eBook

THE SURVIVAL GUIDE FOR MIGRATING TO A CLOUD- BASED CRM

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Introduction

The Power of the Cloud – How to ensure a smooth and successful implementation and orientation process

Cloud-based CRM systems have quickly caught on as the preferred method of managing customer relations. In fact, according to a poll conducted by Rightscale.com, a staggering 93% of their respondents report that they are adopting the cloud.

It comes as no surprise. Switching to a cloud-based CRM system has plenty of advantages for a business. Companies benefit from higher productivity rates, reduced spending on technology infrastructure, streamlined processes, and reduced capital costs.

At first, staff may resist the transition. After all, the process interrupts an already busy work schedule. Communication plays a key role in successful cloud integration. It's true that learning a new CRM system takes time and effort. Therefore, companies must demonstrate the benefits of the cloud by effectively communicating with employees. In this way, they will feel motivated to learn the system throughout the training process.

The following short ebook will look at CRM migration from the end-user perspective, with the goal of ensuring a smooth and successful implementation and orientation process.

PROJECT KICK-OFF & EFFECTIVE COMMUNICATION

Change isn’t always easy. When the sales department learns of the transition to a new CRM platform, they may start to panic:

- What will happen to all my contact information?
- Am I going to lose sales leads?
- What about the competitor product and price information I have built up over years?
- Will we have to enter the same data into two different systems?
- Is the new system an excuse to change the compensation and sales commission rates?

Gartner states that, “adoption is inhibited when users resist the new system by focusing on cutover difficulties rather than embracing the new processes.”

In order to get ahead of this, management has to get out in front with communications. Invite employees to a meeting or video conference to address concerns, explain the roll out process, and sell users on the idea. The goal is to communicate, educate, and, most importantly, build enthusiasm for the new system and explain why the old way of doing business no longer meets the company’s needs.

The following serves as step-by-step guideline for successfully introducing the transition process:

- Explain the challenges of moving to a new system
- Lay out a timeline for integration
- Explain why the old system no longer meets the needs of the sales organization, because it results in lost sales, lower commission, lower profits, and makes it difficult to add new products and lines of business
- Explain how the time-to-market cycle for new products will shorten because of the new software
- Provide training often and repeatedly
- Give frequent demonstrations to show users how their converted data will look in the new system.
- Show new features such as the ability to scan sales orders and images with mobile devices
- Explain how support people (CRM admins) will handle support tickets and communicate with the vendor to fix issues quickly.

Gartner analyst, Michael Guay, explains the importance of effective communication in implementing successful change. He writes that a business can "foster organizational change by making sure everyone understands 'What's in it for Me', and recognize and reward successful early adopters."

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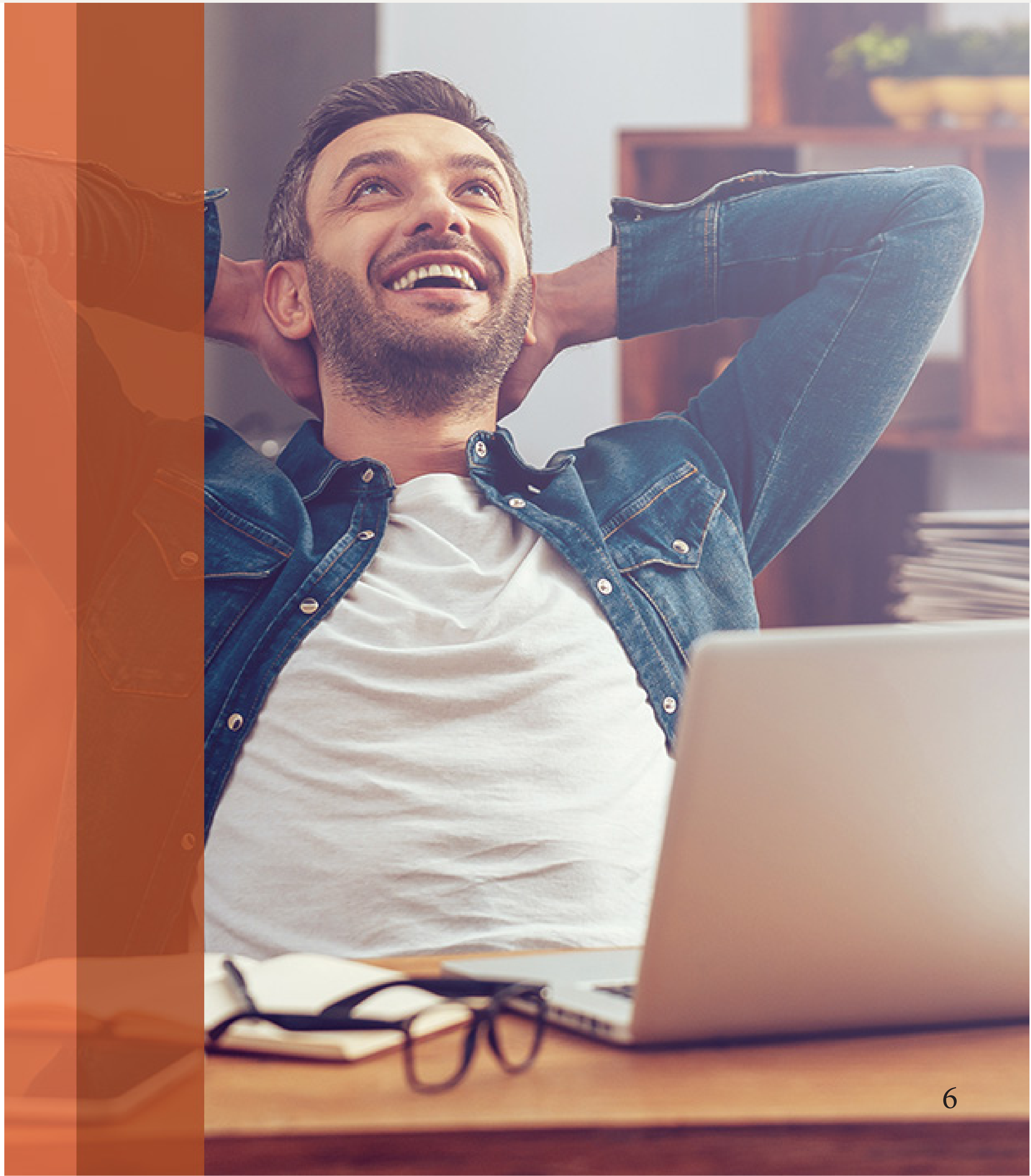
TRAIN, TRAIN, AND TRAIN AGAIN

Some employees may resist change in the workplace. Remember that training builds support for the product. In order to keep all employees motivated, make sure to train early and often. Adhering to the following will maintain motivation throughout the transition and training process:

- Explain the benefits of the CRM system. Give examples of how the cloud-based CRM will improve sales and productivity.

- Business and product line managers should demonstrate how to process transactions in the system. Users will prefer demonstrations from someone within the company rather than instead of a professional trainer that lacks knowledge of their particular business. Ideally the two persons could work together or back-and-forth.

- Avoid teaching too much during one training session. Employees will not retain the information and will find it difficult to pay attention. Better to follow the strategy on continuous “micro- learning” – providing small doses of information at key times. **Gartner research reports on the ‘Forgetting Curve’: German researcher Hermann Ebbinghaus discovered that retained knowledge drops**



significantly after 20 minutes of a training session or presentation. After that time, more than 40% of the information has been lost.

- Follow up with employees after training sessions with questionnaires. This helps management gauge progress on training, and employees will feel valued by sharing their feedback.

- Give users access to online training. Make it entertaining by assigning points and giving awards for those who complete certain modules.

- **Gartner recommends: "improve training effectiveness by conducting reinforcement training three to four weeks after go-live".**

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SELL THE PRODUCT TO THE USERS

Integrating a new cloud-based CRM into the workplace improves business by introducing enhanced features such as a mobile applications and a real-time dashboard. Management should encourage employees by explaining enhanced features of the cloud-based CRM including the following:

- Turns quotes into sales orders quickly and easy
- Provides self-service customer support backed by CRM admins
- Creates replenishment orders based upon inventory level
- Organizes and manages contact information
- Generates a calendar of follow up emails, phone calls, and on site visits
- Scans business cards into the system and assigns follow up to specific sales people
- Helps maintain competitor pricing
- Provides a mobile app for on-the-go referencing
- Offers competitor tracking
- Runs analytics, i.e., forecasting the best time to sell certain products given seasonal variations and other knowledge drawn from the system
- Provides opportunity (lead) management
- Helps manage online campaigns including email and social media
- Assists with discount and order approval workflows, reducing the amount of time before closing deals
- Maintains a price book

Management should encourage employees by explaining enhanced features of the cloud-based CRM.

HOW TO ENCOURAGE USERS TO ADOPT THE NEW SYSTEM

During cloud integration, the sales team will need to dedicate valuable time to training and learning how to use the new system. This may cause temporary cuts in commission meaning sales teams may give up profits for the sake of training. Therefore, management must convince users of ways in which the cloud-based CRM increase long-term profits with the following points:

- **Easy Customer Follow-Up**
  The cloud-based CRM will help sales personnel organize and manage contacts. For example, the CRM can alert the sales team when a product subscription ends. In this way, sales can make sure to contact a customer to ensure subscription renewal.

- **Improved Communication Strategies**
  A cloud-based CRM improves interaction with clients. An organized customer database allows sales to more effectively communicate with customers by means of newsletters, thank you letters, product updates, company news, email blasts, and so forth.

- **Improved Conversion Planning**
  Analytics provided by the CRM system demonstrate sales strategies that work and those that need to improve, leading to overall increased conversions.

- **Streamlined Processes**
  A cloud-based CRM streamlines processes, giving the sales team more time to address customer demands and expand sales channels, meaning increased profits in the long-term.

- **Improved Customer Management**
  Online guidance technology like WalkMe provides on-screen guidance to employees using this CRM system. This not only accelerates training, but also demonstrates how to use enhanced features that improve customer management.

Management must convince users of ways in which the cloud-based CRM will improve customer relations and increase long-term profits.

HOW TO PROVIDE THE BEST SUPPORT EXPERIENCE

Sales personnel aren't the only staff members gaining from the new system. Customer support teams will also benefit from cloud-based CRM systems. However, in order to take advantage, customer support will also need to go through training. To increase motivation during training, customer support needs to understand ways in which cloud-based CRM provides optimal support experience.

- **Improved First Contact Resolution (FCR)**
  They say first impressions are everything. The saying applies to customer service as well. The first point of interaction between customers and the support team measures the quality of customer experience.
  FCR measures the number of cases resolved according to the customer's expectations. A cloud-based CRM can track each case giving management a customer's eye view of their experience. Improved FCR numbers means a company delivers better customer experience while also minimizing the workload for the customer support team.

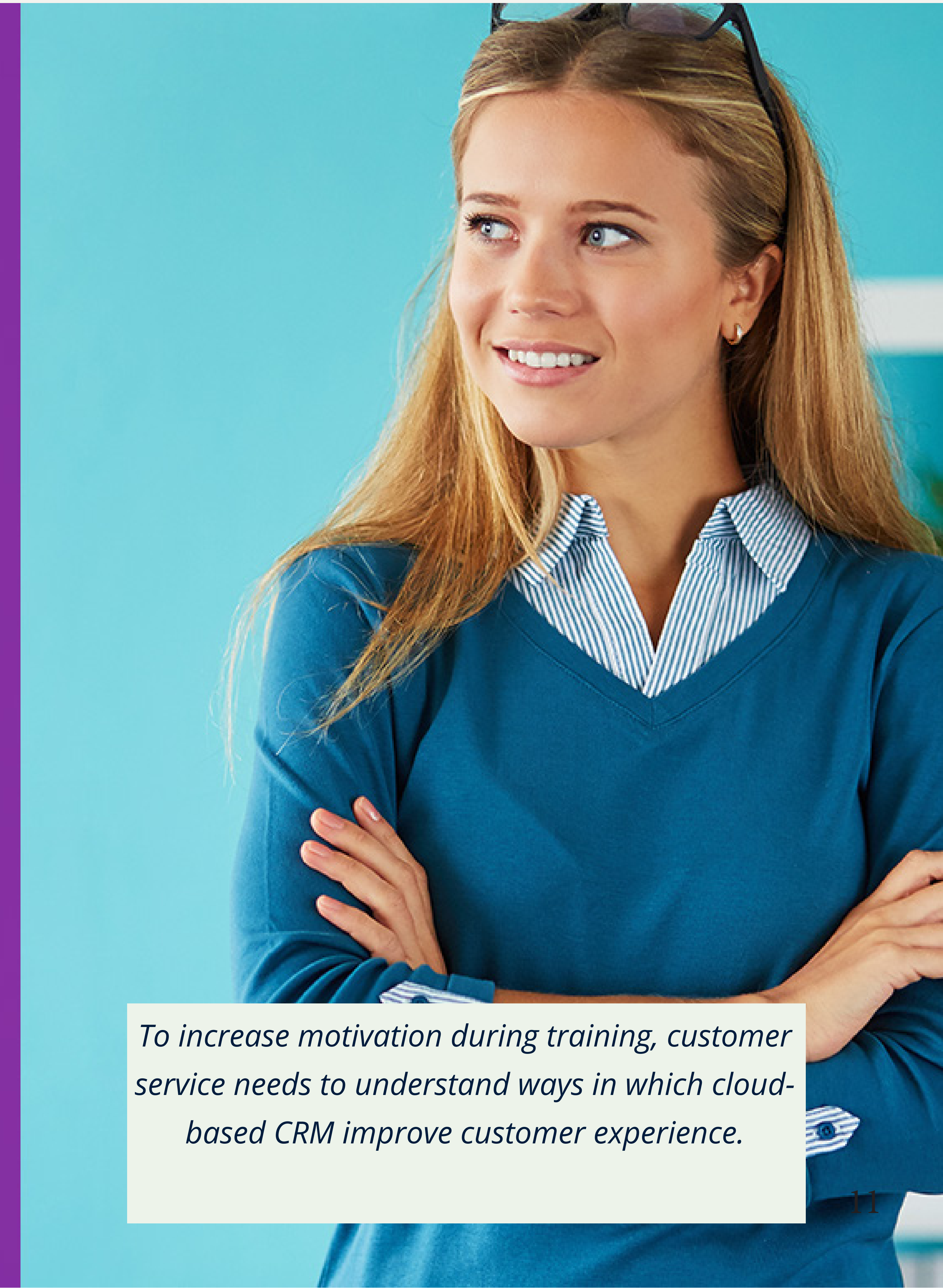
- **Enhanced Social Media Support**
  The latest support platforms use social-media tools so that customers can post questions and have them answered by customer support or

routed by the CRM admins to the cloud CRM vendor for follow-up. This gives customers better access to support right away.

- **Measuring Customer Support**
  Analytics provided by cloud-based CRM allows customer support managers to evaluate performance. Management can assess strategies that work and areas in the customer experience that require improvement.

- **Customer Guidance Tools**
  Cloud-based CRM systems give admins access to more tools for customer support. For example, admins can maintain a collection of how-to videos via the cloud-based CRM and maintain links to performance support platforms with online guidance platforms such as WalkMe that walk the user through transactions.

These are some best-practices ideas for implementing a new CRM system, taken from other successful projects, showing how to increase the user's buy in and provide an increase understanding of the system. The keys are effective communication, motivating employees with thorough and strategic training, and a valuable and easy-to-use online support system backed by CRM admin support.



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ABOUT WALKME

WalkMe provides a cloud-based platform designed to help Salesforce managers to guide and engage employees through any online experience. WalkMe simplifies Salesforce usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. WalkMe removes the barriers of entry from other CRM systems, and increases user productivity while lowering helpdesk requests, and reducing onboarding and training time and costs.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage.

As a result, both during the initial Salesforce orientation process and beyond, managers can empower their users so they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid errors through even the most complex processes.