



## Salesforce CRM User Adoption White-paper

### Summary

This white-paper is intended for anyone in the process of rolling out [salesforce.com](https://www.salesforce.com) within their business. Typical roles include CRM Managers, Business Owners, Business Sponsors but this document may also be useful for salesforce administrators and developers.

### 1. Executive Sponsorship / Management Buy-in

The most important thing to take into consideration before starting any work in salesforce is to ensure that the management have bought into the system and understand the benefits of customer relationship management. It may be worthwhile including finance in any preliminary discussions, focusing on the forecasting functionality which is often overlooked. You're unlikely to gain high user adoption rates pushing salesforce (or any CRM) onto the business - a better approach is to identify senior sales people, show them the benefits of salesforce and run a pilot study. Depending on the outcome of your pilot you can then decide whether to move forward with any configuration or development.

### 2. Design & Configuration

To gain high adoption rates you want your users to be happy with the system, so you need to ensure that it's well suited to their needs. The default salesforce setup may be well suited to people in the business of selling widgets, but not so well suited for those selling advertising or insurance. Should you require customisation, there are a few options:

1. DIY - configure the system yourself (best for basic business processes)
2. Engage with a consultancy or freelancers (best for complex business processes)
3. Install a suitable solution from the Appexchange ([www.appexchange.com](https://www.appexchange.com))

When designing the system yourself focus on the reporting outcomes - for example, if you want to report on geographical location of accounts, you need to ensure that your users are entering the country name against the account record. It's worth reviewing validation rules at this stage for data consistency, but be aware that these may impact user adoption rates.

### 3. User Acceptance Testing

It's always worthwhile conducting user acceptance testing, not only to verify that you're building the right solution for the business but also to ensure that the business are part of the solution. Businesses change, it's people & processes - so for larger organisations or lengthy projects this is a must. For smaller businesses it may not be viable to conduct UAT however it's good practice to get your users to sign-off on any new functionality delivered.

### 4. Training

Many business overlook, however it's key to any successful CRM implementation even if you're a small business. It's vital that your users are thoroughly trained not only on the standard functionality but also any customised functionality that you've built in salesforce. User adoption levels heavily depend on good training, and if the training isn't good then don't expect user adoption rates to be.

## **5. Measurement**

At this stage the system has been built, users trained and you're ready to roll out. Before you do so it's advisable to setup some reports & dashboards so that you can measure user adoption levels. User adoption itself will vary depending on your business needs - some may require users to login daily or several times a day, others may only require their users to login once a week or even less. Whatever your criteria it is worth installing the 'Adoption Dashboards' from the appexchange to measure login rates and other criteria.

## **6. Management Reporting**

A great way to gain user adoption is to meet with each sales team manager and show them how to run sales meetings through salesforce (using reports & dashboards). This 'top down' approach forces the sales users to keep their tasks, opportunities & related data up to date and allows the sales managers more time to do their jobs rather than maintaining spreadsheets.

## **7. Commission**

One of the best ways to gain high user adoption levels is to pay any commission to sales users based on the value of the closed won opportunities in salesforce. To avoid any misuse of this type of system you could setup an approval process so that the managers have to verify each opportunity (or everything above a certain value).

## **8. Incentives**

I'm sure that many readers will already be at this stage - often user adoption is only taken into consideration once most of the design/development/training work has already been done. However, incentivising the use of salesforce is an obvious way to increase user adoption rates in salesforce. Run weekly or monthly competitions from salesforce whichever is best, but putting some budget aside for this will see user adoption rates increase.

## **9. Enhancements**

One of the great things about [salesforce.com](https://www.salesforce.com) is the quarterly release cycle, where new functionality is added to the product without any additional cost. It's always worth publicising this internally to all of your sales (and/or support) users to make them aware of any new features and also train them should it be required.

## **10. Custom Enhancements & Further Training**

In addition to the enhancements that are made by salesforce, you might also want to add your own release cycle where you deliver new, improved functionality and features to your users. Should you decide to deploy new functionality it may also be worthwhile training your users on this new functionality or have regular training review sessions depending on the number of users.

## **About Cloud Success**

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