This is Why Your CRM Users Won't Use It The Way You Want Them To!

By Susan Saldibar

I was in the business of software marketing for years and it always surprised me how many implementations fell flat. Not necessarily because of the software (in fact, ours was great!) but because nobody used it!

Of course, that was back when executive management was pretty much hands off. They'd have the software installed and tell the team, "Okay, start using it!" I've been on the receiving side of that and, believe me, all it motivated us to do was to go back to our cubicles and Excel spreadsheets.

Thankfully our work cultures are changing. So is our software and our software providers! I spoke recently to Lynn Madderra, VP of Operations for Continuum CRM (a Senior Housing Forum partner) about the ongoing problem of user adoption. "We buy software to help solve a problem, but often it's seen as the solution in and of itself --- put it in and we're done," Lynn tells me. "That's often because the selection process is overwhelming. Once the software is chosen, they just sit back after the purchase and believe the hard work is done. But, in truth, that's just the beginning."

What I like about Continuum is their passion about making sure that their CRM software is not only used, but actively embraced by their clients. To help pave the way for others, Continuum has put together a really useful guide (which you can down load here.) The goal of the guide is to make sure that CRM software is both embraced and used successfully, not just by the sales team, but by marketing and senior management as well.

I've paraphrased some of the main points of the guide that I found particularly interesting. But I have to say, there is so much more in the guide. You'll want to download it and pass it around to your team.

1. **Become leadership driven.** Software implementations that are not supported from the top down are much more likely to fail. "Leadership backs off too often, expecting just 'data' out of the system, so the users are left to flounder," Lynn says. "They end up doing only the bare minimum with no direction or buy in from the top. If the team can't see the value, they will just drop off." In other words, this can't be a grass roots effort from the bottom up. It needs to start from the top.

2. **Get the team on board from day one.** This needs to start with the selection process. Leadership should be asking the team questions like, “What do you need to be more effective?” And they should meet with the team well before interviewing vendors to lay the groundwork for what they want the system to do and how they will use it. By doing this, the value of the software is being built from day one.

3. **Make sure the CRM fits your community.** It starts with a user-friendly interface. But user-friendly no longer has to mean a simplistic version of software. “The CRM should be completely configurable so that it reflects the community, from terminology to specific sales steps to culture,” Lynn says. And she suggests that you start simply, layering in additional functionality after the users get comfortable with it.

4. **Take your training to a new level.** What I like about the folks at Continuum is their almost obsessive dedication to the training process. I’ve spoken with Lynn before about how they take training to a new level by working with leadership to make sure all team members are on board with the new system. Here are three key factors that they believe will determine the success of user adoption:

    i. **The willingness to change.** If you don’t have top down support from day one, there will likely be resistance among the sales and marketing team to take on a new piece of software.

    ii. **The learning environment and training schedule.** You should provide a combination of on-line training and live training with a dedicated project manager over a period of weeks during startup. You shouldn’t try to squeeze it all into a couple training sessions. “We recommend spreading out the training period so that users have a chance to get comfortable with the system, ask questions and maybe even come up with new ideas,” Lynn says.

    iii. **Ongoing education and support.** Leadership should encourage continuing education, after the system has been implemented, to learn how to use additional levels of functionality. They should be provided with convenient access to online training and brush up sessions as well.

5. **Lead by example.** Leadership needs to continue to take the lead all the way through implementation and beyond. A good way to start is by tossing out those Excel spreadsheets, rolling up their sleeves and using the software themselves. The Continuum platform provides a configurable executive dashboard to allow instant access to key real time data and performance metrics. Leadership can use it as a springboard for coaching, making improvements and evaluating overall performance.

It’s great to see a new generation of CRM developers, like Continum, driving a higher level of user adoption for their software by putting all users front and center to the process. But, as Lynn is quick to say, the software can’t do it all alone. It will only work if the community is ready to transform their thinking, top down. They will need to move away from old ways that are no longer able to keep pace with the granularity and sheer volume of data we now produce.

To that end, I really urge you to download the full guide “5 Ways to Increase User Adoption”, which you can do here. It contains a lot of great tips beneath each of the five headings that you can use to get your own process started.

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