

Microsoft Dynamics CRM User Adoption Playbook

Prepared by



Delivering higher user adoption

July 2011

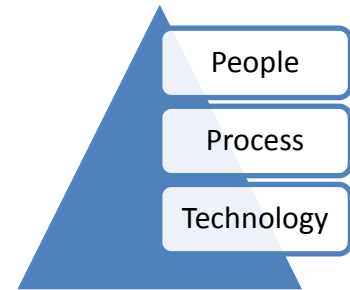
Authored by:

David Kohar, Chief Customer Officer
Bob Cottrill, Principal Business Architect

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
- d. Ask: “What is one thing that we can add/change that will help you be more effective?”

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