USE IT (CRM) OR LOSE IT (REVENUE)
Engage your sales team early and often to ensure successful CRM adoption

by Jeff Boswell and Nick Kennedy
You’ve heard software vendors claim that a new CRM system can increase your win rate by 25% and increase your deal size by 28%. So implementing a new system is a no brainer. Or is it?

Every system is only effective when used properly – and consistently – across the organization. At the crux of any CRM system’s effectiveness is your sales team. Visibility into market-facing activities, opportunities and new business pipeline is critical to running your business. While full-time sales teams should be the best CRM users, in many cases, they are not. When they are not, many executives are afraid of rocking the boat. Too much change or pressure on your sales team, especially your high-producers, could result in costly turnover and lost sales.

How many times have you heard from a sales rep “I’m hitting my numbers, why do I need a CRM system?” How can your organization move the needle and ensure your sales team will also adopt the system with open arms? The key is to identify ways to provide a tool and supporting services that will solve one or more material pain-points for your sales team and answer the inevitable question “what’s in it for me”? 
MAKE YOUR CRM SYSTEM HELP (NOT HINDER) YOUR SALES TEAM

Through a combination of CRM and change management best practices, we recommend focusing on the following eight steps:

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Whether you have already implemented a new CRM system, are implementing one, or are selecting the right CRM system for your organization, it is never too late to focus on successfully shaping behavior. In this white paper, we have separated activities based on where your organization is in the CRM lifecycle and maturity:

(A) Organizations that have yet to implement or are in the very early stages of implementation (e.g., requirements gathering, design);
(B) Organizations that are in the middle of implementation (e.g., building the application, communicating about the system, pre-training); and
(C) Organizations that are in the later stages or post-implementation (e.g., system is built, training has begun, or everything has already been implemented).

IDENTIFY CRM GOALS AND CORRESPONDING KPIs → (WIIFM = I’M MEASURED ON IT)

Many people are familiar with the popular phrase “what gets measured, gets done,” which identifies the need for an organization to track progress in order to make progress. For CRM systems, it is important to identify the key goals an organization hopes to achieve through its CRM implementation, and detail them carefully.

For example, is your organization looking to retain more of its current client base through the CRM implementation? If so, do you know your current client retention numbers? Are they the same across all client segments? Should they be? What do you want the new numbers to look like? When do you expect your organization to meet these goals? Is leadership aligned in understanding these goals and the timeline
to achieve them? These questions must be answered and communicated in order for the sales team to understand their role in the company’s bigger picture. By outlining the answers to these questions, it is easier for management to detail which activities their sales team needs to complete.

Setting clear goals during CRM implementation is critical. Often times, goals are too vague, not prioritized, or lack corresponding measurements and communication, making it almost impossible for leadership and managers to understand the overall vision.

A: Pre-implementation or early stages:
Ask your executive leadership team: “At the end of our CRM implementation, what do we hope to accomplish and what does success look like?” Listen closely, as different executives will often focus on their specific departments or agendas. Collect all opinions and categorize them based on themes. Discuss these themes and see which ones can be agreed upon as the overarching goals of the CRM implementation. Communicate these goals throughout the organization and especially to the sales team so that everyone knows why your company is making this investment. Throughout the implementation, identify KPIs that directly align to the goals, and eventually translate them into performance metrics for your sales team. Clearly communicate how the sales team’s activities will directly impact the company’s overarching goals.

B: Middle of implementation:
Even though the CRM system is currently being built, it’s not too late to have the same conversations detailed within the “pre-implementation or early stages” section. Depending on where your team is at in the implementation, the timeline for these activities may need to be shortened, and instead of up front communications, focus on communication during training. The key is still to identify goals and KPIs, and determine sales team-specific measurements that lead to actionable activities.

C: Late stages or post-implementation:
Similar to the “pre-implementation or early stages” – you’ll need to get your executive leadership team together and ask a similar (but very different) question: “Now that we’ve implemented our CRM system, what did we want to accomplish?” Of course, the optimal time to have this conversation is up front, but it’s better to have this conversation at the end than not at all. If the executive leadership team does not want to get together at this point in the project, meet with the sales leaders and discuss what goals you want the sales team to accomplish now that the CRM is implemented (or almost implemented). After identifying these goals, determine what activities the sales team must accomplish to assist in meeting these goals.
ALIGN SALES INCENTIVES AND PERFORMANCE MANAGEMENT \( \rightarrow \) (WIIFM = I’M PAID FOR IT)

As important as it is to set goals and KPIs for the sales team, it is equally important to ensure that their incentives and performance management are aligned with these goals and KPIs. This process will take some time, especially as it will need to involve other functions (e.g., HR, Finance), but it is necessary to ensure that the sales team works to help the company achieve its goals, rather than focusing only on their personal incentives and performance management reviews.

**A: Pre-implementation or early stages:**
After identifying the CRM goals and corresponding KPIs, assess the sales team’s current incentive and performance management practices. Is your sales team incentivized only to produce numbers, or is there a tracking component built within their goals? If documentation or detailed pipeline management is not within your sales team’s incentives or performance management policies, it will be helpful to begin to add those activities within them. You have already taken the time to align activities and KPIs to your company’s CRM goals, now take the next step and align sales incentives and performance management to those identified activities.

**B: Middle of implementation and C: Late stages or post-implementation:**
Complete the same activities as the “pre-implementation or early stages” section. These activities are more dependent upon completion of identifying CRM goals and corresponding KPIs than the status of the CRM implementation.

MAKE THE CRM SYSTEM SIMPLE TO USE \( \rightarrow \) (WIIFM = IT’S EASY TO USE AND I CAN FIND WHAT I NEED)

With increases in technology, employees are becoming more accustomed to simple user interfaces, workflows, reporting capabilities, and mobile functionality. Current CRM systems account for most of these needs, but it is important for organizations to ensure that they are not over-complicating their processes by using too many “bells and whistles” to start. Focus on the core sales functions (e.g., account and contact management, lead generation, activity management, pipeline management) and ease end-users into using the new system’s vast capabilities.

**A: Pre-implementation or early stages:**
As you gather requirements and begin to design how your CRM system will look, resist the urge to completely re-design how your organization currently captures data. Look for key data points that your sales team will need to input, and mark those fields as “required.” It’s also a best practice to include high ranking and well respected sales reps in the design process (e.g., create an employee journey map).
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B: Middle of implementation:
At this point, the team has already begun to build the system. If you are implementing using a “waterfall” approach, do not try to re-visit the whole design. Instead, take a step back and consider whether you are requiring too many fields from your sales team or requiring processes that may not be critical on Day 1. If you are implementing using an agile approach, you have more flexibility to add and update functionality within your upcoming sprints. Implementing a CRM system is not a one-day thing, it needs to be introduced and then improved upon over time. As mentioned in the section above, sales reps acting as designers will help not only avoid this pothole, but will increase usage after the implementation is complete.

C: Late stages or post-implementation:
If you are hearing feedback that there are too many required fields, or that people are not tracking all of their activities because the system is asking for too much detail, take a step back and determine what activities are truly necessary to “move the needle” towards accomplishing your CRM goals. If all areas are still required, meet with the sales team to better explain why these fields are required and how they are used. Reiterate the team’s goals, and how accomplishing these activities will help the team meet goals. Post-implementation, continuous improvement will be expected and accepted by the sales team, so plan in advance and make sure a mechanism is in place to support it.

TRAIN USERS ON WHAT IS IMPORTANT → (WIIFM = THEY TAUGHT ME HOW TO USE IT)
When thinking about training, it is important to identify and understand the end-user impacts that the CRM system brings. Of course, the system will be new, but did you also change any business processes? For example, did you change the number of opportunity pipeline stages from four to three? If so, not only will you need to train on the system, but you’ll need to train on the process changes as well. Most CRM systems are becoming more and more intuitive, so while you’ll want to cover base functionality of the system, you’ll want to focus the majority of time on what your sales team wants to know: how do I accomplish the activities that I need to do on a daily basis? Additionally, training isn’t only at go-live or in a classroom setting. It is important to begin training early, by actively communicating impacts for the sales team – this will better prepare the team for the upcoming formal end-user training sessions.

A: Pre-implementation or early stages:
At this point in the project, you have yet to design a training plan. Complete an assessment to determine how your sales team will be impacted by the CRM implementation. Focus on both system and business process changes, and the more specific you can be (e.g., focusing on each role within sales, and each business process) the better. After completing this assessment, prioritize the high-impact areas and build training that helps overcome those change gaps. We refer to these process- and role-focused training topics as “Day in the Life” and they are easier for sales teams to grasp than a high-level training course. Do not try to train on too many topics – instead, focus on what’s important. Implementing a CRM system is complex and you don’t want to overcomplicate it from the start.
**B: Middle of implementation:**
If it is still “early to middle” in the implementation, then you still have time to complete the activities listed in the “pre-implementation or early stages.” However, if you’ve already designed your training and are about to begin sessions, continue to execute your plans, but begin to ready yourself for the future. If you realize that the training was too high-level, prepare process-specific job aids for your sales team to use once the system is live. Survey the team and determine what areas are not clear, or what processes they do not feel prepared for, and offer follow-up training sessions. Additionally, if you’ve used a third party to assist you with the build of your CRM system, be sure that they execute a “train the trainer” approach so that someone within your organization is actually leading the training. Having a member of your team own the training is much more powerful than training from an outsider.

**C: Late stages or post-implementation:**
Let’s assume that training has already taken place. Whether or not you felt that your training was effective, it will be important to survey the team and receive feedback on the training as well as topics for continuous improvement or refreshers. One of the biggest mistakes an organization can make is by only offering an initial training – and omitting ongoing training efforts. A CRM system’s use will develop over time (as the team becomes more comfortable with it), and therefore, it will be important to “re-calibrate” the sales team on how to use it properly through ongoing training efforts. Once again, you’ll want to focus on what the sales team really cares about: processes that they use most often and that impact their incentives and performance management. Offer quick webinars, Q&A sessions, FAQs, etc. to help them get in and out with as much information as possible.

**ENSURE DATA IS ACCURATE ➔ (WIIFM = I TRUST IT AT GO-LIVE AND BEYOND)**
One of the biggest CRM killers is bad data. As soon as users stop trusting the data, they stop using the system, creating a circular problem that gets worse over time. It’s critical to begin planning well in advance and focus on areas such as clean data, ongoing data governance, involving business experts in the testing of data, KPIs to monitor data for ongoing accuracy, and how to mine and make use out of the data you’ll eventually have in your tool – there is lots to be learned!

**A: Pre-implementation or early stages:**
Early on in your project, it is important to identify a couple drivers related to data. First, think through the data that will be required for your implementation. You might already have this if you are upgrading from an older CRM system, but regardless, start with the end in mind (e.g., designing sales reports) and think through the scenarios you’ll likely be implementing and design the future data model. Second, assess whether or not you have the data you need and figure out what state it’s in. Don’t panic. Most companies have data issues that need to be resolved, so you’re not alone.
B: Middle of implementation:
Now that you know how much work is in front of you, consider these three suggestions to develop the best data possible, by involving plenty of support from the business. First, make sure the business understands the nuances of data and will be able to easily identify exceptions. Spot check data to make sure it looks accurate and “makes sense” with where it is stored within the CRM system. Second, structure and plan your project to execute a number of mock data loads to test multiple times the process of converting and cutting over the data from its source location to the future CRM system. Finally, establish ongoing data governance plans to ensure that all of your hard work does not go to waste.

C: Late stages or Post-implementation:
Now that you’re live, consider the following final steps. First, kick off and institute the data governance plans you have recently designed. Establish KPIs and reports that will periodically check to ensure data is being maintained at the level you expect. Second, identify ways to mine and analyze your data to leverage all of the hidden value in it. You’d be shocked at how few companies leverage a data tool and know what to do with this information once they have it.

IMPLEMENT GOVERNANCE PROCESSES → (WIIFM = BENEFITS WILL CONTINUE INTO THE FUTURE)
Committed leaders, combined with an established governance process, may be the most effective way to drive adoption from your sales team. Even after identifying goals and KPIs, aligning incentives and performance management, implementing a system that is simple to use, training users properly, and ensuring that the data is accurate, there will still be hurdles to overcome after implementation. By establishing proper governance, you’re telling your employees that your company and its leadership are committed to the success of the CRM system. It lets the sales team know that using the system is not an option and that executives will be consistently monitoring their dashboards and reports in order to accomplish the company’s goals. If performance is not meeting expectations, the proper actions should be put in place to mitigate the root causes.

A: Pre-implementation or early stages:
At this point, you should be focusing on the goals and KPIs of the CRM system. While it should be communicated that governance will play a key role, the details will not come until later in the project. See activities listed within “middle of implementation” for a sneak peek at upcoming tasks.

B: Middle of implementation:
Create a “governance committee” whose purpose will be to ensure adoption of the CRM system functionality and processes, as well as the realization of desired benefits. The committee will also help provide direction on the continued evolution of the CRM system through continuous improvement and additional functionality as needed. Participants within this committee should focus on the results related to
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previously established KPIs, recommendations for ongoing adoption, escalated issues and prioritization of future needs. Create a charter for the committee that outlines its mission, participants, meeting cadence, goals, success factors, timeline, roles and responsibilities.

C: Late stages or post-implementation:
Complete the same activities as the “middle of implementation” section. These activities are more dependent upon completion of identifying CRM goals and corresponding KPIs, than the status of the CRM implementation.

CREATE PEER TO PEER ACCOUNTABILITY → (WIIFM = MY COLLEAGUES USE IT TOO)

It is undoubtedly important to have a strong governance process and committed leaders in place to help drive adoption of the CRM system (as seen above). It is also important to create a culture of peer-to-peer accountability, primarily because a CRM system is meant to be a “single view of the customer” system, and not a tool used by individuals in silos. Without participation/adoPTION from everyone within the sales team, the CRM system will fail to live up to what the organization wants it to be – one version of the truth.

A: Pre-implementation or early stages:
Involve key sales team members early on in the CRM requirements gathering and design process. Ensure that their team is represented by those that are “in the trenches” so that they can voice their concerns, requirements, areas for improvement, etc. We also recommend establishing a “change network” across the organization, which consists of “change agents” to be used throughout the implementation for various roles (e.g., communications, gathering feedback, testing, training SMEs). Make sure that individuals from the sales team are participants within the “change network” – that way they can personally share information with the rest of the sales team, and begin to prepare users for training and subsequent implementation. This type of peer-to-peer communication helps drive accountability among the team.

B: Middle of implementation:
As the project develops, it will be important to communicate impacts to the sales team on how the future will look. Meet regularly with the sales managers and identify key individuals within the sales team to serve as change agents (whether or not you’ve established a company-wide “change network”). Having proponents of change at all levels within the sales team will benefit the team as the whole. Additionally, if you’re able to create transparency reports (e.g., activity leaderboards, top sales reps, etc.) this will help drive accountability given the sales team’s naturally competitive nature.

C: Late stages or Post-implementation:
If the sales team has had limited involvement with the CRM implementation to date, it will be difficult for them to feel ownership of the new system. At this point, you can try to identify some sales team members as change agents to assist with the governance processes going forward, as that should help build
ownership and accountability with future enhancements to the CRM system. Additionally, one way to build peer accountability is through team sales contests. Put individuals within small teams and create a contest related to tracking opportunities and activities with CRM, and align appealing incentives. This will drive a spike in adoption as well as get others to hold each other accountable (since it’s a team competition). However, note that contests only drive short-term adoption, and once the contest is over, many users may resort back to old ways. Work with your sales managers to develop ongoing practices that would work within your teams.

FOCUS ON LONG-TERM ROI → (WIIFM = I’M MAKING MORE MONEY DIRECTLY BECAUSE OF IT)

As we have previously mentioned, your CRM system is not about instant benefits for your organization or sales team. Instead, it is a tool that can provide a long-term return on investments, and if adopted properly, can greatly benefit your sales team’s productivity and results. These long-term expectations should be set and communicated with the sales team up front (but don’t shy away from sharing some of the short-term benefits, such as, improved processes).

A: Pre-implementation or early stages:  
Communicate to the sales team that the success of the CRM implementation is a team effort and that there will up front work (e.g., logging activities and opportunities) to realize long-term benefits (e.g., having a complete view of customer engagement). Consider spending time up front creating scenarios that will solve pain points for the sales reps. For example, if the sales representative can help keep email addresses clean and up-to-date, marketing can use those emails for more accurate campaigns that keep customers in the loop about product announcements and changes, effectively doing work for the sales representative and saving time.

B: Middle of implementation:  
In addition to the communications from the “pre-implementation or early stages” section, begin to share what the company’s goals and KPIs are, and focus on the benefit realization timeline (e.g., when executives expect the team to accomplish these goals). The more you can prepare the sales team on leadership’s expectations, the more they can properly ready themselves. Try to create projections regarding how this new tool or process will help them sell more and sell faster.

C: Late stages or Post-implementation:  
Continue to communicate themes as presented in the “pre-implementation or early stages” and “middle of implementation” sections. In addition, and especially after implementation, share success stories from sales team members about how using the CRM system benefited them. It may be difficult to measure the immediate impact of using the CRM system on improved sales, retention, etc., so focus on qualitative measurements instead. These success stories will help motivate others to continue to use the system and, in time, they should see similar results.
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YOU DON’T HAVE TO START FROM SQUARE ONE
Regardless of whether you are in the pre-implementation phase, in the middle of it, or are already using the system, you should never consider your work done. Effective change management requires a constant focus on training and communication as well as continuing to align rewards, incentives and metrics to drive accountability. The good news is that you likely had to build a strong business case to get buy-in to implement the system in the first place and it’s likely the head of sales was a key decision maker in the process. Leverage him or her to be a “mobilizer” of the sales team. Publicly recognize your power users on the sales team. Make sure positive reinforcement comes from a variety of sources. You’ll be glad you did.

A successful CRM implementation won’t only make life easier for your sales team, but will prove beneficial across all areas of your business from marketing to customer service to finance. With a well-run CRM program, you can be sure your company is delivering a great client experience and growing top-line revenue.

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