

Optimizing User Adoption



Poor User Adoption

Impediments to User Adoption



- Process

- Inadequate user training and communications
- Not supporting the way users want to work (iOS, Windows, mobile, tablet)
- Ill defined business processes
- Users not feeling that they've been heard
- Not being clear on both near term and long term goals

- Product

- Hard to use UI
- Users unclear on WIIFM?
- Bad data
- Not integrated into existing tools and systems
- Lack of leadership support
- Not iterating over time

User Adoption is a Critical Success Factor for CRM

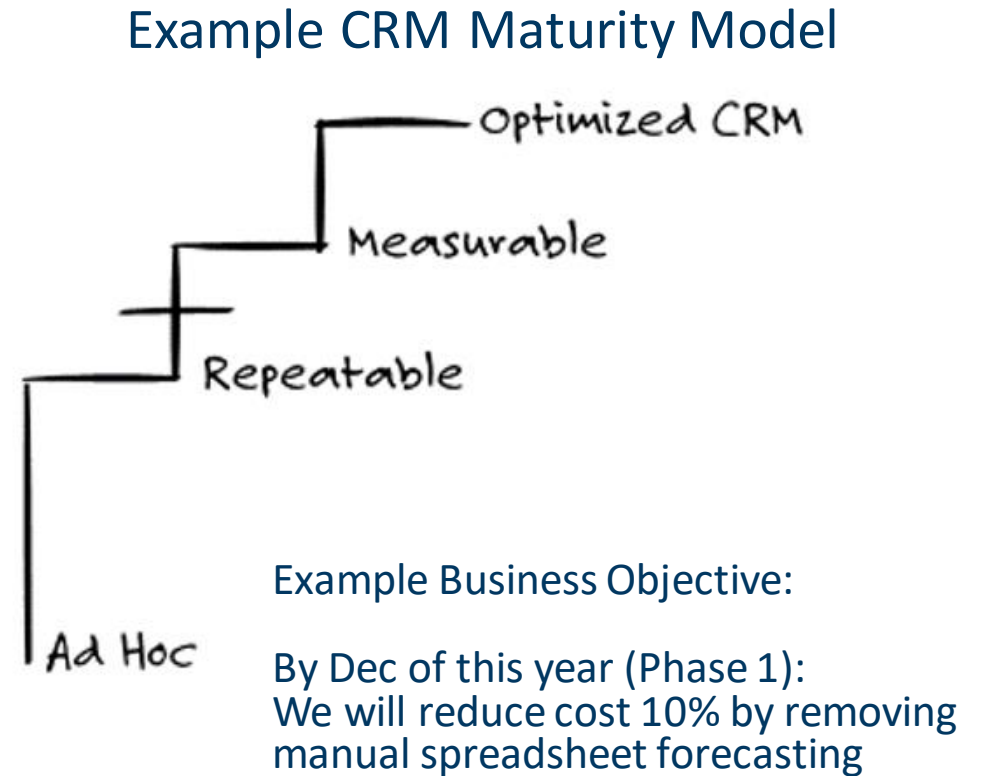


Four Main Elements for Driving Successful User Adoption

1. Well-defined business objectives
2. Build your team
3. Change management
4. Measure, report, iterate, adjust

1. Well defined business Objectives

- Clearly articulate your business objectives for the project and the deployment
- Make sure there is a plan behind those objectives
- It's ok to phase the objectives and the plan – it's a journey, not a destination



Describe WIIFM for End Users – Example



No longer need to manually type and send forecast spreadsheets every week



Update sales opportunities, forecast updates in real time



No more emailing managers and colleagues with updates



Typical sales rep savings: 4-5 hrs/week

Market the WIIFM internally

Be able to describe possible future phases, at least directionally

2. Build your team

- **Recommended Team:**
- Executive LOB sponsor: e.g. SVP Sales
- CRM Program owner: e.g. Sales ops leader
- IT sponsor: e.g. IT Director
- Users: recommend a mix of
 - The “spiritual leader on the floor”
 - The “complainer”
 - The “power user”
 - Manager / approver
- Ideally your users both provide feedback, and become your ambassadors
- Set up a governance schedule: e.g. every month meet and review changes
- Make sure it is a closed loop process – **ensure Users feel their feedback is heard**

3. Change Management

Any CRM Deployment is a Change Management Project

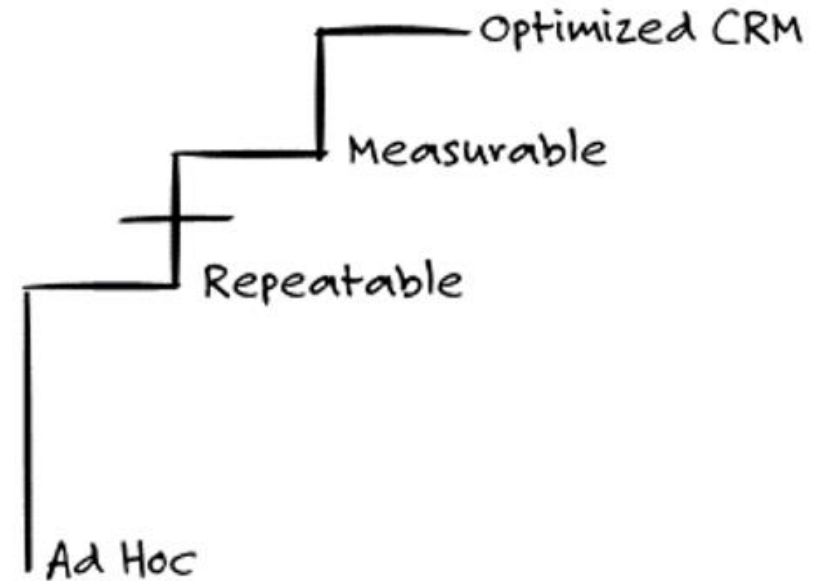
- Apply rigorous project management
- User communication
 - Awareness
 - Readiness
 - Post deployment adoption
- Consider both Carrot and Stick
- Appeal both to Heart and Brain
- Treat as an internal marketing program
 - Define messaging and WIIFM for each stakeholder
- Adapt this to what works best in your organization

Change Management Ideas

- Name the program
- Brand the program (logo)
- Identify the right internal communication channels
- Listening Sessions
- Create an internal comms “Excitement Program”
- Establish a “Champions Program”
- Create a Governance Board
- Create an intranet site
- Have a go-live SWAT team
- Customize your training materials
- Use your early users for both Feedback and Evangelism
- Gamification during Onboarding
- Poll end users afterwards
- Executive Enablement Kit with messaging and talk track
- Define Success Metrics
- Launch Event – CELEBRATE
- Post go-live User testimonials

4. Measure, Report, Iterate, Adjust

- Monitor adoption and usage
 - User logins
 - Granular usage metrics
- Collect user feedback, positive and negative
 - Use positive as internal testimonials
 - Use negative as areas to improve
- Celebrate successes!
- Adjust as needed
 - Congratulations, we've completed Phase 1. Now on to Phase 2!
- **It's a journey – not a destination**



Existing Implementations – A Few Thoughts

- May warrant an evaluation of the current system
 - Look at usage metrics
 - User interviews
 - System health check
 - Usability workshop
- Do you need to tweak or re-launch?

Summary

User Adoption is a Critical Success Factor for CRM

Four Main Elements for Driving Successful User Adoption

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Worksheets



1. Well Defined Business Objectives

- What are the overall business objectives of the CRM project, in phases if appropriate?

CRM Project Name:	
Phase:	
Target Date:	
Objectives:	
Repeat for additional phases, if applicable	

What's In It For Me?

- What is in it for users, by role?

Role:	
WIIFM?:	
Repeat for other roles	

Build Your Team / Define Governance (p1/2)



Executive Team / Steering Committee:	
Business Exec Sponsor	
IT Exec Sponsor	
Program Manager	
Other key stakeholder	
Other key stakeholder	
Other key stakeholder	
Meeting frequency	
Where are minutes stored	

Build Your Team / Define Governance (p2/2)



User Council:	
User Council Program Owner	
Spiritual leader	
Power user	
Complainer	
Manager / approver	
Repeat for all key geos / business units / sub teams (eg enterprise sales vs SMB); goal is to have representation across all key sub teams	
Meeting frequency	
Where are minutes stored	

Internal Messaging Document



- Key messages – to be used in any communications about the project

CRM Project Name:	
Phase:	
Target Date:	
Overall key message:	
Sub message #1:	
Sub message #2:	
Repeat for additional phases, if applicable	

3. Change Management



Communication plan	
Overall communication cadence to users? (weekly, monthly, etc)	
Vehicle (newsletter, intranet site, company meeting)	
Mechanism for users to provide feedback AND for project team to respond to feedback?	
Awareness phase dates	
Readiness / action phase dates	
Post deployment / feedback phase dates	
Will you do a series of user surveys? Questions and schedule?	
Training mechanism and schedule	
How do you make it fun / engaging for users? (carrot)	
Where do you need to crack the whip? (stick)	

4. Measure, Report, Iterate, Adjust



What are the metrics we will report on? (usage data, user survey, ?)	
Post deployment analysis phase dates:	
What are lessons learned?	
How will future phases be adjusted?	
When / how will the above be communicated to the company and to all stakeholders?	