PipeLaunch

E-BOOK

The Ultimate Guide to Boost Salesforce User Adoption in 2023

salesforce appexchange

Contents

Intro

Ben McCarthy
Founder and CEO

SALESFORCEBEN

CRM & Salesforce in particular, has the power to drive serious impact inside your business.

By aligning departments, streaming and automating processes, and having a 360° view of your customers at a click of a button, you can take your business to new heights.

Whenever I talk about the benefits of Salesforce and the impact to businesses, I like to focus on 3 main areas, customer satisfaction, employee satisfaction, and productivity. These three important metrics can drive top line KPI's such as revenue, sales pipeline and customer retention.

It is exactly for these reasons why adoption of CRM systems is so critical to every business using Salesforce.

But before unpacking this topic, it's a good idea to get on the same page on what "Salesforce Adoption" actually means. For some, it could just mean logging in and updating records, but for others, it means supporting users to use the full array of Salesforce functionality, to enable them to perform their job more effectively.

Adoption doesn't just encompass a bit of training for users on how to use the system, but strategies around onboarding, training, and continuous development and optimization of the system. Just as a business is like a living, breathing, organism who is constantly evolving, so is a CRM system, and the CRM system, along with the adoption strategy needs to align with the business.

As Salesforce adoption is of critical importance to every business, I'm thrilled to be able to collaborate with PipeLaunch on this eBook jam packed with tips, insights, and Apps to help you with your adoption strategy.

Salesforce can sometimes be criticised for not "enabling" sales users enough. Whilst there are plenty of features to track leads, pipelines, and customers, there aren't any tools to actually help you discover and sell to customers.

This is why I love collaborating and recommending Apps such as PipeLaunch. With a direct integration into LinkedIn, sales users can discover new accounts, enrich data, and find emails for those elusive prospects.

I hope you enjoy this eBook, and it starts you on the path to perfect sales user adoption!

Ben McCarthy

A CRM Project is crucial to the success of a modern business, and is mainly implemented for one of the following reasons

Maximizing shareholder value

Shareholders are constantly seeking to maximize the value of their investments. A CRM system can help organizations achieve this by improving customer engagement and increasing sales. By managing customer interactions and data in a centralized platform, organizations can better understand customer needs, anticipate buying behaviors, and tailor their sales and marketing efforts accordingly. This leads to increased customer satisfaction, retention, and ultimately, higher revenue and shareholder value.

Ensuring accountability

A CRM system provides a single source of truth for customer interactions and data, ensuring that everyone in the organization is working from the same information. This leads to greater accountability and transparency in sales and marketing efforts, enabling organizations to measure performance, identify areas for improvement, and track progress against KPIs.

Meeting KPIs

Investors often evaluate organizations based on key performance indicators (KPIs) such as sales growth, customer satisfaction, and market share. A CRM system provides the tools and data necessary to meet these KPIs by enabling organizations to better manage customer interactions, identify opportunities for growth, and measure progress against goals. By tracking and reporting on KPIs, organizations can demonstrate their ability to meet investor expectations and increase shareholder value.

Improving customer happiness

A CRM system enables organizations to provide a more personalized and effective customer experience by capturing and analyzing customer data. This helps organizations understand customer preferences, track their interactions with the company, and tailor their sales and marketing efforts accordingly. By improving the customer experience, organizations can increase customer satisfaction, loyalty, and ultimately, drive revenue growth.
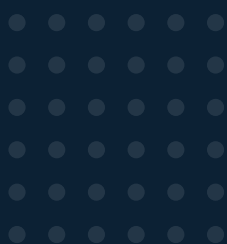
User Adoption
Challenges

It's important to note that CRM implementations are sometimes driven by leadership without taking end users into consideration. This can lead to poor adoption and ineffective use of the system.

To ensure successful implementation and adoption, it's essential to involve end users in the process, provide training and support, and address any concerns or challenges they may have. By doing so, organizations can maximize the value of their CRM system, achieve better results, and ultimately drive increased shareholder value and customer happiness. Here are some of the challenges:

Complexity

Salesforce can be a complex platform, with many different features and capabilities. Users may find it overwhelming or difficult to navigate, leading to a lack of adoption.

Lack of training

Users may not be adequately trained on how to use Salesforce, leading to confusion and frustration when trying to navigate the platform.

Customization

Customizing Salesforce to meet the needs of your organization and users can be a challenge, particularly if you lack the necessary expertise or resources.

Integration

Integrating Salesforce with other systems and applications can be a challenge, particularly if there are compatibility issues or technical challenges.

Data quality

Maintaining data quality in Salesforce can be a challenge, particularly if users are not consistently entering data or following best practices.

Lack of visibility

Users may not have visibility into the full range of Salesforce features and capabilities, leading them to miss out on valuable functionality.

Limited buy-in

If senior leadership or other key stakeholders are not fully bought into the Salesforce implementation, it can be difficult to gain user adoption and enthusiasm for the platform.

Lack of communication

Clear communication and ongoing support are critical for user adoption. If users feel unsupported or uninformed, they may be less likely to fully adopt Salesforce.

Overall, these are some of the user adoption challenges that organizations may face when implementing Salesforce. Addressing these challenges requires careful planning, ongoing support, and a commitment to continuous improvement and communication with your users.

Identify and Analyse the Issue

To identify user adoption issues on Salesforce, you can consider the following key points:

1   Key Metrics

Used Licenses In (in XX time frame) vs. Available Licenses:
Compare the number of active users logging into Salesforce within a specific time frame with the number of available licenses. If there is a significant gap between the two, it may indicate an adoption issue.

Records Created per User:
Analyze the average number of records created by each user. If certain users consistently have significantly lower records created compared to others, it could suggest a lack of adoption.

Leads, Accounts, Opportunities, Contacts, etc.:
Monitor the creation and update rates of key Salesforce objects. If there is a noticeable decline in the creation or update of these records, it might indicate adoption challenges.

2 Salesforce Usage

Last Activity per Opportunity:
Examine the last activity date on Opportunities. If a large number of opportunities lack recent activity, it may suggest a lack of engagement and adoption.

Lead Conversion vs. Account Creation:
Evaluate the ratio of lead conversions to account creations. If there are a high number of unconverted leads or a low number of new accounts being created, it could indicate difficulties in using Salesforce effectively.

Key Fields being used:
Identify the usage of critical fields within Salesforce. If important fields are frequently left blank or not utilised, it may indicate a lack of understanding or adoption of those fields.

By analysing these key metrics and Salesforce usage patterns, you can gain insights into potential user adoption issues. Additionally, it can be helpful to gather feedback from users, conduct training sessions, and provide ongoing support to address any challenges and encourage adoption.

Salesforce Adoption Dashboards
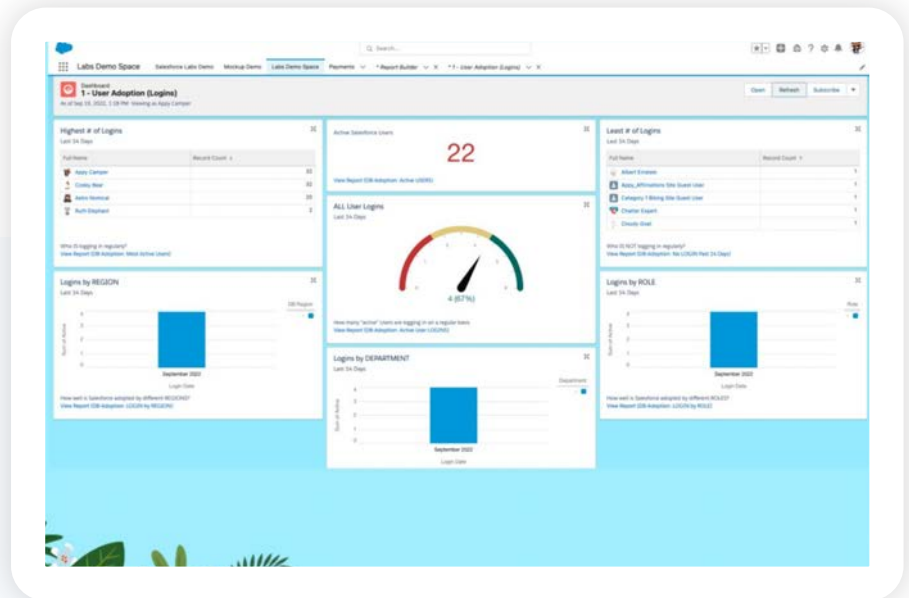
Salesforce Adoption Dashboard

Here are some ways you can leverage the Adoption Dashboard:

Identify Adoption Patterns

The Adoption Dashboard provides visibility into user activity, such as logins, record creation, and feature usage. By analysing these patterns, you can identify users who are not fully adopting Salesforce or areas where adoption is lagging. This information helps you focus your efforts on specific users or functionalities that require attention.

Set Adoption Goals for your Salesforce Implementation

Determine the desired level of user activity and establish benchmarks for key metrics such as logins, record creation, and feature usage. These goals will help you track progress and measure the success of your adoption efforts.
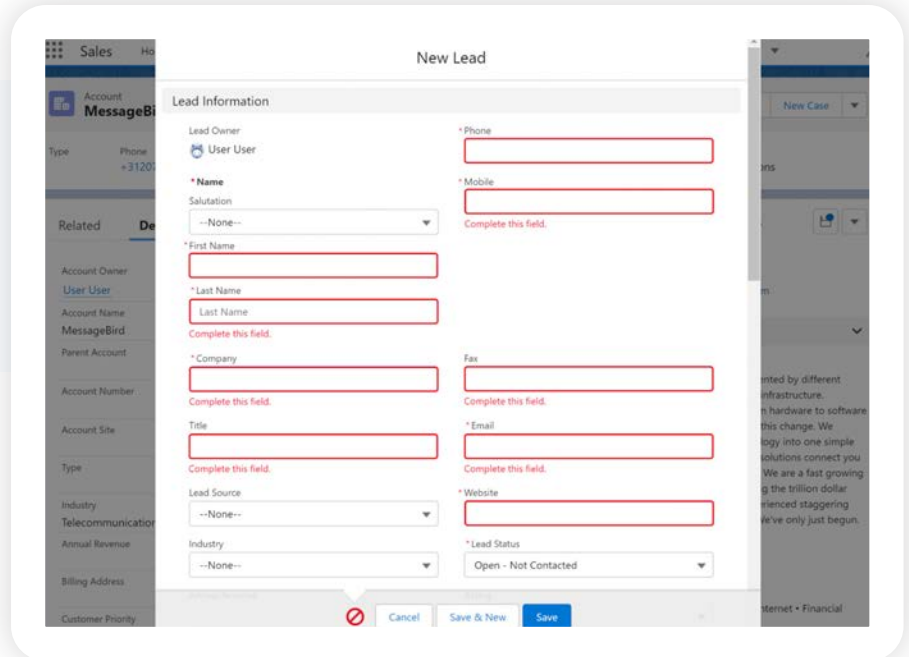
Monitor User Engagement

You can identify trends, such as increasing or decreasing adoption rates, and take proactive measures accordingly. For example, if you notice a decline in user logins or record creation, you can investigate the underlying reasons and address any challenges or training gaps.

Targeted Training and Support

With the Adoption Dashboard, you can identify specific users or user groups that require additional training or support. For example, if you see a group of users who are not utilizing key features or fields, you can provide targeted training sessions or resources to address their needs. This personalized approach can help boost adoption among those who may be struggling.

Remember that the Adoption Dashboard is a tool to guide your efforts, but it's important to combine it with proactive measures such as ongoing training, user feedback, and addressing specific adoption challenges.

Putting the
User First

Keep Mandatory Fields to Minimum

To ensure that the user is at the center of the user adoption process in Salesforce, consider the following points:

Provide Clear User Benefits

Ensure that every input or action required from users provides a clear benefit to them. Highlight how using Salesforce can make their work more efficient, save time, or improve their productivity. This helps users see the value in adopting and using the platform.

Involve Users in CRM Implementation

Include users in the CRM implementation process. Seek their input, involve them in decision-making, and incorporate their feedback. This fosters a sense of ownership and ensures the system is tailored to their needs, increasing user buy-in.

Emphasize Field Importance

Clearly communicate how the information captured in specific fields benefits various departments such as marketing, finance, and operations. When users see the broader impact of their data entry, they are more likely to prioritize and accurately fill in the required fields.

Find Quick Wins and Automate Tasks

Identify quick wins that provide immediate benefits to users. Focus on automating tedious tasks, streamlining processes, and eliminating manual effort wherever possible. Show users how Salesforce can simplify their work, freeing time for more meaningful tasks.

Simplify User Experience

Avoid making it hard for users to navigate and use Salesforce. Keep mandatory fields to a minimum to reduce the data entry burden. Streamline complex processes and provide clear guidance or training resources to help users navigate the system smoothly.

Seek User Feedback

Continuously seek feedback from users throughout the adoption process. Encourage open communication and actively listen to their concerns, suggestions, and ideas. Use this feedback to refine and improve the Salesforce implementation, ensuring it aligns with user needs and preferences.

By prioritising user benefits, involving users, emphasising field importance, automating tasks, simplifying the user experience, and seeking feedback, you can place the user at the core of the user adoption process in Salesforce, increasing engagement and successful adoption.

Quick Wins
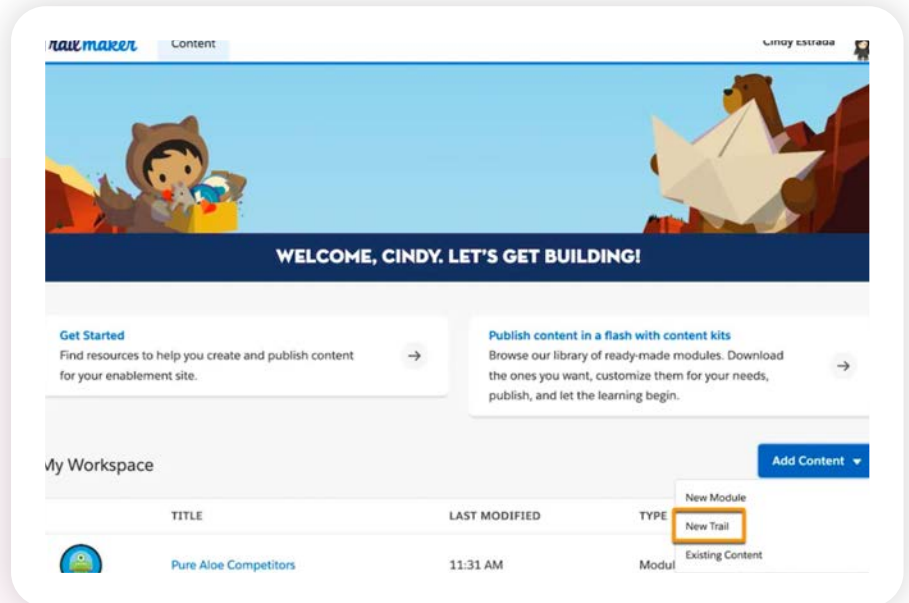
Learning with Trailhead

Using Salesforce can lead to several quick wins for organisations:

❯ Onboarding and User Training

Trailhead
Salesforce offers Trailhead, a comprehensive learning platform that provides continuous training and resources for users to enhance their Salesforce skills and stay up-to-date with new features and best practices.

Allocate Power Users
Identifying and empowering power users within the organisation can drive quick wins. These individuals become Salesforce champions, assisting others, sharing knowledge, and driving adoption, ultimately accelerating implementation and maximising the platform's benefits.

Improve the existing process and take off work

Create Nurture Campaigns to support Sales

By leveraging Salesforce's capabilities, organisations can automate and streamline processes, such as creating nurture campaigns. This automation supports sales efforts, automating lead engagement and nurturing to improve efficiency and increase conversion rates.

Make CRM a knowledge-sharing platform

Transform Salesforce CRM into a knowledge-sharing platform by encouraging users to document customer interactions, share insights, and collaborate on accounts and opportunities. This promotes knowledge transfer, improves collaboration, and ensures consistent information, enhancing the organisation's collective knowledge and driving better decision-making.

Automate the HECK out of Salesforce

Use Flows

Salesforce Flows enable users to create guided, step-by-step experiences for data entry or complex processes. By using Flows, organizations can streamline and automate workflows, saving time and ensuring consistent data entry.

Use External Apps

AppExchange provides a wide range of external applications that integrate seamlessly with Salesforce. These apps extend Salesforce's functionality, enabling users to automate and optimize processes by leveraging specialized capabilities and integrating with other systems.

Transparency /
Visibility of the Business

Salesforce provides real-time visibility into business data, allowing users to access up-to-date information on accounts, opportunities, and performance metrics. This transparency empowers teams to make data-driven decisions, identify trends, and take timely actions to drive business success.

By leveraging the above-mentioned points, organizations can achieve quick wins in terms of increased efficiency, improved collaboration, streamlined processes, and data-driven decision-making.
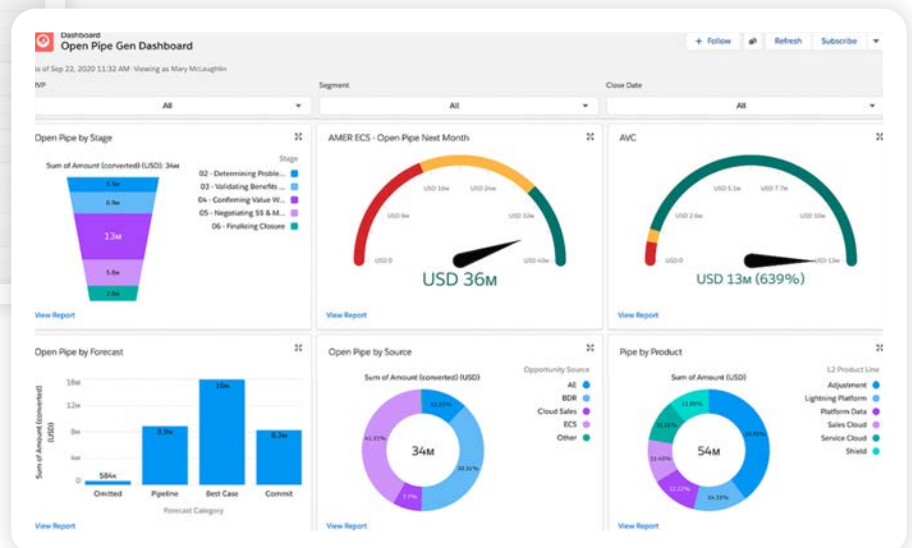
How to get your Sales Team Hooked on Salesforce?

Say no to boring records

Implement user-interactive dashboards

Say no to boring records and implement user-interactive dashboards

Move beyond boring records and implement visually appealing and user-interactive dashboards. Customize dashboards to provide real-time insights, key performance indicators, and relevant metrics that sales teams can easily understand and engage with. This helps create a compelling user experience and increases user adoption.

Make the learning experience intuitive

Make the learning experience of Salesforce intuitive and user-friendly. Provide comprehensive training materials, tutorials, and interactive resources that guide sales team members through the platform's features and functionalities. Offer ongoing support and encourage self-paced learning to ensure a smooth onboarding process.

Be Selective

Instead of overwhelming the sales team with every feature and customization option, be selective about what is initially introduced. Focus on the essential features that directly impact their day-to-day work and demonstrate immediate value. Gradually introduce additional functionalities as users become comfortable and proficient with Salesforce.

Incentivize Adoption

Create incentives and rewards for sales team members who actively engage with and leverage Salesforce. Recognize and celebrate individuals who embrace the platform, achieve significant milestones, or demonstrate best practices. This fosters a positive culture around Salesforce adoption and motivates others to follow suit.

Leverage the AppExchange

Explore the vast range of applications available on Salesforce AppExchange. Identify and integrate relevant apps that enhance the sales team's productivity, streamline processes, or address specific pain points. Demonstrating the value of these additional tools reinforces the benefits of using Salesforce and increases user engagement.

By implementing the above techniques you can captivate your sales team's interest in Salesforce and encourage them to embrace the platform fully.

Pro Tips from
Industry Experts

Doria Hamelryk

Women in Tech
Community Leader, MVP,
and Golden Hoodie Holder

" If you want your users to embrace your solution, make sure to involve them from the start. Don't let technology dictate the needs of your business; instead, let the needs of your business guide the technology. User adoption is the ultimate key to success, and achieving it requires actively involving the stakeholders in the design.

By collaborating closely and including all actors in the process, we lay the foundation for a seamless and prosperous transition. Always remember, it's the perfect blend of business and technology that paves the way for successful adoption.

Jordan Nelson

Salesforce Consultant
and Thought Leader

" When you start a project, always remember who is asking for it. It could be sales, marketing, or customer service, and they each use Salesforce differently and want things done their own way. To make sure what you are building gets used, try to avoid making a one-size-fits-all solution. Instead, spend time understanding what each department really needs and wants. This way, they'll trust you more, feel sure about using the system, and will want to use what you have built.

Michael Jäger

Managing Partner
CREMANSKI & COMPANY GMBH

" To increase user adoption of your Salesforce, it's crucial to have well-defined business structures and processes that support operational staff in their day-to-day work. In addition it is important to communicating the advantages of these structures and the tool. Furthermore, it's important to focus on structured onboarding and enablement to ensure that users are properly trained and equipped to use Salesforce effectively.

Michael Manning

Sales Manager

ART OF CLOUD

" One of the best ways to drive higher Salesforce adoption is to implement data enrichment. Keep your sales teams focused and efficient by eliminating the need to switch between different browser tabs. When data enrichment is integrated within Salesforce, it becomes the ultimate single source of truth. In this way your sales teams can prospect, log activities, and work seamlessly within Salesforce. This streamlines their workflow and enhances productivity, making Salesforce their go-to platform for all sales activities.

Sean Collins

Commercial Director

TETHER

" As a Salesforce implementation partner, we have learned that successful user adoption is the key to unlocking the potential in any system. It's not just about implementing the technology, but ensuring that users are fully engaged and invested in using it.

Providing adequate training and support is essential, but it's also important to involve users in the planning process and show them how the system can benefit them personally. Regular communication and feedback help to build a sense of ownership and engagement, leading to higher adoption rates and greater success in managing customer relationships.

Fabrice Challier

Salesforce
Consultant

" Increasing user adoption is relying on communication. First step will always be to ask the users what they want and try to figure out what they do on a regular basis.

Then try to mix what you've seen with what they request. Sometimes users don't know what they can ask/request or sometimes request things that are simply not feasible. Even if you think that your solution is the best, you need to be ready for criticism and keep a positive attitude. You may miss an important subject for them.

Mateusz Świerczyński

Head of Consultancy
CLORCE SOLUTIONS

❝ To me, the adoption is about tempo and patience. Your audience shouldn't be overwhelmed or confused by your message. The change is coming, and while you're catching up with the users' rhythm, they must be fully aware of what's in front of them.

Some systems can be implemented for months, some for years and it's easy to lose your purpose. Find Power Users, asses your resources, create a feedback loop, and keep delivering within the organization's ability to comprehend and change. As you get to know your audience, it will get easier and the transformation will become desired.

Ike Wagh

Salesforce Content Strategist

❝ To increase user adoption, approach your initiative with a sales-oriented mindset. Start by clearly communicating the specific benefits users can expect in exchange for their time and effort.

Make sure to establish a clear and agreed-upon value proposition BEFORE starting the initiative. This way, you'll have ensured a shared understanding among all groups, paved a way for a smoother project, and mitigated potential internal issues.

Fabien Taillon

Salesforce MVP |
Chief Technical Officer
TEXEÏ

❝ User adoption is a key topic of any Salesforce project. Be sure to involve key users from the beginning, not only to get valuable inputs and feedbacks, but also to make them understand that they are building their tool with you.

The project delivered will not only be your projet, but their project, making them advocate of the new solution. This will absolutely ease change management and user adoption.

Christine Marshall

Courses Director
and Salesforce MVP

SFBEN

" Monitor user adoption proactively. Don't wait for it to become a problem. Identifying adoption issues ASAP can help you create an achievable roadmap of enhancements to boost the user experience, and in turn, increase adoption.

Andreas Unruh

Senior Sales Manager

CLOUD CONSULTING

" To drive successful adoption of Salesforce, effective change management is key. By embracing change, providing clear communication, and involving users in the decision-making process, organizations can navigate the transition smoothly. Implementing comprehensive training programs, offering continuous support, and fostering a culture of learning and growth are crucial for user adoption.

Customizing Salesforce to align with users' workflows, promoting its benefits, and addressing any concerns or resistance along the way will encourage user buy-in. With a strategic change management approach, organizations can boost Salesforce user adoption, optimize productivity, and achieve long-term success.

" Based on my experience, there are just a few key components to driving user adoption. Firstly, it's crucial to demonstrate the system's value early on (get quick wins!) to motivate users and create a reward-driven behavior for its use. Secondly, we should view adoption as an ongoing process, not a destination.

Continual improvement and feedback loops are essential for sustained success. Additionally, it's vital to communicate the evolving nature of the platform, emphasizing that it will grow to meet the organizations evolving needs and that further optimization is underway. Showcase value, always improve, and communicate dynamism.

Djibril Anthony

Solution Architect

Enrich your Salesforce Experience with
AppExchange

AppExchange is a vast marketplace of pre-built applications and integrations extending the Salesforce platform's functionality. As businesses grow and evolve, their needs change. AppExchange provides a scalable and flexible solution by offering a diverse array of applications. It allows customers to easily discover, evaluate, and install a wide range of solutions tailored to their specific needs.

Customers can choose from various options, ensuring they can adapt Salesforce to meet their changing requirements.

PipeLaunch

PipeLaunch accelerates the prospecting process and enables sales teams to spend all their time doing what they do best – selling.

With PipeLaunch, Ideal Customer Profile (ICP) data will be automatically uploaded to Salesforce from prospects' LinkedIn profiles (and other data sources), including all relevant, up-to-date contact details, company news, and even what technologies they are using – no more need for CTRL V.

The added bonus is their Chrome Extension; say goodbye to manually typing information from LinkedIn (and other sites) into Salesforce.

Why do you need it?

PipeLaunch looks at Ideal Customer Profiles and brings all information into Salesforce with the click of one button, saving sales teams multiple hours of research and data entry. Drive Salesforce usage and improve data enrichment by keeping your salespeople in Salesforce.

"

PipeLaunch has been instrumental in increasing our sales velocity. It's helped our team drastically reduce the time They spend finding and updating ICP accounts with contacts, verified emails, relevant news, and job posts. Now they can spend more time talking to customers and generating revenue.

Alex Siegler
GM Revenue Operations | Place

FIND OUT MORE

SQUIVR
a better way

conga

Squivr's native org chart and sales playbook tool for Salesforce helps sales professionals understand their prospects' relationships to drive more sales. Org chart is a dynamic way of strategically arranging and organising the hierarchy, decision-making ability, and buying roles of an organisation. Users can upsell and cross-sell with the easy use of descriptive charts.

When it comes to renewing subscriptions and follow-ups, visualize this in the form of milestones and tasks. Forecast risk and predict timelines using Gantt charts with a playbook tool.

Conga is built for enterprises that are digitally transforming their revenue operations. It's predictive CPQ solution and document generation empower sales, partners, and customers to configure complex products and services, deliver accurate quotes, and create smarter deals.

Conga works efficiently even with complex processes. There are additional advantages such as quote collaboration across teams with audit trails, integrated configuration calculations, and true margin visibility, as well as price waterfall and cost analysis.

Why do you need it?

Ever been in Salesforce looking at hundreds of contacts and not sure how they relate to each other? With this app, you can create a visualization of who reports to who, and how they feel towards your product.

Why do you need it?

Depending on your role, you might be writing hundreds of quotes and sales presentations a year. With Conga, you can generate Excel, PDFs, and even PowerPoint presentations in a very intuitive way. No need to keep multiple data points up to date when you can do it all in Salesforce and export it in any format you want.

FIND OUT MORE

FIND OUT MORE

Customize Timeline Milestone Process

DocuSign

Solu-Timeline empowers Salesforce customers to gain a high-resolution view of their business processes by setting timelines and milestones for any data type. With Solu-Timeline, you can track, automate, and measure processes with maximum visibility, driving efficiency and improving the bottom line. This fosters higher Salesforce adoption and eliminates the need for external process tracking tools.

Whether you're measuring the sales opportunities lifecycle, managing customer onboarding, or enforcing vendor SLAs, Solu-Timeline allows you to create fully customized process tracking in a matter of minutes.

Last but not least, once the deal is closed and when it's time to take a step ahead with the documentation part, DocuSign can help you send agreements directly to Salesforce contacts or specific email addresses.

You can even include messages, reminders, and authentication options. Signed documents and signer-provided data are automatically written back to Salesforce.

Why do you need it?

Measuring and tracking customized business processes on Salesforce can be challenging, especially when it comes to the resolution of a single record. Traditionally, organizations had to invest time in report building or allocate costly development resources.

Why do you need it?

Have you ever sent a PDF quote to a customer who does not have a printer at home? Imagine being able to send a quote via email for the customer to sign on the phone or by clicking a button in seconds. The Salesforce integration will then upload the document and update the record.

FIND OUT MORE

FIND OUT MORE

PipeLaunch

Integrate LinkedIn & improve data quality *natively* in Salesforce.

PipeLaunch, Real-time customer intel with Salesforce LinkedIn Integration, improve Data Enrichment & Sales Insights.

- Find and connect to your ideal customer
- Save time on research & manual data input
- Drive Salesforce adoption and usage

100% NATIVE SALESFORCE APP

salesforce appexchange
★ ★ ★ ★ ★

PipeLaunch gives your sales team a competitive advantage by removing 9 hours per week spent on ICP research, resulting in faster prospecting and pipeline generation.

Sales teams ONLY spend 36% of their time selling, 64% is spent on admin, planning and researching new prospects to contact. PipeLaunch gives your sales users the ability to access all the data they need to successfully engage with new prospects all within Salesforce, giving you a high user adoption and return on your Salesforce investment.

CONTACT US:
hello@pipelaunch.com

START YOUR FREE TRIAL