

# Gaining Employee Buy-in?

## The real challenge of CRM

Your company has just selected a new CRM system for your company. Congratulations should be in order.

However, your work is really just starting so there won't be much time to rest. You know that in order for your CRM initiative to be successful, that you'll need buy-in from your users. This buy-in starts from the top management all the way down to occasional users of your CRM system. Hopefully, you've selected a CRM system that all users will find extremely easy to use.

Your motto during your CRM selection process should have been, "If CRM isn't easy to use, it won't be used".

### Congratulations - You've made a selection on a new CRM system

You have gone through a comprehensive evaluation and have found what you fully expect to be the best CRM system for your company and you believe your new CRM system will serve your company well for years and years into the future. During your selection process you most likely assembled a group of employees together to evaluate vendors to see what company would make the best partner for your CRM initiative.

During your evaluation process your team most likely developed a needs list of the features you were hoping to have in your CRM system. Specific information was gathered among your vendor finalists, demonstrations by the CRM vendors ensued, and you were able to determine the best fit for your CRM initiative. Some of you probably thought the hard part was done – the selection process.

However, now you are quickly realizing that you have some significant work ahead of you to make sure your CRM system delivers the key, important needs that your users expect. You want to make sure your CRM system fits your business like a glove and makes life easier for all of your users. After all, if your CRM system doesn't save you time, make you more efficient, and doesn't help you spend more time with

your clients, what's the point of having a CRM system?

There's probably some question as to how the rest of the company will react when they hear the news that your company will soon be rolling out a new CRM system. Some will be extremely happy and say, "It's about time!", while others will have extreme hesitation.

With a proper game plan in place, you will be able to deliver your news with confidence and you'll soon be showing everyone why your initiative will be extremely worthwhile for your company.

### The initial steps – the big announcement to the staff

You're about to tell your company about the new CRM initiative that will be forthcoming. Are you prepared for the onslaught of questions everyone will have?

Do you have a game plan in place to insure a smooth transition? Setting realistic and honest expectations with your staff can greatly assist in getting your employees behind you to ensure a solid CRM implementation. What will you tell your company?

One of the key items you will want to discuss in your CRM announcement is exactly why your company is taking on a CRM initiative. Many users may falsely believe that a key reason that a company brings on a CRM system is so they can keep a better eye and play big brother with their employees. This is usually not a very good reason in itself for a CRM initiative.

Remember, you need your company behind you to make your CRM initiative successful. Everything you should be focused on in your CRM initiative should be around how life will become easier, hopefully immensely easier once they are using the new CRM system. You should always be thinking to yourself, that your new CRM system will save you time, money, and will allow you more time with your customers and prospects.

Your users will want to know that you have selected something that not only will save them time, but that they will also be getting a great tool that will be extremely easy to use. Your users know that if their CRM system isn't easy to use, it won't be used. Your users also know that a CRM system will only be as successful as the commitment senior management has. They need to know senior management is 100% behind the success of your CRM initiative. If senior management isn't committed to this, they will not see the value that can be created from your CRM system.

If you can communicate these benefits to your company they will have a greater appreciation for what their new CRM system can do for them to make their life easier. Benefits to communicate:

1. Your CRM system will save you time and money
2. Your CRM system will be easy to use
3. Your CRM system will have 100% commitment from senior management

### How focus groups can provide vital input for success

Now that everyone knows a CRM system will be coming – you need to get them actively involved.

This will not only convince them of the vast benefits of a CRM system, but it will also help ensure that their CRM system is focused accordingly to their specific needs.

One route your company may decide to go in your CRM implementation is to establish various focus groups of key users to get their input on specific features, workflow functions, and how to best automate different departments. The input from even the most novice employees may provide critical information that can help your company be more efficient and track the best possible information for your company.

Further, the active involvement of various users in your company during the implementation process often provides an added incentive to even the most casual users to ensure they are committed and even excited about the new CRM system. Most companies that deploy a CRM system will have a project manager from the software supplier that is responsible for overseeing the proper implementation of their CRM system along with you. Your project manager follows a specific implementation methodology based on an agreed framework and can suggest many ways in which focus groups can assist your company to insure a very effective implementation.

### Prioritising for quick success

Quick wins. This term will be of great importance to you during your implementation. Too many times, we have all heard of CRM initiatives that have taken far too long to implement and have cost far too much.

Some companies have taken six to eighteen months to implement their CRM system and have way overspent their budget. This shouldn't be you.

One of the key principles you should employ in your CRM initiative is what we call "quick wins". What we mean by this is quite simple. Choose a few key hot priority areas that are must haves in your CRM initiative and make sure these key feature areas are included in the very first phase of the implementation.

And then make sure you are able to deliver this to your users in a very short amount of time. Users will become very committed to your CRM initiative if they're able to use some of their most requested features in a CRM system in a short amount of time. They will be very impressed by this. On the opposite end, nothing will turn users off more than a CRM system that takes forever to implement and doesn't deliver the basic key features they are looking for. Another key benefit of our "quick wins" approach is that senior management will feel good about the CRM initiative since the first phase is being delivered in a timely manner and within budget guidelines.

### Your Next Steps

We have hopefully provided a few key ideas for you to think about regarding employee buy-in. You certainly know that if you don't have the proper employee buy-in, your CRM initiative will not have the vast success you are hoping for.



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