A CRM Champion's Guide to Adoption

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Introduction

As the Chief Adoption Officer of Salesforce.com, my mission is helping customers across the entire installed base to drive adoption of our CRM solutions. With more than 29,000 worldwide customers that span every industry, market, and geography, I have spent almost four years in this role. In this time, I have developed a fairly broad perspective and I've seen what works and what doesn't when it comes to adoption. In this paper, I'll share what I've learned, to help you avoid some common pitfalls that often hinder adoption.

Salesforce.com takes great pride in the high rate of adoption of our solutions, especially since many other companies that offered CRM solutions were not as successful. We attribute part of our success and high adoption rates to our products' ease of use, which lets sales, marketing, and support personnel become productive very quickly, with minimal training. The result is a strong community of Salesforce.com users and advocates—in fact, our customers are often our best source of new leads. But in addition to overall ease of use, how a CRM project is planned, implemented, and promoted is also crucial when it comes to adoption.

Defining CRM

Before getting into the details of driving adoption, I'd like to define the core elements of a CRM system, just to make sure we're all on the same page. Here is a list of those elements and what they tell you about your prospects and customers:

- Lead management: How prospects first came in contact with your company and how likely it is that they will buy your product or service
- Account & Contact management: Who your customers are, including the roles of the individuals in the organization who will be your points of contact
- Activity management: What happened, when, and why?
- Opportunity management: What deals are on the table and what it may take to close them?
- Pipeline management: The likelihood of a deal closing and what is needed to win the deal within a certain time period
- Forecasting: The projected closing of deals in the pipeline against plan
- Case management: The problems customers are having
- Solution management: The solutions to ongoing customer and product problems
- Campaign management: The frequency and targets of your outbound marketing communications and those that yielded the greatest return

CRM Applications are Unique

Think about it. What other applications can manage information about who your customers are, where they are, who last talked with or met with them, what products or services they bought, and what problems they may be having? Capturing such information is unique to CRM applications; no other business applications can provide this level of customer insight. However, this rich functionality can also make CRM applications relatively difficult to deploy. And all that functionality is useless unless the application is widely adopted.

Understanding what data you have—and don't have—is essential to making sure you can simultaneously address these business challenges:

- The productivity of customer-facing personnel
- Cross-functional collaboration throughout the enterprise
- The command and control needed by management

Another benefit of understanding exactly what data you have is that you can get rid of some of it. Unless there is a specific business benefit associated with particular data, it shouldn't be in your CRM application, period. Just because you have old customer histories doesn't mean you should include them. At best, such data may be unused; at worst, it negatively impacts adoption.

The Role of Business Champions and Executive Sponsors

Frequently, an organization's overall need for a CRM application is not well defined. The business champion who takes the lead on a CRM initiative is often the key beneficiary of the resulting ROI, although he or she is typically not the executive sponsor of a broader, company-wide CRM initiative. In fact, champions often realize that if they try and build consensus around a broader CRM strategy, they will miss the window of opportunity for driving the business benefits they set out to achieve.

The old adage of "boiling the ocean" applies. It is neither necessary nor desirable to resolve every possible issue related to a complex deployment at the outset. Just talking about it can be unproductive. Go ahead, I dare you—bring together a group of executives or potential business sponsors and ask "what does CRM mean to you?" You'll get very few, if any, similar answers. This is why you shouldn't go down this path to begin with.

The most successful deployments are those that quickly show a significant success within a specific area and then build on that early success. The business champion typically defines the business benefits on which to focus. Keeping that focus is important. Unnecessarily broadening the scope often derails the first wave of any initiative. This effort—and what is learned from it—should serve as the core underpinning of a broader deployment. This strategy may seem conservative but it is also, more often than not, highly successful.

It is the executive sponsors—who typically support the cause of the business champions as a departmental or divisional proof point—who make possible projects that lead to a broader and even more successful deployment. Having an early success with a limited focus will make executive sponsorship of broader efforts much more likely.

A CRM Champion's Keys to Success

When I look at companies with high adoption rates, I see that they followed common approaches to deployment, despite differences in size or strategy. In this section, I'll summarize some tried-and-true approaches for business champions who want to drive adoption to make *their* CRM projects a success.

Find an Executive Sponsor

I am always perplexed when executives don't endorse a CRM initiative. Sometimes the reasons are organizational; sometimes they are related to specific individuals. But lack of executive endorsement always has the same result—poor adoption. When you think about it, executives resisting CRM initiatives are pretty ironic because they ultimately have the most to gain from the overall business improvements that result from such initiatives. But I think the biggest challenge to getting an executive sponsor is the sheer magnitude of the resources and organizational changes a deployment may ultimately require, since it is not uncommon that deployments in large, global companies may take months or even years. Executives simply may not want to commit to a long-term time investment.

So shorten it. Build a scenario in which an executive's initial sponsorship transitions over time to be shared with other executives. Remember, if the initiative is to be successful in the long term, it will need to become ingrained into the corporate culture. When that happens, executive sponsorship will become moot. Therefore, charting a path that seeks out a first initial sponsor is a winning strategy. Getting his or her hands-on involvement—including participation in review sessions, help in building consensus, confirmation of priorities and budget, and the timely resolution of escalated issues— is also critical and will go a long way towards building and sustaining success.

Get Beyond the Constraints of IT

It's a familiar struggle. Business users want their needs addressed immediately, while IT can't react quickly enough to meet their expectations. Sales VPs and other key stakeholders then become frustrated and try to force the issue and make changes on their own.

Sales people typically are willing to try something new because they tend to be inherent risk takers—in fact, more often than not, their jobs depend on it. They, of all people, have the deepest understanding of how to achieve customer satisfaction, create winning competitive strategies, and the downside of broken, inefficient bureaucratic processes.

Getting beyond IT constraints is critical to any CRM strategy. The old waterfall approach of defining requirements, searching for an application package, doing a fit-gap analysis, conducting a pilot, and so on, often results in the perception that the solution is something for "next year." Of course, such delays further compound the frustration of those who should be your strongest allies, the business stakeholders. To be successful, focus your efforts on embracing these individuals, empathizing with their needs, and becoming an integral part of their teams.

How Not to Slip on the Slippery Slope of ROI

Generally speaking, organizations are becoming smarter. They are smarter at spending and they are smarter at execution. To what extent this trend is based on improvements in our university MBA programs is probably another debate. Nonetheless, quantifying the overall business benefits of a CRM application is a great idea but you need to tread carefully. It is highly likely that your organization may have a tough time measuring what it is you are trying to improve, let alone setting a goal above some arbitrary benchmark. Efficiencies don't always come with a corresponding metric and not making that clear at the outset may set unrealistic expectations with management.

One approach to responding to the "what it is going to cost and what do I get in return" argument is to outline those business functions that stand to benefit the most. These functions should include those key customer interactions considered most important by your customer-facing personnel. Just building consensus around the key valued interactions is extremely valuable—I've seen many situations where business leaders lack a good understanding of the interdependencies between the customer-facing teams and back-office functions. Your CRM strategy should help to resolve this gap and lay the groundwork for significant organizational gains.

Another approach is identifying tangible business benefits that may not be directly related to ROI, such as:

- Visibility into the opportunity pipeline of the direct sales teams or channel partners, or customer service issues caused by the latest product release
- Knowing when to get executives involved in deals that are not moving forward fast enough
- Identifying competitive losses where the current marketing collateral was not effective
- Performing discount analyses to understand pricing pressures by product and market

Although these benefits may not be directly tied to an ROI analysis of increased revenue or decreased costs, their high value is generally understood. You should clearly communicate such benefits, but I wouldn't spend a lot of time trying to assign a specific ROI value to each of these benefits.

Stay Flexible

Sales, support, and marketing users are an interesting bunch. I think it's fair to say that even though they may not know exactly what they need, they are quick to ask for a solution. To make sure any solution will ultimately be widely adopted, it's crucial to gather the perspectives of many different customer-facing users at the outset, and to make sure any solution can be easily adjusted and modified throughout the deployment. This approach also helps avoid having to define everything in rigorous detail at the outset.

But defining *those* elements that will provide the basis for future functionality is a sound and prudent strategy. For me, the most important element is knowing exactly who the customer is. Of course, the "who" in this case is not just the customer name you'll find in your accounts receivable system; instead, it should include the legal entity you're doing business with, as well as all points of contact up to the executive level. Whenever possible, I advocate taking a bottom-up approach of working with your key business constituents and adding functionality and associated data incrementally and iteratively.

Create a Network of User Champions

Are you capturing the likely productivity benefits to your customer-facing personnel? Have you established a forum in which to discuss them? Are the opinions of this employee group even considered valuable by executive management? On all of these counts, I hope your answer is yes. I've seen efforts where the productivity gains of the customer-facing personnel were ignored or out-prioritized by the needs of management. When that happens, it can be a death sentence for adoption.

One of the best vehicles for ensuring that the opinions of customer-facing personnel are heard and responded to is to form a working group of user champions from each region, business unit, and business function. This front-line team should be responsible for leading the rollout and adoption in each location. The team also needs to be in complete alignment with the Center of Excellence (discussed later). To facilitate the team's work, establish a forum—such as weekly conference calls and quarterly onsite meetings—to openly discuss the readiness of their users, managers, and organizations. Once the CRM solution is implemented, this team needs to provide ongoing feedback to assure a high level of adoption.

Make it Short

The shorter the deployment, the more successful it will be. I know this statement may sound edgy, but it's true. Whenever the first phase of a deployment takes more than 90 to 120 days, I always find problems. Containing scope is absolutely critical to long-term success—get something out there quickly and build on early successes. If you don't it is unlikely you'll recover. Just as in sales situations, first impressions are everything and a CRM initiative is no different.

To ensure a quick deployment, first lay out a progression of activities in a Deployment and Adoption plan. Then make sure everyone buys into the plan. First discuss the plan with your key business users and get their consensus. Then walk through it with management. Make sure you include the feedback from the business users in your presentation to management, especially if you are targeting productivity gains. Let everyone feel the pain that exists in the customer-facing ranks and address those pain points as a way to define scope and priorities with management. Be sure to address how a solution enabled by Software-as-a-Service (SaaS) technologies helps to quickly address productivity issues.

Embrace and Manage Change

Salesforce.com customers have the distinct advantage of being able to rapidly configure and deploy a solution. As a result, your greatest challenge won't be technology, but your organization's ability to adapt to rapid change. Yes, the “change” word. It always amazes to me how often this factor is left out of the equation. Somehow executive managers are slow to accept that some level of change is always part of implementing a major new application.

To make sure the initiative won’t stall, I can only suggest that you limit the number of required changes at the outset of a project. As you decide what changes to make, focus on those that will bring about fundamental and highly visible improvements, preferably in an incremental way. These changes may be challenging to your users, but they should not be insurmountable. By making changes step by step, the resulting improvements will become both the basis and reference points for future changes. Identifying these reference points and building consensus around those steps must be part of your strategy for managing change.

Build a “Corporate Memory”

With CRM, your company can create a 360-degree view of your customers for the first time ever. Such a view will help you to gain insight into every aspect of your company’s business, as well as into every customer. Customer information is a corporate asset that, if used to its fullest, can be a huge competitive advantage that makes possible a near real-time response to rapidly changing business conditions. Your CRM application takes information previously only known to—and often hoarded by—various individuals, compiles it in a single, easily accessible repository, and then shares that information to the benefit of the entire organization. This potential is pretty incredible, but getting everyone to agree on just what customer information to collect is one of the most difficult parts of any CRM strategy.

Organizations that do this well create a “corporate memory,” which has wide-ranging benefits throughout the organization. In my book, these organizations get an A+ in CRM. These are also the folks that I hope will share best practices with other customers and prospects. But I have to admit that I wish more of organizations excelled in this area. One problem is that corporate memory needs to include cross-functional disciplines that are not usually addressed at the same time. As a result, a sales organization may use Salesforce SFA, but the customer service teams may use a different application, so that critical customer data is not shared. Similarly, Marketing may lack a closed-loop system that can accurately measure the return on marketing spend, while all they hear from Sales is that they don’t get enough high-quality leads. You get the point.

Get Managers on Board

“Break in the chain” is the term I use for middle managers who don’t use their organization’s CRM application to manage their business. For example, I’ve seen many examples of the old-school approach, where administrative assistants prepare spreadsheets to manage a sales pipeline. I also see examples where managers still pick up the phone or fire off an email to get the current status of an account or of an opportunity a rep is working on. Such bad habits simply need to change as an integral part of CRM adoption.

To be willing to make this change, managers must trust the data, so it is crucial that customer-facing employees continually update the system with the latest data. Of course, this process needs to be a two-way street, where managers use the system as well. Here managers who are strong adopters can serve as examples to other managers. You can help make this happen by creating a forum that lets managers speak about their own process improvements, the benefits to users, and the gains in overall efficiency. Get the managers talking as a group. It always amazes me to see how often managers just won’t admit what they don’t know. But I have also seen many situations that were easily resolved in a forum where managers could openly discuss their issues with their management peers.

Use CRM as a Portal

I like to think of the CRM solution as a one-stop shop. The more often customer-facing personnel can quickly find what they need just when they need it, the better. This doesn’t mean that every application across the enterprise should be accessed directly from the CRM application. However, any information that directly helps customer-facing personnel in their jobs should be readily accessible from the CRM system.

A good way to identify such information is to look at the most common day-in-the-life scenarios of frequent users. Here are a few to get you started:

- If sales reps use Outlook to schedule their appointments, they should synchronize their Outlook environments with Salesforce instead of separately entering tasks or events into Salesforce. A good practice is to make sure everyone syncs their Outlook calendar and contacts every week.
- If sales reps send product brochures in response to customer requests, those brochures should be available as PDF files in the Documents tab of your Salesforce solution. The reps can then send them using an HTML email template, instead of having to go to an Intranet site via a VPN connection. A good practice is to periodically evaluate what collateral is actually used and the associated close rates, so that you know which pieces of collateral generated new or incremental business, in which to invest further effort, and which to retire.

- If customer service reps use a different system to log customer problems, sales reps should have access to that system from within Salesforce as well, so that they get advance warning of issues that may impact up-sell and cross-sell opportunities. A good practice is to actually have Customer Service and Sales on a single system.
- If marketing reps use a different system to manage campaigns, sales reps should have access to that system from within Salesforce as well, to know what collateral or promotions the customer may have received. A good practice here is also to have both groups use a common system.
- If you use a third-party data provider so that reps can access financial information about a customer, it's a good idea to give sales reps direct access to that information from within Salesforce, ideally from the Account page.
- If your sales methodology requires the creation of annual account plans for your largest customers, reps should have access to those plans directly from within Salesforce. Ideally, account plans are part of your Salesforce customizations that are accessed through a separate tab or useful link.

There are many other scenarios that can be easily realized in your CRM solution. With Salesforce.com's recent innovations—including the Apex platform, Apex Code, Apex Connect, Visualforce and the AppExchange marketplace—the possibilities are almost endless. As you evaluate these possibilities, continually assess what they could mean to the individuals in the trenches and the impact—either positive or negative—on their productivity. Use that assessment as a criterion for what information should ultimately be included in a CRM portal.

Focus on Usability

We conduct comprehensive usability tests early on and throughout the development of any Salesforce product release. Unless these tests confirm ease of use, the development team does not release the application. However, a customer's customizations often adversely impact the usability of a Salesforce application; something that is usually discovered only after the fact. Maybe Salesforce.com makes it too easy to customize their application?

The key to a successful customization is to conduct user testing prior to deployment to confirm that any changes are easily understood and will not over-complicate the solution. I've seen many situations where customizations had to be removed because they created more problems than they solved. Make sure you assemble a train-the-trainer team to evaluate customizations in a working prototype, populated with a small sample of test data, and to use the team's feedback to confirm ease of use. If the customization fails the test, try something else—don't just release it thinking you have no other options. You do! If you take the time to address usability *before* deployment the effort will more than pay off in the long term.

Insist on Data Quality

In my 27 years in the technology business, I've never seen an application where trust in the data was so critical, and conversely, where distrust had such an adverse affect on usage and adoption, as with a CRM application. Yes, some applications—such as General Ledger and other finance applications—are subject to detailed audits for obvious business and legal reasons. But for CRM adoption, trust is absolutely critical; if users don't trust the data they simply won't use it. It's not as though bad data will stop an organization's products from being sold or bring shipments to a halt; far from it. Instead, unreliable data in a CRM application will result in infrequent, casual, and low-value usage, with catastrophic effects on adoption.

Ensuring data quality is absolutely critical at the beginning of your CRM deployment. So is defining ongoing monitoring processes that ensure that the quality doesn't erode over time. I've seen situations where a CIO had five different customer master files, with no idea about which file was the cleanest, let alone what data was duplicated in each. This is not an easy problem to solve–in fact it is one of the most common problems a CRM initiative faces. I like getting business users involved in helping to identify what data should be used and then cleaning up that data before loading it into the CRM system. After all, since business users will originate and maintain the vast majority of this data, it will be their responsibility to keep the data clean.

If necessary, a third-party data services provider—such as Dunn Bradstreet or InfoUSA—can provide the initial source of customer data, which can then be used as a baseline. If your company has limited experience in this area, I would also encourage you to engage consulting resources that specialize in data cleansing, enrichment, and migration.

Don't Become an Island of Information

I'm a technologist at heart, so I have a fairly strong bias towards integration. About five years ago it was pretty exciting when we first released the Salesforce API (now called the Apex Web Services API, to go along with its new capabilities); right around the same time we released the Enterprise Edition. I have been a strong advocate of using the API ever since. In the fall of 2006, API statistics reached a critical milestone: for the first time, API calls exceeded Salesforce page views—proof that customers are widely integrating Salesforce into their overall IT landscape.

In addition to making it possible to pass data in and out of Salesforce, our integration capabilities address a potential adoption problem—that of Salesforce becoming an island of information. For example, by integrating with the system that controls the order process, CRM users can access order and shipment information directly from a closed won opportunity. It's very cool when a sales rep can immediately respond to a customer inquiry. And of course it makes lots of sense to integrate Salesforce data with customer master data, to ensure that the data in both systems is always up to date and consistent.

For larger companies, Salesforce probably replaced another system. Smaller companies may have started from scratch. In both cases, there may not have been a strategy for integrating data across front- and back-office applications. This situation is very common, since system-of-record arguments can have far-reaching technical implications. At the same time, sales organizations are notorious for wanting to do it their way and not getting bogged down in "IT problems." If you face a similar situation, I recommend that you address integration on a lag basis and complete any integration in subsequent implementation phases.

You may be pleasantly surprised to find that integration may be easier than you thought. With the introduction of Apex Connect, there are five approaches to integration, depending on your business needs and existing resources. Just as Salesforce.com makes it possible to shift the IT burden to Salesforce, Apex Connect makes it possible to shift the integration burden.

Invest in Your Administrators

Traditional on-premise applications carry with them a huge administrative burden and associated costs. Not so with Salesforce. For administrators, tweaking and maintaining the app in a browser is just a click away. But why do corporations still under-invest in their org administrator(s), even when a Salesforce solution is far cheaper than an on-premise solution to begin with? It's a good question and not one for which I have a good answer.

When looking for an administrator, look for someone with strong, progressive technical skills, along with a keen sense of the business, so that he or she can easily take the perspective of an application user when suggesting or making changes. These people are not easy to find and when you find them, you need to continually invest in them. Don't think of administration as a requirement only for getting started. It isn't. Salesforce.com's three-release per year strategy requires a continual cycle of learning for administrators.

Companies that prefer not to make this investment can outsource their administration to Salesforce.com. With our Premier Support service, our experts will perform all the administration responsibilities for your organization, except for adding users. For some companies, this can be a cost-effective approach that ensures that they are always well positioned to make the most of new Salesforce functionality as soon as it is released.

Get a CRM Help Desk

Organizations with traditional business applications often have an identified contact within IT, so that users can ask questions and resolve problems. A CRM system is a little different—you simply can't have all your CRM users calling IT. It just won't scale. Still, you need to make sure that your users' questions are answered and that they get the support they need. Otherwise adoption will suffer.

The answer is to build an internal help desk. This resource needs to have defined points of contact with your network of user champions. These champions can provide level-one support to help filter out questions with obvious answers. Involvement of the user champions will also help to identify issues that may have been missed in the initial user training and should be included in any refresher training.

For problems that are logged—by using the Cases and Solutions tab, for example—a Center of Excellence (discussed later) needs to take action because such problems may provide an early warning of problems in other lines of business or geographies. I also recommend that pertinent outcomes be included in the broader program communications, such as a newsletter.

Integrate Your Sales Methodology

This is one of my favorite subjects, one that can have a significant impact on adoption. Although the Salesforce SFA functions are the most highly utilized solution components, not everyone takes full advantage of them. It amazes me how often organizations reduce a sales methodology to include only the sales stages and pipeline management, instead of also including activity management. If you think about it, isn't the whole point of a sales methodology to ensure a high level of consistency and quality in driving and winning business? Then *why* are activities so often neglected?

I want to remind everyone that the functionality Salesforce.com originally released as a service to its customers is the same functionality it built for itself, which included an integral component for task and event (activity) management. Activity management is simply part of the Salesforce DNA! The recording of tasks and events is absolutely critical in driving collaboration.

Knowing which interactions to capture is one of the more challenging implementation decisions. People talk about it a lot, but many customers don't understand how to identify valued customer interactions that should be captured by the application, or why they should do so. For example, should a manager take it on faith when a sales rep says the probability of winning an opportunity has just improved? Or does some customer interaction objectively support raising the probability and advancing the sales stage? This becomes an interesting question, one where many customers struggle with an answer.

My preference is always to implement activity management before opportunity management, which should in turn precede the implementation of pipeline management and forecasting. I consider activity management to be a core underpinning of advanced Salesforce functionality. It's a somewhat contrarian view, but it may be interesting that the chief adoption officer of Salesforce.com has come to this conclusion. Do you know many other chief adoption officers? If you find them, I'd really love to talk to them about this subject.

Measure Adoption

The most common measurement of adoption is how often users log in to the CRM application. My general rule of thumb is that 90 percent of all users should log in at a minimum of every two weeks. Of course, that varies depending on user roles. For example, I would advocate that sales and support reps log in to the application every workday unless traveling.

There are other, more detailed measures that will give you a better understanding of usage and adoption. Object ownership is a good measurement because you can measure the growth in the number of objects created by each user. Although this is a very basic measurement, it will give you insight into how the application is actually used and lets you quickly identify individuals who are not using it in the prescribed way. When using this measure, consider the creation rate of the following objects for each role:

- Sales personnel: Accounts, Contacts, Activities, Opportunities
- Customer service personnel: Contacts, Cases, Activities, Solutions
- Marketing personnel: Campaigns, Leads, Activities

Another common measure of adoption is based on a defined set of key performance indicators (KPIs) that can be pulled from the application. I consider KPIs to be the most sophisticated form of measuring adoption because they provide tangible benefits to managers. If managers can't pull key KPIs from the application it means they are not using the application as intended, which can remedied with refresher training and more targeted monitoring. When choosing KPIs, ensure that they will drive the desired behaviors and consider at what point they should be implemented. Here are a few KPIs that have been implemented successfully by the organizations I follow:

- Sales: Opportunities won, Opportunities lost, Loss by competitor, Average deal size, Sales stage duration, Forecast accuracy, Productivity by rep
- Customer Service: Cases opened, Cases closed, Solutions created, Productivity by CSR
- Marketing: Leads generated, Leads converted, Revenue generated by campaign

Establish Centers of Excellence

Understanding what works and what doesn't is critical, both during the deployment and over the long term. Your CRM initiative should have a structure and team in place to manage the overall deployment and to ensure its success. This is especially important in large corporations, where many different lines of business (LOBs) are involved across different geographic regions. Of course, complexities also go up significantly when multiple languages and currencies are involved.

If you haven't already, I highly recommend that you create a Center of Excellence (COE). A COE is a centralized team of key program personnel that controls all aspects of the CRM initiative. The COE can add value in many areas, but one of the most critical is the dissemination of best practices. The center should get direct feedback from the user community and be able to quickly identify root causes and potential remedies to problems that occur. The center needs management's commitment of resources and budget on an ongoing basis, at a level commensurate with the overall CRM investment. For example, a 1000-user deployment may require a staff of six to eight full-time resources throughout the deployment, which can be reduced to three to four part-time resources after deployment. The actual number needed to staff a COE will largely depend on the level of self-sufficiency of each LOB and region.

I think adoption is strongest where user champion teams take direct ownership of training, data migration, and change management. Ideally a user champion—identified in each LOB and region— can be linked to the centralized COE team. Such a set-up lets the COE manage multiple elements of its program concurrently, while placing ownership of adoption where it rightly belongs, in the hands of the business users.

Provide Training

Although there are references to training throughout this paper, this subject deserves its own section. While change is a critical component of a successful CRM deployment, getting the organization behind the level of change that may be necessary can be a daunting task. Training is the way to get there.

As you think through your training requirements, pay specific attention to the productivity of the customer-facing personnel. Too often, as management focuses on its priorities it ignores how the people in the trenches will be affected. To successfully analyze the needs of such users, construct "day-in-the-life" scenarios for each user role. These scenarios are really just detailed user acceptance test cases that validate the overall solution. When coupled with familiar data, such scenarios can provide users with specific examples that show how intended improvements will benefit them in their daily work. Getting resoundingly positive feedback from such training sessions is typically a precursor to strong adoption.

Training sessions should also be appropriate to the audience. It may be helpful to segment sessions so that management training focuses on higher-level scenarios and addresses how managers can adapt to impending changes. After all, managers need to be the first line of defense in answering the "whys." Clear and direct answers will go a long way towards instilling confidence in others. Lack of guidance and direction, on the other hand, is a recipe for low adoption.

What amazes me is how often users won't admit what they don't know. The best way to address this problem is for the user champions to do a few "ride-alongs" to observe how various user groups interact with the solution, gather feedback quickly, and make recommendations about what refresher training would be helpful. Although this approach may seem basic, it is critical to monitoring adoption and eliminating the root causes of poor adoption.

Offer Adoption Incentives

I'm often asked about rewards programs as a way to help drive adoption. Fundamentally, I like the idea of rewards. For example, one customer gave away iPods to the strongest adopters each quarter. Identifying and rewarding the strongest adopters is a great way to reinforce best practices. It also has the side benefit of showing, by example, the benefits of change, which is one of the best forms of training.

I've also been asked about tying adoption to compensation and I firmly support taking an approach of "if it doesn't exist in Salesforce it doesn't exist." Such an approach ensures that everyone helps to contribute to the corporate memory. Be sure to be specific: the mandate must include both the timeliness and quality of the data. For example, prospects and early-stage opportunities should be entered into Salesforce immediately—reps should *not* be allowed to wait until just before closing a deal to enter the data. If data is not entered immediately, you lose a core benefit, namely getting early visibility and being able to measure close ratios. In terms of data quality, the data entered into an opportunity must include competitive information, identification of key contacts, and product details.

Make it Mobile

Remember back in the late 90's, when wireless was just taking off and everyone was euphoric over the potential applications for your PDA or cell phone? Although those grandiose ideas were premature, the vision they offered was compelling. Fast forward to the present—wireless application protocols have come a long way, so that many of those visionary capabilities are now being broadly adopted.

Typical sales reps are always on the road. Rather than having to wait to connect to the Internet in their hotel rooms, they can now connect from the parking lot or the lobby of their next customer. Anything that makes it easier for them to access and update information in Salesforce will lead to greater adoption. And when Salesforce is integrated with their email service, the justification for adoption becomes even more compelling.

Take Advantage of New Product Features

Taking advantage of new product features is one of the most under-utilized benefits of the Salesforce model. The rate of innovation in our products is dramatic, particularly when compared to that of the on-premise software model. Why then is it that some customers take so long to leverage new product features? I've spoken to customers that are behind by three releases, which quite frankly is disappointing. When asked, the typical reason they give is that they don't have a good process to keep up with the rate of change.

I already commented on the need to continually invest in your org administrators; well, this is where that investment really pays off. Salesforce.com allocates significant R&D resources to creating those product features most requested by our customers. For new CRM customers, that means that they can immediately take advantage of those features that the more experienced customers consider most valuable and have been waiting for.

There are many ways to make sure you stay abreast of the new features on the product roadmap. I highly recommend that a few members of your CRM program team attend Salesforce.com's local user groups, city tours, and the annual Dreamforce conference. Besides a wealth of product information, such events give them a great opportunity to network with their peers. I find that there is nothing better than customers sharing experiences with other customers. And it makes my job much easier!

Communicate, Communicate

It may go without saying, but a simple email or newsletter discussing CRM is great for adoption. Keeping everyone informed about the progress of an implementation is important to getting everyone involved. The communication should include other news from your sales operations, marketing, or customer service teams. Whenever possible, have this communication sent by an executive sponsor. Such communications should be fairly frequent during deployment and then taper off to be sent monthly or quarterly after deployment.

Program communications are good momentum builders. If done right, they can keep everyone excited about what the organization is doing to help users be successful. Communications can also be used to introduce new application functionality, as well as asking for feedback regarding the application. I've seen these types of communications start with a contest for suggesting and voting for names for the new CRM system. Anything that gets people involved with the initiative is a great way to kick off the communication process.

Phase Functionality

Big bangs are often a bust. A company's long-term Salesforce adoption depends on an excellent deployment. I look at deployment excellence on a case-by-case basis, but most often the best deployments are those that occur in phases, as incremental functionality for various business units is rolled out over time. This approach gives the deployment team some latitude in who gets what, and when. It also creates a risk buffer so that task slippage can be more easily contained. In saying this I also advocate that customizations are owned by each business unit, which allows the training materials for each unit to be tailored to the user group. A chief adoption officer's dream!

The phasing in of functionality is also critical. It is important that new users not be overwhelmed with having to learn a new system. It shouldn't become a burden—if it does, adoption will be painfully slow. Give new users a chance to master the basics and then start releasing more advanced functionality incrementally. Updates to user guides, online help, and refresher training may also be needed. Make sure your network of user champions and the Center of Excellence confirm the readiness of the user teams prior to implementation.

Conduct a Survey

Accept that not everything will be perfect from the start. CRM application failures are often a topic of conversation for the IT'ers that implemented Siebel and other CRM offerings. But with today's technologies you don't have to wait for the train to go completely off track to find out what's going on. Instead, use some of the great Web-based survey tools to periodically sample user opinions.

Ideally, such surveys are not completely anonymous so that local user champions can do a more detailed level of analysis. But don't jump to any conclusions based on these results; just use them to get a good sense of the overall likes and dislikes of your core constituency, the business users.

Go Beyond CRM

The opportunities to drive even greater business benefits grow with every Salesforce product release and allow you to expand your usage beyond just the core CRM capabilities of the Salesforce service.

The Winter '07 product release was one of the most significant releases in the company's history. You can now take customizations to a whole new level to build robust business applications very quickly and at a very low cost. At the heart of this capability is the Apex Code programming language, which runs directly on Salesforce.com's servers. That way, developers are freed from having to manage servers and they get the same power to create applications as Salesforce.com's own R&D staff. That means that, for the first time, you can add complex business logic to your application. Instead of just creating custom tabs, objects, fields, and relationships, you can define the process logic necessary to enforce specific business rules. This gives you complete control over how the application should behave.

Introducing Your Extended Salesforce.com Family

Each year Salesforce.com executives plan the strategy for the following year and each year they place customer success on the top of that list. For me, it is reassuring to know that Salesforce.com's highest priority is customer success. This intense focus means that a lot of resources that are dedicated to making you successful. If you haven't already, I highly encourage you to take advantage of those resources and to reach out and meet some of the folks listed below. I am certain you will benefit from their expertise. Remember, they are here to help you.

- Account Executives (AE) are our account managers and our quarterbacks. They are responsible for your success and serve as a primary point of escalation for any business issues.

- Customer Service Representatives (CSR) are our free technical resources. They are Salesforce experts who respond to phone calls and emails during normal business hours, serving customers on a first-come, first-serve basis.
- Premier Support Representatives (PSR) are fee-based technical resources who are experts assigned specifically to your account. As a result, they can develop a deep understanding of exactly how *you* are using Salesforce. They provide 7x24 coverage and priority access in phone and email queues.
- Customer Success Managers (CSM) are our free CRM and Salesforce experts, who are responsible for originating and disseminating best practices throughout the installed base of Salesforce.com customers. They are also tasked with ensuring the renewal of license contracts and they serve customers on a limited, ad-hoc basis.
- Services Engagement Managers (SEM) are fee-based consulting resources who are responsible for evaluating your consulting requirements, assigning the right resources to get the job done, and ensuring your satisfaction. They have access to an incredible pool of consulting talent.

In addition, you'll find great content resources online, including community forums and recorded sessions of Dreamforce presentations. The marketing teams continually refresh this content, which is summarized below:

- www.successforce.com, which contains all of our best-practices content. It's a great place to get started.
- www.appexchange.com, which lists hundreds of components and applications you can use to extend your CRM capabilities or introduce totally new applications. You can read reviews from other customers, download them for a test drive, and then install them for production use. Note that some of these apps are free, others must be purchased.
- www.salesforce.com/developer is the place to go for developers who use the Apex platform and Apex Code.
- www.ideaexchange.com is a forum where customers can submit suggestions for enhancements they want in the Salesforce product suite.

Our customer events are another great way for you to network with your industry peers and meet Salesforce.com personnel. Check out the following programs:

- Success Tours are customer events that include product roadmap presentations, customer testimonials, partner showcases and a networking social. These events are held throughout the year, in major cities all over the world. The City Tour schedule can be accessed from the Salesforce.com home page by clicking the Local Events button.
- Local User Groups are organized by customers for customers. Yes, Salesforce.com people are invited to attend and present, but the focus is on customers talking with customers and learning from each other. To find the local user group near you, click the Local Events button on the Salesforce.com home page.
- Annual Dreamforce Conference is *the* mega event, with thousands of customers and over 150 customer sessions with a wealth of content. If you are serious about Salesforce, you have to attend!

Summary

I hope you found this paper useful and I encourage you to try some of the ideas it contains. Clearly, one size does not fit all for CRM applications. The key to making these suggestions work for you is that you outline your objectives, build a roadmap of how to get there, and then ensure that the right checkpoints are in place to ensure a successful program.

The beauty of CRM applications is that they directly influence your company's focus on your customers. For Salesforce.com, customer success is our #1 priority. It has to be—we depend on your renewals. We built what we needed to be successful in *our* business. And that is what we make available to you, so that you can be successful in *your* CRM initiative as well.

Please don't hesitate to reach out Salesforce.com and ask for help. That is why we're here–our success depends on yours. And so does my job!

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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