Podcast Script: 10 Tips in 60 Seconds- Driving CRM Usage

Welcome to this 60-second Sugar snippet. My name is Susie Williams and today we're going to talk about ten ways to encourage your users to use their CRM system. To help me with the countdown, I've invited the Sugar Band to join me.

1. Make sure the system is as simple as possible. Sugar allows you to customize menus and the desktop to hide unused areas of the product from users.
2. Make sure your system has been set up with the terms your sales folks use. Modify the dropdown values so they reflect the same words used by your sales force, especially the "sales stages."
3. Get an executive sponsor for your project, like your VP of Sales
4. Have your executive sponsor send out an email announcing your CRM system and strongly encouraging people to use it. Sugar provides a template email for you to use for this activity.
5. Add or import as much lead, company and contact data into the system as you can find.
6. If possible, integrate your CRM system with your ordering or billing systems so your sales reps don't have to do "double-entry" to book orders.
7. Start with a pilot group of users. Get them up and running first, and they can help the rest of the group.
8. Set up an email alias, or a phone number, for providing help to users.
9. Post a web page on your intranet where users can go to sign up for access, ask for help, find the manuals, and log onto the software. Sugar provides a web page template for you to use for this.
10. Make sure training sessions are built into your rollout plans. Include both initial training and follow-up refresher courses. Don't forget plans to teach new hires who may have missed the initial training sessions.

And that's your 60-second Sugar snippet. Goodbye!