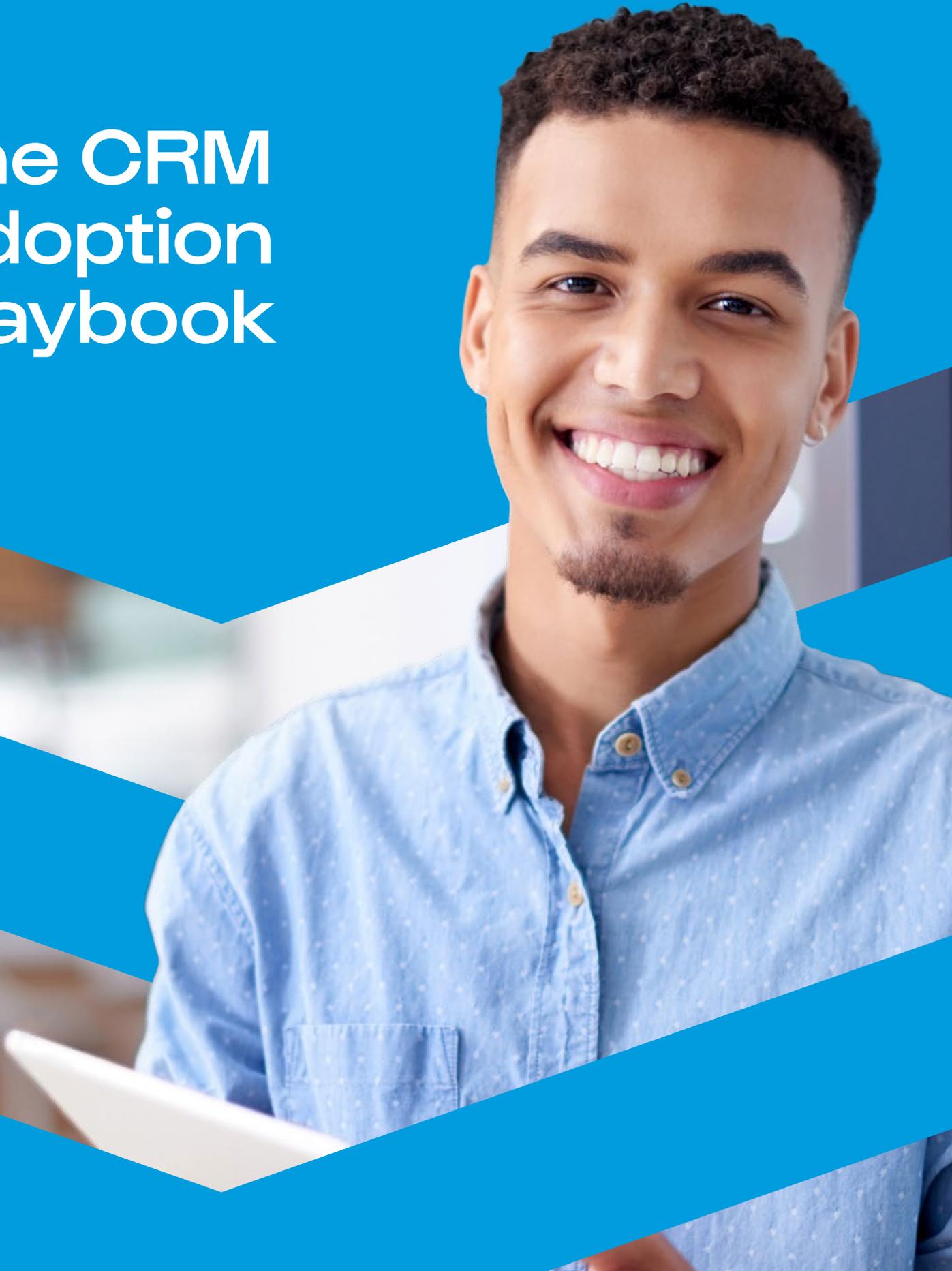




The CRM Adoption Playbook





Introduction

Use this Adoption Playbook to guide your users to effectively embrace change and communicate the value of implementing a CRM. Combine modern CRM and effective adoption strategies to ensure your software rollout exceeds expectations.



The Playbook

Many organizations undergo an overhaul or replacement of their CRM technology. When this happens, common challenges arise during the adoption phase among users who are not prepared for the change. Based on this information, we've looked at the core issues that can contribute to poor user adoption and how you can address these challenges.

PLAY #	PLAY	ISSUE	OBJECTIVE
1	Communicate Value	Users don't see the full potential of the CRM	Educate users on CRM benefits and how it will make their lives easier
2	Incentivize Users	Users don't feel motivated to use the new CRM	Recognize and reward successful usage of the platform
3	Internal Championship	No adoption due to lack of an internal champion	Have a strong CRM champion to motivate other users
4	Change Management	Users are unhappy with product functionality	Show users how to leverage your CRM investment
5	Happy User	Users are happy with new CRM—now what?	Keep users happy, committed to CRM usage and consistently engaged

Play 1

Communicate Value

OBJECTIVE

Educate users on CRM benefits and how it will make their lives easier



During implementation of your new CRM, you may encounter users who don't understand why they need to use it. This resistance could stem from:

- Poorly defined business processes
- Lack of clarity on short and long-term goals
- No understanding of user benefits
- Difficult to use interface

Solve this issue by conducting a meeting with users to showcase the value of the new CRM.

- Reiterate the strategic vision behind the CRM implementation. Make sure the users know the why behind the decision.
- Evaluate how they are using the CRM and recommend ways to expand their platform usage.
- Highlight the benefits of the CRM such as automating certain mundane tasks and using automation to give them better visibility into information that is most important to them. Make it relatable and relevant.
- Take advantage of tools and resources provided by the CRM partner. Training is critical to a successful rollout and complementary to boosting user confidence.
- Find the right trainer—someone who speaks to both the value and how users can use it effectively. Messaging is a critical part of adoption.
- Use specific examples to demonstrate the use cases of your new CRM based on common actions of the target users in your organization.
- Keep it simple. Introduce functionality in phases, starting with features that will immediately empower users.
- Consider an internal marketing campaign to ensure users understand the benefit and value of the new CRM.

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Play 2

Incentivize Users

OBJECTIVE

Recognize and reward successful usage of the platform

Use the psychology of positive reinforcement to your advantage to encourage adoption.

- Provide rewards to users as a way to reinforce platform adoption—these rewards can be small gift cards for certain milestones or tasks.
- Incorporate gamification as a fun option to encourage adoption and create a friendly competition. Motivate users with a leaderboard and point system to make it a truly rewarding experience.
- Provide peer recognition in a team meeting or public recognition via social media. People can be motivated by acknowledgement and it will increase their performance.
- Include CRM usage as part of the user's monthly or quarterly goals. Keep it simple with a gradual approach to fully adopt the system.



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Play 3

Internal Champion

OBJECTIVE

Have a strong CRM champion to motivate other users

Building an internal champion is an important step in CRM adoption:

- Users who see the CRM value and adopt it successfully are more likely to share their positive experiences with others. Influence these users to become strong CRM champions.
- Identify a person who exemplifies the following characteristics:
 - Positive demeanor regardless of change
 - Holds the trust of their team (regardless of leadership)
 - Supports the new CRM implementation
 - Inquires about improvements to the CRM experience
 - Eager to learn about the new CRM and how to make it more useful
- Users who see the value of the CRM and adopt it successfully are more likely to share their experiences and influence others.
- Champions provide insight on well-received training methods and can relate specific use cases for their team.
- Cadences set up for user adoption can be reinforced by champions as the advocate rather than the enforcer.



Play 4

Change Management

OBJECTIVE

Show users how to leverage your CRM investment



Change is not well-received by everyone—common reasons users are adverse to change include:

- Inadequate user training and communication
- No involvement or engagement in the CRM selection process
- Product functionality does not meet expectations
- Lack of internal success and/or champions

Managing change successfully is challenging and requires patience. The following recommendations can help you prepare for the pushback you may have.

- Engage users early in the process for both feedback and evangelism including asking and/or polling for continual feedback.
- Establish implementation as a program with a product plan that includes milestones. Conclude the program with a celebration of the launch.
- Customize the training materials to fit your organization and include gamification to increase user engagement.
- Use the feedback to partner with your CRM company to support improvements specific to your organization.
- Involve executive leadership support with an Executive Enablement kit, which includes messaging and a talk-track to motivate users regarding how they can be successful.

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Play 5

Happy Users

OBJECTIVE

Keep users happy, committed to CRM usage and consistently engaged

Continue engaging with users beyond the initial CRM adoption.

- Adoption goes beyond the first 90 days. Initial adoption is critical, but continuous usage is also extremely important.
- Monitor adoption and usage by tracking the right metrics such as user logins and granular usage metrics.
- Continue to evaluate product functionality and usability to ensure the CRM meets specific business needs.
- Even if adoption is high, things can change. Try to be proactive with continuous education and keeping feedback conversations open.
- Sincerely thank and recognize users who actively participate and progress in the CRM adoption.
- Establish a “Champions Program” to recognize and reward users with high usage and effective adoption.





Conclusion

Consistent engagement is important to ensure your users stay happy and are utilizing the CRM to their advantage. Work with your CRM advisor to define goals and collaborate to have a successful roll-out of the software to your organization. Tools and resources are essential to training users and helping them to embrace change.



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