The System Won't Work, Unless Your Training First Focuses on Strategy

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Once you've migrated your data, implemented programming interfaces and consolidated the IT architecture, all CRM IT implementation projects have a common objective when coming closer to the end of implementation: assuring that users really use the new CRM system.

Generally speaking, user training is focused on teaching all employees who will use a new CRM system in their daily work about the functions in the product. In the ideal, the system will have information about customers, pre-defined rules for a more efficient workflow management and automated processes, among other things.

But do employees really understand the objective and benefit of a CRM IT implementation if they are trained only on what the new system does? The answer is no.

If the CRM IT implementation is not understood and communicated as being part of a new business orientation and working methodology, an organization will face a series of problems in the "improved" operative CRM business, such as:

- Issues with customer data quality
- Lack of exploiting CRM system functionality
- Lack of pro-actively enhancing customer data with each customer contact

Data quality
Problems with the quality of customer data arise because each employee has his or her own way of introducing data into the CRM system, starting with how the person uses capital letters and ending with how well he or she knows (and adheres to) grammar rules.

The result is that duplicate customer data files exist. And the means extra work for system administrators, who need to get rid of those duplicates. But the issue disappears if you train users about the strategic importance of customer data for the company:

No quality customer data = less knowledge about the customer = less opportunities for personalized and targeted CRM campaigns.

Teach them that their actions are crucial to obtaining high quality customer data.

I have also experienced CRM IT implementations where users have been introduced in a landscape of great functionalities and system capabilities that were never used in the future. Why that? Because, as it has been scientifically proved, we have only a restricted capacity to memorize things we learn in, let's say, a five-day user training. Once your employees have understood all the main screens and buttons, no one considers any extra functionality. Under-use of a system is, in effect, abuse. The only way to avoid such abuse is to offer a monthly follow-up on user training, with practical exercises that oblige users to handle the whole system functionality.

Failure to proactively enhance customer data is another common issue. An example would be a call center agent who is having a conversation with a customer or receiving an email with business contact details and not introducing information about the customer in the CRM system.

In one training session, I asked a participant why he wouldn't save the email v-card details of the customer in the customer profile. He replied with a question, "Why should I?"

Pushing different buttons isn't going to help you appreciate the fact that each contact with the customer helps us get to know and understand our customer base better. You must be sensible to the core of CRM: The quality and quantity of information that we have about our customers helps us serve them better.

Client project

Those are just a few of the problems you can face if your user training is focused only on CRM system training. Our experience in a client project, where we were in charge of user training within a Clarify implementation, has made us reinforce the strategic and methodological approach of CRM.

First, we started defining the training plan by matching user groups to different Clarify modules: Call center agents would receive the training for their more inbound-oriented, ClearCallCenter module; marketing employees who would use the system would receive the training for the ClearSales campaign management module; and system administrators and data quality managers would learn about the ClearSupport support functions and the configurating modules. We define and included practical, real-life exercises in each training session, after we interviewed each user group about typical situations they face in their daily CRM work.

Secondly, we identified those employees in the organization who would not use the Clarify system but who would be involved in the main CRM processes of the organization: customer complaint resolution, campaign setup, routine customer communication and after-sales.

Then, in a third step, we established a one-day "Why do we go for CRM" training session for all those participants to ensure they would all have the same understanding of the company's strategy behind CRM. That's why a CRM implementation is so different from an ERP implementation: The focus is on the customer, not the improvement of back-office processes.

In a fourth step, we put the CRM system users through a four-day system training session in their the respective Clarify modules, starting with the main CRM business rules: Get to know the customer, anticipate the customer's needs, respect the customer's privacy and give each customer a minimum premium service. Each business rule was integrated in online exercises that the participants had to resolve on their own and in role-playing.

At the end of the session, the benefits were clear:

- All training participants understood what CRM means within the business strategy of the company.
- CRM system users started to see their work differently: contributing actively to the company's CRM strategy (through such practices as enhancing customer data and using a quick reference guide on the way to introduce data).
- Employees who would not be using the CRM system but *would* be involved in the processes also improved their contribution to CRM. (For example, marketing employees now understood that they had to stop buying prospect data from list brokers and start using the company's own CRM database for their direct marketing campaigns.)

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