1st Line and Mid-Management are Key to Successfully Deploying SaaS-based CRM

Over the course of dozens and dozens of implementations during my nine years at salesforce.com, my team(s) and I would hear a variety of opinions on the subject of "what it takes" to have a successful deployment of salesforce.com. On the people side, we kept hearing, "…you gotta have executive sponsorship…" or "…it's gotta provide value to the end-users…"

I'll write some thoughts on executive sponsorship and ideas of adding end-users to the success formula in a subsequent blog. Today, I'd like focus on what I learned from a few exceptionally experienced customers – successful deployments depend quite significantly on mid-management's sanctioning of the effort.

Let's start with an example. Let's say your deployment is for 1,000 subscriptions of salesforce.com. You are using an agile/iterative approach for your deployment. Your organization decides to keep phase I simple with light integration to back-end systems, some process rework, good focus on data migration, and because it is simple, you decide on a light strategy for change management, adoption, and training. You are deploying a new sales methodology along with the new sales tool (salesforce.com) and you are thinking of changing the compensation plan so that reps only get paid if their data resides in salesforce.

Let's look more closely at the organization about to deploy salesforce. For illustrative purposes only, let's say there is one (1) executive, who is your sponsor, ten (10) area vice presidents, one hundred (100) regional vice presidents, and approximately 889 end-users. Figure 1 below simply apportions this 1,000-person target audience into a distribution curve in three (3) categories:

- Get it – 20% of the group;
- On-the-Fence – 60% of the group;
- Resist – 20% of the group;

# of Resources	Target Community	Get It	On-the-Fence	Resist	Total @ Risk
1	SVP	1	0	0	0
10	AVPs	2	6	2	8
100	RVPs	20	60	20	80
889	End-Users	178	533	178	711
Totals		201	599	200	799

Figure 1

The largest group, by far, is the end-user group with 889 resources, of which, approximately 711 of them are “potentially” at risk of not adopting the new technology along with the new “comp” plan and the new sales process – quite a bit of change going on here. So, how do you ‘really’ drive adoption and behavior change in this scenario? We believe management must become the coach.

Manager as Coach

Before the management team can effectively coach, they must first “buy-in” to the initiative and second, they must “stay-in” the initiative. How do you get managers to arrive at a state of “stay-in?” A select group of managers must be selected to participate in the change process, if not in the decision process as well. These selected managers, who are influencers, should include both supporters and skeptics of the initiative. And, if possible, these managers should participate in the discovery and design phases of the project. This participation serves a couple of key purposes:

- They become actively involved early in the initiative. This act alone will provide increased credibility as they communicate this fact to their peers and team members;

- They obtain a sense of ownership of the project – it starts to become their project. They start to see the ‘to be’ world and envision how their teams will be more productive using the new system;

- The project team obtains input from the field around processes that *should* be the priorities. Note: *Often times, management finds out what the solution is all about like everyone else – in the 11th hour in a PowerPoint based training session.*

If the members of the management team participate in the change process, they are more likely to support it, and this gives them a chance to achieve a state of ‘stay-in.’ Once management is in a state of ‘stay-in’ they can now effectively coach.

In our hypothetical example, there are 889 end-users and 771 of them are in the category of ‘on the fence’ or ‘outright resisting’. The figures can be dramatically better than this but my experience has shown time and time again that these figures are very common - give or take a few percentage points. It’s not about the technology – the technology is generally proven. It’s about the right process getting mapped to the functionality and the people in support of how they do their work – productively getting their jobs done.

You may be asking yourself; “…are these figures real?” When we introduce change, to just about anything, the brain is wired for two responses – go toward (fight) or to go away (flight) from that what is being changed. Change is not easy because the status quo is being disrupted. People get used to the cadence of their organization and to the behavioral norms that have been established. They get comfortable. Expectations are known and change means a disruption to control, to status, and to autonomy[1].

To get to the point where using a new tool becomes a ritual or a habit requires discipline and repetition… practice, practice, practice. To practice effectively requires good coaching. It is not a reasonable goal to expect people to adopt new technology the day after experiencing a four (4) hour PowerPoint based training course that is not customized in any meaningful way relating to how to do their job. The heavy lifting to achieving adoption really starts after deployment. And the work around adoption after deployment must come from the resources that are best suited to drive behavior change – management.   These are the folks who patiently coach around adherence to sales strategy and process, to negotiating deals, and to using the system on a daily basis.

After deployment, behaviors generally have not found a new norm yet. People are navigating their way around the new tool, the new processes, and the new expectations *(often wondering just how 'real' is all of this anyway)*. In short, they are navigating toward their new sense of autonomy trying to find 'their' way. Figure A represents the reality of 800^+ end-users trying to orient themselves in the right direction. An adage I heard once that resonated with me was that the challenge of change is not about changing the direction of the "ship" but '800' individual canoes… imagine if you will! The intent of coaching by management is to help everyone understand what direction they are going, to paddle in unison and to reinforce behavior, daily. To orient end-users away from chaos (Figure A) to alignment (Figure B) is hard work.

Figure A

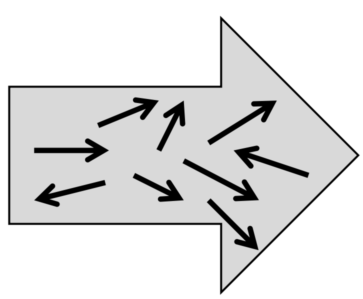
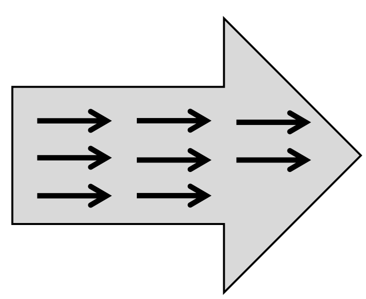


Figure B



At the end of the day, if key resources from the management layer become part of the change process, then they will communicate the relevant benefits upwardly to their management, laterally to their peers, and daily to their teams. Then, adoption has a strong chance to sustain itself. This implies usage of the new tool

[1] David Rock, *Your Brain at Work*, (New York, NY: HarperCollins, 2009), 105-110.

and with usage of the tool, data is entered by resources on a daily basis. The data has a multiplier effect beyond sales as it becomes very useful information to the marketing, sales enablement, and sales operations teams. Better information means blind spots are illuminated for senior management as they now have critical and accurate input for timely and critical strategic decisions. Strategic decisions grounded on “real” information enables proactive, planned growth and minimizes unplanned surprises that require reaction and in some cases drastic measures.