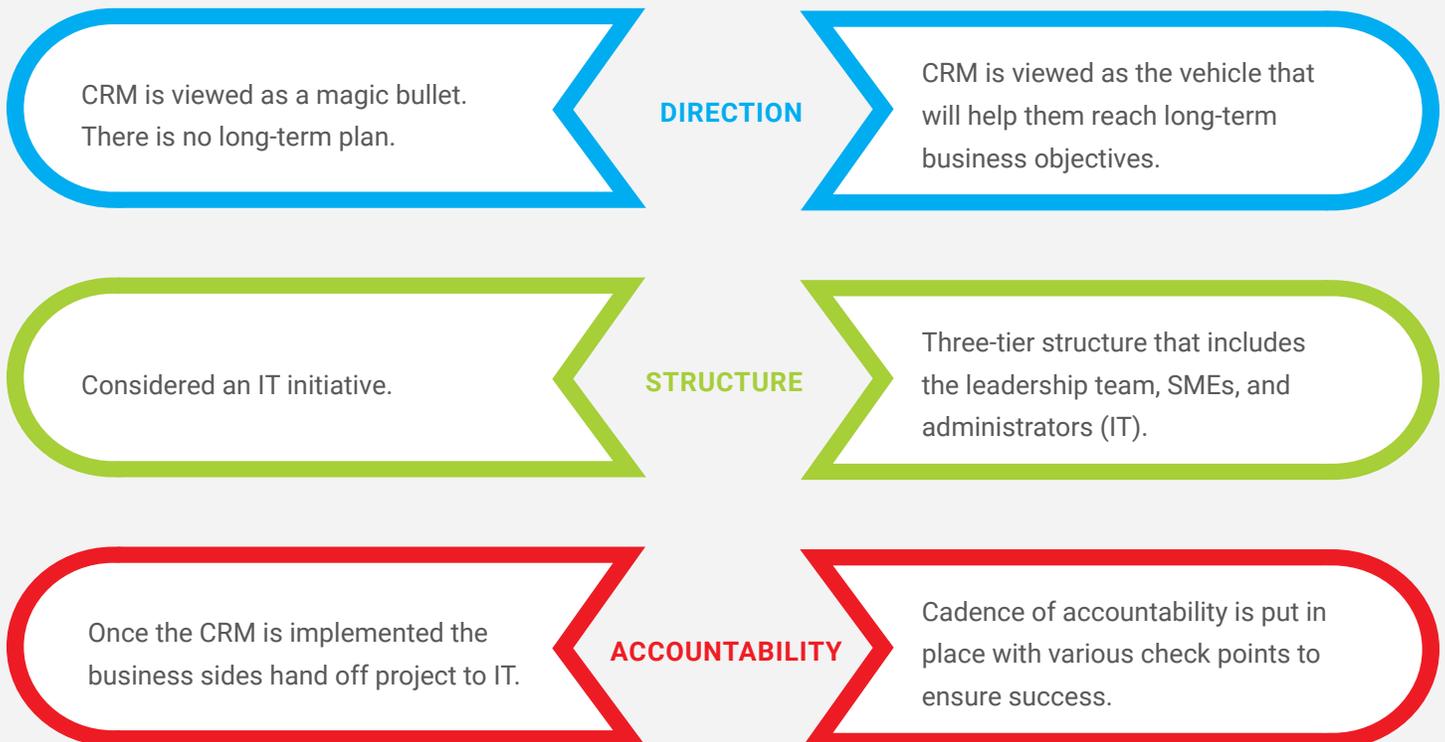


With the project team in place, high-performing organizations set out to create a cadence of communication pre- and post-implementation. They understand that CRM is a means to an end. A vehicle that will help them reach their intended business outcomes. And those business outcomes are established by getting the project team together to define what they are.

With the business outcomes established, these high-performing organizations then work backward to create a solid plan of attack. Together, they create a rollout strategy, a communication plan, and a robust training program to ensure long-term adoption.

High-performing organizations take these measures because they realize that employees need to know the purpose of the tool and the value it will provide to encourage CRM usage. It's human nature. Think about it. When you understand the "why" and "how" of what you're doing, you're more likely to buy in and dig deep to make sure the project succeeds.

## Low-Performing Organizations vs. High-Performing Organizations



## 8 Steps to Successful CRM Adoption

Understanding why you're undertaking a CRM initiative is the first step in the right direction. But if you plan to be successful, it pays to study what high-performing organizations are doing right with CRM.

Sales organizations that have been successful with their CRM initiative see an average return on investment of \$8.71 for every dollar spent on CRM software<sup>3</sup>. They're also 81% more likely to be practicing consistent usage of the tool<sup>4</sup>.

Knowing that CRM is key to gaining a competitive advantage, how do you incentivize your sales team to adopt the software? Over the years as an implementation partner, we've overseen countless CRM initiatives. And companies that have been successful tend to follow these eight steps.

### Step One: Seek Companywide Involvement

Before you select and roll out your CRM solution, make sure to get organizational buy-in first. Your sales team will not take CRM seriously if upper management is not involved. Therefore, you need to show the value of the platform to your executive counterparts.

The fact is, CRM is more than just a sales tool. From marketing to customer support, and even field service, CRM impacts all facets of the organization. Because everyone has access and visibility to the same data, it facilitates better interdepartmental conversations and more informed decision making that improves the bottom line.

For example, CRM drives tighter sales and marketing alignment. Together, both departments define what a good lead is and at what point in the buyer's journey should a lead be handed off from marketing to sales. The result is increased efficiency and more closed deals.

From the customer service perspective, gaining insight into the sales pipeline would allow for

---

**“Organizations that have been successful with their CRM initiative see an average return on investment of \$8.71 for every dollar spent on CRM software.”**

Nucleus Research

---

better resource planning. They would be able to see how many new clients they need to onboard and alert management if they need to hire more people to meet the demand.

By demonstrating the value of CRM, you ensure organizational alignment while increasing the likelihood of adoption by your sales team.

### Step Two: Develop a Single System

Sales professionals are notorious for having short attention spans. Unlike other departments, they don't take well to the swivel chair approach. This means that your sales team is not going to sift through multiple platforms to complete one action. They will either use one or nothing at all.

To develop a single system, start by having a pre-implementation meeting with your sales team. Ask them what features or processes they want to see in CRM, and then build it out for them.

If you're using Microsoft Dynamics 365 Customer Engagement (CRM), you can leverage the apps and integrations the system offers to build a dashboard specifically for them. To incentivize them to use the system include data that matters most to them – commission.

For example, you can have the dashboard refresh the commission amount after an opportunity has been updated or closed. In turn, your sales team will have a better idea of what must be done to reach their sales targets.



### Step Three: Provide Mobile Capabilities

We live in a digital world, and most sales professionals expect and need a CRM solution that supports the mobile nature of their role. In a study conducted by Innoppl, 65% of sales professionals that have adopted mobile CRM reported achieving their sales quota compared to only 22% of sales professionals using non-mobile CRM<sup>5</sup>.

Having the ability to log in information immediately after a client meeting is essential for sales. It ensures that data is accurately captured in real time versus having your sales reps taking notes and updating the system once they get back from an on-site visit. That's if they even remember.

As you look for mobile CRM capabilities, make sure to note whether the solution has offline functionality as well. This is important as not every location your sales team goes to will have good reception. Offline capability, such as Microsoft Dynamics 365 offers, ensures that the information your sales team inputs in mobile CRM is synced when a reliable connection is available.

---

**“65% of sales reps that have adopted mobile CRM reported achieving their sales quota compared to only 22% of sales reps using non-mobile CRM .”**

Innoppl

---



#### **Step Four: Leverage Process Driven Forms**

Between following up with existing clients and looking for new leads, your sales team doesn't have time to waste on administrative tasks. Yet most sales professionals are spending 35.2% of their time selling and 64% on everything else<sup>6</sup>.

Process-driven forms solve this problem by using a wizard to walk your sales team through a process. The idea is to make it easy for them to input the data without the burden of keying the same information twice. Take creating a sales opportunity, for example. By leveraging a process-driven form, you ensure that the sales rep fills out the necessary fields before submitting the information.

A process-driven form can be a four to six step wizard that takes the user back to the home screen once it's done. The trick is to make it specific. Choose one sales process and make the choices for them by limiting the options available on the wizard. You don't want to overwhelm your sales team with too many options. This will only keep them from using CRM. After they are familiar with the system you can start introducing other elements.

#### **Step Five: Deliver Consistent, Tailored Messaging**

Once you have company-wide buy-in and are ready to move forward with your CRM initiative, it's time to put your communication plan into action. This is all about setting the right expectations.

Often, what we see with these types of projects is that sales professionals and other employees will find out about the implementation by word of mouth. They hear other people talking about it, but they've never been directly addressed. You want to avoid that.

Instead, communicate to your sales team that this project is going to happen and why. Leverage all internal communication tools and let them know when the project will be implemented while regularly providing them with status updates. A tactic we recommend is to use general dates at the beginning of the project and provide more specific dates as you get closer to completion.

The next thing you want to keep in mind is messaging. There will be times where having a singular message for the whole company will make sense. But ultimately, you will want to tailor your messaging for your department. For example, executives are going to be interested in budgets and forecasts, whereas your sales team is going to be interested in mobile and commissions.

### Step Six: Make Sure Your Data is Clean and Accurate

The whole purpose of CRM is to unlock actionable data that will help you make better business decisions. But to make those decisions, you need to have data that is clean and accurate. Otherwise, you run the risk of losing credibility from your sales team, impacting CRM usage.

Tackling data clean-up before your implementation is ideal. You want to handle this first even if it slows the project down. Tapping into a third-party vendor that uses a Master Data Management approach will ensure the quality of your data and create a single system of record before pushing these copies back into CRM.

### Step Seven: Train and Train Again

A common mistake we see companies make is failing to reinforce the initial training with additional training post-implementation. When creating your post-implementation training plan, you should focus on two areas: performance support and continual training.

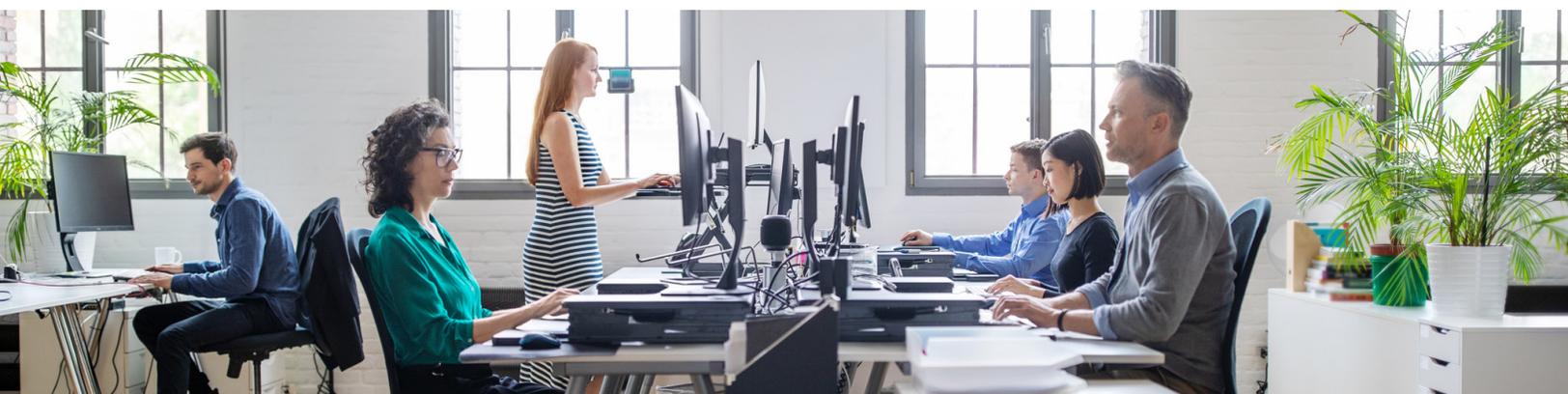
With performance support, the goal is to help your sales team find the answer to their question two clicks away from their work. Companies usually do this by having a performance support solution added to CRM. At a minimum, they will add links to a SharePoint file with FAQs and documentation.

The second part is continual training. What you want to do is measure the usage of CRM and then schedule additional training where you see a lack of use. Most sales professionals are not going to come to you if they have an issue. Instead of waiting for them to raise their hands, proactively set up the training so you can address any problems your sales team may have. Unlike the first training, your subsequent training can be shorter and more specific to the user's pain point.

### Step Eight: Request Feedback

After you have implemented your CRM, it's time to solicit feedback from your sales team. If you find they have nothing to say post-implementation, that points to a larger problem. Most likely, they're not using the system.

To combat the silence, set up a meeting with your sales team and remind them that this is not some project that is being shoved down their throats. Once you have their feedback, make sure to act on it and communicate the results to them. Again, it's all about making your sales team take CRM seriously by showing your commitment and resolve in helping them get used to the system.



## Getting Training Ready

As you plan the rollout of your CRM, it's essential to have a training program and methodology to reinforce adoption. After working with hundreds of customers, we have found that a three-pronged approach works best. This includes eLearning, live training, and workflow learning.

While there is no one size fits all training program, this methodology can be scaled to fit your company needs. You will also want to focus on training mediums, training frequency, and your training provider while you develop your training program.

### Training Mediums

There are many training mediums to consider. However, in our years as a training partner, we have found that a mixed approach works best. Typically, you want to start with the eLearning component.

This could be a full course or a video if it's a single concept. This is where you establish the baseline knowledge of CRM so that when it comes time for the live session, everyone is operating from the same knowledge base. As a rule of thumb, you will want to start your training with your managers. The reason is that you want them to be available to answer any questions your sales team may have during the live session.

After the eLearning comes the live training component. While this could be over the web, we find that the classroom setting is most effective because you can walk through a task or assignment together.

This enhances the retention of information better than watching over a webinar. It also allows for better interaction as the instructor can answer questions in real time and explain the **“why”** behind the actions.

Another reason why a classroom setting is better is that there are fewer distractions. The



salesperson has no choice but to focus on the matter at hand. To make the classroom setting more effective, we often encourage the instructor to collect mobile devices and tablets so that the salesperson is not tempted to answer client emails or notifications.

Finally, you want to implement a learning management system (LMS) if your company does not have one. An LMS will help you track who has done training and who has not.

In turn, you can use this insight to proactively schedule training for those who have not trained. You can also provide your sales team with a variety of training options by hosting other mediums, like video and PowerPoint, into LMS.



### Training Frequency

No one learns new material overnight. As part of our methodology, we highly recommend adding a performance support solution. With performance support, the goal is to give your employees the ability to find answers quickly without disrupting their workflow.

This gives your sales team the ability to remember what they learned in their initial training while allowing them to transfer that knowledge to their everyday work quickly.

When onboarding a new employee, it's a bit more obvious. You can take the 30-60-90-day approach to make sure that the new employee is secure and confident in navigating the system. This is also the best chance you will have to impress the importance of CRM.

In contrast, with a new implementation you want to train ahead of the rollout and follow up with subsequent training that is shorter and more specific to the salesperson's concerns.

Keep in mind that new features and functionalities are constantly being developed. If you're using Microsoft Dynamics 365, for example, then you know Microsoft releases new features twice a year. So, get ahead of the releases and schedule training before they are rolled out.

Another approach is to ask your sales team who needs more training regularly. Since they rarely get asked this question, many don't request help. However, if you take the initiative to ask this question, you're reinforcing the fact that their input is essential.

Your implementation partner can help you with this process by providing a training assessment six months to a year after your initial implementation.

An assessment enables you to determine whether you've been delivering training at the right level, while analyzing the training techniques and systems you're using. Your partner then will provide recommendations to help your team move beyond adoption and into the world of high productivity.

### Video: CRM Often Changes Business Outcomes and Here's Why



## Training Provider

While you can rely on your implementation partner to help you with your training program, it's important to remember that you will be the owner of the platform. To help companies out, we've developed a training readiness program that provides support and understanding that will allow you to own CRM after you go live.

Training readiness is a structured program that runs concurrently with your main implementation. It's designed to help you get prepared with your initial training program by introducing you to our methodology and best practices. We then reinforce the training with several training preparation sessions as you move toward the completion of your project.

To put a capstone on the training readiness program, we'll do a training rehearsal to go over the highlights of the live training. Taking this extra measure ensures the proper train-the-trainer approach for your SMEs so that they can be adept at transferring this knowledge to the sales team.

The goal is to provide trainees with a familiar face that they can go to with any questions. As SMEs get trained, make sure to solicit their feedback and make any required adjustments to the training content to ensure its efficacy.

## Sources

1. "What Is Customer Relationship Management (CRM)," Academic Room , n.d., <http://www.academicroom.com/topics/what-is-crm>.
2. David Sims, "CRM Adoption 'Biggest Problem' in 83 Percent of Cases, Wigan Gets CRM Treatment, CDC and Savills Asia Pacific, PacificNet Q3 Results, UltraSoft Wins UK CRM Award," First Coffee, n.d., <http://blog.tmcnet.com/telecom-crm/2007/11/30/crm-adoption-biggest-problem-in-83-percent-of-cases-wigan-gets-crm-tre.asp>.
3. "CRM Pays Back \$8.71 for Every Dollar Spent," Nucleus Research, n.d., <https://nucleusresearch.com/research/single/crm-pays-back-8-71-for-every-dollar-spent/>.
4. "How Are Businesses Getting Their CRM Practices Wrong?," QuickDesk, n.d., <https://quickdesk.io/blog/blog/businesses-getting-crm-practices-wrong/>.
5. Sathish Mariappan, "Mobile CRM," LinkedIn SlideShare, n.d., <https://www.slideshare.net/SathishMariappan/mobile-crm-6803102>.
6. Ken Krogue, "Why Sales Reps Spend So Little Time Selling," Forbes (Forbes Magazine, n.d.), <https://www.forbes.com/sites/kenkrogue/2018/02/15/why-sales-reps-spend-so-little-time-selling/#3fa3e40f1051>.
7. "17 CRM Stats That Sales Professionals Need to Know," Nutshell, n.d., <https://www.nutshell.com/blog/crm-stats/>.

## Conclusion

Sales organizations that have successfully implemented CRM report an increase in sales by 29%, sales productivity by 34%, and sales forecast by 42%<sup>7</sup>. But to achieve this, you need to shift your perspective of CRM from an implementation to an ongoing initiative.

This means getting buy-in from leadership, developing a culture of frequent and open communication, and reinforcing your adoption with training. While an implementation partner can help you achieve these goals, it's important to understand that they are not always going to be there.

The end goal is for you to be the sole owner of CRM with the implementation partner serving as a guide for those hard-to-answer questions and concerns.

**Interested in getting up to speed in the digital age?**  
Get in touch to learn more.

[CONTACT US](#)

### About Alithya

ALITHYA GROUP INC. IS A LEADER IN STRATEGY AND DIGITAL TRANSFORMATION IN NORTH AMERICA. Founded in 1992, the Company counts on 2,000 professionals in Canada, the United States and Europe. Alithya's integrated offering is based on four pillars of expertise: strategy services, application services, enterprise solutions and data and analytics. Alithya's Microsoft practice covers a wide array of capabilities, including Dynamics, Azure, IoT, AI, business and advanced analytics, digital solutions, application development and architecture.

[alithya.com](http://alithya.com) | [MSsales@alithya.com](mailto:MSsales@alithya.com) | 866-420-7624