

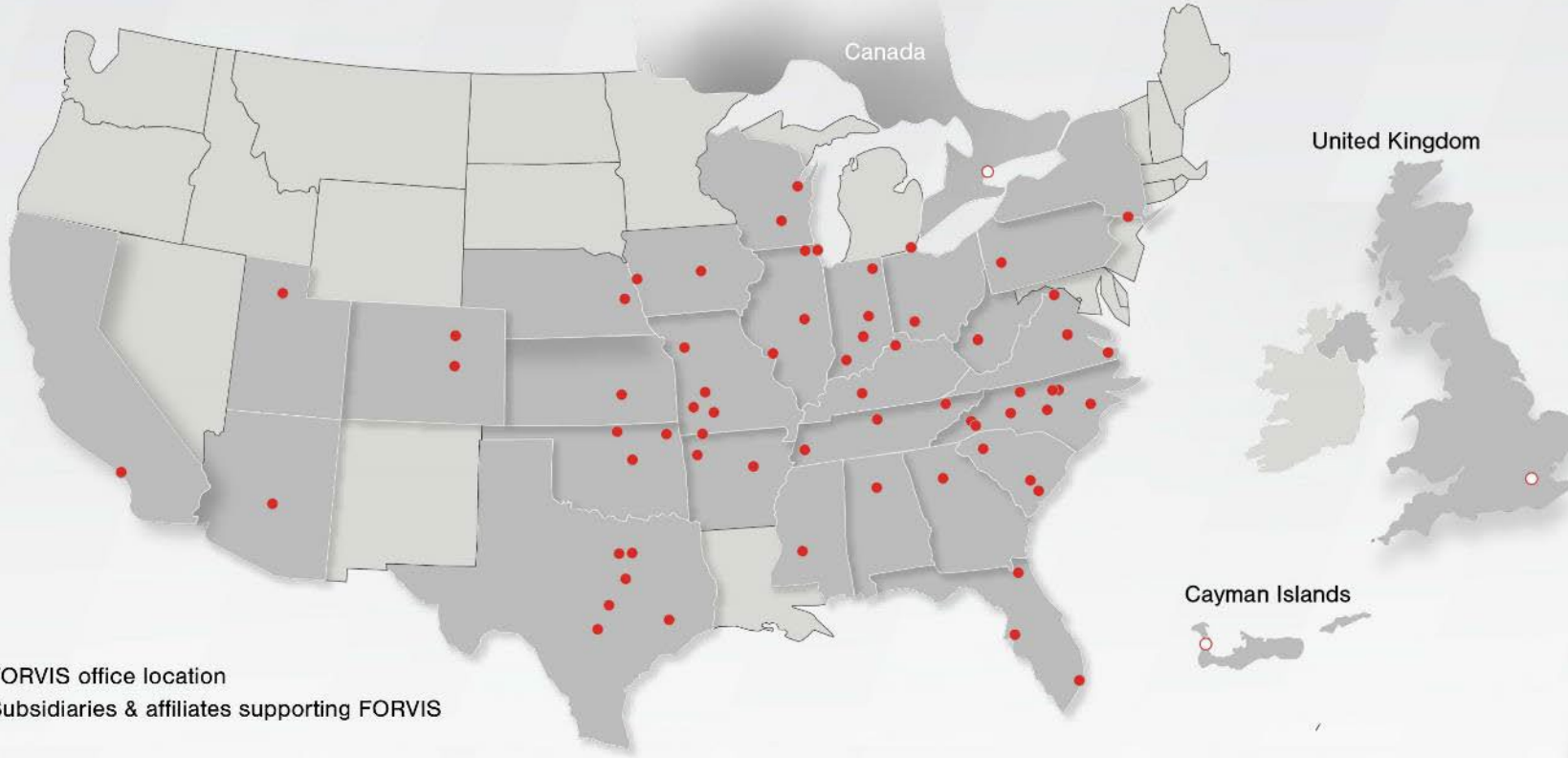
FORVIS[®]

Unlocking the Value of CRM Through User Adoption

May 14, 2024

Business Technology Solutions

Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

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**FORVIS was ranked number eight on Inside Public Accounting's 2022 annual ranking of accounting firms by revenue.

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



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Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

Microsoft Partner



In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.

FORVIS

Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Today's Presenter

Chad R. Collett

Director of Marketing
FORVIS / Business Technology Solutions

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Business Technology Solutions

What Is CRM?



Traditional CRM Components

■ Sales

- Lead management
- Account & contact management
- Opportunity/pipeline/forecast tracking
- Quote management
- Orders management
- Activity tracking

■ Marketing

- Campaigns & Customer Journeys
- Segmentation
- Lead Scoring & Data Capture

■ Customer Service

- Case Management
- SLAs
- Knowledge Base
- Customer Surveys

What Is CRM?



Business Benefits Gained

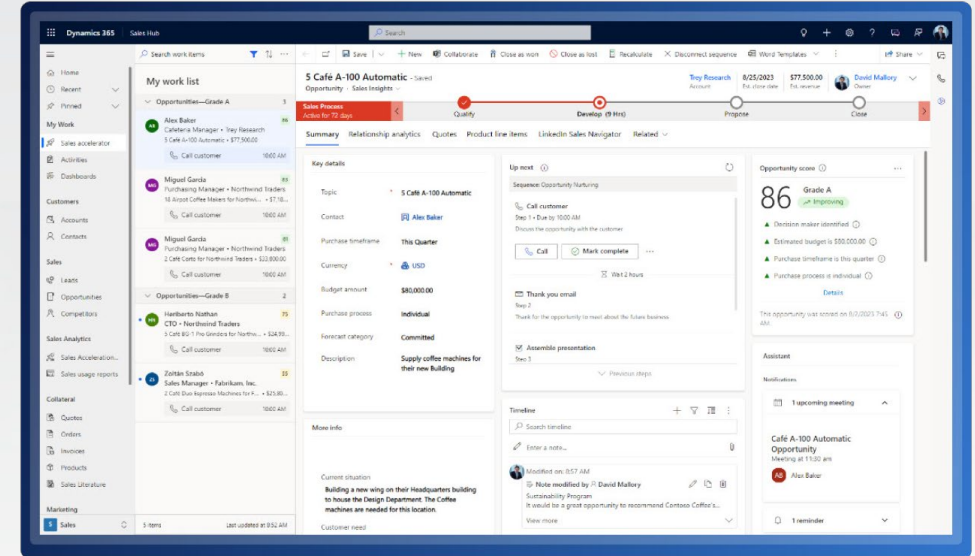
- Collaboration across the business
- Efficiency & productivity
- Standardization of processes & data
- Automation
- Centralization of data
- Awareness/insights

Attainment of Business Goals

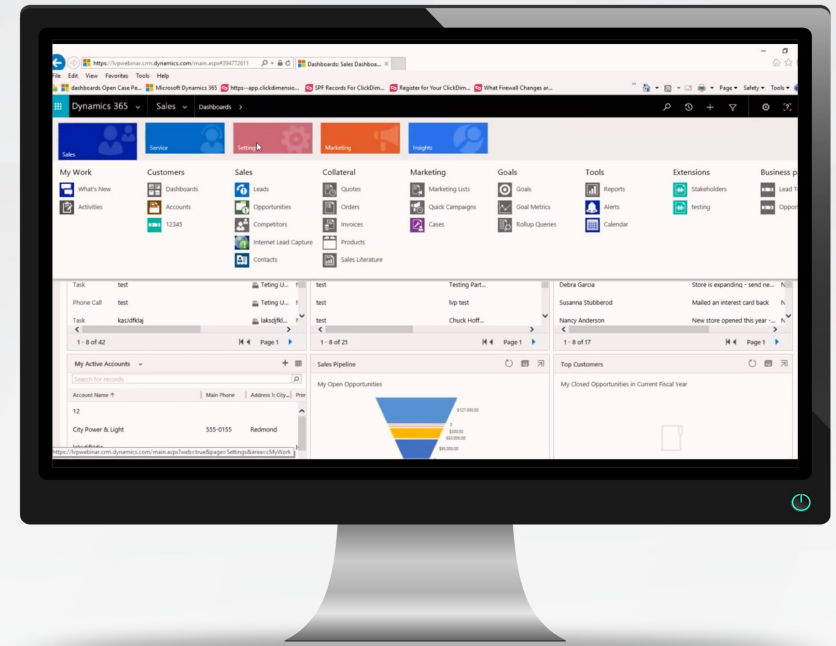
- Growth
- Innovation
- Expansion
- Value-added long-term customer relationships

Why Use a CRM?

- No centralized, easily accessible system in place for sales
- Too many manual, time-consuming processes
- Cannot measure effectiveness of sales, marketing, or customer service
- Complex sales process
- Low sales productivity
- Relationship tracking not captured or centralized
- Reporting & data analytics not easy to get or not accurate
- Sales & marketing teams aren't aligned
- Customer data is replicated & maintained in multiple systems
- Customer retention concerns
- Lack of collaboration & insight across the business

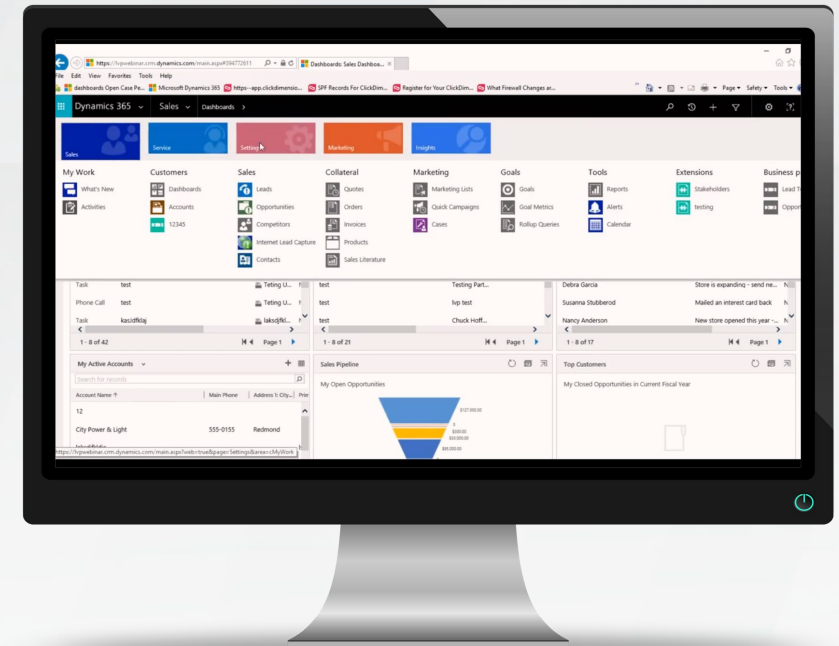


What's the Most Common CRM Challenge?



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What's the Most Common CRM Challenge?



User Adoption!

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Common User Adoption Challenges



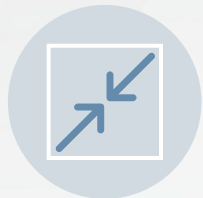
Lack of awareness



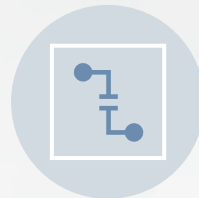
Lack of training



Time-consuming to use



Resistance to change



Lack of support



Mistrust/confidence in tool



Inability to identify value



Data quality issues



Security concerns

The Benefits of CRM User Adoption



The average ROI for CRM spending is \$8.71 for every dollar spent



Companies that implement CRM can see a 300% increase in conversion rates



47% of companies saw their customer retention rate increase when they started using CRM

CRM User Adoption Guiding Principles

CRM strategy
& vision

Leadership
support

Understanding
your
end-users

Focus on
process

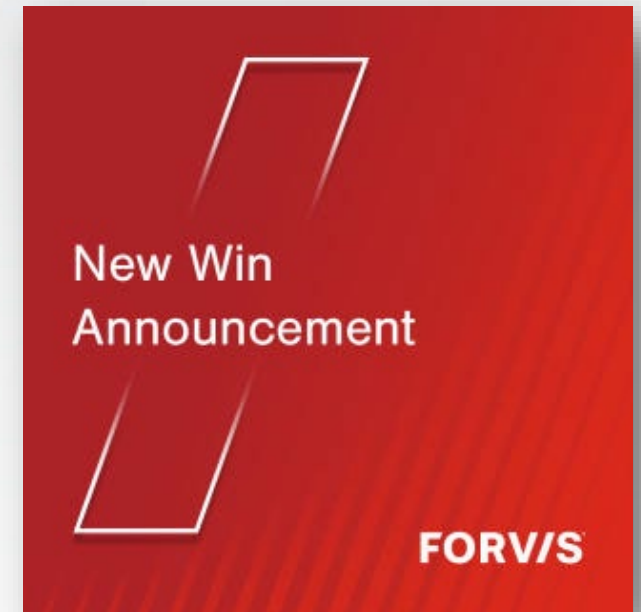
Commitment to
simplicity

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CRM User Adoption: Let's Talk Tactics

Communication

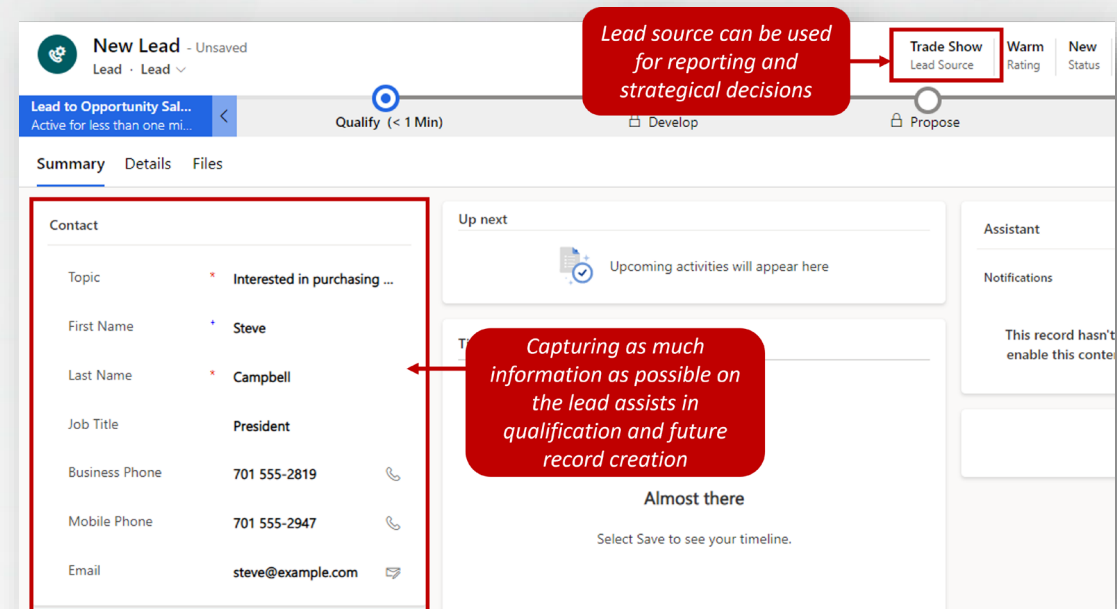
- Why we are using CRM (& this platform)
- How we are using CRM to drive business decisions
- How individuals & teams should use CRM (training)
- Benefits to individuals
- Future enhancements, road map, collect ideas
- Share success stories & wins
- Integrate CRM into your business development & meetings
- Include “CRM” in your company-wide communications
- Where do users go for help? Create a go-to landing page on your Intranet



CRM User Adoption: Let's Talk Tactics

User Experience

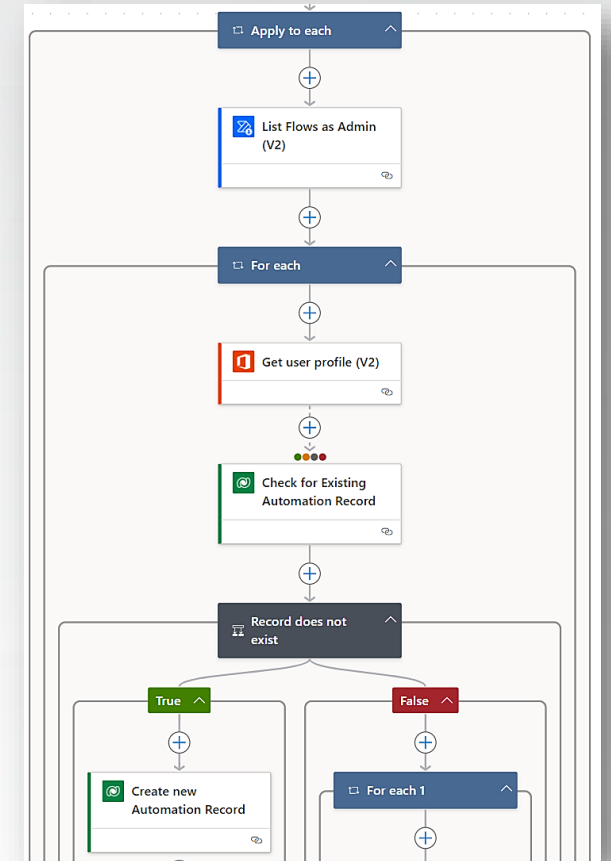
- Keep your users top of mind when designing & updating CRM
- Involve your users in design & do your research before design
- Make CRM user friendly
- Declutter the user interface
- Personalize the CRM experience for your users
- Organize screen layouts so they make sense (Ask)
- Keep CRM current, remove outdated or non-utilized fields
- Process evaluation
 - Start with one process if needed (Leads, Opportunities, etc.)
- Mobile app & use cases



CRM User Adoption: Let's Talk Tactics

Automation

- Business rules, workflows, Power Automate Cloud Flows, custom development, Copilot, & AI
- Many use cases:
 - Assignment notifications plus process if no action taken (Leads, Accounts, Opportunities, Cases)
 - Report unassigned leads, changes in lead scoring, & automated assignments based on engagement
 - If the expected close of an Opportunity is in the past, recommend user update value while on the form
 - If an Opportunity has a value over \$X, show a manager approval field & make it required
 - When an Opportunity has been won, update the related account to “Customer” if they weren't already
 - Run a flow weekly that identifies overdue, open Opportunities for a user & send an email to the user with an embedded table & links
 - When a new user is licensed, automatically assign the person a security role in CRM
 - The list is endless—& with the addition of AI, what you can do is mind-blowing!



CRM User Adoption: Let's Talk Tactics

Data Integrity

- Do you trust your CRM data?
- How clean/complete/accurate is your data?
- Are you collecting the right information? Too much, too little?
- Is your CRM system the single source of the truth?
- Integrations with back office, marketing automation, website, webinar platforms, etc.
- Provide clear instruction to your team members about how your CRM system should be used, & what will happen if your data quality erodes
- Audit your CRM data regularly
- Have a data plan (now & in future)

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Duplicate records found

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

| | | | | | | | | | |
|-------------------------------------|--------------|--------------------------|-------|--------------------------|-----------------|--------------------------|------------|--------------------------|---------|
| <input checked="" type="checkbox"/> | Account Name | <input type="checkbox"/> | Email | <input type="checkbox"/> | Primary Contact | <input type="checkbox"/> | Main Phone | <input type="checkbox"/> | Website |
| A Datum Comp... | | | | | 425-555-0158 | | | | |

Duplicates found: Account (1)

| | | | | | | | |
|-------------------------------------|--------------|--------------------------|-------------|--------------------------|------------|--------------------------|---------|
| <input checked="" type="checkbox"/> | Account Name | <input type="checkbox"/> | Modified On | <input type="checkbox"/> | Main Phone | <input type="checkbox"/> | Website |
| A. Datum Corporation | | 8/12/2023 6:12 PM | | 425-555-0158 | | http://www.adatum... | |

[Ignore and save](#) [Merge](#) [Cancel](#)



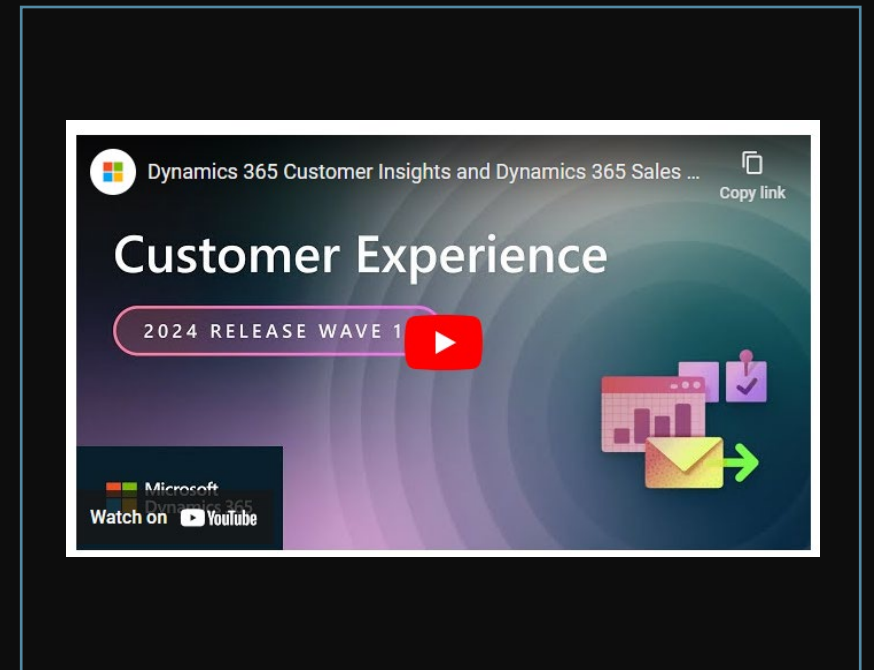
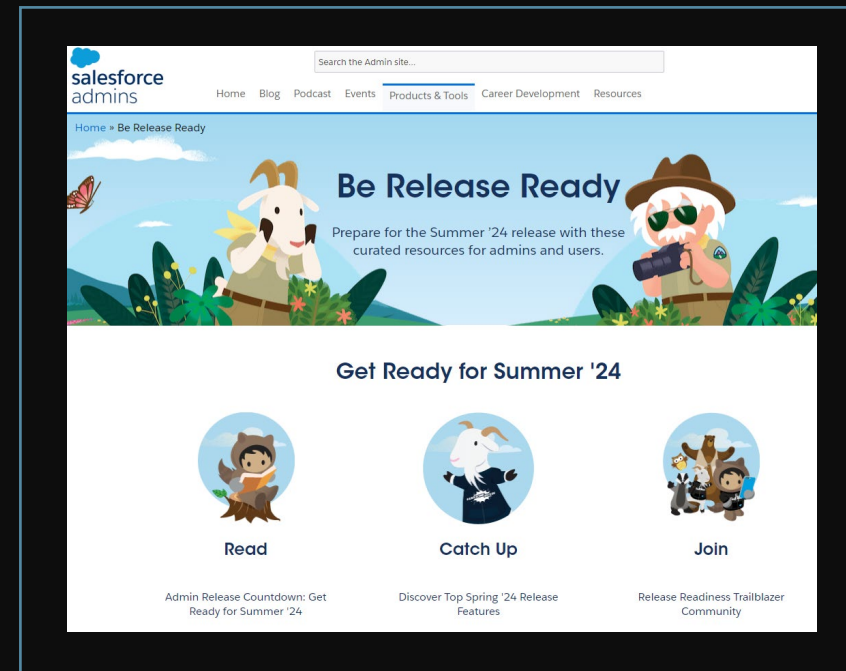
CRM User Adoption: Let's Talk Tactics

Keep Evolving Your CRM

- Collect enhancement ideas from users
- Develop a process to review, prioritize, & communicate updates
- Publish your road map (& keep it updated)
- Expand use of CRM beyond sales, marketing, & service
- Stay current with new releases from CRM provider
- Use your CRM consulting partner as a guide for insight into product updates/releases
- Stay aligned with your vision & CRM strategy

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CRM User Adoption: Let's Talk Tactics

Training

- Create & maintain your training plan
- Have multiple ways to train
- Offer structured training before, during, & after go-live
- Have a plan to train new employees
- Provide easy to find on-demand videos & resources
- Provide user group webinars, lunch & learns, office hours, etc.
- Leverage your CRM champions

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The image shows a video library interface on the right and a video player on the left. The video library lists several videos:

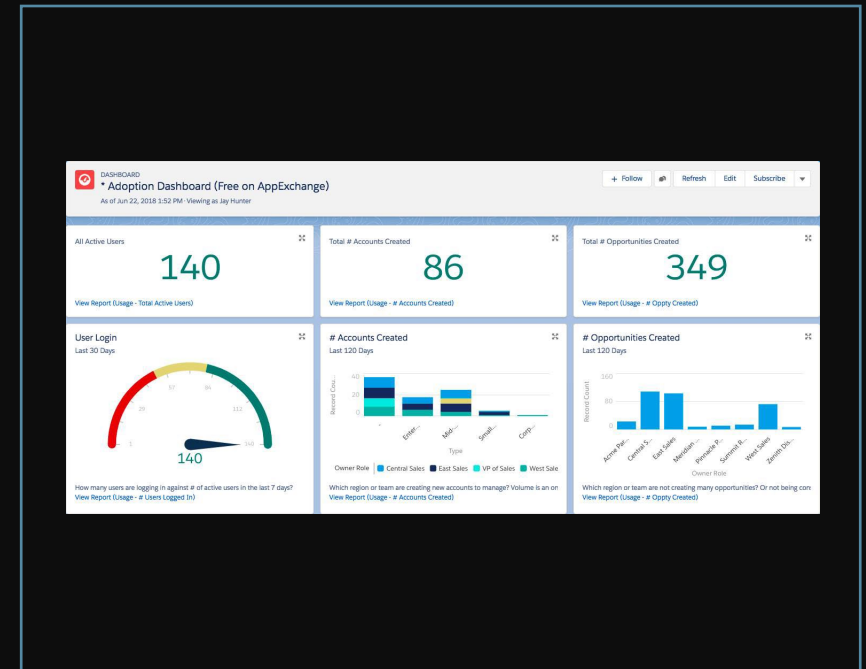
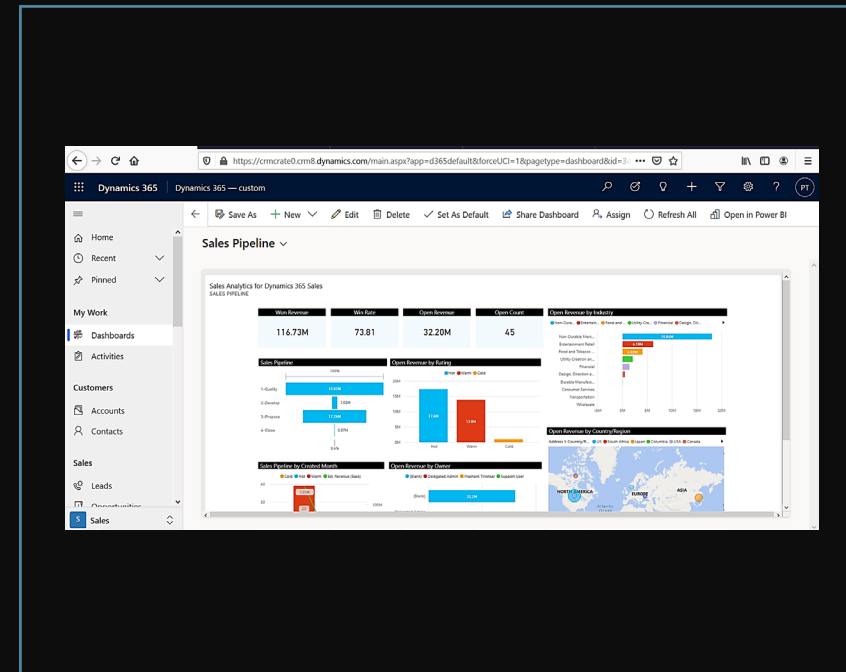
- 000 - Video Library Instructions (1 minute) - Ivpcrm
- 010 - CRM Support and Enhancement Process (9... - Ivpcrm
- 090 - Reports (14 minutes) - Ivpcrm
- 097 - Dashboard 97 (8 minutes) - Ivpcrm

The video player on the left shows a video titled "Microsoft Dynamics 365 Sales 101" with a "WATCH NOW" button and the FORV/S logo.

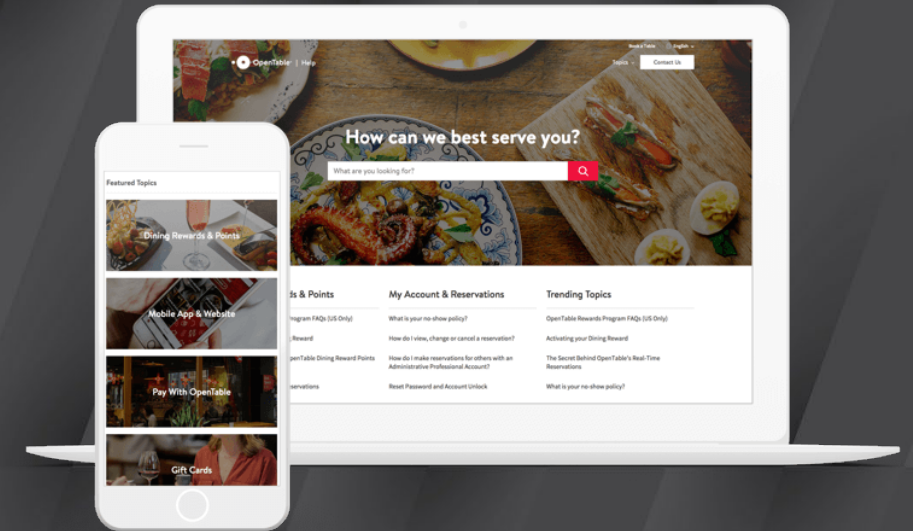
Measuring User Adoption

Tracking User Adoption

- Hold users accountable & communicate expectations
- Are licenses being used? Reduce/re-allocate?
- Identify metrics to measure end-user adoption
- Dashboard & View examples:
 - How many opportunities have users created in the last 30 days?
 - How many activities did users complete in the last 30 days?
 - What data have users created or updated in the last 30 days?
 - What is the login rate over the last 7 days?
 - Who is logging in? (Also, who is not logging in & why?)
- Tie CRM user to job/role success, e.g., logs into CRM daily = closes deals faster



Learning Tools & Resources















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Microsoft “Learn”

Microsoft Learn has nearly 3,000 modules & learning paths on various Microsoft technologies

<https://learn.microsoft.com/>

| | | | |
|--|--|---|---|
| <p>MODULE</p> <p>Boost sales performance with Microsoft Copilot for Sales</p> <p>🕒 31 min</p> <p>Microsoft Copilot • Business User • Beginner</p>  <p>+ Add</p> | <p>MODULE</p> <p>Explore Dynamics 365 Sales</p> <p>🕒 1 hr 26 min</p> <p>Dynamics 365 • Business Owner • Beginner</p>  <p>+ Add</p> | <p>LEARNING PATH</p> <p>Explore the fundamentals of Microsoft Dynamics 365 Sales</p> <p>🕒 2 hr 18 min</p> <p>Dynamics 365 • Business Owner • Beginner</p>  <p>+ Add</p> | <p>MODULE</p> <p>Describe Dynamics 365 Sales capabilities and related apps</p> <p>🕒 52 min</p> <p>Dynamics 365 • Business Owner • Beginner</p>  <p>+ Add</p> |
| <p>MODULE</p> <p>Set up and configure Dynamics 365 Sales</p> <p>🕒 57 min</p> <p>Dynamics 365 • Business User • Beginner</p>  <p>+ Add</p> | <p>MODULE</p> <p>Manage leads with Dynamics 365 Sales</p> <p>🕒 1 hr 20 min</p> <p>Dynamics 365 • Functional Consultant • Intermediate</p>  <p>+ Add</p> | <p>MODULE</p> <p>Manage opportunities with Dynamics 365 Sales</p> <p>🕒 1 hr 15 min</p> <p>Dynamics 365 • Functional Consultant • Intermediate</p>  <p>+ Add</p> | <p>MODULE</p> <p>Get started with Dynamics 365 Sales</p> <p>🕒 53 min</p> <p>Dynamics 365 • Business User • Beginner</p>  <p>+ Add</p> |
| <p>MODULE</p> <p>Manage Dynamics 365 model-driven app settings and security</p> <p>🕒 20 min</p> <p>Dynamics 365 • Administrator • Beginner</p>  <p>+ Add</p> | <p>MODULE</p> <p>Manage relationships with relationship selling in Dynamics 365 Sales</p> <p>🕒 1 hr 14 min</p> <p>Dynamics 365 • Functional Consultant • Intermediate</p>  <p>+ Add</p> | <p>MODULE</p> <p>Use Microsoft 365 services with model-driven apps and Microsoft Dataverse</p> <p>🕒 1 hr 14 min</p> <p>Dynamics 365 • Business User • Intermediate</p>  <p>+ Add</p> | <p>MODULE</p> <p>Process sales orders with Dynamics 365 Sales</p> <p>🕒 51 min</p> <p>Dynamics 365 • Functional Consultant • Intermediate</p>  <p>+ Add</p> |

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Dynamics Conferences


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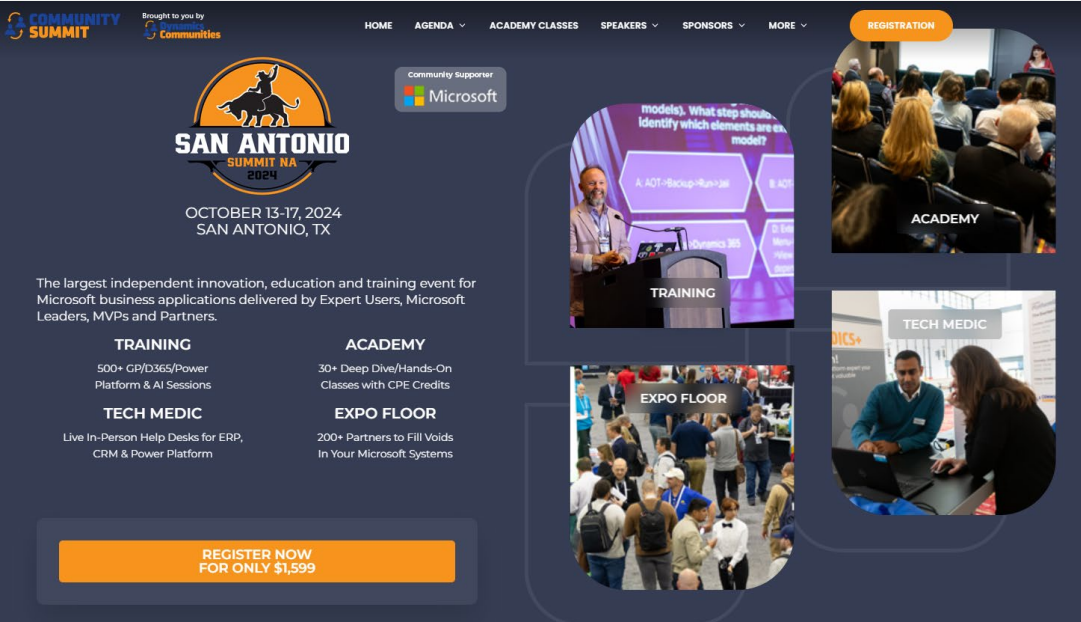
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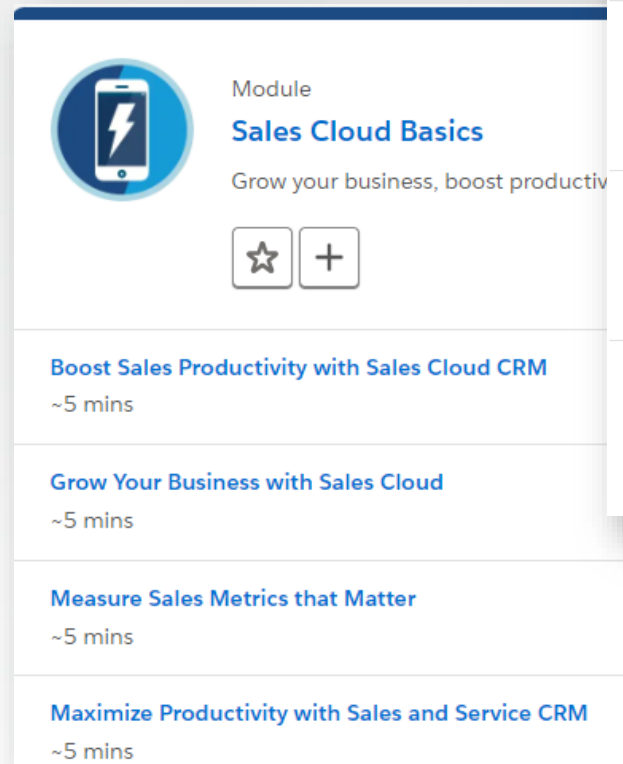
TECH MEDIC

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Salesforce “Trailhead”

Trailhead is for everyone; it covers topics & learning modules for anyone using Salesforce, from admins & developers, to sales leaders & end users

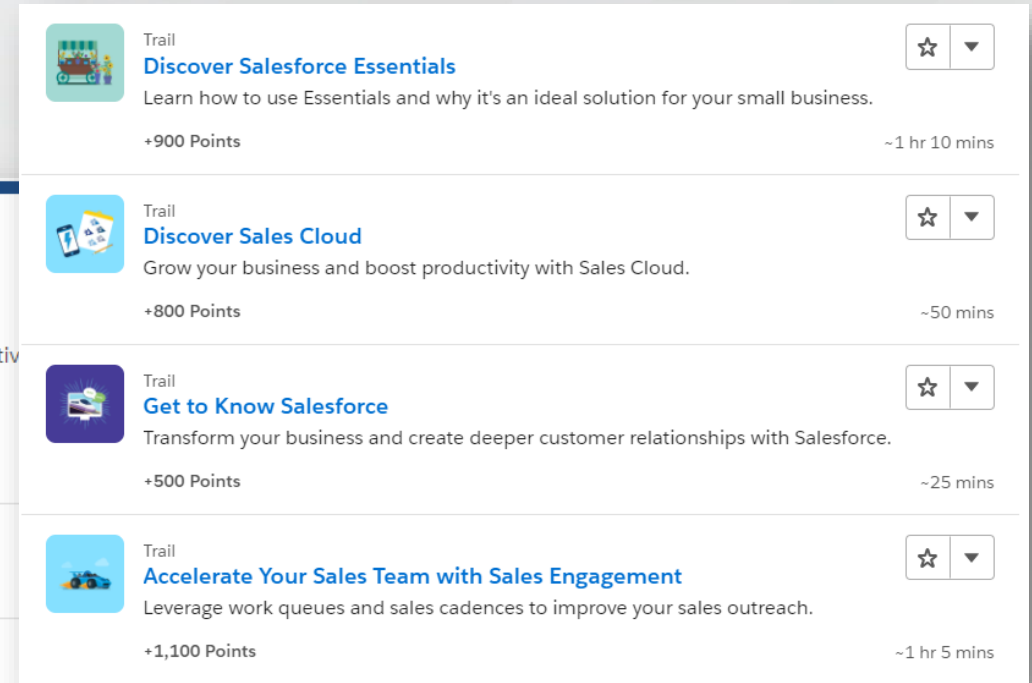
<https://trailhead.salesforce.com/>



Module
Sales Cloud Basics
Grow your business, boost productivity

☆ +

- Boost Sales Productivity with Sales Cloud CRM**
~5 mins
- Grow Your Business with Sales Cloud**
~5 mins
- Measure Sales Metrics that Matter**
~5 mins
- Maximize Productivity with Sales and Service CRM**
~5 mins



- Trail
Discover Salesforce Essentials
Learn how to use Essentials and why it's an ideal solution for your small business.
+900 Points ~1 hr 10 mins
- Trail
Discover Sales Cloud
Grow your business and boost productivity with Sales Cloud.
+800 Points ~50 mins
- Trail
Get to Know Salesforce
Transform your business and create deeper customer relationships with Salesforce.
+500 Points ~25 mins
- Trail
Accelerate Your Sales Team with Sales Engagement
Leverage work queues and sales cadences to improve your sales outreach.
+1,100 Points ~1 hr 5 mins

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September 17-19, 2024 | San Francisco & Salesforce+



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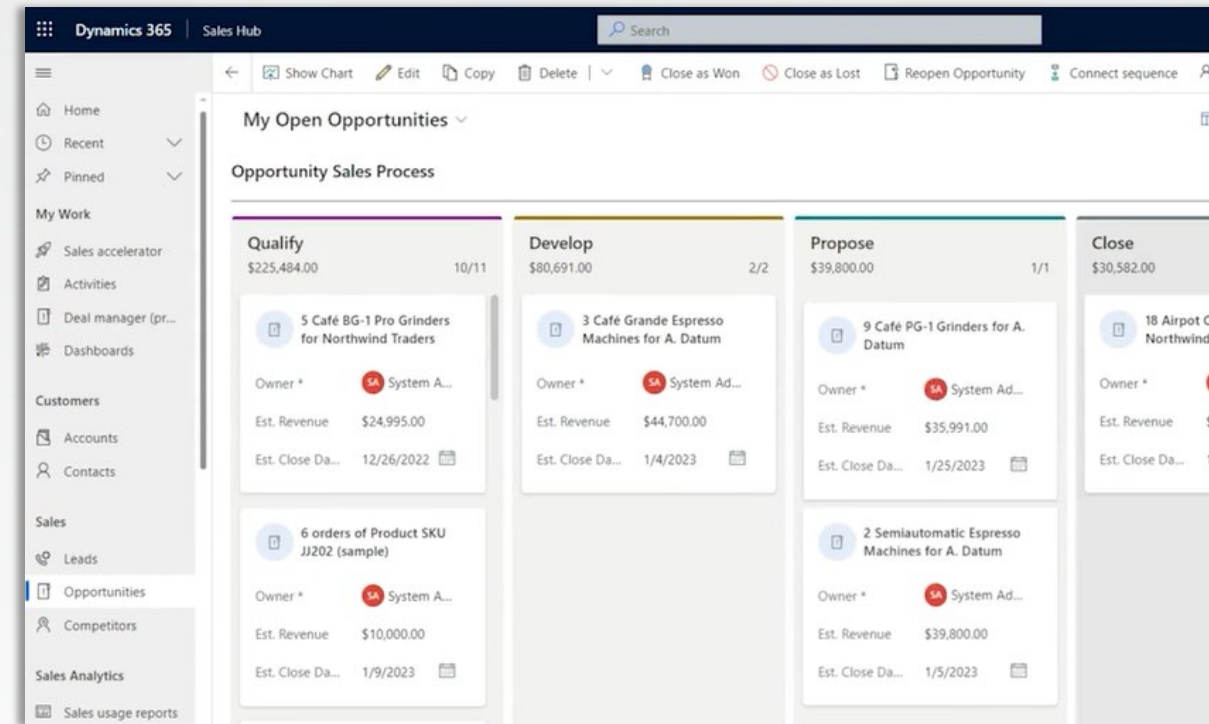
Register for free

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Final Tips

Hold Users Accountable

- Users perform better & meet expectations more often when they have defined clear expectations
- Set clear attainable goals for each user/department/company
 - Set stretch goals
- During one-on-one meetings, coaching sessions, etc., use CRM as a coaching tool to hold users accountable
- Create a competition for your team based on using CRM
 - This reinforces the basics of CRM
 - Promotes the use of CRM
 - Satisfies the “what’s in it for me” barrier



If It's Not in CRM ...

It Doesn't Exist!

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Resources



ARTICLE

Don't Put Off Your CRM Spring Cleaning: 11 Areas to Clean Up

READ NOW

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WEBINAR

Salesforce Sales Cloud vs. Service Cloud: Finding What Fits

Wednesday, May 1 • 1-2 p.m. ET

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New Time-Saving Features for Sellers in Dynamics 365 Sales

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VIDEO

How to Use Salesforce Flow & Automate Workflows

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WEBINAR

Boosting Sales With Microsoft Dynamics 365

Wednesday, April 17
11 a.m.-12 p.m. ET

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VIDEO

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Salesforce List Views 101

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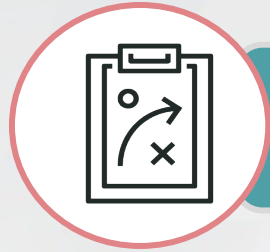


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How We Can Assist



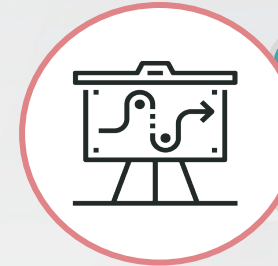
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption



Digital Transformation Execution

Solution Execution

- Business Process Assessments
- Platform Selection
- Design, Build, & Support
- Supply Chain Assessments
- Sales & Marketing Consultation
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Management
- Project Audit & Stabilization

Organizational Change Management

- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

Questions?



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Today's Presenter

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Director of Marketing
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