

Make CRM stick

Eight ways to increase
CRM adoption in your organization

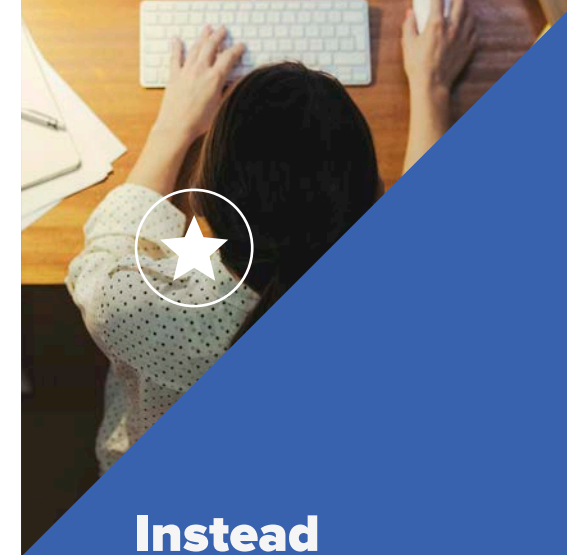


1. Succeed where others fail with CRM

Just a decade ago, fewer than half of sales organizations took advantage of CRM, but today, nearly 83% have implemented CRM.¹ Achieving a competitive advantage is no longer about being the first of your peers to deploy a CRM system; it's about making the wisest use of customer information to evolve your sales, marketing, and customer service best practices.

CRM can only help improve sales and the customer experience if it's fully and consistently adopted throughout the organization. Many companies have implemented CRM solutions, but too often, actual adoption and usage among employees remains low.

In a recent survey of sales and marketing professionals, 87% indicated they were required to use CRM, but 79% of those professionals admit they just “check the box” to satisfy their bosses.² Adoption requires more than forcing employees to check the box. Employees need to add real value by inputting useful information into the CRM system and following business processes that take advantage of its capabilities.



**Instead
of getting
maximum value
from CRM,**

79% of employees
admit they just
“check the box” to
satisfy superiors.²

What makes a CRM initiative fail?

Change is hard and some people will try to avoid it—even if the change is for the better.

Many CRM initiatives fail because the solution selected won't work in the way that the organization's sales, marketing, and customer service departments are used to doing business. Instead of adding technology to enhance your existing recipe for success, many CRM vendors will ask you to up-end established business processes in order to force fit their technology. CRM adoption can also fail if an organization doesn't properly communicate its CRM policies or adequately train its employees.



Choosing a CRM solution that adapts easily to your organization's unique business model **can help you win higher adoption rates**

The secret to successful deployment

Is there a secret to successful CRM deployments?
In many ways, the “X factor” is you.

That X factor is your company’s unique value proposition, your way of doing business, and how you build relationships that drives your success.

A new CRM solution will contribute to your organization’s success only in as much as it can help enhance what makes your company unique. To win more sales and increase profitability, a CRM system needs to help you scale up your company’s success factors and deliver the same great experience to more customers.



High adoption rates are the key to CRM success

Your CRM initiative will fail if nobody uses the system. To make CRM “stick” throughout your organization, you need to choose the right solution and plan your implementation well.



2. Create a solid implementation plan

Before you begin evaluating CRM systems, do some careful planning

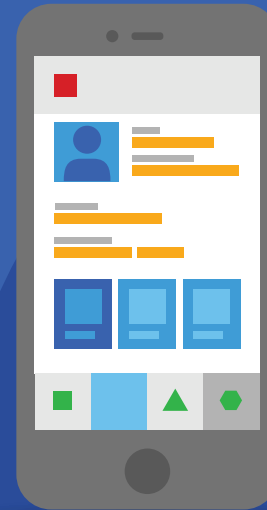
In fact, do a lot of planning. Consider how you will use a CRM system in your organization, so that you can roll it out the right way and in the right business areas.

Review your existing business processes. Do they work? Are your people productive and efficient? If yes, don't change those processes. Don't choose a CRM solution that forces you to work differently in order to use the software.

However, if your business needs some improvements, now is the time to plan a better way. Don't be afraid to create new workflows if the old ones don't work well. The right CRM vendor can give you a lot of good ideas for creating efficient, automated workflows in sales, marketing, and customer service.

Your team won't adopt a CRM system unless it's easy to use wherever they are working. You need a system that's designed for use on smartphones and tablets. Mobile devices are widely employed in the sales profession, and more than three-quarters of chief sales officers think mobile CRM improves overall sales team performance.³ Of organizations already using CRM, 74% have enabled mobile CRM.⁴

A successful CRM system should help you meet up with customers and prospects anywhere. CRM has to be mobile in order to go with you—across the office, out on the sales floor and into the field.



76%

of Chief Sales Officers (CSOs) think mobile CRM improves overall sales team performance.⁵



74%

of Chief Sales Officers have enabled mobile CRM.



14.6%

the increase in productivity when selling organizations add mobile access to CRM.⁶



26.4%

the productivity increase resulting from using social-and mobile-enabled CRM.⁷

Give employees

mobile access to CRM

3. Choose a highly flexible solution

Your CRM solution must have the flexibility to adapt to the way you already do business. That's what will help your new CRM grow and adapt as your business changes. It's the best way to ensure the long term viability of your CRM investment.

Take time to understand the philosophy of each CRM vendor. Get to know the type of software platform that each CRM system is built on. Is it designed with open architecture that makes it easy to integrate the CRM system with your other business solutions?

Choose a solution designed to maximize flexibility while minimizing complexity. Selecting a CRM system with adaptive architecture can help your organization:

- Create cost-effective, purpose-built applications
- Automate existing business processes for greater efficiency
- Scale up what already works about your customer experience
- Securely access, update and share information on the devices you prefer
- Enjoy a minimal learning curve



The best CRM solutions will be:

- Flexible
- Adaptive
- Intuitive
- Efficient
- Integrated
- Scalable
- Mobile
- Social

4. Choose a CRM system that's easy to personalize

Give your team a CRM solution that works the way they do

As previously mentioned, your CRM system will need to work naturally within your business processes. And where it doesn't, you'll want a system that you can configure and personalize without having to involve your IT department every time you want to make a change.

Many CRM solutions have enhanced configuration functionality built in that helps CRM users and administrators to:

- Tailor the CRM system to capture and preserve unique business processes
- Easily create rich, personalized user experiences
- Adapt processes to accommodate unique user, team, company and industry requirements
- Ensure greater user adoption of the CRM system and higher productivity



CRM must adapt and evolve with your business

To go the distance in a rapidly-changing world, your CRM system should scale up as your workforce grows. Being able to customize the system without coding will help make it easier to adapt the software when your business workflows change.

5. Use email to your advantage

Employees are most productive using the productivity tools they know and love, such as Microsoft® Outlook®. Giving your sales professionals a CRM solution that incorporates these tools, instead of trying to replace them, helps drive higher CRM adoption rates and helps ensure that your organization captures the information needed for successful operations.

Lacking a CRM system, many sales professionals try to manage customer relationships with Outlook. Sales managers can be frustrated to discover that after implementing a new CRM system, important customer information still resides in sales reps' email streams. Instead of fighting sales people about the way they prefer to work, choose a CRM solution that harnesses the power of both systems to help employees move from email to action.

Put CRM inside your inbox to drive higher CRM adoption by sales professionals and make it easier for occasional users in your organization to access and edit CRM information.



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6. Select a system with social media capabilities

Social media gives your sales and marketing professionals the opportunity to understand more about your customers than ever before. The Millennial generation researches products and services online and shares opinions about businesses like yours with their social networks. Your CRM system needs to have social media capabilities, so you can find your customers online and gather important information from their social conversations.

Understand your customers

Get to know your customers on a more personal level and reduce the awkwardness of cold calls by first reviewing social media profiles stored as links within your CRM. Choose a system that also enables you to review what customers or prospects post on social media apps such as Twitter® and LinkedIn®. It's helpful if you can see a customer's entire social media stream on a single, unified timeline. You should be able to easily reply to any post from within your CRM.

Take action and connect

It's important that your CRM provides capabilities to translate social media posts into actionable responses such as notes, leads, opportunities, to-dos, tickets, and feature requests. Track social activities and topics trending with your customers using search terms or hash tags, so you'll be able to create better social buzz for your company and its products or services.



Social CRM increases the productivity of sales professionals **by nearly 12%⁸**

7. When you go live with CRM, don't turn back

With any new system or new way of doing things, there will be some internal resistance to change. It's important to communicate the importance of your CRM initiative and make it clear that buy-in for CRM comes from the top down. Explain to employees how the CRM system will help them work more effectively and help the company meet objectives.

Develop a set of procedures for employees to follow when they capture new customer information in the CRM system. Once the system is ready to go live, set the date for employees to adopt the new system and procedures. Shut down any systems your new CRM is meant to replace.

Don't make many exceptions to your new CRM procedures or allow multiple systems to run concurrently.

If you do, change-resistant employees will slip back in to old, familiar habits, jeopardizing overall adoption of the new CRM system.



Testing and training complete successful implementations

CRM will be an important component of the overall management of your business. Test your new system thoroughly before your go-live date. Make a solid training plan for employees, so that you can ensure early success with CRM.

Train CRM administrators first

Your administrators will need to be trained early to learn how to customize the solution for different groups of users and workflows. Standard vendor training should be offered for the administrator role, or if your CRM solution is provided by a local business partner, your consultant may conduct onsite, personalized training.

Customize the solution and then test with end users

Create a select group of CRM end-users. The group should include users from sales, marketing, customer service, and support, and both managers and employees. Test the customized CRM solution thoroughly before roll out.

Train “super users” before all end-users

Consider starting with vendor-provided training for a group of “super users”—managers and other group leaders willing to invest the time to learn the ins and outs of your new CRM solution.

Roll out company-wide training

As you go live with your CRM system, conduct training for all employees. Remind them again of the importance of adopting the new system. The super users embedded in each department will be ready to offer helpful how-to advice and answer questions.

Think of training as an ongoing process.

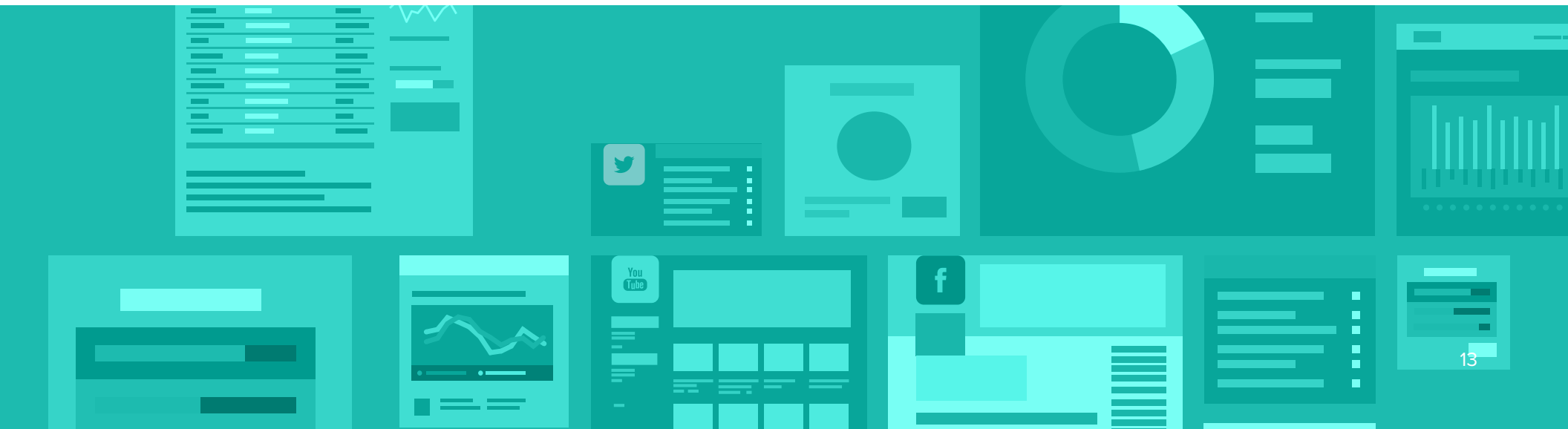
Procedures can always be improved. After employees use the CRM system for a while, ask for feedback. Then plan additional training for review or further explanation.

8. Choose wisely to succeed

Your operational success with CRM hinges on widespread adoption by your sales, marketing, and customer service employees

You can improve adoption rates by creating the right company culture, policies, and training. However, the CRM system itself plays a huge role in the adoption rate. To increase your organization's adoption of CRM, use these selection criteria:

- Choose a CRM solution that's flexible enough to work the way you want, with integration to important back-office systems and the ability to work with CRM from within the email inbox.
- Make sure the CRM system supports employees everywhere with support for mobile devices.
- Select a solution that engages customers on every level, with full support for sales, marketing, customer service, and support, as well as social media functionality.
- Pick a CRM solution that will easily adapt to what makes your company a winner—your unique value proposition and business processes—with adaptive architecture and easy, configuration capabilities.



Why Infor?

Purpose-Built CRM Solutions

- Access your CRM inside Outlook, Gmail™, and mobile devices
- Deploy in the Cloud, on-premise, or in hybrid environments
- Integrate front-office CRM with back-office ERP solutions
- Mobile support for broad range of tablets, smartphones and devices

“

We are on the go on a daily basis. We need information very quickly and in a very organized manner. Infor CRM Mobile sits right next to my heart . . . It helps me to see how our merchandise is moving. It helps me to see how my people are performing and it keeps me in touch from the floor.”

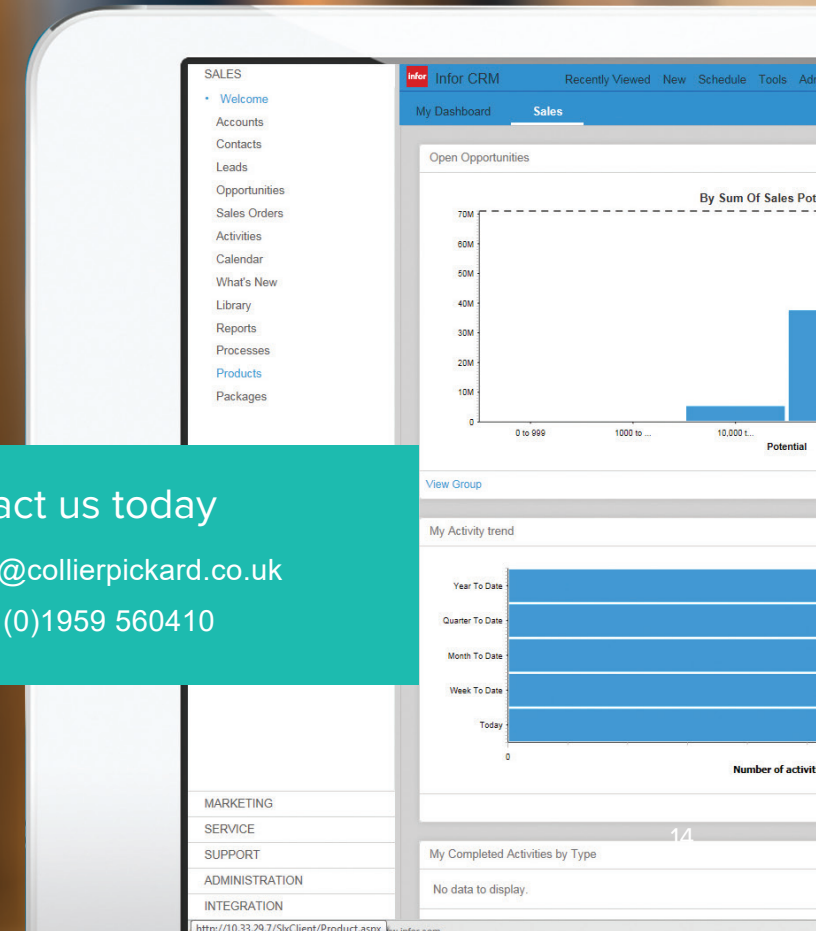
RAYMOND MOSELEY

Sales Manager, Harry Rosen

Contact us today

✉ crm@collierpickard.co.uk

☎ +44 (0)1959 560410





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From initial needs analysis through to implementation, training and support, our team are there to deliver simply successful CRM.



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