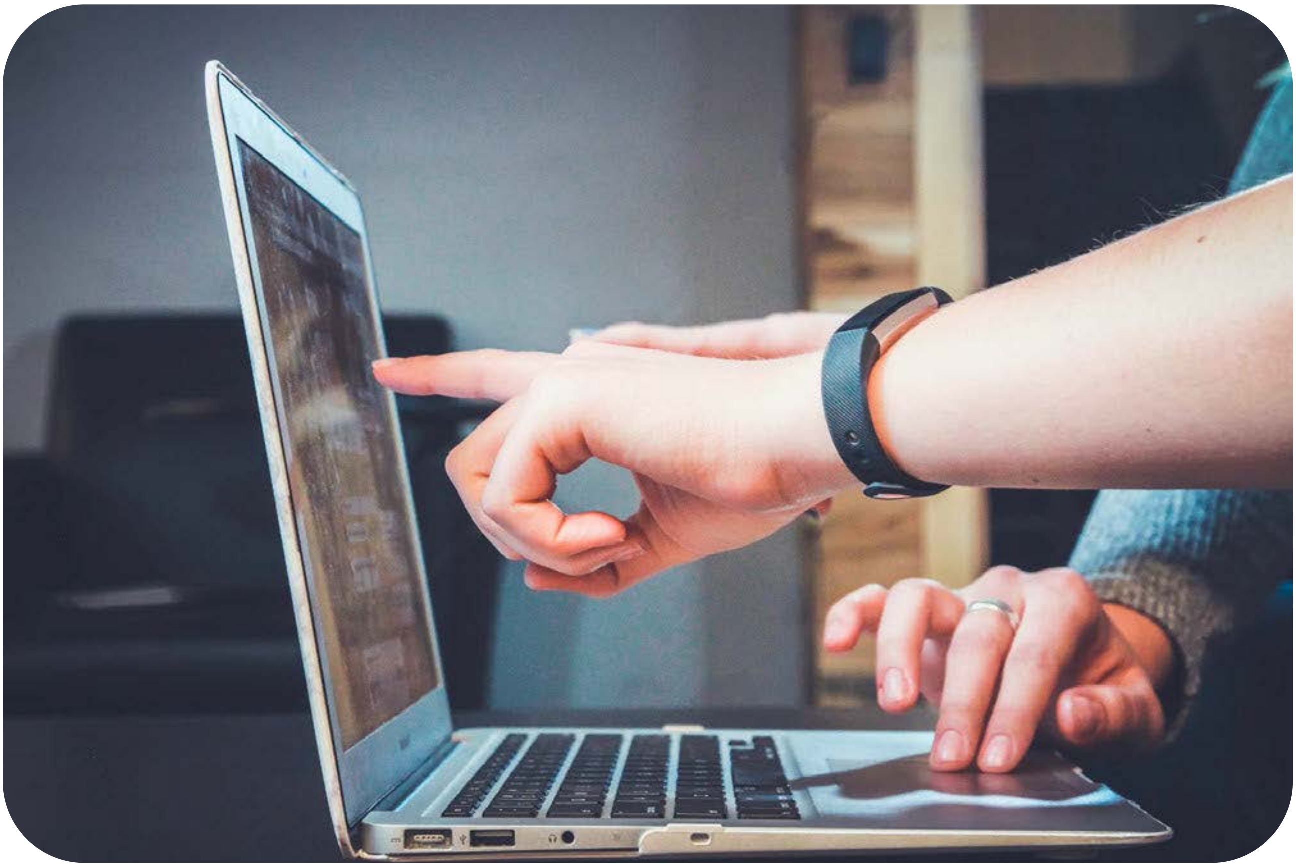
Getting Your Sales Team to Adopt a New CRM Solution

Part change management, part cultural shift, part edutainment–ensuring sales is onboard when onboarding a new CRM solution is critical to your success. Read on to learn how you can ace adoption in your organization.



WHITE CUP

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User adoption is the key to achieving the greatest return on investment from your Customer Relationship Management (CRM) system and can give you an incredible edge over your competition.

You can lead your sales reps to the CRM waters, but how do you get them to drink and, more importantly, continue to come back to the CRM well again and again?

Over the years, White Cup has partnered with almost 1,000 companies worldwide to help them structure their CRM rollouts for optimal uptake. Below are 11 things our experts say make all the difference in creating an engaged, enlightened, and fully CRM-empowered salesforce.

Start With the End in Mind

In years past, CRM systems have been synonymous with either an electronic Rolodex or a "Big Brother" management surveillance system. Neither impression will win your sales reps over in getting onboard when onboarding a new CRM system.

Instead, reset the overall intention and focus behind the implementation. It's important to present the new CRM solution through the lens of sales enablement as opposed to a traditional "back end" CRM solution. You need to answer the question: **How does the CRM solution translate into putting more dollars in sales reps' pockets?**

Have an Executive Sponsor

Executive sponsorship and leadership is ultra-critical to a successful CRM rollout. The executive sponsor embraces the role of ambassador for the project and evangelizes its importance in the company's overarching strategy and goals and desired outcomes. They are also responsible for ensuring ongoing and clear communication.

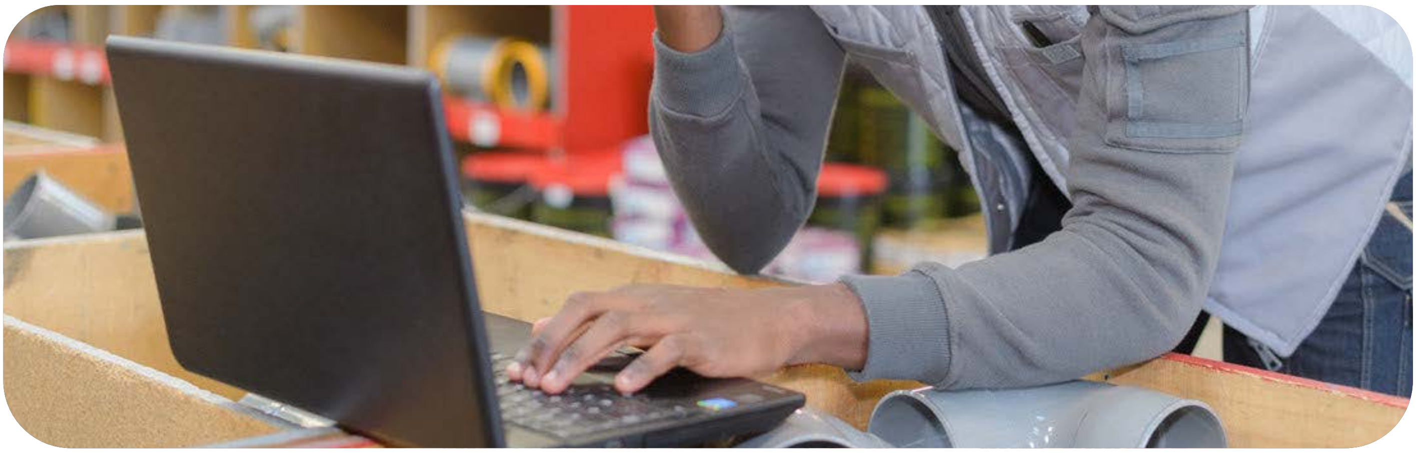
Establish Metrics that Matter

Be sure to have metrics in place and clearly articulate, what does success look like? What is the company trying to accomplish? If it's a growth year, an appropriate metric might be something such as the number of new logos secured. If the focus is greater profitability, the metrics might be different, such as improving upsell rates within the existing customer base.

Focus on What's in It for Me

Quantify the value of the new CRM system in highly desirable end results for sales reps. Does it make processes easier and more efficient for the sales rep – i.e., reducing the time to prepare a quote from 1 hour to 10 minutes, or eliminating the need to send ten emails back and forth to close out a deal?

The most successful companies focus on features that significantly improve the daily life of sales reps. This should include providing visibility to things that help them build relationships and ultimately sell more – i.e., What products did the customer buy from us over the past six months?



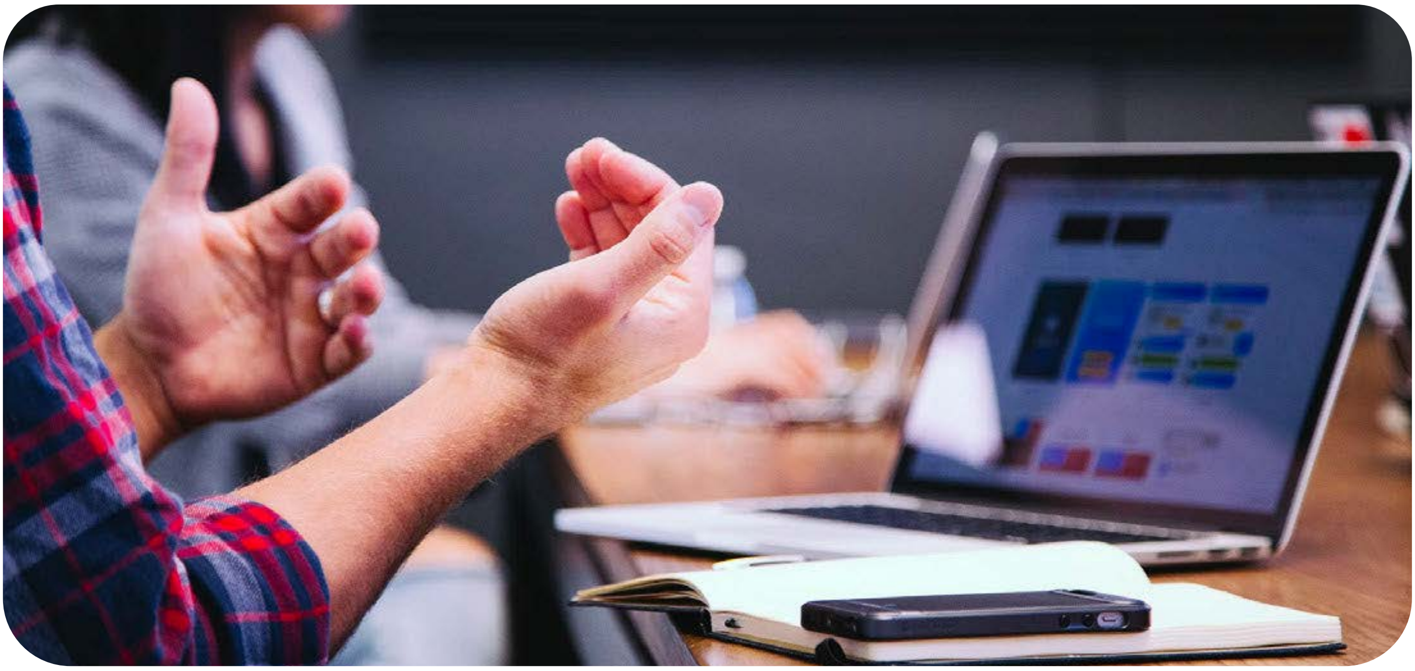
Make a Big Splash

First impressions count. It's essential for executives, internal CRM champions, and employees to be excited about the CRM rollout to generate company-wide enthusiasm. Punctuate your launch with an event; it doesn't have to be fancy, but order in pizza and beer at the very least. And don't wait – just do it; perfection is the enemy of good.

Start Simple

It's a mistake to try to do everything at once when it comes to training. Your organization isn't ready for that level of change. No one likes to work on something they don't understand; this can be very defeating. Narrow the focus of your training to start with high-level operations that provide significant value to sales reps.

Once your salesforce has the basics down, they will have the foundation to level up their skills. Establish scheduled role-based training that reinforces previous learnings.



Focus on the "Magic"

Technology does the things that humans and spreadsheets can never do. CRM is particularly powerful in identifying things that matter – such as critical correlations and helping with task prioritization.

This helps triangulate the opportunities representing the highest and best chance of closure and value to sales reps. The most valuable resource sales rep have is time. The "magic" of CRM lies in its ability to surface the "unseeable" and help guide sales to those actions producing the most outstanding returns in exchange for their time. ERP systems offer a tremendous amount of information, but they are cumbersome to extract data from; CRM makes valuable data insights easily consumable for sales.

Celebrate Each and Every Victory

Publicly demonstrate and internally socialize every win that comes from using the CRM system. The best way to prove to your sales reps that CRM works as promised is to showcase the prize haul. If you are fishing, the best proof of value of using the right type of bait is to land a big tuna! And speaking of prizes, rewards and recognition can also go a long way to incentivize adoption.

Tech-Enable Your Sales Performance Meetings

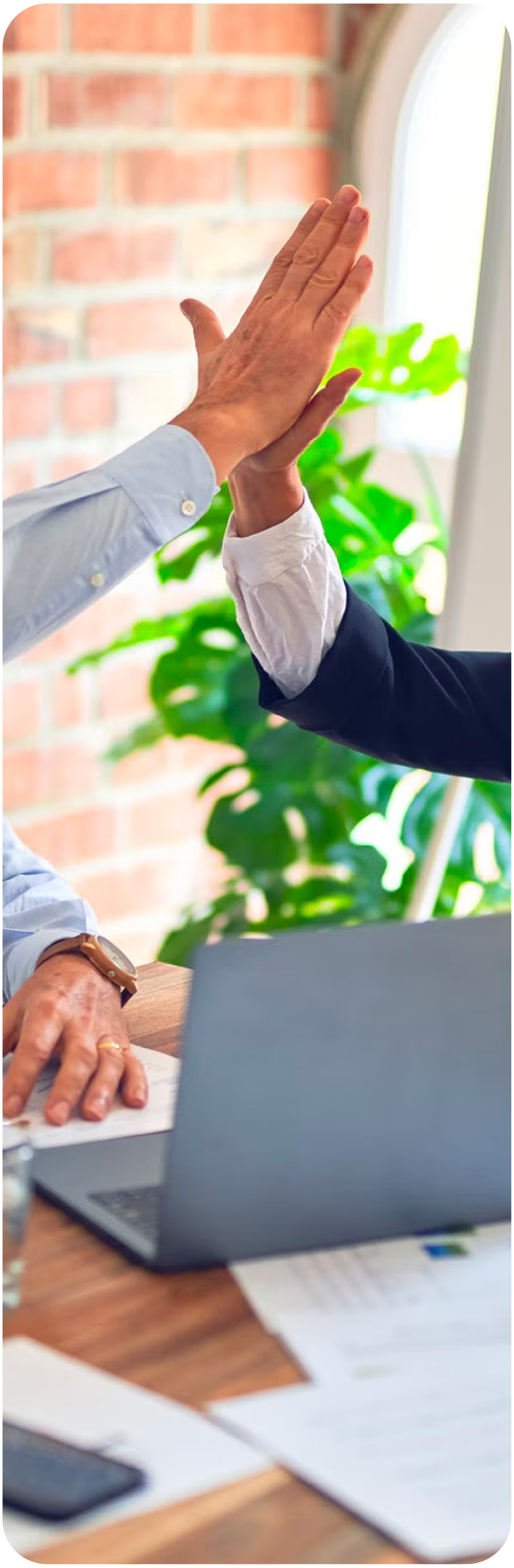
Conduct your weekly one-on-one management meetings centered around the use of your CRM technology. Ask your sales reps to “show” you reports, dashboards, and records within the software. If a sales rep cannot do this the first time around, you can be sure they’ll come prepared for the next meeting, having invested the proper time and attention to develop the necessary competencies.

Designate Tech "Alphas"

Many organizations successfully train early adopters who then serve as “tech team captains,” providing peer-to-peer help and guidance. However, be mindful that this can sometimes be a crutch, giving users a way to wiggle out of fully learning the system. The goal should be no man (or woman) left behind, so don’t let your “alphas” take the place of company-wide CRM system comprehension and immersion.

Cut the Cord

It’s vital to decommission any legacy systems that your sales reps are accustomed to using in a timely fashion. The longer you allow these systems to stay up, the less motivation and urgency for sales reps to transition to the new CRM system. Communicate upfront clear timelines for when these older systems will be mothballed, ensuring that the legacy data is ported over to the new system.



White Cup CRM: Built for the Business of Distribution

White Cup CRM is built to address the high-volume, high-velocity, repeat sales distribution environment in the digital era, making it easy to stay connected, engaged with customers and prospects, and focused on closing sales.

From marketing and sales automation to quoting and document signing, White Cup CRM provides a comprehensive set of tools to orchestrate efficient engagement with customers from the first touch to a done deal. Built-in workflows make it easy to push marketing data to sales reps, set automatic email notifications, auto-assign tasks, and seamlessly move deals through the sales cycle. Sales activity reporting and notifications help team members stay on track.

White Cup CRM also brings newfound ease and time-to-value to marketing operations, helping distributors stay top-of-mind with prospects and customers. Built-in marketing automation with templates makes it easy to build targeted lists, launch compelling email campaigns, and track results in minutes.

Distributors can quickly view prospect and customer data on-the-fly, on any device, anywhere, via easy access to the latest communications to drive deals forward. White Cup CRM is designed for simplicity of use and ease of adoption and is integrated with the industry's best ERP solutions.

Get in the Data-Driven Driver's Seat with White Cup

In the distribution space, you face challenges never experienced, and your customers are too. It's a whole new world that requires unique strategies to unlock new sales opportunities and build relationships based on a deeper understanding of your customers' needs.

Ready to get in the data-driven driver's seat? White Cup turns a distributor's sales pains into profit gains. Our CRM, Business Intelligence (BI), and Pricing software make it easier for you to sell more, keep more profit, and beat the competition. With over 20 years of experience, White Cup is trusted by more than 1,000 customers globally.

About Us

White Cup offers a Revenue Intelligence platform with integrated solutions specifically designed for the wholesale distribution industry. Our software captures data across critical business systems, reveals industry-specific analysis, and provides the tools needed to take action for revenue improvement.

To learn more, visit **whitecupsolutions.com.**

Let’s Talk