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TOP FIVE REASONS WHY SALESFORCE IMPLEMENTATION FAILS

Many of our clients engage us after a failed implementation that was implemented with little or no consideration given to how end users will use the platform or how the system could be configured to deliver the kind of value that would encourage users to get excited.

We have identified the top five reasons sales reps are often slow to adopt or even push back on a new Salesforce implementation. We believe the end user and customer experience are intrinsically linked and must be addressed together. If both of these entities are not in sync you will not get the most of out of your CRM.

1. Salesforce implementation failed to include users in the design and development

Many times, CRM systems are designed to support sales accounting processes and make it easier to track performance, estimate revenue, and measure top-line growth. Subsequently, from the outset, the system is configured with features and functions that make sense to accountants and managers, but have almost no practical application or relevance to what end users do every day. When the actual users are not consulted to determine what tools or capabilities they would like to see in an automated sales system, the message to users and sales reps is very clear: "This system was created to make someone else's job easier by giving you more work that doesn't help you efficiently achieve your goals ." The sales rep's primary objective is to sell more, not tinker with applications. If the primary intended users are not consulted or involved in the creation and roll-out of a solution of this magnitude, they will not be enthusiastic about using it.

2. Failure to align CRM processes with sales team processes

Once again, Salesforce implementations are too often designed to support marketing and financial metrics rather than the sales process. People who monitor and analyze raw financial data think very differently and have different needs than Sales reps. This becomes evident very quickly when an end user tries to do his job and cannot navigate simply and easily through Salesforce. In almost all cases, sales teams already have a process they are comfortable with that defines how they address territory management, account planning, customer research, order management, pricing and approval systems, and document management. Unless the CRM system has been deployed with end user input to assure that it will be aligned with their existing sales process, the CRM roll-out will precipitate a massive change in workflow. This will be accompanied by an equally massive protest from Sales reps who now find it difficult to use. This will make the CRM learning curve for end users long and painful, and many will simply avoid the process altogether, resulting in a negative return on your investment.

3. Failure to build trust with the sales team

The Salesforce implementation should engage with the end users to clearly explain the benefits the system will provide them (and there better be some!!).   Sales reps are being asked to spend precious time and effort to log information into Salesforce which, if not presented appropriately, may appear to offer no real measurable benefit to their process. In addition, it may be used to track their performance and could be used "against" them during future performance reviews. Sales reps should understand the benefits of how the data enables leadership to assess its performance, while, at the same time, have a voice in how it's architected so the outcome is easy and efficient for their use. For example, a mobile solution for data entry might not be first on leaderships list of tools needed, but for sales reps this saves time and allow the reps more freedom and flexibility, resulting in better data for everyone!

4. Failure to clean up data

Data is the backbone on your customer interactions and decision making. If your data is not clean the sales professionals will be confused and waste time trying to track down the account and its related records. As a result of dirty data, your business cannot make good decisions because your reports and forecasts are incorrect. Your end users will lose their edge because they can't find accurate or complete information on their customers. Your Salesforce user adoption goes from bad to worse as your employees feel that their Salesforce data is inaccurate and unhelpful. The bottom line is wasted time and money.

5. No Training

Many Salesforce implementations do not include adequate training or enough training options. Sales professionals are usually on the road and to not have time for one-off training sessions. There must be multiple options such as online sessions, recorded videos, and in-person events. We recommend that you provide training at your sales conference so that all reps can attend and will be available.

You can't just tell people that the new way is better, you need to show them how it's better. It all starts with good training. Organize a customized, hands-on training for every employee and make sure:

▮ It's relevant and tailored to the specific audience.

▮ You've made it mandatory: no training means no Salesforce account.

▮ It's hands-on and taught in the context of day-to-day responsibilities. (Try running through relevant scenarios in a sandbox.)

▮ It's taught by a Salesforce champion who is from the same department as people receiving the training.

Finally, after the training, you will need to provide on-going and easy-to-access support, such as office-hours, refresher training, cheat sheets and chatter groups.

Salesforce implementation best practices should be followed to avoid these issues. If you would like to ensure that your Salesforce implementation is focused on best practices that focus on driving user adoption across the organization, continual sales improvement, and further business transformation contact us at **www.cirriussolutions.com/contact.**