The small business CRM adoption acceleration checklist

TRAINER'S BOX®

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Introduction

This 7 step checklist will help you accelerate the success of your CRM implementation.

Your business will thank you. Your team will thank you. And most importantly, your customers will thank you—with more sales.

Businesses see **451%** growth in qualified leads after successfully adopting a CRM.

The successful adoption of a CRM system provides killer benefits for both your business and your team. But to make it work, your team has to use it, and that can be a challenge for some businesses.

Step 1: Identify how a CRM can support your current systems/process

The key to your team's CRM adoption success is identifying a solution that will best fit with your business sales systems and processes. You don't want to make your team's processes more onerous. You want to make them better and more efficient.

Before you move forward with a new CRM, map out your current sales process. Once you have a clear sense of how your processes work in your current system, you'll be better equipped for identifying a CRM that will meet your needs so that you can hit the ground running.

Don't just focus on the present. Look for a CRM that can grow with you and that you can grow into over time. **As you search, consider features that will support your sales and marketing efforts, like the ones found in Keap's CRM.**

Lead scoring and segmentation

Keap CRM scores leads based on behaviors, demographics, and interactions, so you spend more time following up with hot leads that are ready to become customers (and less time following up with people who will never buy).

Data management

Save your team time by eliminating the need to manage data. Drowning in a sea of lead and client contact information? Import their information into the CRM, clean up your list of leads and contacts and eliminate duplicates.

Marketing automation

Build campaigns that automatically add your leads into your CRM so you can follow up consistently and effectively. Keap is the only all-in-one solution that seamlessly combines both CRM and marketing automation into one place for small businesses.

Calendar and task management

Organize, prioritize, and work through your sales activities—in the same place. You can manage your appointments, create to-do lists, set reminders for tasks, and streamline your workday.

Mobility

Manage leads and clients and automate marketing from anywhere. Access and edit contact information, add tags to trigger automated follow up and campaigns, and communicate with leads and clients, all while you're on the go—or at home when you a have moment before dinner. Mobility is a fantastic way to help your team manage and personalize their work-life balance.

Ecommerce

Every purchase in a client's order history is communicated back to the CRM and stored in their profile so you can create promotions you know your clients will love. This allows you speak directly to your clients' behaviors automatically. You can even segment your promotions by events, holidays, locations, purchase history, date, promo codes—the sky's the limit.

Step 2: Go all in from day one

The best rollouts have a clear timetable. We recommend that you establish a clear go-live date and stick to it. Nothing says “problems” like delays and false starts. Additionally, it’s key that you lead by example. Show enthusiasm. Dive in, and be the No. 1 adopter for your organization. On that note, don’t tolerate shadow systems. Cut the cord, day one. It might sound too hardline, but if you allow your team to run duplicate systems in parallel with your CRM, it will be the shadow systems that get the most attention. That’s a waste of your time and your money.

Be sure you have a complete and clear data set of all your lead and client information ready to go early on. This is the biggest step in the process, and you can speed up the rollover by having that information ready up front.

Step 3: Invest in training

Get a CRM that supports your training plan so that you're not forced to break ground on your own or be forced to hire expensive consultants. Make use of smart, low-impact training, and custom-build it for you:

- Target the training to the campaigns you intend to use
- Reward users who train others
- Identify best practices up front and encourage users to follow them

Lisa Macqueen

Clean Marketer

When we implemented Infusionsoft by Keap there was definitely resistance because our team was unfamiliar with the technology. We overcame that with a few simple strategies:

- We focused on the benefits of implementation, showing them the laborious tasks that took an hour (like issuing contracts), could now be processed in minutes
- Each week we ran a simple overall training session, on a specific topic or campaign so it wouldn't become overwhelming
- We wrote an easy-to-follow user guide for each campaign, with screen shots and advice that showed what a campaign actually did and which emails it contained
- We only trained on the campaigns that were relevant for that employee
- When we do staff appraisals, one question we ask is, "How confident do you feel using Infusionsoft by Keap?" Based on the response, we offer additional training to fill in the gaps.

Tip: One of the most common and daunting fears of any new software from the employee's perspective is the "Big Brother" problem.

Many people worry that new metrics will create an atmosphere in which management is always watching and evaluating their performance. The truth is a CRM provides visibility that makes it easier for you to identify success, which can be rewarded. If you tie your success to the success of your sales team, you can better incentivize use, which helps eliminate this worry.

Step 4: Secure a cloud-based solution

Look for a CRM that offers cloud-based solutions. This frees your team to connect anywhere and start relationships immediately rather than waiting to get back to the office to enter a new lead, which can be a major source of lost leads.

Your team will also have greater freedom to work away from the office, and you'll have the ability to see which work is being accomplished even when your team isn't sitting at their desk.

In addition to freedom and mobility, a cloud-based solution is nearly always more secure and allows for your information to be 100% up-to-date and accurate no matter where it's accessed.

Cloud-based solutions make data recovery more reliable. If you rely on spreadsheets that are stored on an employee's laptop (which you shouldn't), and that laptop is left on a bench at Heathrow Airport, what is the cost to your business? The cloud won't replace the laptop, but the cloud will protect the data and make it just as available when the employee is freaking out on the plane 10 minutes into the flight.

Step 5: Take the iterative appraoch—measure and improve

Measurement is one of your greatest assets with a CRM. You won't get all of it right from day one, and you should be honest with yourself about this. Let your team know that. Take an iterative approach that allows your entire team to learn from mistakes and suggest improvements as you pick up steam.

It pays to think of milestones right off the bat that you can track 30, 60, and 90 days out. Measurement allows you to make improvements to your processes right away, which benefits your adoption strategy as well as your client relationship strategy.

Step 6: Identify and communicate the return on investment

ROI for you business and your team

To understand ROI, you need to take a close look at what you're doing now with your current system. Knowing what you do right now will help you identify how your business can benefit from CRM. Once you have a clear picture of the potential ROI, identify concrete ways in which you will share the benefits of your revenue boost with your sales team as part of your new CRM investment.

Tip: Jesse Fowl, founder of Solomon Solution, a consultancy on CRM adoption, has some great ideas for making CRM "fun." That alone is a surprising idea, but one of his best suggestions was to celebrate sucess. For example, in your weekly sales meeting, pull the reports from your CRM and show that, 'Hey, John closed $10,000 in sales that we generated through CRM.' Show people where the money is." What better way to get them excited about using the system?

Step 7: Keep everyone informed

As you discover the benefits of your new CRM in your business, make sure to take the time to communicate those wins to your team. Nothing puts wind in a team's sails like clear, measurable progress and success communicated enthusiastically.

Take the time to also praise those who are using the CRM to the fullest. By focusing on those who are responding positively rather than harping on those straggling behind, you'll create a culture of expectation and healthy competition.

Conclusion

The thought of implementing a new CRM can be a daunting one. Especially for small businesses that don't have the resources available to medium and enterprise level companies. Moreover, you don't want to go through the hard work of implementing the software only to have your team fail to adopt it.

The way to encourage adoption is:

1. To understand the challenges,
2. Lay out a clear plan for encouraging usage, and
3. Start using the new software and don't look back.

Want to go deeper to see how a CRM can help you refine your marketing approach by using segmentation to deliver more personalized interactions and smarter follow up? Check out our free guide, Take your CRM contact list to the next level with segmentation.

About the author

Ben Snedeker

Ben Snedeker joined Keap in 2015 to do full time that which he loves most: writing the stories that inspire action. He holds a MFA in Creative Writing from Emerson College. In his prior life, he was a freelance writer working days at MIT as a grant manager. After a decade of paper pushing in academia, writing for a fast moving company like Keap is his dream come true. A perennial tinkerer, when he's not in the office, he can't help but tend his bonsai trees, edit other people's writing, and make sure his kids clear their plates before they leave the table.

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