SUGARCRM

5 Ways to Increase CRM Adoption Within Your Sales Staff

Chris Bucholtz

Sales managers usually have no problem grasping the value of CRM—it presents sales data in an easily-digested format that allows managers to adjust programs, processes and people to optimize selling. For sales people, however, CRM is often viewed as a new burden, a hindrance and an example of the sales manager shifting his work on to them. In reality, it's as helpful to sales staffers as it is to managers, if used right. But perception is reality—so sales managers need to help overcome preconceptions of their sales staff. In other words, sales managers need to sell CRM to their sales staff. However, CRM brings so many benefits up and down the sales ecosystem that it becomes an easy sale if those benefits are articulated properly.

Introduction

The way the concept of CRM is defined during the sales process can sow the seeds of its ultimate failure. Because the decision makers are often sales managers rather than actual sales people, the pitch is usually made to them that CRM makes it easier for the managers to manage their sales staff. Which is true.

But what's in it for the sales staff? They're the ones who will spend extra time entering data into the CRM application. Adding the maintenance of customer records in CRM to their duties is not initially seen as a benefit—it's seen as something that keeps them from their key task of selling. And providing managers with additional data is viewed as a way of allowing the managers to keep tabs on the sales staff. is If the purpose of the CRM application is to give their bosses more information with which to browbeat them, why would sales staff use it?

Of course, CRM is much more than simply a management tool—and it's most effective when it has more data entered into it. That doesn't result in mere managerial success—it means success for the entire sales team and success for the entire business. So how do you get past the perception that CRM is an eavesdropping tool for sales managers and a burden on the sales staff, and instead cultivate a view that CRM is a tool that helps everyone in the organization?

Simple. You have to sell the sales staff on CRM. You can do it—if you're in sales, you've probably sold things in the past that bring benefits that are fewer in number and harder to track than those provided by CRM.

Five Ideas for Selling Your Sales Staff

Here are five ways to position CRM to help you demonstrate to your sales team that using CRM will make their lives easier and their commission checks larger.

1. CRM is a memory accelerator

Contact management is a very basic function of CRM, and it's a critical capability for salespeople. But with sales teams shrinking, quotas rising and sales pros constantly begging for greater numbers of leads from marketing, at some point the data becomes overwhelming. No one can hold all of the pertinent contact information in his or her head, nor can it be managed in a spreadsheet in an easily-accessible way for long before it too becomes overwhelming. However, once that data is entered into CRM, it's there for good—and it's accessible, and it's easily modified if need be. Think of it as an assistant for the sales pro's brain; instead of devoting brain power to remembering where data on prospects and customers are hiding on the desk or on the desktop, sales pros can go to a single source, get the data they need quickly—and then devote the rest of their mental energy to selling.

2. CRM organizes your activities

Sales people have complicated calendars, especially if what they sell has a long sales cycle. That can result in a reminder system to help them follow up with calls or collateral when the time is right. But these are usually home-grown systems, and home grown systems often start to groan under heavy burdens. Increase the number of leads you're working on by 30 percent, and will your

jury-rigged Outlook-based reminder system hold up? CRM is great for building these reminders into your daily process, and they can help you standardize your sales processes so that you never forget to schedule a follow-up call. Moreover, they also provide you with a record of your follow-up activities. Even if you don't include notes from a call, the fact that you know you made it is useful—and probably more than you're tracking right now.

CRM also helps lessen the burden other reports have traditionally placed on the sales staff. Examples include the weekly sales funnel status update and forecast updates. When selling data is entered into CRM, the application automates these activities entirely. If gives the sales staff more time to sell—not less—and makes it easier for managers to assemble their forecasts, giving them more time to act as coaches and mentors

3. CRM lets you share intelligence

Of course, sales people are fiercely jealous of the accounts they're working. That makes sense. However, it also makes sense to compare notes. If one selling approach is working, why keep it under your hat? Being the most successful sales person in a failing sales organization is gratifying only up until the point that your company declares bankruptcy. Tracking selling patterns allows sales people to see what works for them, and what might work for others; instead of having the sales manager impose a set of "best practices," sales people can develop and share them among themselves. CRM also makes it much easier to get productive when territories shift or when responsibilities change; instead of learning the lay of the land from scratch, the record of the business's behavior in those regions or markets has been captured and that data is immediately available to help get the sales pro who's inheriting them up to speed.

4. CRM gives you access to social data

If you're in sales, especially on the B2B side, you may already check on prospects by looking them up on LinkedIn. CRM is becoming increasingly attuned to the social world—and instead of having to look up prospect or customers' social profiles manually each time, socially-enabled CRM applications can pull this data into the customer record for posterity. Some CRM applications now include sales intelligence tools like InsideView that automatically provide social media data each time a customer's record is opened. Instead of having to fish through the entire social media world, these emerging tools allow sales people to get the information that's most useful to them rapidly, allowing them to devote more time to selling and less time to looking things up on the Internet.

5. CRM ensures recurring sales

While the immediate benefits to sales are nice, there's a behind-the-scenes benefit to sales are great as well. The customer record is useful to customer support, which can understand the relationship between the customer and the company and use it to provide better service. It's also a big help to marketing, which can better segment the customer audience for its messages and use the data to hunt down better qualified leads. As a result, sales people will encounter happier customers when it comes time to renew a contract, sell a replacement product or upsell a customer to e a new product or service. Support and marketing may not be the sales person's responsibility, but how well those responsibilities are carried out have a direct impact on the sales person's success with recurring business. By starting the process of documenting customer relationships, sales people are laying the groundwork for success today and down the road.

Strategies for Selling Your Sales Staff

While your positioning of CRM's benefits in terms that appeals to the sales staff is an important first step, it's not all there is to getting complete buy-in. As in any sale, you'll need to break through skepticism in order to win your customers over.

Nothing beats the skeptics better than real results. For that reason, one favorite tactic it to keep an eye open for

early wins that resulted from the use of CRM. Keep an eye out for the eager adopters within the sales team, and watch their wins. When a sales pro can point at a sale and describe how CRM helped get him closer to a close, take notes and make sure everyone on your sales team hears about it. Repeat this: whenever you can articulate how CRM contributed to a closed sale, do so. Another area where CRM use helps the entire sales organization is forecasting; the committed use of CRM by the entire staff leads to more accurate forecasts, which can eliminate frantic quarter ends in which the staff tries to make up the gulf between what's been forecast and what the actual sales numbers are. CRM use allows better forecasts to be made, which can reduce the stress on sales.

The goal here is to back up your assertions of how useful CRM is to ordinary sales staff with results that point out that it's useful not just for generating reports for management but for increasing commissions for sales people.

Positive motivations—like examples of CRM successes—tend to be more successful than punitive motivations. For example, making CRM use into a monthly competition between sales people—in which consistent users are rewarded with a prize at the end of a sales period—can be an effective motivator. Introducing sales enablement technologies for alerting, lead management and other functions can be a motivator if those technologies use CRM data to give sales people a leg up in selling. Punitive motivations—like reducing commissions on sales that weren't tracked through CRM—can be effective, but they tend to reinforce the perception of CRM as a tracking tool for management. A mixture of carrots and sticks may be needed to drive total adoption, but try to lean toward the carrot side of the equation to maintain staff effectiveness.

Conclusion

CRM has a lot of benefits for your business—and they're benefits to everyone within your business. But change is tough, especially when your sales staff is already succeeding at what they're doing and they perceive new technology as a hindrance rather than as a help. If you want them to help you as a sales manager better understand what's going on in your sales pipeline, you need to demonstrate to them how CRM can help them boost their commissions while making their lives easier. Just as in selling any other product, it's important to frame CRM in terms of the problems it solves for your sales staff.

About the Author

Chris Bucholtz is Editor-in-Chief of CRM Outsiders. Chris is a long-time journalist, blogger and CRM industry influencer. For over 17 years he's been a technology journalist for some of the industry's best print and online media. After his role at VAR Business, he became the first Editor of InsideCRM, a Focus.com brand. He then took the reigns as Editor-in-Chief of ForecastingClouds.com— an online destination delivering rich content and thought leadership views regarding CRM and ERP cloud solutions. He's also a regular columnist for CRMbuyer.com and has been writing about Social CRM for the last 4 years.

In his current Editor-in-Chief role, Chris is the voice of CRM Outsiders Bucholtz continues the CRM Outsiders tradition of being an independent and opinionated CRM advisor, who provides trusted and useful content to the market. He uses his extensive network to encourage other CRM visionaries to contribute regularly on CRM Outsiders.

About SugarCRM

SugarCRM is the world's leading provider of open source customer relationship management (CRM) software. Over 7,000 customers and close to a million users rely on SugarCRM to execute marketing programs, grow sales, retain customers and create custom business applications.

Leading publications such as CRM Magazine, InfoWorld and eWeek praise SugarCRM for its ease-of-use, flexibility and open design.

SugarCRM is available in 4 different subscriptions and can be installed on-premise or can run in the cloud. For cloud deployments, customer can choose to run on Sugar On-Demand, a traditional SaaS deployment, or run on one of the leading cloud computing platforms, including Amazon EC2, IBM SmartCloud Enterprise, Microsoft Azure, or Rackspace Cloud. Sugar customers can also leverage the cloud infrastructure of one of the 350 partners around the world who resell SugarCRM. This breath of options offers customers an unparalleled choice and control over their data and deployment.

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