CRM RELAUNCH FOR ADTECH GLOBAL DRIVES SALES EFFICIENCY

CHALLENGE

Adtech Global had just migrated from Salesforce.com to Microsoft Dynamics. The migration was led by IT because there was no Sales Operations or Sales Enablement function in the company. Sales teams were confused about how to properly utilize the system because only one training session was held and no documentation or ongoing reinforcement was provided to the sales teams. The system was not integrated with Microsoft Outlook so sales was not utilizing the system fully to drive greater effectiveness and time savings. Furthermore, the sales people were not trained on how to utilize the lead's functionality of the system or how to run reports on leads, accounts and opportunities.   Sales goals were not loaded into the system. There was no standard dashboard for sales people to use to track their progress on leads, opportunities, renewals and annual sales goals.

ACTIONS

- Met with sales leadership to understand areas where sales was struggling with the tool.
- Developed a training curriculum to close the knowledge gap.
- Worked with IT to ensure that all sales people had the appropriate connection in place with Microsoft Outlook.
- Worked with training team to develop documentation and short videos to reinforce the live training and give new hires a jump start on CRM training.
- Held a meeting with sales teams once a month to allow them to ask questions regarding CRM functionality to continue to close the knowledge gap while also using their questions as input for development of future training programs.
- Loaded sales goals into the CRM system for each salesperson.
- Developed a standard "sales dashboard" as the default start page for sales teams to help them understand progress against activities, leads, opportunities, renewals and sales goals.

RESULTS

- Reports showed that adoption of lead and activity functions increased as more leads were converted to opportunities and more activities were created in the system to improve productivity.
- Sales was very complimentary of the training and said that it and the standard dashboard saved them significant time on a daily basis as they no longer had to manually calculate progress relative to goals.