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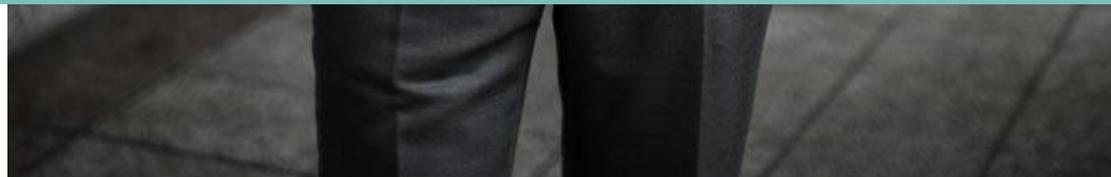


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WEEKLY BLOG

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The Secrets to Successful CRM Adoption



BY [MAXIMIZER CRM](#)



A CRM implementation isn't coin-operated...

Achieving a successful [CRM ROI](#) instead takes focus. It's about planning, getting your technology and people working together. And there are many moving parts that can impact your total cost.

Indeed, businesses spend [anywhere between \\$5,000 to \\$80,000+](#) getting a new CRM system up and running.

Those costs include expenses like software subscriptions — advertised on your vendor's pricing page — and expenses your vendor will be less keen to share, such as the cost of extra user training, technical support and software customization. With an industry-leading solution, your [hidden costs](#) can rack up significantly.

You want a solid return on your investment. And you know no matter how well your CRM strategy aligns with your business objectives — and no matter how good the technology — you will struggle to achieve your ROI if your team does not engage.

In [part one](#) of this series, we discussed how to get your sales CRM processes working like a finely tuned machine. Now in part two, we'll show you how you can get your team on board and enthusiastic about using your CRM software.

What follows are the top CRM adoption obstacles and 14 proven CRM adoption strategies.

The top CRM adoption obstacles

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You'll ultimately confront several people-related issues during your implementation, as highlighted by repeated Forrester surveys.

These cited “human” pitfalls [have included](#) the following:

- 15% – aligning their organization with new ways of working
- 35% – inadequate change management and training
- 49% – slow user adoption

According to CRM analysts, here are the most common user adoption roadblocks:

- Poor adoption strategy
- Lack of support from senior leadership
- Poor coordination with your intended end-users
- Few consequences for not using your CRM
- Software badly mismatched to your team's existing workflow
- Software poorly integrated with your other systems
- Lack of relevant training
- Lack of training support across your solution's lifetime

Thankfully, there are some relatively simple strategies that significantly boost your chances without adding significantly to your final tally.

We'll address each factor impacting your adoption fortunes.

- Building a robust adoption outreach strategy
- Choosing the right CRM system to spur, not frustrate, adoption

Building a robust CRM adoption strategy

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People don't like change and may resist it. It's a common instinct, especially when change isn't clearly articulated and entails potential liabilities. Here are some ways to communicate effectively with your team.

1. Create an inclusive vision:

It's almost cliché to say this, but getting people on board early is essential to nipping status quo bias in the bud. Host luncheons and meetings where you can visually demo your new software. Then once you've got their attention, consider asking the following: How are they interacting with existing apps that they rely on every day?

- Do they find them easy to use? Where do they get stuck?
- Do they ever waste time waiting for systems to respond?
- How can you leverage the new system to eliminate interruptions that distract them from selling, solving problems and delighting customers?

2. Layout a clear game plan: A clear implementation game plan and clear messaging are equally crucial. Plan out your messaging to be as clear and consistent as possible, and be sure to cover all the bases, including...

- Why the new software is necessary
- Why staying the same is impossible
- What is about to happen
- Where your project is at on an ongoing basis
- A realistic completion date
- How your project's success will be measured

3. **Sell your CRM using a CRM Champion:** You will also need ways to “sell” your solution to your team. Like anyone, they’ll want to know what is in it for them. If “CRM” becomes a synonym for extra IT admin work, distracting from calling prospects — then no matter how hard you push, your team still won’t want to use it. Appointing a dedicated CRM Champion can help you bridge the divide. Ideally, your CRM Champion is a team leader who understands how your solution will help your team become more productive without doing more work and can communicate the benefits of your new system in terms they will appreciate.
4. **Make CRM-use mandatory:** Finally, you’ll need to get rid of the old ways of working as soon as your CRM is up and running. Consider doing the following:
 - Restrict access to duplicate data sources and systems
 - Require sales reps to enter key prospect information into their CRM during their first sales call
 - Mandate sales reps close their opportunities inside their CRM

Getting the right CRM software

Next, let’s talk about software. Ideally, you want a solution that helps learners adjust quickly and collaborate painlessly — and with minimal delay!

Therefore:

5. **Embrace debate:** When you engage users they might request costly or impractical capabilities. Don’t be afraid to push back. Your aim is to strike a balance between high levels of customization and automation, and reasonable scope of work. Fine-tune your software within practical limits to help end-users achieve their aspirations.
6. **Consider getting every department hooked up:** Your sales team will want to see their prospects, opportunities, contacts and accounts — all in one place. Consider getting sales, marketing and customer service on the same page so they can collaborate on a shared 360-degree view of your customer. A mid-tier

vendor who offers an all-in-one subscription at a reasonable price can help you add new user subscriptions at a reasonable price.

7. **Get the right integrations:** Additionally or alternatively, consider a CRM that connects easily with your other business-critical apps. That way, if your marketing team wants to keep working in familiar marketing apps, like Marketo or Hubspot — they can continue doing so! Meanwhile, you can automatically flow lead information to your sales team working in your CRM so they can take effective action further down the buyer journey. A solution that comes with an app directory stocked with the right (free!) pre-built integrations can be of huge benefit here.

8. **Personalize your UX:** Clunky, slow or cluttered interfaces will only make matters worse. So will CRM solutions that shoehorn you into their workflow, forcing you to contemplate more coercive, time consuming or expensive measures to guarantee adoption, including extra training services or software customization involving pricey third-party consultants. Instead, consider smoothing your transition and keeping costs down with a more flexible solution. One that doesn't take a one-size-fits-all approach and expects you to fit into its workflow, but rather, one that can be adapted to how you do things. At Maximizer, for example, we consult with customers thoroughly to build a CRM that matches their workflow as closely as possible. We then empower them to personalize their UX even further by leveraging our CRM's built-in configuration features. You'll find some CRMs like Maximizer come with heightened personalization, allowing you to self-tailor your process stages and data capture fields as much as you want — to work just as you need them to.

The bottom line

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A CRM implementation can feel intimidating. And it's true, without the proper approach, you may incur needless expenses that can rack up quite quickly. In a worst-case scenario — unlikely but possible — your implementation may fail, leaving you to start again from scratch. Assuming there's a second chance.

Thankfully, the strategies for ensuring user CRM adoption and locking down your CRM ROI are well understood. A good vendor can also help hand hold you all the way to a successful completion

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