



Top 10 Tips for User Adoption



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- Understand and define what success means to you
 - Establish goals & objectives
 - Establish metrics for what you want to achieve
 - Sales: “10 percent reduction for forecast preparation”
 - Marketing: “Lead follow up improved 15%”
 - Service & Support: “50% cases handled with single response”
- Establish project scope early
 - Take a phased approach if needed
- Communicate the message
 - Share the message to all.



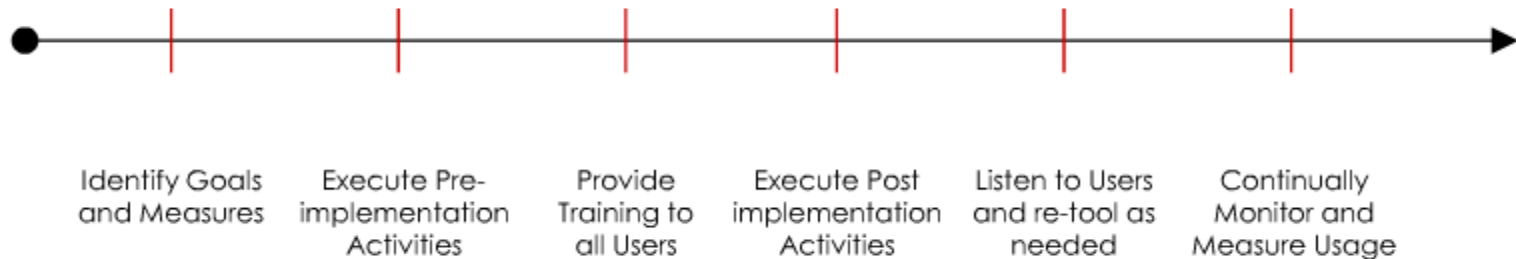
Establish your Internal “Pre Sale” Early

- Know what the application is:
 - Provides managers with real time visibility across the organisation, directing attention where it’s needed most
 - Provides reps with a consolidated view of their customers and increased inter-departmental collaboration
 - For IT professionals it is a platform on which to consolidate homegrown/stand alone applications
- ...and is NOT
 - It can not define your business processes
 - It is not a quick fix for poor/average performers
 - It is not a stand alone tool to drive sales or productivity



1. Establish the “Pre” Sale Early

- Communicate the strategy well in advance
- Know your audience
 - Targeted communications
 - What’s in it for me?
 - Establish buy in early by addressing objections up front
- Establish a timeline to set expectations





2. Top Down, Bottom Up, and Across

- Promote executive sponsorship with top down communications & reinforcement of desired behaviours
- Identify active & vocal advocates that represent the end user population
- Identify project team members that represent all affected layers of the organisation





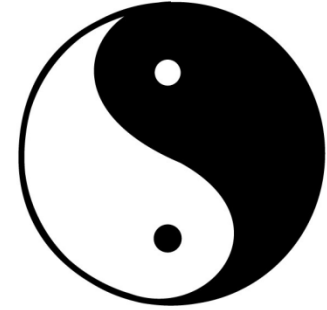
3. Focus on People & Processes

- Recruit subject matter experts who know the day to day activities to help with design & documentation
- Thoroughly document business processes
 - Use the application to house project documents
 - Leverage later for training
- Customise the application to reflect processes
 - Identify reports/metrics — reverse engineering
 - Follow design best practices



4. Make Microsoft CRM Your Command Center

- ...for every segment of your deployment lifecycle
 - Preparation: Goal docs, timelines, etc.
 - Documentation: Business designs, etc.
 - Training: Tip sheets, design documents, recorded training
 - Reinforce: Feedback docs
- Build in as many processes & tools as possible
 - All leads flow through sfdc
 - All project & training collateral in documents tab
 - Sales tools



5. Position Microsoft CRM as a Productivity Tool, Not a Chore



- Drive productivity & efficiency with
 - Templates
 - Mass email
 - Stay in touch
 - Desktop integration
- Customise for 360 view of accounts / companies
- Easier pipeline management
- Build your own views & reports (keeps things familiar)
- Improve quality of marketing campaigns





6. Manage to the Application

- Walk the walk – use the application often
- Focus initially on top reports – don't over complicate
- Lead by example
 - Run meetings from the application
 - Management performs spot checks and inquires when needed
 - Don't support side discussions
 - Establish dashboards to drive visibility in key areas



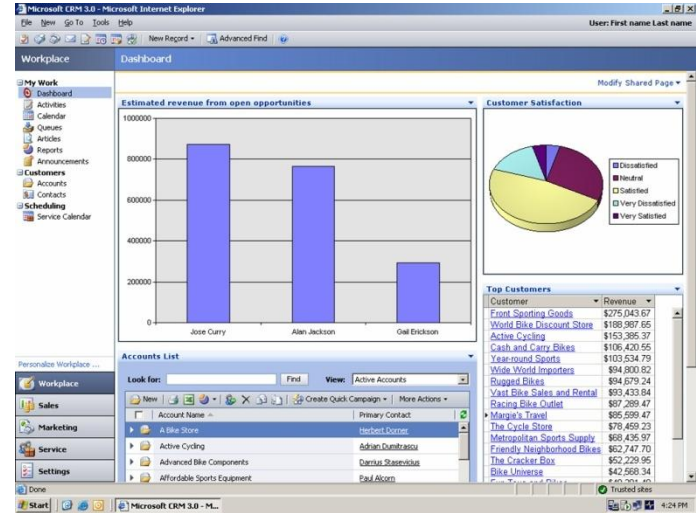
7. Training

- Leverage project documents to develop training materials
- Bespoke training + advanced training
 - Reinforce processes and organisational roles
 - Reinforce terminology: opportunity = engagement
 - Reinforce specific tools to make it contextual
- Delivery
 - Involve trainers & subject matter experts early
 - Role based curriculum
 - As close as possible to go live date as possible
 - Minimal lecture, mostly hands on



8. Validate Adoption

- Reports & Dashboards
 - Leverage dashboards
 - Exception reports to check data quality
- Spot checks
 - Managers check opportunities
 - Administrator verifies updates, data quality, etc.





9. Reinforce Adoption with Carrots/Sticks

- Carrots
 - Contests, top performer, etc.
 - Build Microsoft CRM usage into job description & performance evaluations
 - Solve users' pain points

- Sticks
 - No access to resources until....
 - Accounts with no activity are fair game
 - Call from executives



10. Encourage and Facilitate Feedback

- Reinforces buy in by giving everyone a voice
- Use the application to capture feedback
- Establish a change process to manage feedback
- Newsletter, lunch time sessions, weekly webinars, etc.



Have we gotten any feedback yet?