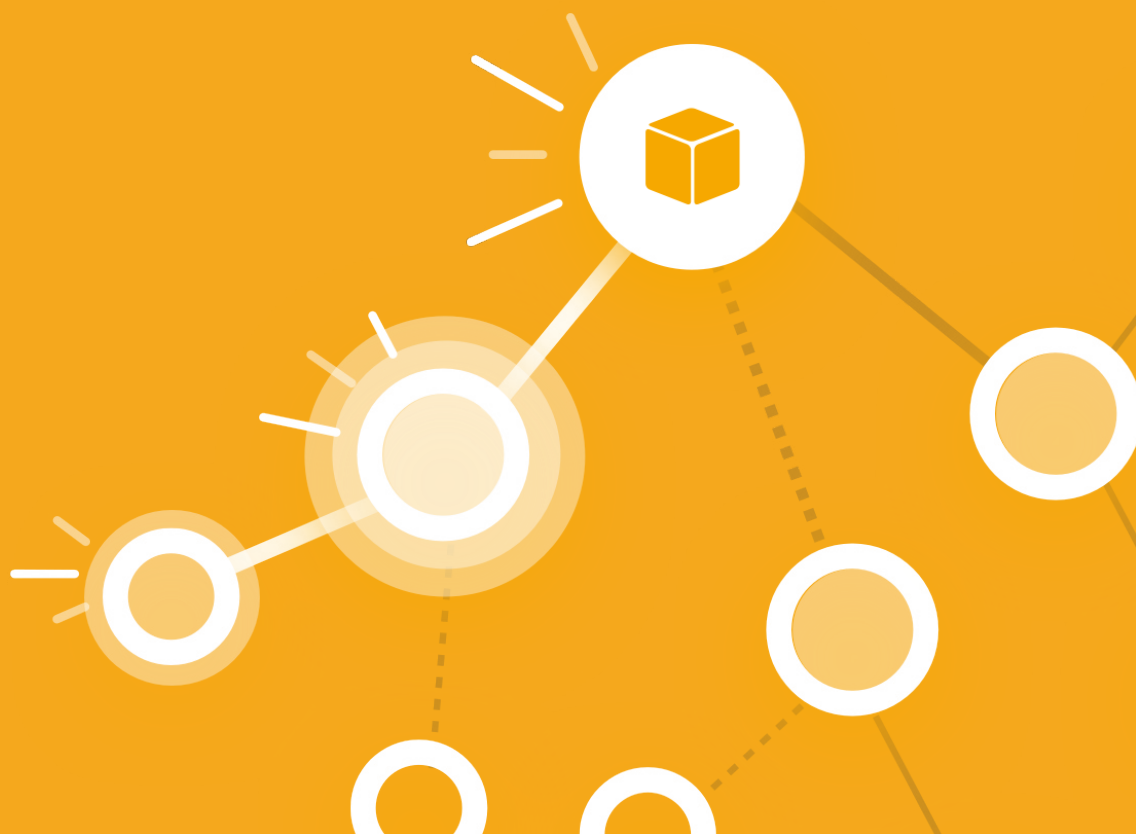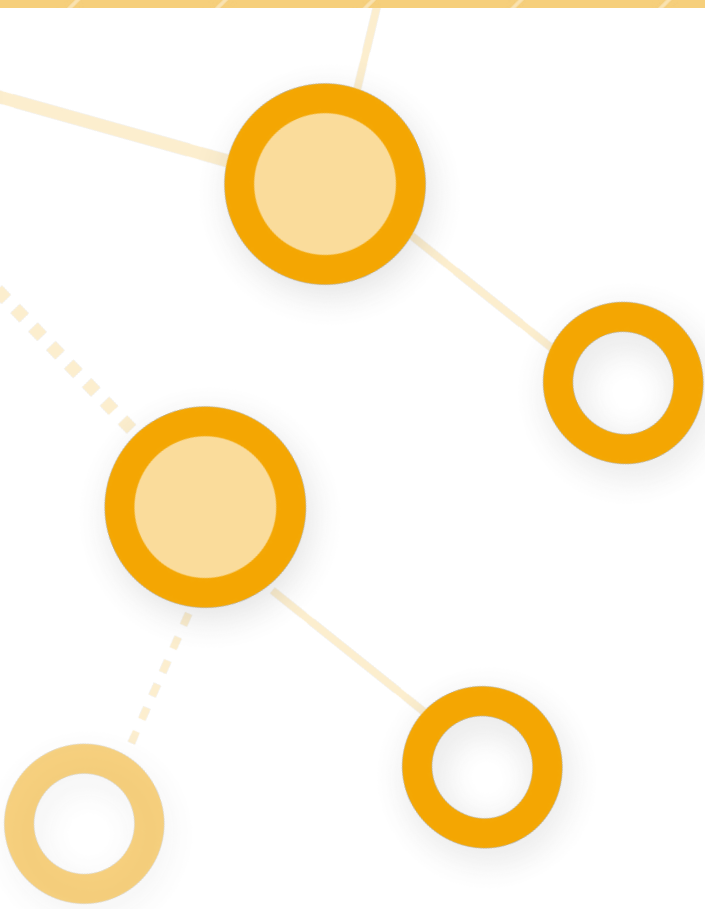# User Adoption Playbook

SUGARCRM.

INTRODUCTION

Use this User Adoption Playbook to guide your users
to effectively embrace change and communicate
the value of implementing a CRM. Combine modern
CRM and effective adoption strategies to ensure
your software rollout exceeds expectations.

The playbook

Many organizations undergo an overhaul or replacement of their CRM systems or technologies. And when this happens, common challenges can arise with adoption across users who are not fully prepared for the change they're going to experience. Based on this information, we've looked at core issues that lead to poor user adoption and identified different plays to address these challenges.

| Play number	Play	Issue	Objective
1	Communicate value	Users don't see the full potential of the CRM	Educate users on CRM benefits on how it will make their lives easier
2	Incentivize users	Users don't feel motivated to use new CRM	Recognize and rewards users for successful usage
3	Internal Championship	Lack of internal champion or internal champion hasn't been able to drive adoption	Have a strong CRM champion to motivate other users
4	Change Management	Users unhappy with product functionality	Show users how to leverage your CRM investment
5	Happy User	Users are happy – now what?	Keep users happy, committed to CRM usage and consistently engaged

Play #1 Communicate Value

Objective: Educate users on CRM benefits on how it will make their lives easier

There are a few situations in which users may not understand why they should be using the new CRM:

- Ill defined business processes
- Not being clear on both near term and long term goals
- Users unclear on WIIFM? (What's In It For Me?)
- Hard to use UI

Conduct a meeting with users to showcase the value of the CRM system:

- Reiterate the strategic vision behind the CRM implementation. Make sure the users know the why behind the decision.
- Evaluate how they are using the CRM and recommend different ways of expanding usage
- Highlight the benefits of the CRM such as automating certain mundane tasks and using automation to give them better visibility into information that is most important to them. Make it relatable and relevant.
- Take advantage of tools and resources provided by the CRM partner. Training is critical to a successful rollout and complementary to boosting user confidence.
- Get the right trainer – someone who can speak to the value and not just how to use it. Messaging is critical for quality adoption with users.
- Use specific use cases and examples to show how the value of the new system will help users achieve their business goals easily.
- Keep it simple. Introduce functionality in phases, starting with features that will immediately empower users.
- Emphasize the WIIFM story. Consider an internal marketing initiative to ensure users understand the benefit and value they will get with CRM adoption.
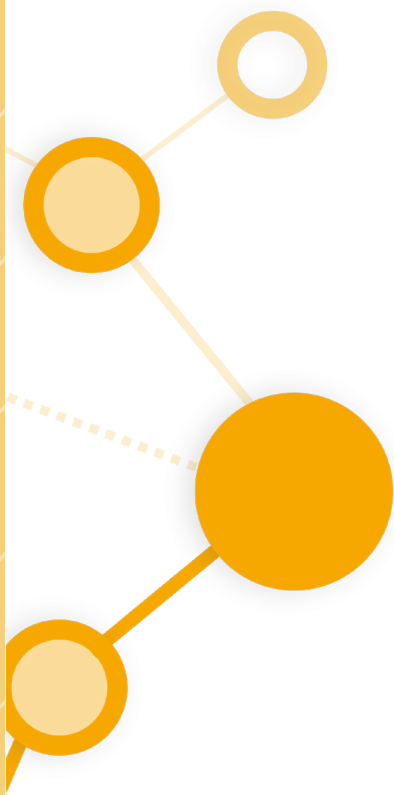
Play #2 Incentivize Users

Objective: Recognize and reward users for their successful usage

Use positive reinforcement to your advantage:

- Provide rewards to users as a way to reinforce their adoption can be helpful. Rewards can include small gift cards for certain tasks completed.
- Incorporate gamification as a fun option to encourage adoption and create a friendly competition. Motivate users with a leaderboard and point system to make it a truly rewarding experience.
- Provide peer recognition in a team meeting or public recognition via Facebook or LinkedIn. People are generally motivated by acknowledgment and will perform better.
- Include CRM usage as part of the user's monthly or quarterly goals. Keep it simple with a gradual approach to fully adopt the system.
- Get creative and make it fun for your users to want to adopt the system.
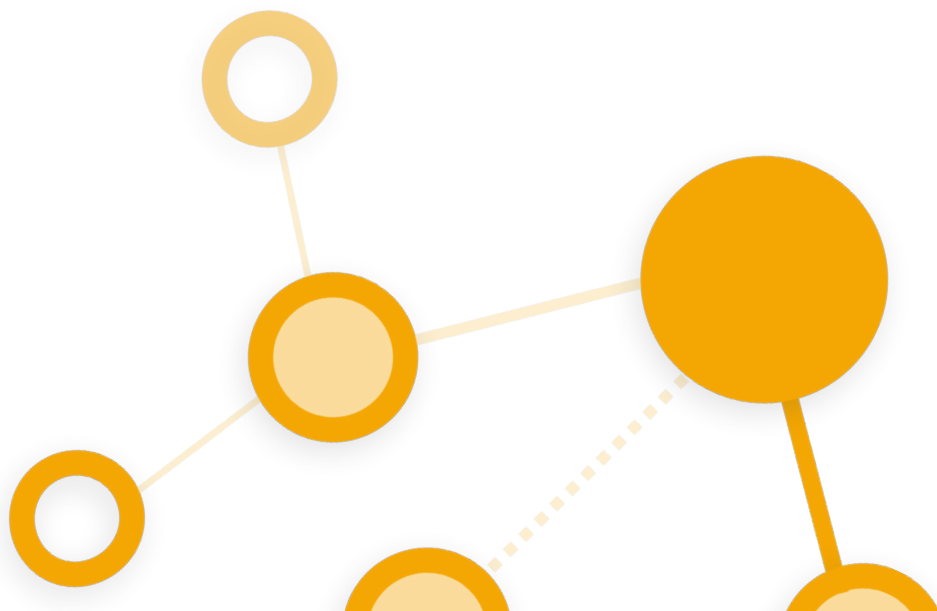
Play #3 Internal Champion

Objective: **Have a strong CRM champion to motivate other users**

Building an internal champion:

- Users who see the CRM value and adopt it successfully are more likely to share their positive experiences with others. Influence these users to become strong CRM champions.
- Identify CRM champions with the following characteristics:

  - Positive demeanor and motivated by change
  - Has the trust of his/her teammates
  - He/she supports the usage of CRM to his/her teammates
  - Asks for feedback and ways to improve the CRM experience
  - Eager to learn about the CRM and use creative ways to make it relevant to daily usage

- Offer the champion and his/her followers a variety of group training methods, including live training, written documentation and recorded videos if applicable.
- Setup a training cadence for all users. Enforce then reinforce. Pinpoint advocates throughout the process to bring positive reinforcement to the team

Play #4 Change Management

**Objective:** **Show users how to leverage your CRM investment**

Common reasons that users are adverse to change:

- Inadequate user training and communications
- Not involved or engaged in the decision process for the new CRM
- Product functionality not as expected
- Lack of internal champion to advocate positive adoption

How to prepare for pushback for managing change:

- Engage users early for both feedback and evangelism. Poll users afterwards for continuous feedback
- Establish implementation as a program. Develop a project plan for progressive implementation with reasonable milestones leading up to a celebratory launch event.
- Customize training materials and develop gamification during onboarding to make it fun and exciting.
- Conduct listening sessions to document feedback from users to provide to your CRM partner for enhancements and usability improvements.
- Involve executive leadership support with an Executive Enablement kit, which includes messaging and talk track users can leverage to be successful.
- Establish a "Champions Program" to recognize and reward users with high usage and effective adoption.
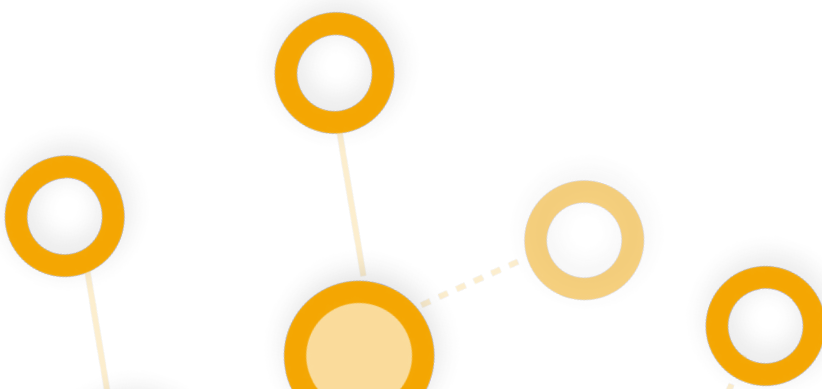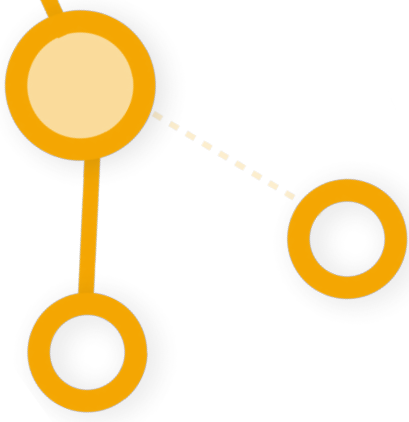
Play #5 Happy User

Objective: **Keep users happy, committed to CRM usage and consistently engaged**

Continue engaging with users beyond initial CRM adoption:

- Adoption goes beyond the first 90 days. Initial adoption is critical, but continuous usage is also extremely important.
- Monitor adoption and usage by tracking the right metrics such as user logins and granular usage metrics.
- Continue to evaluate product functionality and usability to ensure the CRM meets specific business needs.
- Even if adoption is high, things can always change. Try to be as proactive as possible with continuous education and keeping the feedback conversation open.
- Sincerely thank and recognize users for progressing with CRM adoption.
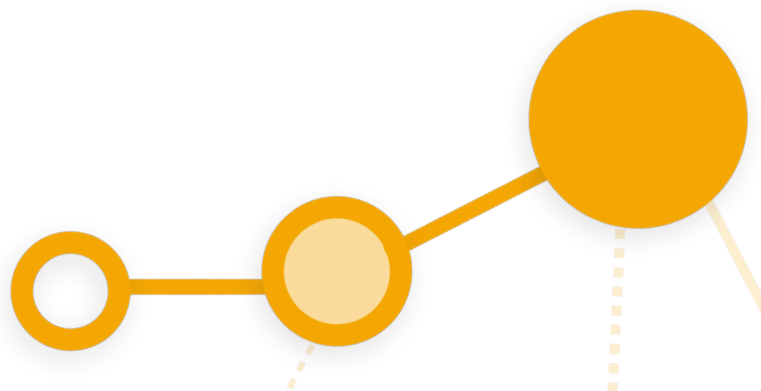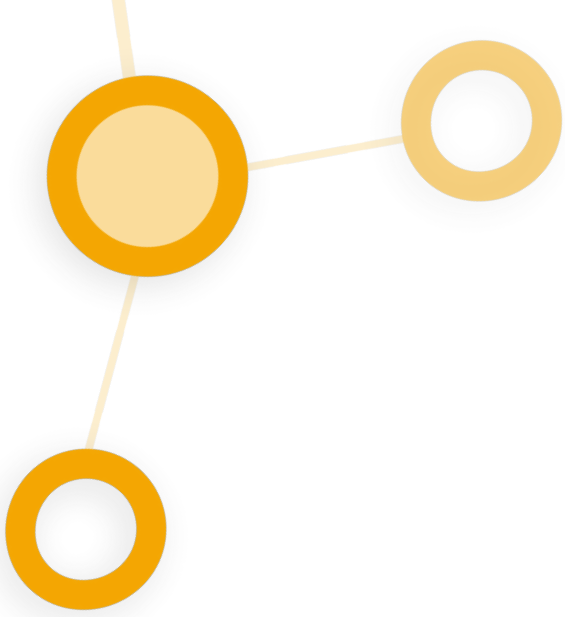
CONCLUSION

Consistent engagement is important to make sure your users stay happy and are utilizing the CRM to their full advantage. Work with your CRM advisor to define goals beforehand and collaborate for a User Adoption plan to success in rolling out the software to all your users. Tools and resources will be essential to training your users and help them embrace the change.