You Tell Them “How”, But Do They Know “Why”?

By Susan Saldibar

So you are in the process of implementing a new CRM system. You set aside several hours to conduct a thorough, hands-on user training session. You spend a lot of time and effort introducing all the bells and whistles and instructing the team on how to use just about every function and field the system has to offer. Everyone leaves pumped up. Or so it seems. Then, a couple weeks later, they’ve forgotten about half of what they learned.

What’s wrong here?

The team at Continuum CRM (a Senior Housing Forum partner) has the answer to that question. I spoke recently with Kristin Hambleton, Vice President of Business Development for Continuum CRM. And what she told me makes a lot of sense, especially given the less than stellar success of traditional training programs. Here’s what she and her team recommend doing to increase the odds of successful user adoption of that new CRM system.

First, let your key users in on the hunt.

“You should begin your search for a CRM by involving users in the process of selecting, as well as implementing the system,” Kristin tells me. “That’s not to say that every user should be on the project team but, at the very least, internally, you should be meeting with your team and listening to what they need,” she says.

By doing this, you are starting right from the beginning to pave the way for greater user adoption. By letting key users in on the process from the start, you will be able to carve out exactly what you need and not pay for things you don’t need. “When you listen to what your users tell you they need and configure your CRM to fit those needs, you’ll have a tool they will actually use,” Kristin says.

Remember, training is not the end goal, user adoption is.

Before they train anyone on anything, the Continuum team makes it a point to demonstrate how the tools will benefit each user. They walk users through things like email templates and word merge and integration;

functions that save time and are actually fun to use. And they take the time to customize the various fields in advance to fit their roles. It makes a big difference. "It's important to let them 'see' the benefits in advance," Kristin says. "Show them how much fun it can be, how much time it will save them and other valuable things the tools will do for them."

Training should answer, not only the question of "how", but most importantly the question of "why".

The Continuum CRM training model fosters user adoption by always countering a "how" with a "why". "Our training methods reinforce the value the CRM brings to the team," Kristin tells me. "We train on why the system is configured as it is, why workflow and process is important, and why you should care about data collection, even if you didn't necessarily have to in the past."

Consider conducting your on-site training session at the end.

What I like about this training model, is it allows for all styles of learning and creates a pathway that further sets the stage for successful user adoption. Here's what Continuum has found to be effective:

1. **Start with on-line basic training.** Why? Because it lets each individual learn at their own pace and at a time that is convenient to them. Continuum's Education Center has a variety of online lessons to meet all comfort and experience levels. Continuum CRM provides short videos on subsets of the full training lessons to help employees spot check, as they go, their understanding of various features and processes

2. **Augment training with live online sessions.** Continuum CRM provides live training sessions to users that reinforce what is learned in the online Education Center.

3. **Finally, schedule your on-site training session.** I realize now why this makes so much sense. By the time you have everyone in the room, most of them should be pretty familiar with the system already. So you don't have to waste valuable time with long introductions. By now you have already explained the benefits of your new CRM and they will have gotten their feet wet with online sessions and videos. They will also be more familiar with terminology, layouts and how it functions, so they are able to navigate through the system more efficiently.

"What's great about doing the on-site training downstream, is that you get an opportunity to drive the session in a direction more beneficial to those in the audience," Kristin explains. "By now they know the basics, so you can really dig deeper and show them even more functionality. And, because they understand the 'why' for each function, they are more open to using features their department may not have considered before. More often than not, I will hear people say, 'Hey, I could use that too!'"

You can learn more about user adoption and ways to make the training journey more effective by attending Continuum CRM's next webinar "Effective Training Before, During and After your CRM Migration" Click here to register.

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