

Dynamics CRM User Adoption Playbook

Prepared by



*How to delivering higher user adoption
with*



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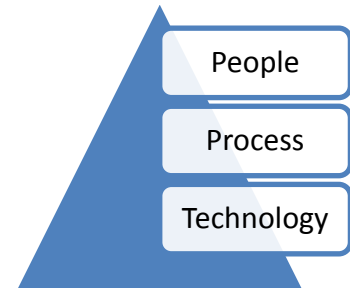
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Document Overview

The purpose of this playbook is to help organizations better plan for, and succeed with, user adoption of their Microsoft Dynamics CRM implementation. Anyone who has either gone through a CRM implementation before or has done any research on the topic will know that if you treat it like a technology project your chances for success are pretty low. If you first focus on the clients and prospects along with the specific business processes that your employees use to acquire, retain and grow your relationships, your chances for short and long term success rise significantly.

What this playbook does is give you the practical steps and check lists that you can use in order to refine your approach, and increase your chances for maximizing CRM adoption within your organization.



We have organized this document into 3 sections to help drive improved performance/user adoption:

1) How to get ready for your CRM Solution Implementation

- a. Defining your CRM Objectives
- b. Defining what business processes you will enable
- c. Creating the right project team
- d. Determining what users will be affected by the project

2) What to focus on during the Implementation

- a. Developing a CRM Scorecard
- b. Defining a communication plan
- c. Defining what the “Give and Get” is for users
- d. Keeping the solution simple, visual and familiar

3) What to focus on at Go Live/Post implementation

- a. Training and Support
- b. What gets measured gets done
- c. Adding new functionality quickly that is in high demand post Phase 1

CRM is a journey and it is far easier and successful to start simple and then add functionality than it is to overwhelm your users with lots of change, resulting in confusion, frustration, and low adoption.

If you follow these 11 steps, based on our experience, your chances for success go up significantly in both coming out the gate and maintaining higher user adoption.

Getting Ready for your CRM Solution Implementation

Before you start rolling up your sleeves and begin your implementation, you need to plan for:

- 1) Defining your CRM Objectives
- 2) Defining what business processes you will enable
- 3) Creating the right project team
- 4) Determining what users will be affected

1. Defining your CRM Objectives

Start to layout the reasons for undertaking an initiative like this. We will help construct a more specific CRM scorecard during the implementation, but this exercise defines the key objectives, which charts the course for your first phase. Here is a simple template to get you started:

Area	Key Objectives
Business	Improve the acquisition of new customers
	Improve the retention of existing customers
	Improve the accuracy of the sales forecast
Technology	Reduce the cost of supporting current tools
	Be more responsive to changes in the business

2. Defining what business processes you will enable

What business processes are you going to enable with CRM? Many organizations start with Account, Contact and Opportunity Management. Decide what business processes you are addressing and how they are managed today. This doesn't need to be a lengthy process.

Here is a simple template to get you started:

Business Process	Key Activities	How Tracked	By Who
Account Management	Annual Account Reviews	Word Document	1. Sales Rep 2. Reviewed by Sales Managers
	Account Calls based on Tier of Customer 1. Monthly – Tier 1 2. Quarterly – Tier 2 3. Semi Annual – Tier 3	Excel Spreadsheet	1. Sales Rep 2. Reviewed by Sales Management
Contact Management	Email/Calls/Appointments	Outlook/Excel	Sales Reps
Opportunity Management	Sales Pipeline Reports	1. Reps send in weekly excel reports 2. Sales Operations rolls up into a Weekly Pipeline 3. Weekly Pipeline Call	1. Sales Reps/Managers and VP call on Monday morning

3. Creating the right project team

Here is a list of roles and responsibilities to get you started with the planning of your CRM engagement. Remember, this is a business project first. Technology is the enabler. If the business is not actively driving this the probability of success is significantly diminished. The “% of Time Needed” is based on a streamlined project that is 8-12 weeks in duration so involvement time will vary based on the length and complexity of the project upfront

Role	Responsibilities	% Time Needed
Executive Sponsor	Responsible for overall Executive Management of project vision, budget, and high level CRM Objectives. Responsible for Corporate Messaging to the organization and end users. Owns the business processes managed in the solution ongoing.	10-20%
Project Manager / Project Owner	Manages the day-to-day activities of the implementation project team. Responsible for execution against all project milestones and deliverables, and responsible for managing issues, risks, timeline, and budget. Will act as the first line of communication to the Zero2Ten (“Z2T”) project team for day-to-day operations.	20-25%
Subject Matter Experts	Responsible for driving business decisions with business owners. Participates in Modeling workshops and provides necessary documentation and information regarding key processes. Assists with issue resolution and user acceptance testing. Participates in Iteration Review meetings and provides feedback on the solution. Responsible for coordinating with Business Customers.	15-25 %
Business Customers	Responsible for providing knowledge of business processes. Participates in modeling workshops and provides any necessary documentation and information regarding key processes. Provides feedback on solution and helps identify any enhancements for future phases.	15-25%
System Administrator/IT	The System Administrator is expected to be the primary person who will take over application support and configuration at the end of the project.	20-30%
DBA or Architect	Participates in any infrastructure planning and deployment activities (if relevant) with Z2T project team. Provides information regarding data models of systems to integration or migrate with. Extracts and cleanses data in the appropriate format for data loads.	10-20%

4. Determining what users will be affected by the project

Do a quick poll of the teams/users that will be affected and ask them what they think are the potential pros/cons of implementing a new CRM solution. This will give you an opportunity to minimize the cons and focus on delivering on the Pros. Don't underestimate the challenges "change" will bear on your users. The result of this exercise will feed your "promotional" efforts, as discussed during the Implementation section to follow. Here is a simple template to get you started:

Business Users	Key Activities	Pros	Cons
Sales Reps	Account Management Contact Management Opportunity Management	<ol style="list-style-type: none"> 1. Won't have to have their sales reports in every Friday afternoon 2. Won't have to fill out the monthly spreadsheet to marketing on key customers for events 	<ol style="list-style-type: none"> 1. Perceived additional administration

What to focus on during the Implementation

During the implementation, there are some key activities that will help prepare you for successful adoption:

- 1) **Developing a CRM Scorecard**
- 2) **Defining a communication plan**
- 3) **Defining what the “Give and Get” is for users**
- 4) **Keeping the solution simple, visual and familiar**

1. Developing a CRM Scorecard

Lay out what improvements you would like to make to the business processes that you are focusing on and what relative improvement may be achieved. This is a very good, and sometimes, challenging exercise to go through. It is often difficult to assign a specific metric or target improvement based on the interdependencies of the processes that you are improving but the important thing here is to be **“as precise as is reasonable”** for each objective. Z2T has assisted a number of clients with their “CRM Scorecard Workshop” in order to derive some key objectives with tangible targets up front. The scorecard template starts to look like this when completed:

Objective	Related Metrics	Measurement	Target Improvement
1. Improve visibility into the pipeline for end users and management	<ul style="list-style-type: none">• Increased close rates	<ul style="list-style-type: none">• % of closed opportunities/BDM	<ul style="list-style-type: none">• 5% improvement in close rates
2. Improve retention of current clients	<ul style="list-style-type: none">• Renewal rates	<ul style="list-style-type: none">• % of clients that renew	<ul style="list-style-type: none">• 5% improvement in renewal rates

2. Defining a communication plan

Develop a schedule and key points to communicate to introduce and keep the organization informed about the project. This will both promote the upcoming solution as well as to keep people informed about the status of the solution.

Project Stage	Key Communication Points
1. Project Initiation	<ul style="list-style-type: none">• Overview of Project Objectives• Overview of Project Timeline• Overview of Project Participants
2. Post Prototyping	<ul style="list-style-type: none">• Updates on the Project• Reinforce the Objectives• Screen shots of the solution• Q&A on issues that have been raised
3. Pre Go Live	<ul style="list-style-type: none">• Update on the Project• Reinforce the Objectives• Details on the training• Q&A on issues that have been raised
4. Post Go Live	<ul style="list-style-type: none">• Update on what is next for the Project• Reinforce how you are measuring success• Q&A on issues that have been raised

3. Defining what the “Give and Get” is for users

Fundamentally, you are going to ask the users to give something. This might come in the way of tracking their customers or opportunities more thoroughly than they have in the past. So what is in it for them? **The key is not to guess.** Find out what will be helpful to the users. They will quickly give you a number of ideas. Not all will be practical or feasible to implement in phase 1 but it is critical to give the users a voice. Make a list of things that they are interested in. You may want to guide them by providing some context to the solution that is being implemented like “We are focusing on Account, Contact and Opportunity Management for Phase 1, so within that, what would you want to see?” In other cases, you might just want to get their feedback across the board.

Also, there are a number of possible benefits that you can provide to the user for putting in and keeping their data up to date. These can vary based on the type of implementation but a few to consider are:

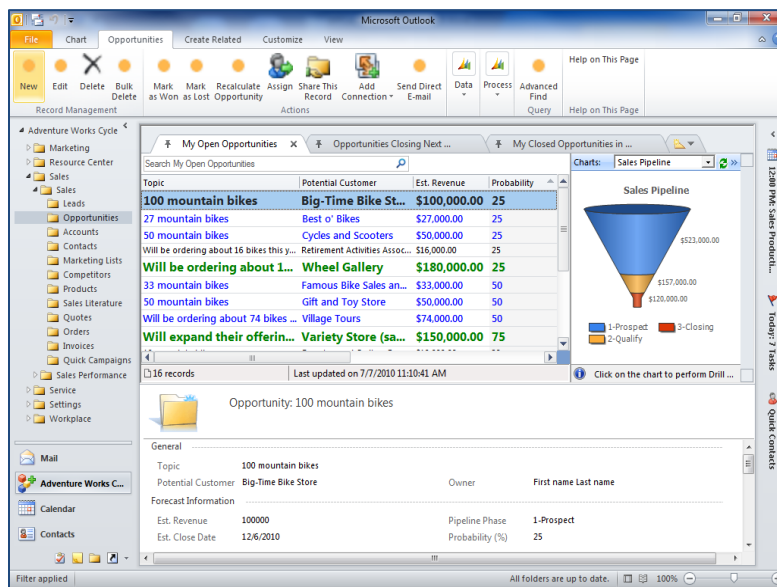
Functionality	“GET” for the user
1. Accounts	<ul style="list-style-type: none">• Bring in social and business data to augment the information that the user provides giving them access to better sales and marketing intelligence
2. Contacts	<ul style="list-style-type: none">• Track who has been on your site and be able to automatically inform sales reps of their contacts website visits and interests
3. Opportunities	<ul style="list-style-type: none">• Management can provide better coaching/support on critical opportunities• Reduced amount of time to provide forecasting information

4. Keeping the solution simple, visual and familiar

This step cannot be skipped if you want to succeed! It is **VERY** important to keep the solution simple. You should not implement every bell and whistle dreamed up in the boardroom when you are envisioning the solution. The users will be going through a change, as you are likely changing process, changing their solution and possibly changing how they interact with each other, so they need this to be easy to pick up and use. If you find yourself adding functionality because **“someone might like to track this,”** we suggest not adding it at this point. A good guide here is answering “what do we have to have”...less is more initially. Even if only some of the CRM data becomes stale or unreliable, it can cast **a poor perception of the quality of all the data.** Keeping to the necessities early will help prevent this.

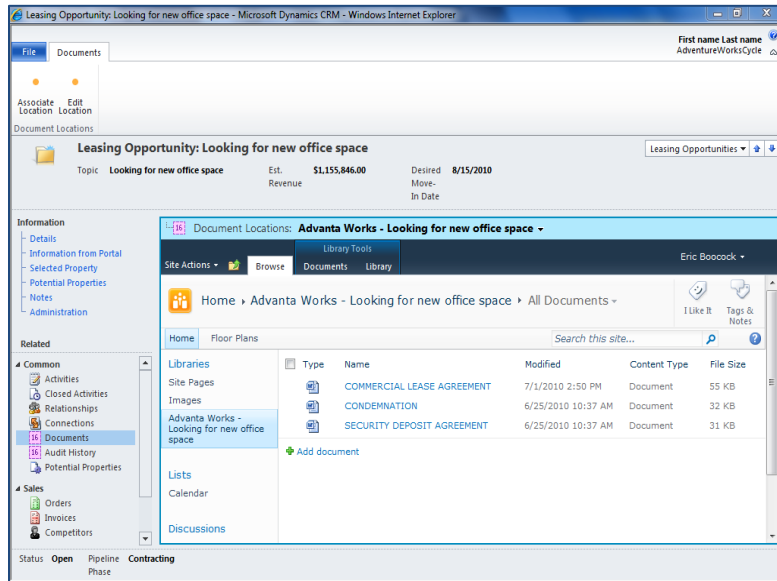
Dynamics CRM plays well into this step because it provides something that users are familiar with and that is Outlook, Word, Excel and possibly SharePoint. Outlook integration is one of the top reasons/features that organizations are looking for in a CRM solution. Getting users to adopt the solution is made easier with the Outlook integration. However, keeping them there is the key to the success of the project.

Screen Shot 1 – Outlook Client



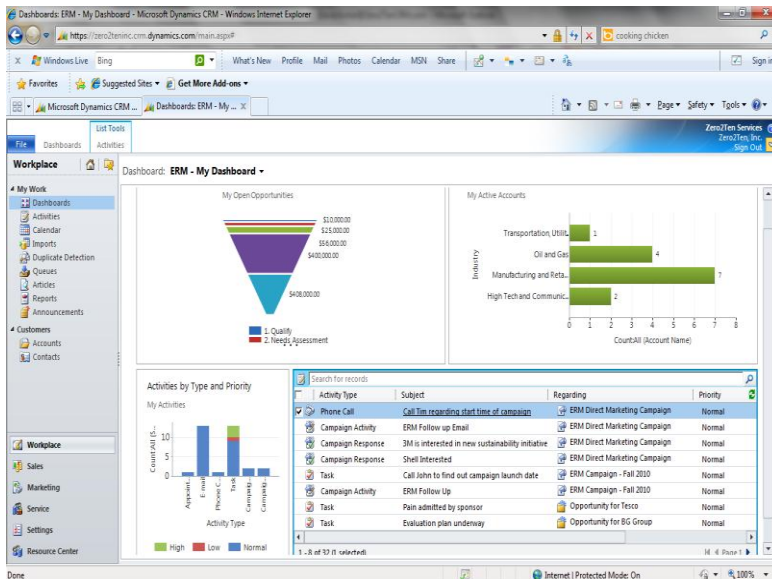
Secondly, providing a solution that allows them to go to fewer applications is a big plus for adoption. If you are already using SharePoint and have an existing site for each customer, embedding that site into the CRM record will allow CRM users to go to one place to get their customer data. This provides another reason to have users stay in CRM to get the information that they need.

Screen Shot 2 – SharePoint embedded in CRM



Finally, make the solution visual where possible because users will respond better to charts and dashboard than they will to rows of data. Providing a way to visually represent your data will improve the user experience and ability to get to the right answer quicker.

Screen Shot 3 – Visualization



What to focus on at Go Live/Post implementation

During the implementation there are key activities that will help prepare you for successful adoption:

- 1) **Training and Support**
- 2) **What gets measured gets done**
- 3) **Adding new functionality quickly that is in high demand post Phase 1**

1. Training and Support

Training is essential for your users to understand the new solution, but they also need to understand the changes to business processes and the new ways they collaborate with their teams and management.

Training requires 2 key components to be successful:

- a) Clear understanding and communication of the new/changes to the processes
- b) Specific “How to” solution training (ie “How to manage a lead”)

Establish a Help Desk to support users ongoing. Depending on the number of users and complexity of your CRM solution, this may not require a full time resource but the users should have a place to go to get both business and technical questions responded to quickly.

2. What gets measured gets done

This one is very straight forward. If you are monitoring the pipeline and having weekly calls to review deals, opportunities in CRM will become accurate and up to date. If Marketing is leveraging contacts from CRM to more effectively reach and communicate to them, then Contacts will get more attention. Consider some incentives early for establishing the right behaviors. This may come as monetary or as recognition for users that are making sure that they are keeping CRM accurate. Most importantly, document and communicate out feedback from the users on how they are adopting CRM to help them do their roles more effectively. Typically adoption by peers is the biggest motivator to get users to adopt.

3. Adding new functionality quickly that is in high demand post Phase 1

One thing for sure is that you will get feedback from Day 1. Phase 1 should be quick wins that you can roll out in a short period of time so you can reinforce that the solution can adapt to the business. Paramount to your global CRM success is the critical Phase 1 win for the project team and a great opportunity to keep the users engaged in using the solution. Capture their feedback and use it as a way to prioritize and to communicate out changes that will be coming in future releases. Get a 2nd release out ASAP. The timing will vary by organization and implementation but 1 month or less is ideal.