SalesProcess360
Helping Companies Get ROI from CRM

ASSOCIATION FOR HIGH TECHNOLOGY DISTRIBUTION AHTD
STRATEGIC BUSINESS PARTNER PROGRAM

3 Ways to Increase Sales Rep Buy-In to CRM

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Join your AHTD peers at the next round-table discussion on CRM best practices, exclusively for AHTD members, on Sept. 7 at 10 a.m. CT. To reserve your spot, email [brian.gardner@salesprocess360.com] or call 504-355-1150.

How to get sales reps to buy into CRM was by far the hottest topic in a recent CRM Best Practices Roundtable discussion with AHTD members. While there is no single answer to this question, attendees and I worked together and explored potential strategies.

Not surprisingly, many of the ideas shared focused on culture. I agree that culture is vital to increasing buy-in, but what I found particularly interesting during the roundtable was how the technical capability of a CRM system can encourage – or discourage – buy-in.

Here are three CRM features/capabilities that can influence the buy-in levels among your sales reps:

1. Standardized forms.

Drop-down answers, check boxes and radio buttons – rather than lengthy text fields – make it easier for reps to complete forms, reducing their perception of CRM as “just another thing I have to do.” An added bonus – standardized forms will greatly improve the integrity of your data and make it easier to extract insights from your database.

2. Integration with ERP and email.

If you make the time and financial investments required to integrate your CRM with your ERP, you can avoid repetitive data entry and offer reps a unified way to view customer data, create quotes and enter orders. Remember, you don’t have to integrate everything all at once. As with most other elements of CRM integration, you can start slowly and grow from there.

Email integration can also help with buy-in. Reps won’t enjoy manually entering email data into a separate CRM system; it will be easier for them to link emails with company records when those emails are already integrated into your CRM system. If you’re also having your inside sales and service teams associate emails with contacts, outside sales reps will be able to leverage that information and are much more likely to see the value in CRM.

3. Standardized dashboards.

Several roundtable attendees mentioned difficulty in getting reps to fully understand the value a CRM system can provide. Since a large part of the potential value comes from being able to analyze CRM data at the customer, product or quote won/loss level, one attendee mentioned putting standardized dashboards in place for all reps to help them see the insights they can draw out of the system without having to come up with it themselves.

I firmly believe that the power of CRM lies in effective and efficient sales processes. Make your processes more efficient by investing in a CRM system that is easy to use and extract value from. You can also work with your current provider to make incremental improvements to your current system.

Thank you to everyone for joining us, and for sharing your experiences with the group.

I look forward to seeing everyone this fall at the conference, and I hope you'll join me at the next roundtable discussion on CRM best practices, exclusively for AHTD members, on Sept. 7 at 10 a.m. CT. Email me at brian.gardner@salesprocess360.com or call 504-355-1150 to reserve a spot.

The power of CRM lies in effective and efficient sales processes.

Brian Gardner is the founder of AHTD Strategic Business Partner SalesProcess360 and the author of ROI from CRM: It's About Sales Process, Not Just Technology, available at mdm.com/roi-fromcrm. He has more than 25 years of experience in industrial sales management and CRM.