Top Tips for Encouraging CRM Adoption

The extent to which you can get your employees on board with your CRM matters a lot. In fact, it can be critical to the overall success of your efforts. Having people excited about the opportunity before it even comes along can make it easier to work through the challenges of trying out a new system. Inevitably, change is hard- but it does not have to be when you properly frame the opportunity for your employees. Read on to learn about some of the most important tips you need to know when adopting a new CRM.

**Make Sure It’s Mobile**

Does the program work on mobile? If your sales force is out in the field, it is important that they are able to access the information whenever they need it easily. Looking for a program that reads well across multiple channels is the best way to ensure that they can see relevant information in real time. Simple viewing makes it a lot easier to adopt new technology!

**Don’t Mandate Company-Wide Reports**

Not everyone is going to find the same benefits associated with various views and reports. You need to use your own dashboards and determine what works for each department. The upside of letting each department work within the system is that they’ll begin learning the ins and outs on their own and feel more confident in using this technology on a regular basis.

**Have it Synced With Email**

The more streamlined things are, the more time your sales team and you can save in viewing pertinent details. Every department linked to sales should have access to the CRM, because it goes beyond simply serving as a sales list. Make sure to spend some training time to cover why each individual department can benefit from the program.

Walk through examples so that people are clear on how they can use it. If someone does not see a purpose for the CRM, it is likely that they will never interact with it. So give them a reason, and one that links to their day-to-day life. Introducing this on your own increases the chances that they will put some time into getting to know the software.

**Eliminate Redundancy**

Not every field built into the software is something that you need to use. Before settling down and setting up your own structure, think about the key data points you actually need to know. It is otherwise very easy to get lost in the numbers and the excitement of tracking so much data. It will fall short if there is no purpose to collecting all this data, though, if you cannot find a use for it. The same goes for dumping in new data from an old system- the review of this data is only likely to be valuable if there is a clear purpose for it. Hold off on a “data dump” if it’s not going to be helpful to clog up the system.