

# 19 Brilliant Ways to Promote CRM User Adoption



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Digital transformation has become essential to support people working remotely and to compete in a global, connected economy. That means upgrading business management systems has never been more important. And while CRM implementations have come a long way since the early days of multi-million dollar budget overruns and missed deadlines, they still require substantial financial and resource commitments from your organization.

To get the most impact from a business management solution, your team must understand and adopt the system quickly. Although today's software offers streamlined workflows and intuitive interfaces, even some tech-savvy employees tend to drag their feet during implementations.

So why is user adoption still such a challenge for organizations implementing new business management systems? There's no one easy answer. Employees may be resistant to change, training may be inadequate, change management may not have been well planned, or leadership may not be fully committed. In most cases, it's a combination of factors.

This white paper will share the knowledge gained through countless CRM implementations to help get your employees started on the right foot. Our team has shared best practices, critical warnings, and bright ideas to help you quickly realize the full value of your software investment. Read on to see how you can help your employees embrace change and take your organization to the next level.



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1. Plan Thoroughly
2. Lead Proactively
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# Plan Thoroughly

## 1. Build an inclusive software selection team

Members of the CRM evaluation and selection team should represent a cross-section of your organization. In addition to leaders who understand the business objectives of the implementation, include staff members who can anticipate how the software will impact day-to-day operations. Ensure that each department or business unit feels their perspective is represented in the selection process.

## 2. Design the system to streamline current cumbersome processes

Take the time to clearly understand your business processes and re-design them to simplify and streamline your employees' work. Replacing tasks currently done on paper with digital processes that take just as much time won't win over your users. Design a system that will help employees accomplish more in a day with fewer headaches. Your implementation partner should be familiar with your industry and provide best practice examples to guide your workflows and business processes.

## 3. Plan ongoing support and training before go-live

Establish and communicate a clear plan for post go-live support and training. Users need to know that they will have help transitioning to the new system. Ongoing support and training will also keep users from establishing workarounds to avoid using the new system.

## 4. Maintain key integrations and customizations

Don't expect users to manually transfer or enter data that the previous systems handled automatically. Missing features and missing integrations are serious obstacles that users may be unwilling to accept. Integrations with other systems and customizations that meet specific requirements should be addressed early in the planning phase of implementation.

## 5. Map customer journey before designing CRM

Before you define the data fields and workflows needed to improve your sales and marketing system, you need to understand where you tend to lose opportunities. By mapping your customer journey from start to finish, you can align processes to help guide your prospects—including triggers to launch automated campaigns focused on historic sticking points.



# Lead Proactively

## 6. Leadership must champion the project

All employees affected by the new system should have a clear understanding of why the project was initiated and the ultimate goal for the organization. The leadership team, from CEO to department managers, should be committed to that goal and be able to explain it clearly. Leaders should be supportive of employees efforts and remain fully engaged throughout the project



## 7. Identify an internal project manager and key users

Before the project begins, identify a project team and project leader from within the company. All team members should be empowered to spend appropriate time on the project. That may require a reduction or reallocation of current responsibilities. The project team should be well rounded and include members from various parts of the organization. Perspectives from each team should be considered from the beginning.



## 8. Leverage “Superusers” and cheerleaders

A “Superuser” is typically an employee who is enthusiastic in learning and advocating the benefits of the new system. Superusers should be included or engaged by the project team to assist with training and communications. During the project, some team members will become cheerleaders for the project—embracing change and offering support. The project team should be on the lookout for these employees and have a plan and leverage their enthusiasm and knowledge to help others.

## 9. Prepare to be flexible

During an implementation there are likely to be unexpected challenges and opportunities. Assure everyone involved in the CRM implementation project that changes are to be expected and will be managed thoughtfully. Project team meetings should address potential changes and leadership should be fully informed of possible impacts.

# Manage Expectations

## 10. Maintain consistent, continuous communications

To keep everyone informed—from leadership to front-line users—establish regular communications channels. Project updates should be honest and informative to help users feel included in the entire process. Consider using a Teams site to promote discussions, answer questions and provide an “always-on” location for project information.

## 11. Establish metrics for goals and expected outcomes

The defined goals of a CRM implementation project should be clear and measurable. With mile markers, the project team can monitor and report on success. As decisions are made during the planning and execution phases, defined metrics provide guideposts to keep the project aligned to the desired outcomes.

## 12. Recognize the potential impact on employee workloads

A CRM implementation will require significant time from project team members and users. Employees should not be expected to maintain their full-time job responsibilities in addition to planning, testing and training. Put plans in place to offset workloads, e.g. reduce regular work, get support from other departments, hire temps, or some other method. Give employees the time they need to fully focus on their implementation assignments.

## 13. Explain the business case for the project

Spend time building a clear business case to help users understand why they are being asked to support the implementation of a new CRM system. By providing employees with the “why” as well as the “what,” leadership will establish a more inclusive environment that will promote user adoption.

## 14. Promote patience and tolerance during the project

A CRM implementation project can be stressful for many of the individuals involved. Project teams must make difficult decisions that not everyone will agree with. Department managers will be facing additional stresses to get regular work done despite significant distractions. Users may be nervous about learning new systems or having their jobs become redundant. Everyone faces personal issues that may not be apparent. Patience and tolerance for missed deadlines or mistakes will go a long way in supporting user adoption.



# Train Effectively

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## 15. Provide an overview walkthrough before training

Help users understand the big picture so they can understand how their role contributes to the process. Explain the CRM processes—including flow charts if appropriate—that span across the organization to provide context for users. In addition to helping with the initial adoption of the system, a broader perspective may help users see how they can extend the system to streamline operations in the future.

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## 16. Address potential concerns of automation

Users will balk at learning a new system if they think it might replace their job or devalue their work. If automation will redefine their role, users need to understand precisely how they will fit in and what their responsibilities will be. Demonstrate how the new system will benefit them specifically and how their effective use of the application will make their work more productive and fulfilling.

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## 17. Use terminology and examples that employees understand

During training sessions, use industry-specific terminology instead of generic examples included in vendor training data. If your organization uses the term “bill” instead of “invoice” users could be confused. Populate testing and training data with actual company data to help employees identify with the situations. When using actual product or customer names, lessons are much more likely to be understood.

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## 18. Offer a variety of training options and support

Support all learners by providing a variety of training options. Some people will prefer in-person, hands-on training and some will prefer to move at their own pace. Video recordings of live sessions support both paths and can provide a resource for new hires after implementation. Set up a Teams site that provides a central location for immediate and accurate answers and training-related discussions. Not only will it keep business moving during the cut-over, but it will also help end users feel supported as they work in the new system. Leverage superusers to help other employees in their business unit with on-the-job training and coaching. Superusers provide a familiar face to answer questions and help with troubleshooting.

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## 19. Take full advantage of video communication

As the number of people working remotely continues to climb, the value of video training and communication has increased. For most organizations, user testing and training sessions will include employees working from home. By hosting sessions in real time with a tool like Microsoft Teams, you'll enable two-way communication that can provide valuable visual feedback. Facial expressions and body language are key indicators of users' comprehension and adoption as they participate in training sessions.

# When it comes to user adoption, experience counts!

If your goal is to implement a Microsoft Dynamics 365 project where your employees happily adopt the new processes and system, give us a call.

Planning for the Microsoft Dynamics 365 user adoption process begins when the project is conceived and is guided by the intention to “make employees’ work life easier” through ongoing engagement.

We involve a representative group of users, across company ranks, in the development process from the start through user acceptance testing. Creating a team of project “champions”, we gather employees who are most likely to be vocal about changes in the company’s technology and lead them through an iterative process to incite valuable, ongoing feedback for the project team.

A key element of encouraging user adoption of Microsoft Dynamics 365 is the rollout of user training. Our team uses proven methodology to engage different types of learners (visual, auditory, tell/show, homework, vide etc.) and to ensure that all employees receive the required knowledge to “dive in” and happily use the new system. Training in smaller groups is our preference, to ensure everyone keeps up and fully engages in the process.

Finally, we Include management/business resources at every step, especially during training, to ensure that users understand why the new system is being implemented, limitations of the old system, and to act as a “conduit” or “translator” to bridge the business knowledge between the trainer and employees.

Contact us today to see how we can help you ensure the highest possible user adoption for your next Microsoft Dynamics 365 project.

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# About Beringer Technology Group

PERFORMANCE. INTEGRITY. TRUST.

## Solving Technology Challenges – It's What We Do

Each of us, from our leadership team to our technical resources and office staff, is here to understand and support your business with technology solutions. We have built a team with the expertise and skills that set us apart. We are big enough to support your business and small enough to give you the personal attention you deserve.

## Serious About Service – It's What Sets Us Apart

Our philosophy is simple: We believe that “good work leads to more work.” We treasure our long-term relationships with clients and, in the last 25 years, have implemented Microsoft Dynamics 365 CRM solutions at hundreds of their sites.

At Beringer Technology Group, we believe in adding value through long-lasting relationships with our customers. We take the time to get to know you and your company – your goals, successes, challenges, and everything in between. Our professionals design, implement, and support Microsoft Dynamics 365 and Microsoft's suite of cloud solutions to meet the technology needs of today's businesses.

In addition, our solutions are flexible, allowing you to capitalize on emerging technologies as your business grows. Value in the short term and positioning for the future – it's what we deliver.

- Flexible Solutions
- Dedicated Support
- Long Term Value

## World-Class Support – There When You Need Us

We know how frustrating it can be to place a service call and never hear back. That's just not our style. We offer live, full-time support 24/7. Our team of dedicated, certified professionals, with decades of experience, employ best-in-class support solutions and resolve support issues quickly and efficiently. If you need us, we'll be there.

## A Recognized Leader – The Best of the Best

As a proud Microsoft partner, Beringer Technology Group has been recognized in the top 1% of Microsoft's partner ecosystem as Gold certified for more than a decade. We are Microsoft Gold Certified with multiple competencies in Cloud Business Applications, Cloud Productivity, Small and Midmarket Cloud Solutions and Collaboration and Content. Every member of our Dynamics team is a Certified Microsoft Professional. We are uniquely qualified to help you get the most value out of Microsoft Dynamics 365 implementation.

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