

THE SuMo SALES ACADEMY

How to...

Motivate your
reps to use
Salesforce.

Research has shown that CRM software can increase sales, productivity, forecast accuracy and customer retention. However, a large number of organisations currently using Salesforce quote **user adoption as the main challenge** in realising ROI.

It appears that the most important piece of the puzzle is missing. Without a team of strong users regularly updating the system with information on our prospects, deals and customers, we'll never be able to get anything useful from this expensive bit of technology.

In this guide, we'll show you some easy ways to shift your reps' attitude from ***'I have to use Salesforce'*** to ***'I want to use Salesforce'***.



Do you really have an adoption issue?

Before we delve into fixing any lack of adoption, it's worth identifying if there is in fact a problem with our users' uptake of the platform in the first place.

Pinpointing where on the usage spectrum our team sits will help us better shift behaviours and quantify results of any new initiatives.



Never logs in __|__|__|__|__|__Never logs out

Salesforce has [a list](#) of metrics to measure adoption, which fall into three main categories: usage, data quality and business performance.

Keep in mind that the specific metrics and their regularity may differ depending on your business and sales process. But the below provides a good guideline to work from.

1. Usage

Suggested baseline metrics to track usage.

Metric	Frequency
Users logged in – last 7 days	Weekly
Users not logged in by last name – last 7 days	Weekly
Users never logged in	Weekly
Accounts created by owner role – last 120 days	Monthly
Opportunities created by owner role – last 60 days	Monthly
Contacts created by owner role – last 120 days	Monthly
Activities completed – last 60 days	Monthly
Accounts last modified by owner – last 120 days	Monthly
Neglected opportunities by role – next 60 days	Monthly
Open tasks by assigned role – current and previous	Quarterly

2. Data quality

If data quality is poor, it may compromise user adoption. Below is a list of suggested baseline metrics to get you started in tracking data quality.

Metric	Frequency
Opportunities with a close date – last 60 days	Monthly
Stage opportunities are entered	Monthly
Prospect accounts missing # employees – last 60 days	Monthly
Lead rating on converted leads	Monthly
Accounts with all key fields populated	Monthly
Accounts missing rating field	Monthly
Key, non-required fields filled out	Monthly

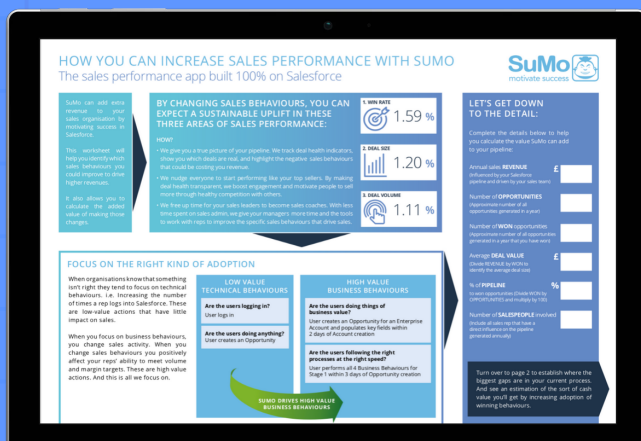
3. Business performance

Ensure that users are not just logged in, but are using the application in a way that enhances business effectiveness.

Metric	Frequency
Pipeline by owner or owner role	Monthly
Monthly sales trends	Monthly
Activity type by assigned owner	Quarterly
Win ratio for current and previous fiscal year	Quarterly
Open leads by owner role – open not contacted	Quarterly
Deal type by owners winning – current and previous quarters	Quarterly
Deal type by owners losing – current and previous quarters	Quarterly

You may find that these metrics don't really correspond with your exact expectation or process. What it does reflect is the importance of creating a framework to measure appropriate use.

Evidently, it's not enough to just measure log-ins. You also need to be able to track all the important steps in the sales cycle that lead to your desired business outcome.



This worksheet will help you identify which of your reps' behaviours on Salesforce could help you drive higher revenue attainment and allows you to calculate the added value of making those changes.

[Click here to access your copy.](#)

Why your reps aren't using the system.

Now that we've reviewed what we mean by Salesforce user adoption, and examined what the standard is amongst customers of the platform, let's look at the most common reasons why reps seem to have a problem engaging with the system.

Aversion to change:

As creatures of habit, we all struggle to incorporate new changes into our everyday routine - even if these are undeniably beneficial to us.

Change turns our *flight* or *fight* response on, which in turn triggers negative emotions like stress, anxiety or fear.

Many businesses implementing Salesforce anew experience a general reticence to the idea of working '*in a whole new way*'.

Heavy investment:

Aside from the financial investment made by the business, implementation of the platform takes up a lot of time and headspace from salespeople too.

Your reps are already too busy for this. They don't want to be learning a new system; they want to spend their time actually selling.

CSO Insights **2018 Sales Operations Optimization Study** states that companies with adoption over 75% in 2018 reported win rates 6% higher, on average, than those with rates under 75%.



No clear value for the rep:

Salesforce is often seen as a managerial tracking tool, in place to keep tabs on the performance of the team.

If the only reason you're asking me to take time out of my already jam-packed schedule is so you can micro-manage my every move, chances are, I'm not going to be happy about it.

If the rep can't see all the benefits the system can offer to them personally, he/she won't use it.

It's technically demanding:

This CRM tool is vast and complex and will only prove useful to the team if they know how to get the best from the platform.

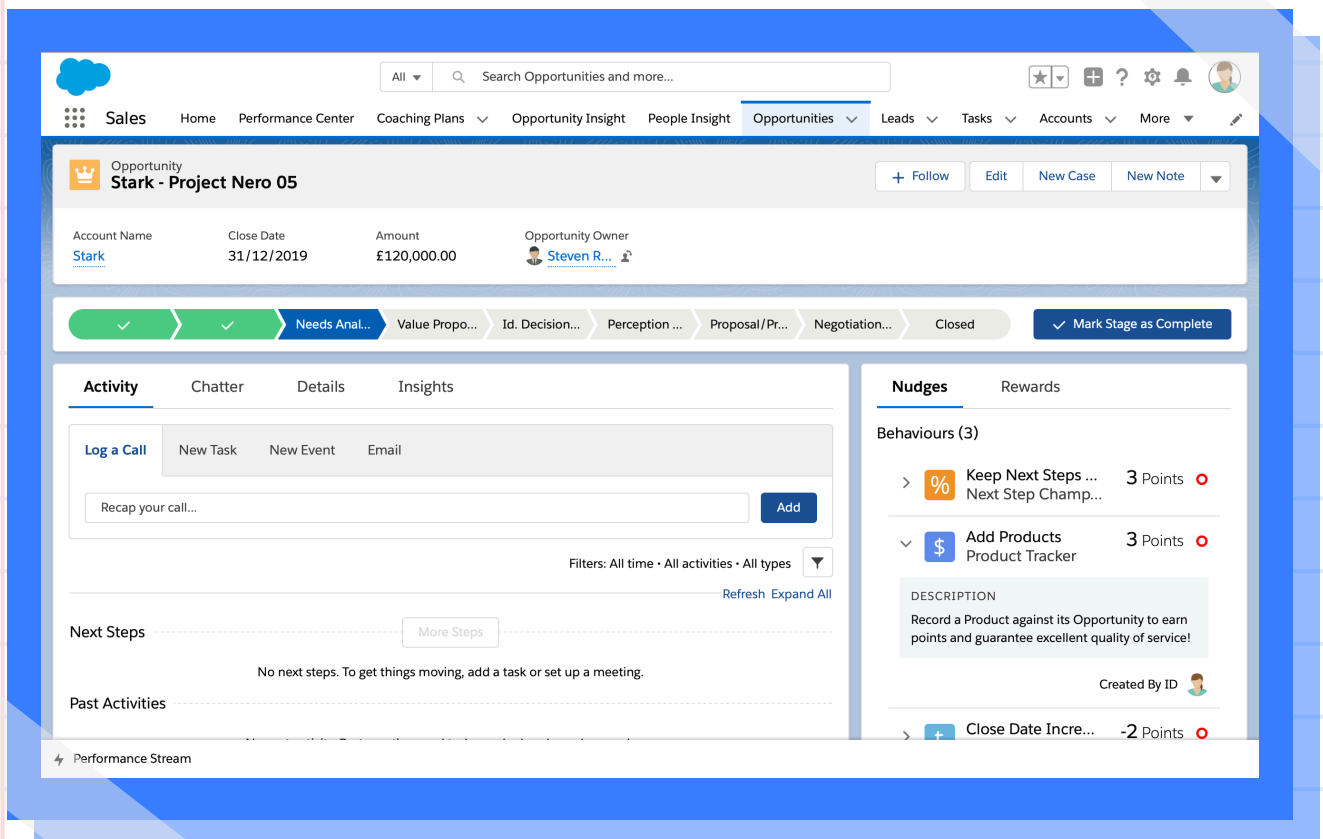
Not all salespeople are technically savvy. And very few people like to admit they find things hard or confusing.

If your team is not using Salesforce as you expected, it may be that they simply don't know how to use it.

It doesn't match your process:

Sellers want to sell. Any task that causes a deviation from this, is a hindrance.

It's important that your sales journey is mapped accordingly within the system, so that it follows the natural progression of deals.



It's boring:

Sales people enjoy the thrill of a good conversation, the satisfaction of reaching a good deal, the fulfilment of helping a prospect find a helpful solution.

There's nothing sexy about inserting data and crafting reports.

Sorry, Salesforce. You can be a bit dull...

5 ways to make Salesforce more engaging.

After reflecting on possible reasons why reps might not enjoy a fruitful relationship with the system, let's look at some clever ways to make Salesforce more appealing for your end users.

Update the UI and simplify the UX:

Ode to the smartphone generation. Vibrant gradients, tactile CTA buttons, Instagram filters, smooth Paypal transactions... We're getting well accustomed to being aesthetically pleased.

Which is why, clunky UX and boring UI no longer belong in the modern workplace.

Putting some time into making the entire process a seamless and enjoyable experience for your team can really pay off.

These updates don't have to be earth-shattering, either. For example, reducing the number of fields on a record to the absolute essential for closing a deal is a low impact, high gain action that could really help user adoption.

You could also consider transitioning to the livelier Lightning, getting rid of archaic mandatory fields nobody uses or injecting your brand colours into the fabric of the platform to give Salesforce a facelift.

Give reps back their time by automating:

Give your reps something money can't buy - time! - and they'll quickly start seeing what they stand to gain from using Salesforce.

Fortify the system through means of automation. Tools like Lightning Process Builder, Workflows or App Builder can help you automate otherwise manual and time-consuming tasks like filling in data or creating follow-up emails.

Make it come alive:

There are a few fun things you can try to take Salesforce out of the screen and into the real day-to-day of your sales team.

For example, you can trigger alerts to notify the team when something good happens. So, if a deal is won or you've reached a really good number of meetings that month, trigger an alert that automatically notifies your reps via Slack or email.

Alternatively, trial out some **Inspire boards** around the office. These will help you broadcast any form of Salesforce data far and wide, using interactive and interesting display boards.



Keep performance at centre stage with **interactive leaderboards**.

Place performance management in their hands:

Instil a sense of autonomy and offer more clarity into their impact on the overarching goal by creating performance dashboards for the reps - not just the managers.

These should not take a '*Clean your Room*' approach. It should simply help reps keep an eye on the prize.

You could look at including dashboards that present data on questions like:

How many leads have been converted?

How many Opportunities Created (and at what stage)?

What are my top 10 deals by Amount/Value?

What are my worst 10 deals by Amount/Value?

What does my forecast of Opportunities look like?

How many tasks have I created?

How many meetings have been scheduled?

How many Opportunities have I closed?

Once you've agreed the metrics you want to track, ensure that both rep and manager review this often. Use these reports as the source of truth to lead any ongoing performance coaching sessions.

Make it fun:

Yes, CRM can be fun. You just have to get a little creative.

Salespeople are inherently competitive, so slightly left-field motivational approaches like **Gamification** can work really, really well.

Before you get started, qualify what your expectations are. And build a gamification initiative around one specific target. Do not try to boil the ocean.

If you want to up productivity, host a competition around activity volume. Looking to improve the quality of your data? Create a data cleansing marathon contest.



We've written extensively about this over on our resource page. You can find some [sales contest ideas here](#).

A few ground rules on implementing gamification to boost adoption.

Identify the outcome you're really after - adoption and not revenue attainment is your main focus for now.

Start small and keep it simple - At first, allow players to earn points by undertaking simple activities like login in or making X amount of calls. Then increase complexity as people catch on to the rules.

Be clear - offer guidance around how to score points. Everybody should know what to do in order to win.

Reward little and often - keep your players engaged through the entire competition by holding weekly award ceremonies. They don't have to be fancy affairs; a *KitKat* presented to that week's top dialler around the kitchen table can go a long way in keeping the competition alive.

Keep it varied and know when to stop - game fatigue is real! Work towards several short sprints rather than one dragged out contest. It will increase everybody's chances of winning at least once and keep momentum for longer.

How one of our customers improved Salesforce user adoption.

As new users of Salesforce, UBM (now **Informa**) were focussed on getting their sales team to quickly adopt the CRM system and fully engage with their newly refined sales process.

It was very important for UBM that their sales reps saw the benefits available to them through appropriate use of Salesforce but also, to create a fun and engaging environment where reps could learn, engage and thrive.

SuMo was used to engage reps in competitions that rewarded them for exhibiting high-value sales behaviours within Salesforce. The sort of behaviours that would drive a successful sales outcome.

The competition was themed around the 5-a-day guideline (the popular advice to leading a healthy diet by consuming 5 portions of fruit and veg a day). Reps were encouraged to perform 5 high-value sales behaviours every day to create a wholesome and healthy pipeline.

Following a competition like this helped UBM show their sales team the benefits behind using Salesforce regularly and to its full potential. It generated a spike in activity, aided with training and proved that good use of the system can in fact be correlated to revenue attainment.

[You can read the full case study here.](#)



Conclusion.

We hope this guide helps you rethink the use (or lack thereof) of Salesforce within your organisation. The platform can really supercharge your business results, but, as with any technology, only when backed by its users.

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