6 Ways to Successfully to Adopt a new CRM

Implementing a new CRM seems like a daunting task, especially if your sales team is resistant to change. However, a good CRM can be the driver of a consistent sales process. Consistency is key when it comes to sales forecasting. Good leaders know the importance of defining, managing and executing a clear sales process. It impacts your company's overall revenue, and it is an important driver of an accurate sales forecast.

Knowing this, what are the key things you must do when you implement a new CRM?

Incentivize your team. Sales teams are inherently competitive, so why not incentivize your sales team to adopt the new CRM? Making sure your team is motivated to make the implementation successful is very important. Celebrate milestones or reward efficient adopters with more commission or a small prize. Having a good CRM system makes it easy to track and see metrics for your deals—make use of the reporting on your CRM to create KPIs and goals that your team will want to achieve. Team goals will make sure everyone wants to adopt the new CRM.

Train your sales team strategically. Throwing a new process and technology at your team without proper training is surely going to hinder them from wanting to use it. Your team must feel comfortable and confident with the software. The timing of the training is important—you can't train your team too early because they will forget. Make sure there is a complete suite of resources, information or a "CRM Champion" who can be the in-house expert for anyone who has trouble.

Market the Benefits. If the sales team is not taught the benefits of using the new CRM, the chances are high that they won't adopt it and are unlikely to use it. If they don't know how to properly use the CRM, they will become frustrated and are less likely to adopt the process. The best way to train your sales team is to conduct hands-on end user experience training— run through “a day in the life” scenarios based on the end user’s individual experiences and their daily roles and responsibilities. This will make the training relatable and more engaging.

Start Doing Reviews from CRM Data. The transition from the legacy system to the new CRM is always a delicate balance. Many sales people will be resistant to switching over from the status quo. Set a hard deadline as to when all the deals have to be migrated to the new CRM, or when the legacy system will be officially obsolete and cleared.

Start performing your sales reviews using the new CRM data and insist that only data from the CRM will be considered for Sales reviews. Going a step further would be to link commission payouts only once the deals are closed on time in the CRM.

Minimize data entry. Manually inputting data into a CRM is tedious and time consuming. Keep the data entry to minimum—have your sales team enter just enough data to maintain robust reporting and analytics. If using the CRM routinely becomes a timely and dreaded process, there’s a lower chance that the team will adopt the system.

Get feedback. Keep tabs on everyone’s experience using the system. Take the time to solicit feedback on the system, because it is ultimately the end user’s experience that will dictate whether the new system is going to be successful.
At ForecastEra, with out Sales Performance Solutions we provide ongoing support and assistance in helping your sales team use our tools. We ensure that there is a seamless transition and will work with your team to create a customized solution for your sales needs. Remember, a powerful CRM is the key to a healthy pipeline and accurate sales forecasts.

Find out more about how we can work with you to implement our cutting edge CRM and improve your company’s forecasting capabilities: http://www.forecastera.com