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Feel the love for...

SALESFORCE

(again)

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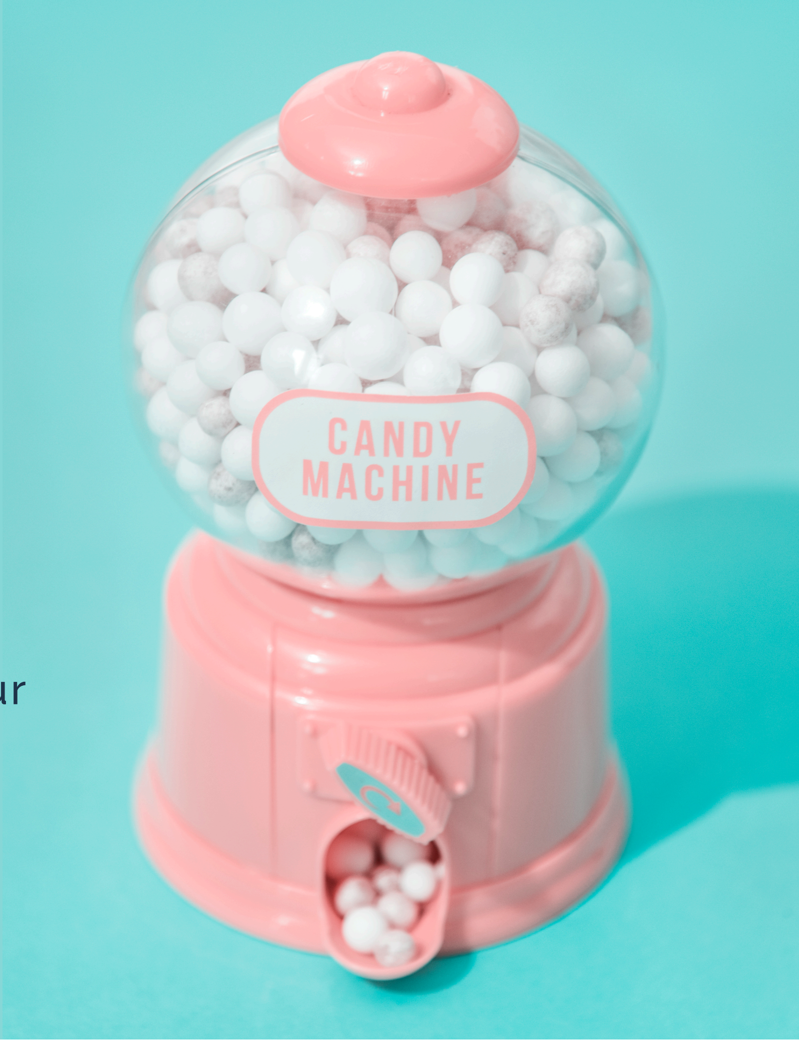
It's time to rekindle the passion between your reps and the CRM platform.

In this guide, you'll find five simple steps to improve your Salesforce user adoption.



Sales managers love a good CRM system. After all, this is where all their favourite things are kept - highly targeted accounts, up-to-date customer details, lovingly cared for deals... Useful assets in their bid to drive more sales.

Sales reps, on the other hand, don't tend to feel this kind of passion for the system. For them, it's just another blocker standing in the way of their success; nothing but a hindrance they have to check off their to-do lists in order to keep their manager happy.

The problem with this split in opinions is that it starts to create an ugly vicious cycle, one that sees the data getting dirtier and dirtier, the sales rep becoming more and more frustrated with the process and the manager unable to glean any possible benefit from this costly implementation.

One of the main blockers is the misconstrued belief that CRM systems, like Salesforce, are actually a management tool. However, the platform isn't really built for the sales reps either. At least, not on their own. In the end, we're left with an expensive bit of technology that nobody uses.

In this guide, we take a look at the common challenges involved in the implementation and adoption of a CRM system. Plus, we look at 5 important steps that will help spark the flame of a long-lasting romance between your sales reps and Salesforce.

COMMON SALESFORCE ADOPTION CHALLENGES

1. POOR COMMUNICATION

Inability to successfully communicate the true value for the team from the outset can dangerously hinder our rollout.

When deploying Salesforce, be sure to answer these questions for your reps:

- Why do we need it?
- How does it work?
- What's in it for me?
- What is considered best practice?

2. LACK OF SUPPORT FROM SENIOR STAKEHOLDERS

How can we expect our sales force to adopt a system our Stakeholders hardly believe in?

Before attempting to gain user adoption, your number one priority should be getting top-down backing.

Be prepared to hear common qualms and objections such as:

- "Sales people are hired to sell. Get them on the phone!"
- "Salesforce has limitations/problems"
- "It's too expensive"
- "I can't see the ROI"
- "If this project fails, I don't want my reputation associated with it"
- "We don't have a behavioural problem, we've got a technology problem"

How can we expect our sales force to adopt a system our Stakeholders hardly believe in?

3. RESISTANCE TO CHANGE

We are all biologically programmed to resist change.

As creatures of habit, we all struggle to incorporate new changes into our everyday routine - even if these are undeniably beneficial to us.

And this is because comfort and conformity make us feel safe.

Change turns our ‘flight or fight’ response on, which in turn triggers negative emotions like stress, anxiety or fear.

Keep this in mind when trying to get people onboard a new system and process they’re not necessarily familiar with.

You’re sure to hear comments like:

- "That’s how we’ve always done it”
- “I am used to working in the way X system operates”
- “I am technically challenged - I don’t get it”
- “Is this new system going to put me out of my job?”
- “I don’t like being monitored like this. I feel constantly watched”

4. FAILURE TO RECOGNISE THAT SALESFORCE IS CONSTANTLY EVOLVING

Just like any other technology, Salesforce is not a tool you can simply turn on and leave to run alone. System changes and advancements happen quickly and often.

At the same time, our own sales organisation and process is in constant evolution. So, we must work hard to build a platform that can adapt to fit the needs of our reps and business.

Always remember to:

- Build a roadmap for success. What do you want to get out of the system?
- Invest in additional tools that will enhance the platform
- Employ a dedicated Salesforce Admin/Developer
- Keep reviewing, tweaking and improving

5. NO SALESFORCE CHAMPION

Salesforce is a pretty impressive bit of technology. As such, we often overestimate what it can do for our business.
The cost behind the implementation and subsequent deployment, gives us the false impression that the system should work perfectly out of the box.

But for Salesforce to really start proving its worth, it needs some proper TLC from a good champion that understands and believes in the solution.

A good Salesforce champion should:

- Be result-driven and business-minded
- Have a strong analytical eye
- Be technically able
- Be able to communicate well with a diverse range of business users
- Have a 'can-do' attitude and positive outlook
- Always be willing and able to help those in need
- Provide constructive feedback to both users and technical teams

6. INADEQUATE OR NO SALESFORCE TRAINING

If you can only do one thing to improve your use of Salesforce, it's this. Offer good user training!

This CRM tool is vast and complex and will only prove useful to our team if they know how to get the best from the platform.

When planning out your training programme, don't forget to:

- Start simple
- Teach the basics (set up the foundations for more sophisticated practices later on)
- Allocate sufficient learning time
- Keep it interesting - not too long, not too bland, not front-loaded with knowledge (there's only so much information we can take at a time!)
- Don't stop there. Follow up initial training with coaching sessions, video tutorials and regular workshops

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7. PROCESSES NOT CLEARLY DEFINED OR THAT NO LONGER WORK

It's not uncommon to stumble across sales organisations that work with no real sales process in place.

As sales people are renowned to be lone wolves, they're sometimes allowed to work in their own way and follow their own method.

With disastrous implications for our process and data.

For a process be successful, it has to be agreed on and followed by the whole team. It also needs to be monitored and measured to guarantee it's actually efficient.

Make sure you are aware of:

- How your sales team manages and routes leads
- How data is managed
- How orders are entered
- How data flows between departments
- What performance metrics are used to measure success

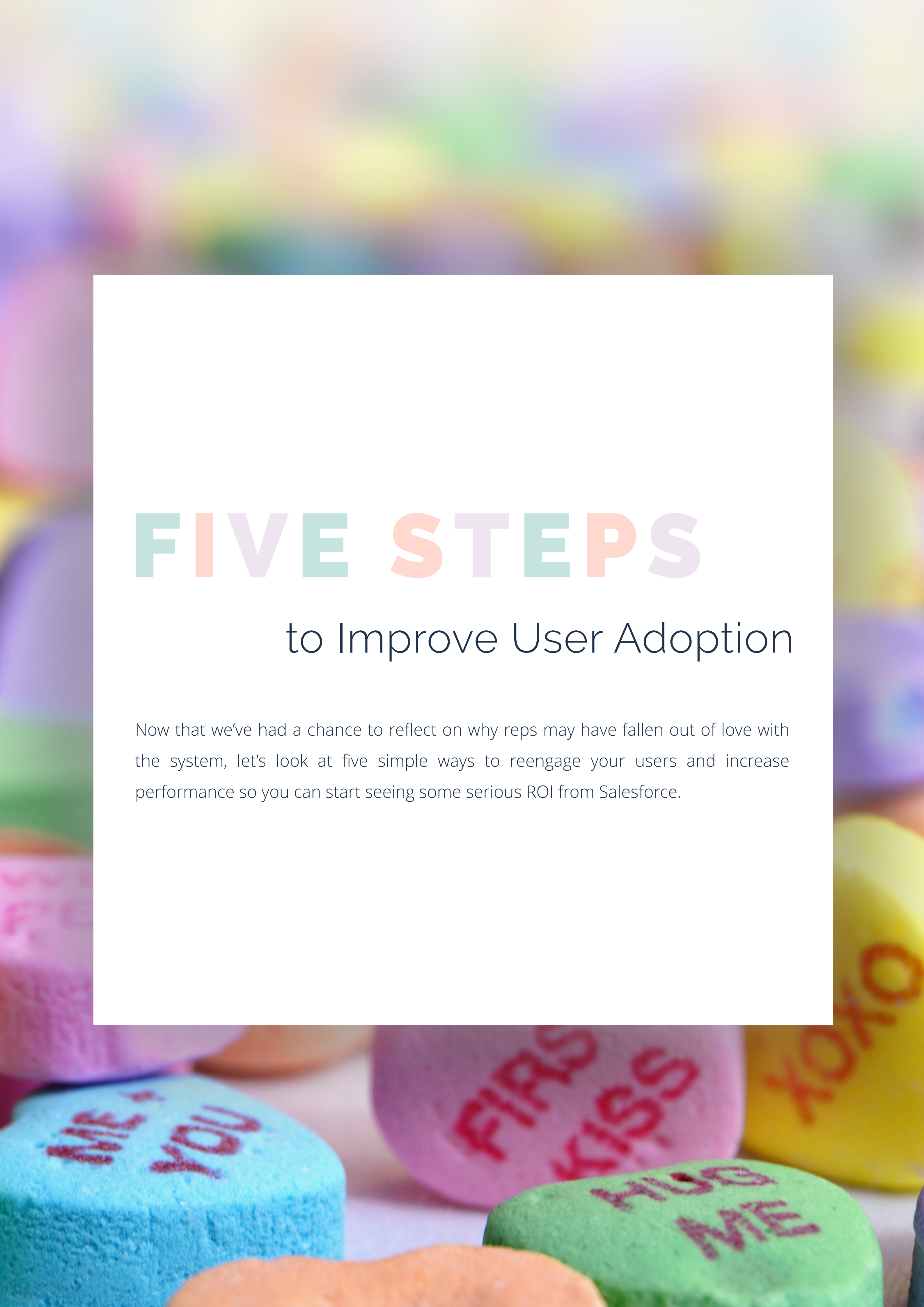
And be sure that your entire team understand the process, goals and reasons behind it. Otherwise, they'll quickly start seeing it as a fastidious reporting tool they have no time for.

8. POOR DATA QUALITY

No matter how many bells and whistle we add to the platform, at the end of the day, the quality of the data we feed into the system is all that matters - if you're putting rubbish in, you're bound to get rubbish out.

Common pitfalls that are weakening our data could be:

- Not sufficient mandatory fields in place
- Too many mandatory fields in place
- Lack of strategy on how to keep data clean
- Reports & Dashboards are unreliable
- Excel mentality



FIVE STEPS

to Improve User Adoption

Now that we've had a chance to reflect on why reps may have fallen out of love with the system, let's look at five simple ways to reengage your users and increase performance so you can start seeing some serious ROI from Salesforce.

STEP 1:
IDENTIFY A SENIOR STAKEHOLDER TO TAKE OWNERSHIP

Once a Salesforce implementation has been successfully completed; often it is left to others, such as the Salesforce Administrator, to champion Salesforce day-to-day.

More often than not, Salesforce teams are left in the wind in the hope they can resolve both the technical and business culture challenges alone.

But it's proven that a Salesforce team is less likely to come across push-backs when supported by an executive stakeholder.

A good stakeholder should be the bridge between senior members and the wider team, leveraging both position and experience to be a positive agent of change.

It's important that a stakeholder helps support the business with requirements that need to be roadmapped and prioritised based on business goals, and to ensure the delivery/communications surrounding enhancements across the board.

STEP 2:
FIND BOTTLENECKS THAT HAMPER DAY-TO-DAY USE

We tend to ask a lot from our sales reps.

Aside from delivering on ambitious targets, we also expect them to help us build excellent data sets so we can efficiently forecast, landscape and create better opportunities for our business.
It's safe to say, our reps are central to our sales journey.

Therefore, it's crucial that we create an environment that helps, rather than hinders, their day-to-day.
Help smooth out the journey by analysing the true use of the platform, looking out for functionality that is rarely used or fields that ask for too much and deliver too little.

If any step of the process is difficult or tedious without any hard benefit attached to it, ditch it.
Simplify the use of Salesforce and people will be more inclined to actually use it.

STEP 3:
AUTOMATE AND ENHANCE WHEREVER POSSIBLE

Adding a little innovation to Salesforce can help users accelerate otherwise manual tasks like populating data. Always look for opportunities to add value to your users through means of automation - i.e Lightning Process Builder, Flows, Workflows, App Builder, etc.

Some great examples of automation include:

Salesforce Lightning for Outlook or Gmail: Record emails, meetings, and tasks without logging into Salesforce. This is ideal if you have remote workers in customer facing roles.

Global Actions: Create buttons in Salesforce to record specific actions, tasks or calls that happens regularly. For example, if a rep leaves a voicemail, a button could be used to create a completed task and denote the record accordingly to show the attempt in just one click.

Process Builder: To ensure that page layouts and lightning pages make logical sense to the user by not putting 100s of fields for them to complete, or to use automation to help them populate a record of a certain type or customer demographic.

STEP 4:
MAKE FULL USE OF THE APPEXCHANGE

The AppExchange counts with a dearth of free and paid-for plugins built exclusively to enhance the use of Salesforce.

These add-on *bells and whistles* could prove hugely successful when attempting to make Salesforce more attractive, more engaging and easier to use.

Some of our favourite apps on the channel currently are:

DupeCatcher: Perfect tool to help de-dupe duplicate leads, contacts and accounts within your CRM.

Salesforce Lab's Data Quality Reports: This app puts some data quality measures in place and has a suite of out-of-the-box reports to create a data cleansing strategy that will help drive out undesirable behaviours surrounding the input and updating of your records.

LinkedIn Sales Navigator: Gain intelligence on your LinkedIn connections and enrich the data you hold on contacts within your Salesforce org.

SuMo: Inject science into the art of selling with this data-driven app that helps monitor the behaviours of your reps within the system, works out the real health of your deals and turns sales managers into elite coaches.

STEP 5:
CALL OUT YOUR SALESFORCE CHAMPIONS

Think of Salesforce as a system built for the people, by the people.

Keeping your users at the heart of what you do will be incredibly beneficial for adoption rates as it will help support the message that it's a platform built to help their success rates - not as a tracking tool.

Identify your best users and invite them to be your Salesforce evangelists - there to help construct a strong platform and promote best practices across the organisation.

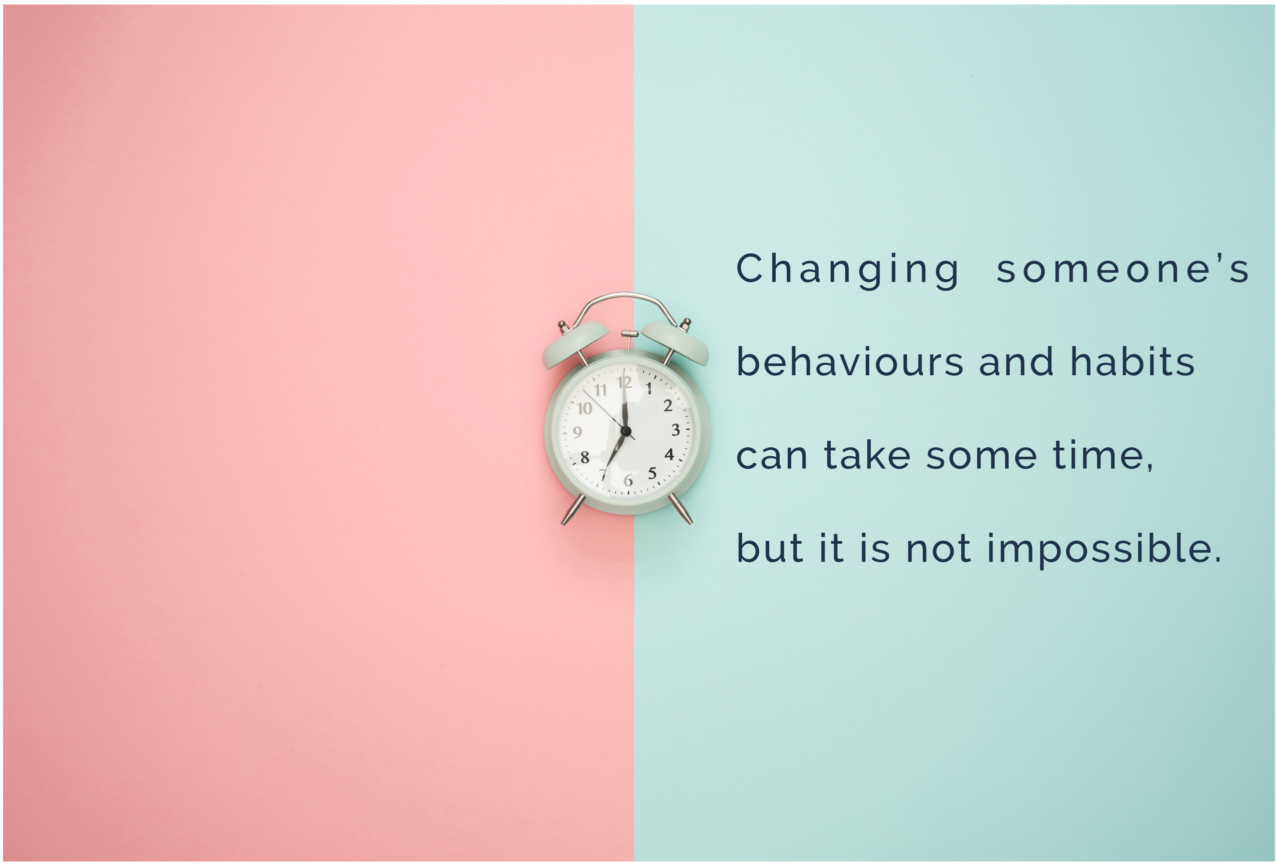
Contrary to popular belief, these champions don't have to be technical. If anything, the best champions tend to have a business facing role and are empowered to look for ways to get the most from the tools they have in their role.

Design a strategy that will allow your Salesforce Champions to carry out regular training, mentoring and coaching to the rest of the user base (at all levels).

Arrange lunch and learns, competitions on who can get the most badges on trailhead, or perhaps even setting up **SuMo** to measure adoption in a fun, motivated way.

The key to making this work? Make sure you have Salesforce Champions for all departments of the business and that these people are happy to offer help and guidance even if it's not part of their role.

But remember; Salesforce Champions are **NOT** a substitute for administration or technical support.



CONCLUSION & FINAL THOUGHTS

Changing someone's behaviours and habits can take some time, but it is not impossible. The way we behave can be *reprogrammed* as long as we are motivated by the value that change can bring to us personally.

It's important to remember that this can be difficult for some people. Some of us are oil tankers, taking a long time to change course, whilst others are kayaks that can turn on the spot.

It's key to have patience and accept that some will need more support than others.

In order to get the buy-in you need to make the implementation and use of Salesforce a success, remember to be open to communication and clear on the overarching objective.

Refrain from making the implementation solely about hitting business goals and highlight the value Salesforce can have on the individual.

Wherever possible offer personalised support and additional training to any struggling users. Remember that not everybody learns at the same rate.

Ask your team what they find valuable and what they find difficult and always be open to feedback.

And remember, your work is never done. Keep iterating and improving to get the most out of your Salesforce investment!