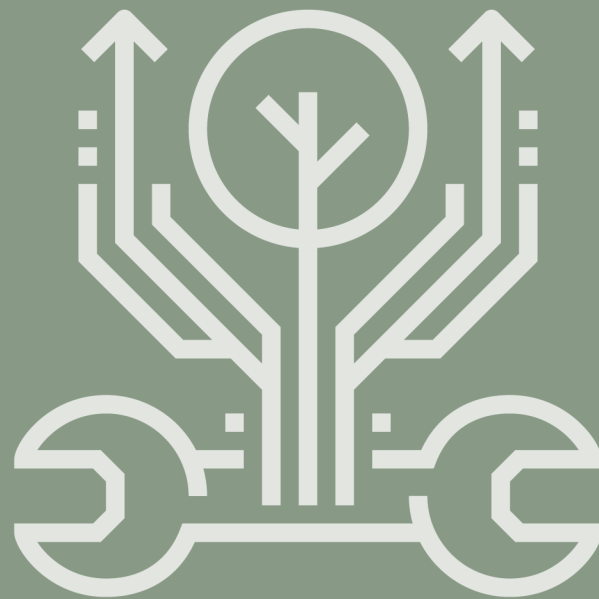




HOW TO GET SALESPEOPLE TO USE CRM TOOLS



A WHITEPAPER BY THE BROOKS GROUP

CRM can improve forecasting, customer retention, marketing investments, and sales force productivity—but only if your sales team actually uses it.

Implementing any new software platform in your company is a major ordeal. It has to be integrated into all of your existing systems, and all of your data needs to be transferred over. All appropriate employees (salespeople, sales managers, sales ops and sales leadership) need to be trained in how to use it. And even if it's a simple, straightforward program, it will probably take at least a little getting used to.

Because of this, a lot of people tend to be resistant to change — even change that's beneficial.

And this seems to be doubly true of Customer Relationship Management software. Salespeople are notoriously, ardently opposed to adopting any form of CRM tools. Their current method of handling customers may be inefficient, but at least it's familiar. Even if new software will greatly improve their workflow, they won't adopt such a drastic change. So the question becomes, how do you assuage these feelings of opposition and get salespeople to use a CRM platform such as Salesforce.com?

The Facts

The Sales Performance Optimization Study (SPO) conducted annually by CSO Insights for over 20 years shows that 2015 will be the first year that businesses have decreased their investment and usage of a CRM. But there still is a place for the tool as long as organizations are smart about implementing it.

CSO Insight head researcher Barry Trailer explained that the decrease of CRM usage could actually become a competitive advantage. Those who focus on optimizing their CRM processes instead of succumbing to CRM apathy can limit their investment in lead generation simply by using what they already have.



One of the most common reasons cited by organizations for the failure of their CRM systems is a lack of adoption by the sales team. A CSO Insights study of over 1,000 companies showed that less than 40 percent of the companies achieved CRM adoption rates over 90 percent.

Typically, salespeople find the data entry cumbersome or consider it a waste of their selling time, and they don't see how the system benefits them personally.

The Problems

So a lot of salespeople are dissatisfied with the way CRM tools work. But why?

Is it the fault of the software itself? That can't be the case, as there are still a significant number of people for whom it works just fine, and who admit to seeing an overall improvement in their sales. So it must instead be a problem with the way it's being implemented. Here are some common mistakes that companies make when implementing CRM software solutions.



THE WRONG FOCUS. Your company has an established method of doing business and making sales. It's how you train people, it works for you, and it helps get the job done. Often, companies will implement their CRM software in a way that simply isn't compatible with their current sales methodologies. This makes it difficult, if not impossible, for salespeople to use effectively. It's geared towards management and easing their workload, rather than taking into consideration the actual salespeople at all.

OVERLOADING. The decision to streamline your company, get organized, and improve productivity is generally made all at once. By gum, you're going to start doing things right! So you implement all sorts of new performance management tools, new processes, new policies... and, then, as the crowning touch, you unveil your new CRM. It's just too much to process all at once. There's all of this new stuff to get used to, and each thing requires learning a whole new set of parameters. Following all of those parameters is simply too much to remember.

POOR PRESENTATION. As mentioned above, CRM generally seems geared towards management, not salespeople. So when you roll it out, that's how you present it to the company: as a management tool. The upper echelons will have an easy time of things, keeping the customers happy, making sure they pay on time, etc. Costs will be cut, profits will increase. Meanwhile, the salespeople are stuck doing what amounts to data entry, making sure the miracle software has a record of every transaction. No one takes the time to impress upon the salespeople how this new software platform will benefit them as well.

POOR EXECUTION. Maybe the reason your CRM is being badly presented is because it's just not very good to begin with. When you invested in the new platform, they assured you it was an incredible tool that could help you in a myriad of ways. That may very well be true, but a tool is only as good as the way you use it. The sad truth is most companies who implement CRM are doing it badly, at least at first. And if you're implementing CRM badly, there's a good chance no one likes or wants it.

If you've recently implemented a set of CRM tools at your company and are trying to sell your sales department on the idea, take a look at these issues and see if they might be applicable, and how you can correct them. If you're about to implement a set of CRM tools at your company, take an even closer look at this list and take care not to make any of these mistakes.





The Solution

The question is how? How can you implement a Customer Relationship Management platform in a way that benefits both salespeople and management equally?

First and foremost is recognizing the importance of good communication.

In order to make CRM work, you need clearly defined objectives. If all you have is a vague sense of, "We'll use this to get organized and keep in better touch with our customers," then you're setting yourself up for failure.



You should map out:

- Exactly what benefits you want to get out of your CRM platform
- How you plan on achieving these benefits
- How and when you plan on communicating with your team the benefits of the solution

This is key:

You need to communicate these objectives with your sales team from the beginning, before the software has even been implemented.

Helping your sales team understand the benefits of CRM, from an actual sales perspective, rather than just a managerial one, will make them more open to the idea of using it. Put it in context: CRM allows them to access a wealth of information about their customers and potential customers at the touch of a button.

This information helps serve the customers better, which in turn helps build stronger relationships. Those relationships lead to better sales and more satisfied customers. So it's in the salesperson's best interest to use it.

Put it in context: CRM allows them to access a wealth of information about their customers and potential customers at the touch of a button.

But communication works both ways. Make sure that your salespeople are able to give their input to the CRM software as you're implementing it. This will greatly increase your chances of adoption because they're going to feel that they have "skin in the game."



Questions to ask them:

- What do they want to see from it?
- What features or capabilities would make their jobs easier?
- What's their current workflow like and how can the CRM platform best acquiesce to that?

Continue to get feedback from them even after the software has been implemented.

You need to make sure that your CRM platform is designed and implemented properly, so that it does, in fact, serve your salespeople, as well as management. Some helpful tools for salespeople include:

- Email templates
- Quote-building tools
- Easily accessible database of things like case studies, testimonials and other content that can be used to help sway a customer
- **CRITICAL:** Some sort of support infrastructure that gives them access to SME's quickly and easily

Keep it simple, though. You don't want to overwhelm users by turning formerly simple tasks into complex procedures. And don't try to load too many changes on them at once.

Finally, you need to make sure that everyone, both salespeople and managers alike, are properly trained in how to use the CRM software effectively. Proper implementation and proper training are essential to avoiding bad CRM. Customer Relationship Management can be a powerful tool. But tools are only as good as the way you use them. If everyone understands how best to use CRM to their advantage, then you'll be able to streamline your company, increase your growth, and ensure greater sales and better relationships with customers. Those are things your salespeople can't help but embrace.



Key Takeaway

It's easy to customize to meet your needs, so create an ongoing dialogue between salespeople and management that addresses issues and concerns with the software as they arise and corrects them quickly.

About The Brooks Group

With nearly 40 years of industry experience, The Brooks Group achieves sustainable sales culture transformation for clients by delivering targeted training that becomes operationalized by threading into an organization's existing systems.

The Brooks Group takes a holistic approach to practical culture shifts and focuses on customized "street smart" sales and sales management programs, with a high level of relevance and practicality for the individual learner. Training gets reinforced with an industry-leading cloud-based sales and sales management coaching platform.

For more information

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