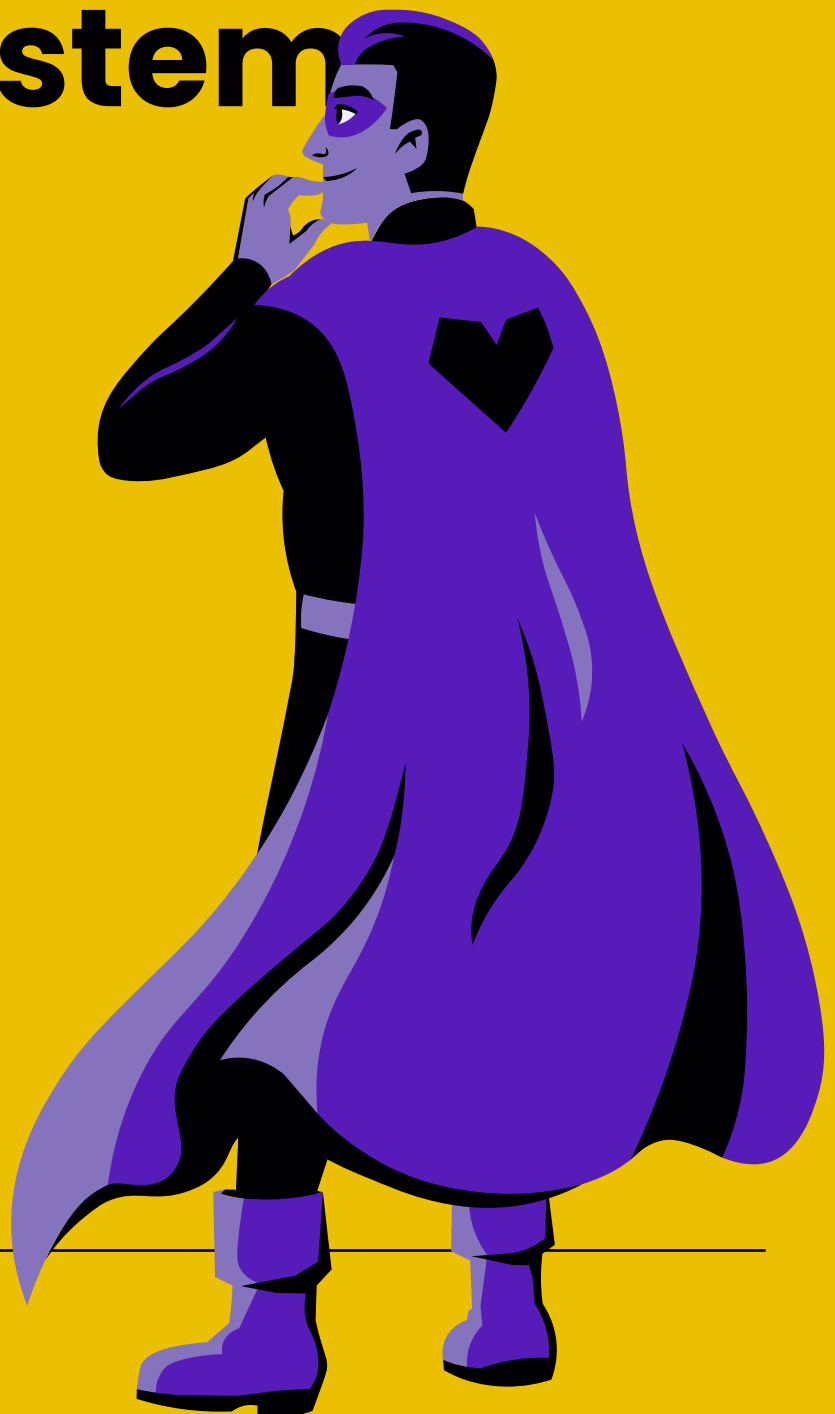


15

ways to motivate salespeople to use a CRM system



Hi!

We are glad that you have decided to explore our guide *15 Ways to Motivate Salespeople to Use a CRM System!*

Here at Zimple we are heading towards our vision of efficient and pleasant use of CRM systems. We have created this guide paying special attention to teams and organisations that are wishing to improve the level of use of their CRM as using CRM in your daily work should not feel unpleasant or troublesome.

We hope that you and your team will find this guide useful. We are more than willing to have a chat with you if you feel you would need some help or guidance with your CRM.

With sales greetings,

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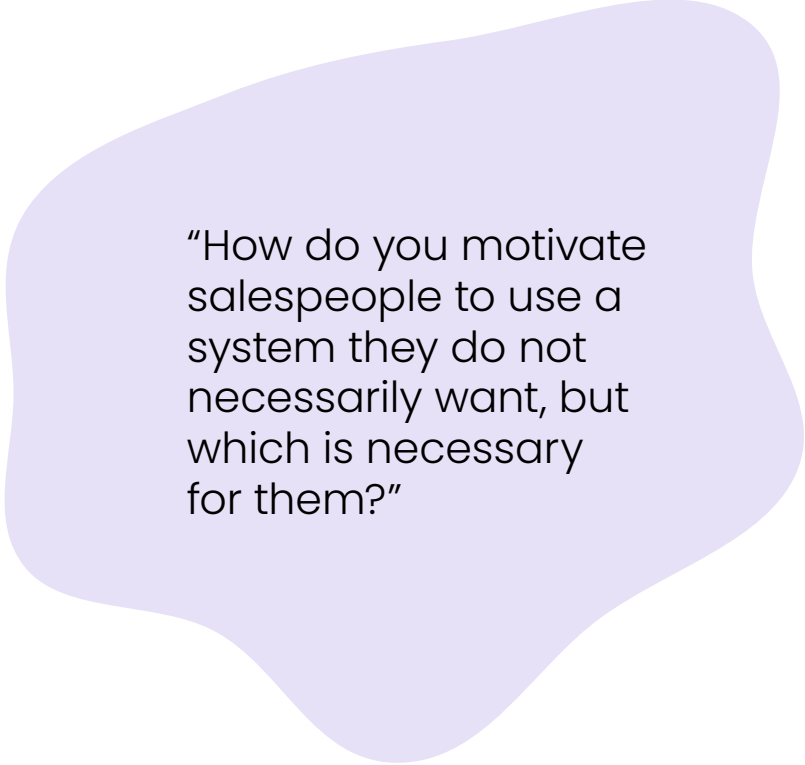
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Introduction



“How do you motivate salespeople to use a system they do not necessarily want, but which is necessary for them?”

Selling is hard work, and few of us have such a unique service or product that it has no competitors. The best way to succeed in a competitive market is to take care of the customer experience.

A functioning and efficiently organised sales process plays a major role in this. To manage and organise the sales process in the best possible way requires a CRM system. As a sales manager or leader of a sales team you are also responsible for getting the sales team to use the CRM system.

Although the number of companies using a CRM system has increased dramatically in recent years (56% in 2018 and 74% in 2019) ¹, the utilisation rate within companies is not rising at the same rate. According to a study by Merkle Group Inc., 63% of CRM system deployment projects fail. ²

Why?

Because sales do not use the system.

A CRM system brings a lot of benefits!

For sales and sales teams, correct and regular use of a CRM system brings at least the following benefits:

- ❑ Automation saves time
- ❑ All customer-related information can be found in one place
- ❑ Document management becomes easier
- ❑ Predicting sales is easier and more accurate
- ❑ Marketing can better be part of sales and help where needed
- ❑ Customer satisfaction improves
- ❑ It is easier to develop operations

These are just a few of the clear benefits of a well-used CRM system. When customer data and activities are in good order, customer relationships are easier to manage.

Information related to contacts, transactions and organisation can be

found in one place instead of salespeople's personal notes on several different post-it notes or notebooks.

Salespeople can be certain that things are under control and recorded. Things will move ahead even if a salesperson has to take sudden sick leave; others will know immediately how things stand with a customer.

Automation helps take care of many small everyday manual routine tasks automatically, so that salespeople have more time for managing customer relationships and for sales.

In general, it can be stated that CRM provides salespeople with an opportunity to take their sales process to a new level. But the challenge is still how to make sales see the benefits and use the CRM system on a regular basis.

So why is CRM not used?

Many sales organisations continuously struggle with salespeople's inadequate CRM entries. Failure to make entries may be unintentional and when in a hurry, entering an individual activity or even updating a sales project may not be the first thing on one's mind. Then, however, the overall picture of the work done in sales may remain hidden, which in the worst case can distort the future outlook for sales.

Salespeople can sometimes be picky, especially when it comes to the systems in use. The most experienced and successful salespeople, in particular, may find it challenging to face new things. For years, they have honed their sales strategies, and they have no interest in shaking things up for nothing.

Approximately 60% of salespeople say that when they find a way to do things that works for them, they will not change it.⁴

And this is quite understandable; if it isn't broken, why fix it?

Perhaps there is no fault in the process itself, but none of us has likely encountered a sales process that cannot be improved in one way or another.

Sometimes it can be about insufficient training, which leads to frustration with the entire system and the benefits it provides. If a salesperson needs to learn how to use a new CRM system by themselves, you can be sure that it will not be used efficiently or at all.

CRM deployment is a big change in a salesperson's daily work. That is why it is perfectly natural that new systems or their renewal may provoke strong resistance among salespeople.

According to a study, sales use currently 17% of their daily working time for entering information into different systems.³ Is there really a need for yet another new system to enter data into, and why?

CRM often comes alongside other ingrained habits, and the same customer data is then entered inefficiently into many different places: sticky notes, Excel spreadsheets, CRM, the calendar... Incorporating the new system into daily work will take time, as will replacing old habits with new ones.

The introduction of the new system cannot therefore be handled as just a notification, with the expectation that everything will roll out naturally.

Deployment of the system is change management

You cannot expect results or benefits to be visible immediately. So, how do you motivate salespeople to use the system long-term so that its benefits become clear to everyone and the results of the regular use of CRM can be seen?

The initial enthusiasm is often temporary. If entering data into the CRM does not become a habit to start with, entering data carefully may prove to be a short-term phenomenon. And then old habits return, customer data is stored in Excel sheets, email, post-it notes or a notebook.

According to the study, the deployment of a traditional CRM system takes about six months. And from that point, it still takes three to five years for the company to reach a good ROI.³

Since benefits only show as measurable data at the level of the entire company over the longer term, who has the patience to be motivated by a seemingly futile change? Is the management prepared for the change with the patience it requires before switching to the new system? The introduction of the CRM probably requires changes to the entire sales process and the way of managing sales.

An ideal situation would be that the salesperson would open CRM first thing in the morning. A CRM system well-equipped for the needs of the company makes it possible that in practice, the salesperson no longer needs to open their email or calendar: everything can take place via CRM. But only if the database is regularly updated and activities are entered consistently. A CRM system does not function if data is not regularly entered in it and old customer data enriched.

If the sales team is unwilling to use the CRM system, this guide provides a few ideas on how salespeople can more easily see the answer to the question:

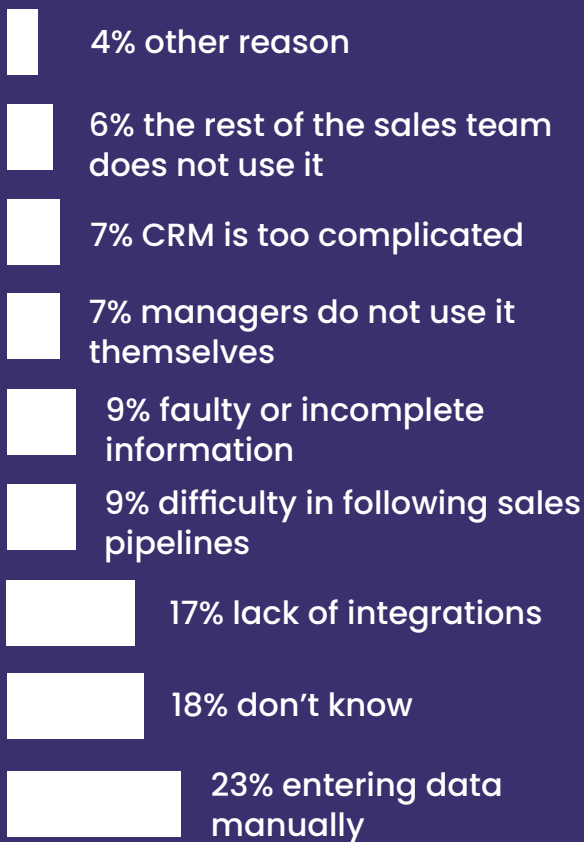


“What’s in it for me?”

CRM challenges

WHY IS CRM NOT USED?

Main reasons for not using CRM ⁵:



TIME MANAGEMENT

2/3

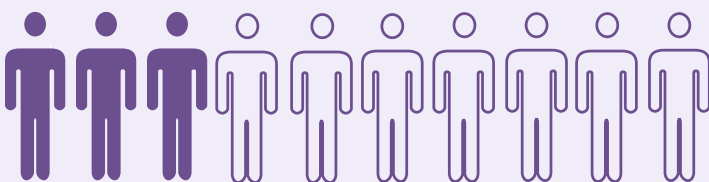
Salespeople spend 2/3 of their working time on administrative tasks, such as managing the CRM system. ⁴

CHALLENGE

13%

of companies say that daily use of sales technologies is more challenging today than 2–3 years ago. ⁸

UNWILLINGNESS TO USE CRM



34% of those how do not use the CRM see unwillingness to change to be the biggest challenge for deployment. ⁶

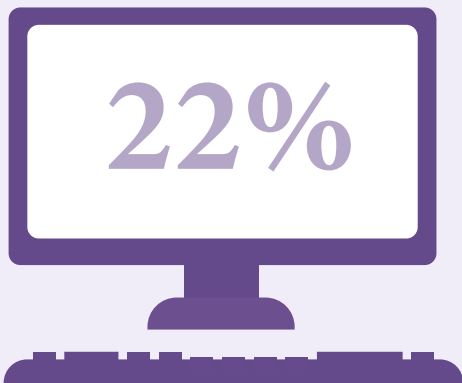
CRM'S BIGGEST COMPETITOR: EXCEL AND EMAIL

40%



of salespeople still use email and Excel sheets to manage customer data.⁷

ADOPTION OF TECHNOLOGIES



of business owners believe that adopting new technologies in their daily work is one of their biggest challenges right now.⁴

WHAT CRM?

220%

of salespeople are still unsure of what a CRM system is.⁴

MANUAL DATA ENTRY IS TIME-CONSUMING

34%

of sales representatives use more than an hour to enter data manually into different systems. That is also the biggest reason for not using CRM.³

What to do?

methods 1–5

1. Select the CRM system together

The CRM system is a management tool that shows how sales functions, develops, where to improve and how the sales forecasts develop. However, those who use the system on a daily basis and enter the data into the system are the salespeople, not the management. If the management selects a system for the salespeople that best serves the management, one can be fairly sure that it is not the best for sales.

That is why it would be good to involve sales in the CRM purchasing process. If including the entire team is too difficult and complicated, it is important to involve at least a couple of salespeople in the project. That way you get important information directly from the users, what is important for them regarding their daily use and what kind of system they want to use. When sales have been involved in the CRM system selection, it is also easier for them to commit to it. You can take a horse to water but you can't make it drink, and a salesperson will not use the system if commanded.

2. Ensure that everyone receives the necessary training

Without proper training, the deployment of CRM is like asking ice-hockey players to try synchronised swimming. If salespeople do not understand the system, its functions and the most important points, they become frustrated. The system as a whole is perceived as useless and then there is no motivation to use it.

Make sure that all salespeople are trained to use CRM. A professional is able to tell the salespeople the best methods, the most well-functioning ways to work, and above all, how and what each entry affects. When salespeople understand the principles of the system and how their own activity affects the sales forecast, for example, it is easier to motivate them.

3. CRM activities make what a salesperson does visible

Even if a deal cannot be closed and thereby receive visibility for one's own work in the management's monthly reports, the work done can still be seen in the CRM. Once the activities performed, phone calls, emails, discussions, appointments and offers and contracts sent are regularly entered, it can be seen that the salesperson hasn't spent time on the golf course instead of working.

CRM also helps make the work visible to the management, which is a good thing, especially when the work is being done remotely. A salesperson is able to show how the days were spent without the management having to ask separately or "micro manage". It is also easier to see if a salesperson needs support in some phase of the sales process.

If one salesperson has no entries in CRM and others have plenty, what does it say about their work or use of CRM?

4. Who takes care of the customer if the salesperson falls ill?

What if a salesperson falls ill? Who will then take care of whose accounts and how does the backup see what was discussed with whom? What has been agreed and when? You cannot always expect a salesperson to delegate emails, cancel appointments or go through their notes while ill. It would both add to the salesperson's stress level and lower customer satisfaction.

And if you are backing up a colleague, do you then have to ask awkward questions of customers, like what they discussed earlier? Or how long does it take for a salesperson to search for what was agreed on from their emails, notes or calendar when preparing for an appointment with their own customer?

Nobody wants to lose a customer because the customer satisfaction drops due to sick leave or another acute situation. And especially not because the salesperson cannot manage the customer data properly.

ZIMPLE TIPS

One-off training is not enough. In the first training session, sales receive the keys to using CRM, but the guidance on using it on a daily basis only starts properly with several follow-up training sessions.

Only after two or three months of use can you say best what is actually needed. It is rare for the deployment of any system to go 100% right in one go: there is always room for improvement.

5. Tell sales how the system benefits them

Nobody uses a system if they are not informed about what its purpose is. Concrete examples from everyday life should be used to make it easier for the sales team to understand the benefits.

In practice, there are two approaches to a CRM system: customer data management (salespeople's approach) and reporting (management approach). A fancy reporting option in the CMS does not alone make salespeople use the system, because then customer data management is totally forgotten.

Therefore, tell salespeople what's in it for them when they regularly enter data into the CMS system specifically in your organisation. The starting point should be that the management does not force people to use the system, but the salespeople genuinely want to use the system.

A FEW EXAMPLES:

- Using a CRM system, sales get rid of a number of manual and administrative tasks, which in turn gives them more time to focus on booking appointments, discussions, and most importantly, closing deals. In other words, work that they are paid for. The CRM system automatically finds the email exchange, phone calls and appointments with the contact, which the salesperson used to have to remember themselves or fill in manually.
- Salespeople's work becomes more effective thanks to automation. CRM makes activities automatic, such as sending follow-up emails and scheduling reminders and appointments.
- Salespeople's work becomes more organised when CRM takes care of all data related to the contact or deal, matters agreed on during the customer relationship, and purchase history. This ensures that no data is lost, and on the other hand, you also know where all the data can be found.

“Make sure you clearly see the benefits of CRM. The fact that others have CRM is not a good reason to purchase it.

You should work out if you want to have certain reports available, why exactly those reports, and which objectives they support.

You get what you measure: that is, what you report is what you manage. “

Benefits of CRM

BETTER RESULTS



In companies, where over **75%** of the team has successfully deployed a CRM system, sales reach better results than before the deployment. ⁴

CRM USAGE IN THE PHONE

65%

65% of companies where the CRM system is actively used on the phone reached their sales target. Only **22%** of non-mobile users of CRM reached the same targets. ⁹

PRODUCTIVITY

50% of company owners said that CRM increased productivity, **65%** were able to raise their sales targets, **40%** were able to lower employee costs and **74%** improve customer relationships. ³

TIME SAVING

5h

Sales teams save on average five hours per week by automating daily work tasks. ⁸

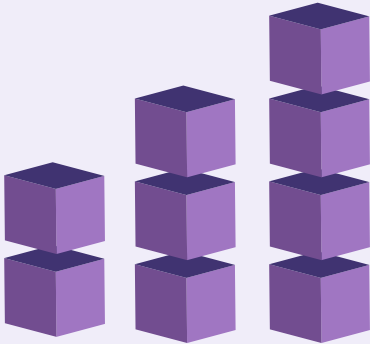
MOBILE APPLICATIONS



50% of the teams improved their productivity when using the CRM mobile application. ⁹

SALES TIME

Salespeople's unobstructed access to customer data may shorten sales times by **8-14%**. ¹¹



PREDICTABILITY OF SALES

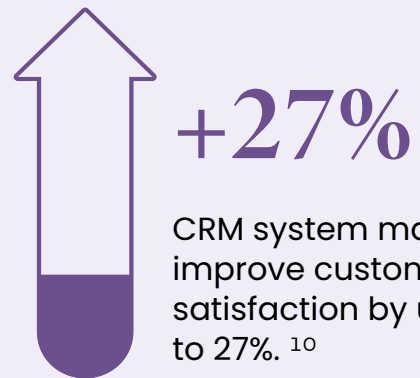
CRM systems may help improve sales by up to **29%**, sales productivity by **34%** and the accuracy of sales predictability by **42%**.⁷

ACHIEVING SALES TARGETS



61% of salespeople who used a CRM system in 2019 achieved their sales target, compared to 52% of those who did not use one.¹²

CUSTOMER SATISFACTION



CRM system may improve customer satisfaction by up to 27%.¹⁰

ROI

245%

The ROI of a properly and correctly deployed CRM system may be up to **245%**.⁴

What to do?

methods 6–10

6. Keep only one place where you enter customer data

Make sure that salespeople have no other place or system where they enter customer data. This is important to remember just for the reason that there's no need to fill in data several times in different places, but also to make sure that all the data is specifically in CRM.

Entering data is time-consuming, especially if it has to be done twice. Sometimes salespeople have a so-called stash where they record notes about customers. Once the use of CRM is made effortless, salespeople are trained to use the system, calendars and emails are automatically synchronised, and the necessary integrations are completed, it is easy for salespeople to enter customer data in CRM.

Your task as a manager is to make sure that the data entered by salespeople is automatically transferred between different systems.

7. Keep things simple

Nobody has the energy to learn to use a system that is too complicated, and the use of such a system is rarely efficient. At the beginning, it is important to keep everything simple. Do not overload the sales team with too many new functions in one go. Prioritise the functions you want and expand the deployment of new functions over time.

Once everyone has mastered the basics and the basic use of CRM is already part of a daily routine, you can think of the new functionalities needed. When deploying them, it is also good to take the salespeople's needs and training into account and remember the "one thing at a time" mentality.

8. Do not only tell people how to do it, do it yourself, too

A very typical way for a manager to act is to tell people how things should be done and expect them to do so. In practice, we all know that things will not be done long-term or with commitment if the motivation does not come from salespeople themselves. Why would salespeople find CRM worth using if the immediate management does not?

Good ways to show the entire sales team that management also uses CRM actively and that sales entering the data really makes a difference include:

- Using the CRM system actively for reporting
- In sales meetings, always going through activities jointly agreed to be entered in CRM (phone calls, emails, appointments and deals)
- Following up the development of sales actively and regularly, using the CRM system
- Using only the CRM system for measurement: if it isn't in CRM, it does not exist.

When sales notice that activities are measured and they make a difference, using the system rapidly becomes part of every workday.

9. Make sure that the CRM has the necessary features

Although CRM should be simple to use and different functions should be kept at a minimum, it is good to take into account the role of the available add-ons or integrations in boosting the work.

Once the CRM system has been in use for a while and everyone is managing the basics, it is worth investigating if there is a phase in the sale process where work could be made even more efficient. Is there a need to boost and support prospecting, nurturing leads, managing documents, marketing or closing? When CRM supports the daily work of salespeople in the best possible way, using it is more meaningful and appropriate.

When used regularly and on a long-term basis, the sales pipeline can reveal clear points and bottlenecks where there are issues in sales. For several CRM systems, it is possible to purchase add-ons or integrations to support those specific points.

However, it is important to proceed one thing at a time: everything cannot be fixed at once. What is the most critical problem for your team which your CRM system could help you to tackle?

10. Remember mobile accessibility

Salespeople rarely sit and work in the office; they are either in a car, in remote meetings at the summer house or working from abroad. Customers also expect fast actions and a short response time from a salesperson: if they cannot get a reply in a reasonable time, the customer may move to a competitor's sales pipeline.

In a good mobile application, notes can also be recorded, not only typed. Make sure that your salespeople can serve customers from anywhere, without compromising traffic safety by tapping on their phone.

As early as when selecting the CRM system, make sure that it has a mobile application that is easy to use, clear, and contains all the necessary functions

A CRM system designed for the salesperson can be identified from the fact that its mobile app not only allows calling but also identifies the caller number if the contact information is available in CRM. The call data can be stored in CRM, directly in the customer or deal data.

CRM features

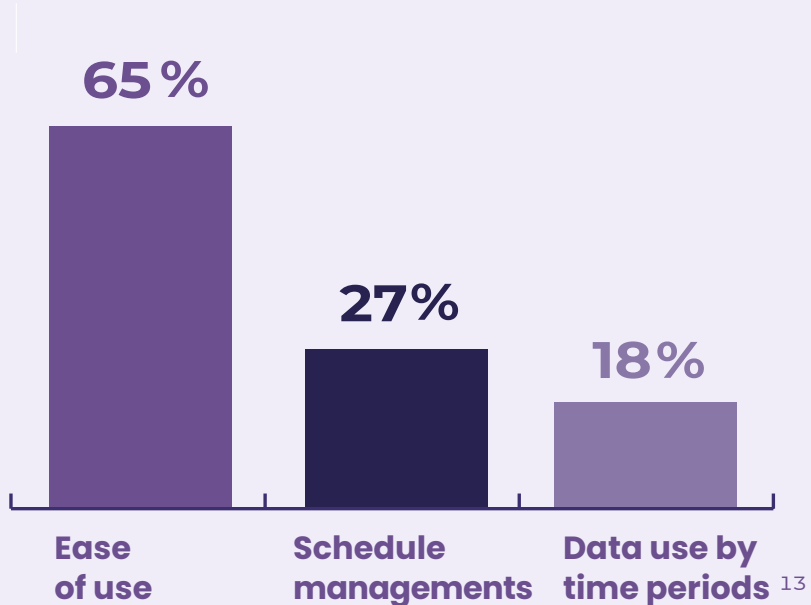
CRM FEATURES

When purchasing a CRM system, most attention is paid to the following features:



WHEN PURCHASING CRM

When making decisions about CRM, decision-makers take into account:

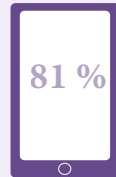
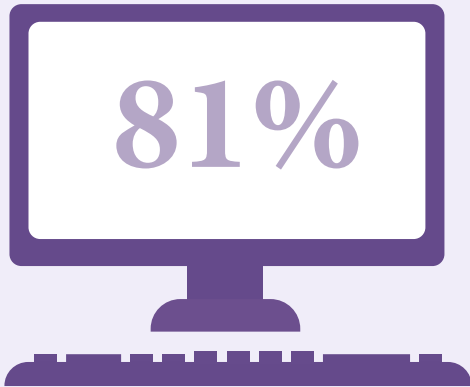


CLOUD SERVICES

63%

of companies favour cloud-based CRM systems instead of desktop applications that need to be installed. ³

SYSTEM USE IN DIFFERENT DEVICES



of CRM users use the CRM system on several different devices: laptops, desktops, smart phones and tablets. ¹⁵

SYSTEM USAGE



43% of CRM users use under half of the features of the CRM system. ⁴

SOCIAL NETWORKS



Salespeople have found their efficiency to increase by



26%



when social networks (e.g. LinkedIn) and a mobile app are added to the CRM system. ¹⁴

MOBILE APPLICATIONS ABROAD



34%

In Europe, only 34% of companies use the CRM mobile applications. ³

What now?

methods 11–15

11. Set individual targets

Create individual, personal targets for each salesperson regarding CRM usage, and follow them up actively. Naturally, this requires input and time from management, but CRM deployment is not only salespeople's job.

The targets can be either short-term or long-term, but it is most important that they are followed up actively. For example, weekly sales meetings, monthly development discussions; whichever way works best in your organisation.

When a plan and targets have been made for CRM use and they are measured, CRM becomes part of daily work more easily. Long-term encouragement helps to see the results and benefits of active use.

12. Collect feedback and take it into account

It is important that a salesperson notices that their voice is heard in the development of the system and their own work. Whether the CRM system is selected together with the salespeople or not, it must support the salespeople's daily work in the best possible way.

No system is ever ready on the day it is deployed, and development needs arise constantly along the way. So, keep your ears open to salespeople's development ideas and make it known that the development proposals they make are relevant.

Making changes to the CRM that best serves salespeople, getting the necessary add-ons and streamlining the work should be simple and not require large coding projects: The CRM should be able to grow alongside the company. However, it is seldom possible to predict all the needs before use.

13. Reward

Instead of pressuring your sales team to use the CRM system using harsh language, encourage them by appreciating their work. A traditional stick vs. carrot situation.

Those who clearly seem to invest in the use of CRM, fill in the fields actively, add activities and are interested in different functionalities should be rewarded. For example, presenting them as role models and highlighting the results in sales meetings also encourages other salespeople to get their act together. It may also convince the salespeople to see the CRM system as a tool that facilitates their work, rather than a system craze by the management.

Salespeople are known to be competitive – it cannot hurt to organise some competition. Incentives for CRM use can act as a catalyst during a short-term deployment campaign or they can be an ongoing part of the reward system.

Think how the appreciation of work or rewarding activity could best fit into the culture of your company. Committing the personnel takes place best through appreciation, so rewarding does not have to be material. Whether your incentives are long-term or short-term, make sure that there is a clear connection between the activities you reward and the results you want.

14. Share success stories

Instead of pressuring, forcing, or constant nagging, use positive examples as evidence of the benefits of using a CRM system.

Ask your company's power user to tell others what benefits they have noticed about using CRM. Generally, they are related to the use of time or the user has completely got rid of vague notes in notebooks or post-it notes.

15. Create together a CRM plan and guide

Create together a so-called CRM guide that goes through what kind of information users should collect into the CRM system, how and who is responsible. Then it is always clear to everyone what is expected from them.

The guide can even define the minimum utilisation rate of CRM: the minimum information that will reap the benefits at both the salespeople and organisational level. Also make sure that everyone knows the impact of entering each piece of data.

Remember to update the guide on a regular basis and make sure that it is easily available to all users.

ZIMPLE TIPS

Adopt the idea of peer workshops. When one colleague gets used to using CRM and, for example, closes more deals or improves customer satisfaction, let them tell others how they managed to do it.

Organise small peer workshops, where the person in question tells how your organisation specifically can reap the best benefits from the CRM system. When instructions, requests and good results come from a colleague, it is easier to assimilate and incorporate it into one's own daily work.

“Make CRM the thing for the whole team – starting from tool selection to improving its use.

Agree on ways of working together and ask regularly what deficiencies the system has.

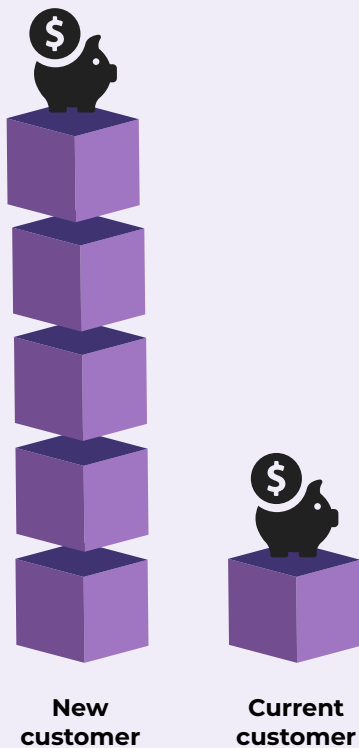
In this way, you make the CRM serve the users and not the users serve the CRM.”

Customer experience

ACTIVE USE OF CRM IMPROVES THE CUSTOMER EXPERIENCE

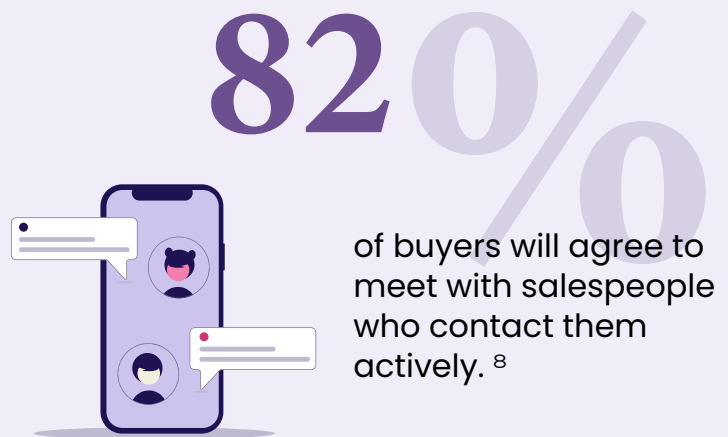
Active use of CRM has been found to have a link to better customer satisfaction. Automation, reminders and synchronisation of emails and calls keep the customer relationship fully in the control of the dedicated contact person, the rest of the team and other interest groups. The quality level of the service always remains good.

CUSTOMER ACQUISITIONS



Soliciting a new customer costs a company **five times** more than serving existing customers. ⁴

ACTIVE SALESPeOPLE



LOYAL CUSTOMERS

Loyal customers use **67%** times more money than new customers. ⁴



CUSTOMER EXPERIENCE VS. PRODUCTS AND SERVICES



of customers believe that the customer experience offered by a company is as important as the products and services it offers. ⁴

QUALITY OF SERVICE



of customers have made a decision to change the service provider due to fluctuations in the quality level. ⁴

PRIORITISATION OF CUSTOMERS



43% of companies think that salespeople should prioritise customer accounts better to focus their sales. ⁸

PURCHASE FACTORS



51% of companies find that salespeople should better identify factors leading to buying. ⁸

Deployment

“In an ideal situation, internal instructions or a sales playbook is written about the processes around and through CRM.”

Elaborate and successful deployment

Deployment project for a CRM system should be done thoroughly not just because of the user experience of the salespeople but also in order to back up all the technical features of a CRM system. As during a CRM deployment project there are several things that should be carefully considered of, it might be a good idea to continue the project with a CRM professional. In fact, utilising professional expertise is likely to turn out to be remarkably more cost-efficient than having to spend your resources on fixing the situation later. Not to mention your CRM system not functioning as it was supposed to.

It is not possible to get the most out of your CRM system if time and effort are not invested in the deployment project. With a CRM system there is a risk of the database being built disorderly which makes the data unusable and the numbers hard to report.

This leads to losing the main idea of the whole CRM system: improving customer experience through storing, sharing and reporting data.

It is crucial to do the configuration carefully and make the CRM ecosystem to meet the needs of your organisation. This is the only way to ensure that using the CRM system is beneficial and motivating for the salespeople. This will result in better customer experience as well. With an experienced professional you will get on the right track straight away and will discover the best ways for you to work. This will keep both the salespeople and sales management happy.

As its best CRM is not only a tool that benefits sales but also a database for critical info about your clients which, for example, marketing and production can utilise, too.

It is all about the foundations

It surely would be tempting to start using all the fancy features your CRM has got to offer and see what you can possibly do and achieve with them. This, however, often leads to losing focus.

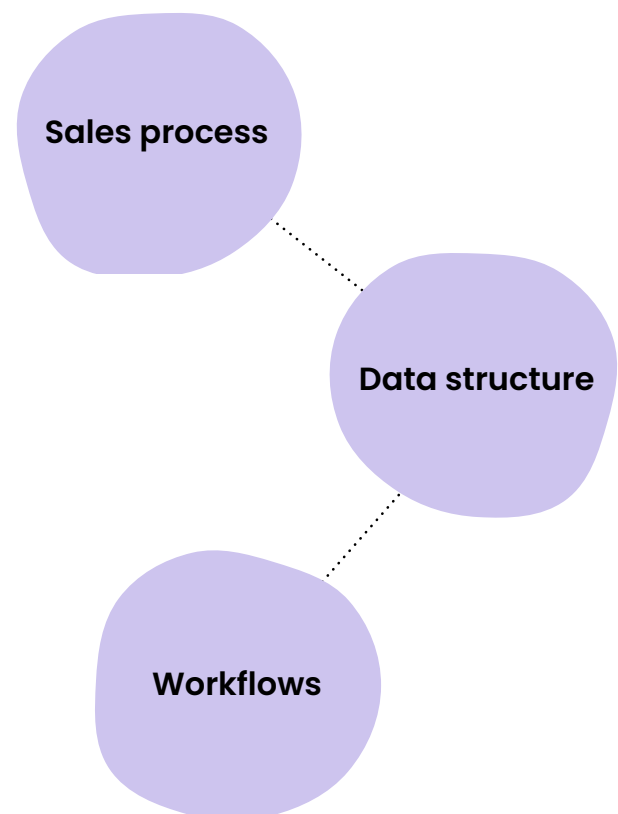
At first the most important thing is to find out what the CRM system is for and what do you want to manage with it. The foundations of a CRM are sales process, data structure (meaning what should be entered in data fields, when and where to) and workflows (how do sales projects proceed in the process, how do they move into production, what kind of automations and activities are needed).

At first the most important thing is to find out what the CRM system is for and what do you want to manage with it. The foundations of a CRM are sales process, data structure (meaning what should be entered in data fields, when and where to) and workflows (how do sales projects proceed in the process, how do they move into production, what kind of automations and activities are needed).

The foundation, meaning the process and data structure, should be built firmly to avoid going after spontaneous ideas. Going after spontaneous ideas without being logical or systematic will usually lead to having a messy environment which is not pleasant to use.

You should consider carefully what is crucial for your organisation and what simply goes under the category of things that would be 'nice to have'. It is absolutely fine to move on to the 'nice to have' level – but only after the firm foundations have been built. Being inconsistent will lead to the users being frustrated with a system that is confusing and unpleasant to use, and in worst case scenario the system will remain unused and pointless.

The three foundation pillars of CRM systems are:



The flow of Zimple's deployment projects

With Zimple the deployment of Pipedrive is quick and easy. The deployment phase itself usually takes from two to four weeks. During this period of time the CRM system will get tailored to meet the needs and hopes of the organisation. After this the sales team will get to use the system.

Deployment itself does not mean just installing the software and guiding users. It is, in fact, a very profound project. The main goal is to get the most out of its performance to maximise sales profits. In order to create sales processes that create profit, integrate the right tools with the system and generate reporting and monitoring procedures that are necessary for following the goals and targets of the organisation, it is essential that Zimple's consultants get familiar with the customer's current practices, sales processes, sales strategies and sales targets.

1**Preparation for deployment****2****Deployment****3****After deployment**

Preparation for deployment

To be decided:

- Who is the key user?
- Who are the users?
- What kind of processes are implemented in CRM?
- How does that data go in and out of the system?

Deployment

With Zimple your sales team will never be left alone with a new CRM system and new practices. Zimple will walk with your organisation or team through the whole deployment process, which usually takes approximately three months. During this time we can make sure that the system supports the sales team's targets and the tools used are suitable for each team.

Technical specifications are made and personnel are trained. We recommend that our customers write internal instructions or a sales playbook about the processes around and through CRM.

- What information does each person enter and when, how does the salesperson use CRM?
- For example, is mail synchronisation expected?
- Which activity types are used in which situation?
- What are the targets and how are they entered in CRM?
- How is the value of a deal formed?

After deployment

Within the first few months, after the use of the CRM system has become a solid part of the salespeople's daily work it is possible to do adjustments. Ideas often and requests often come out during the first months, and they can be refined together with Zimple's consultants.

During the deployment process Zimple's consultants are in charge of all necessary measures starting from the deployment to documenting. They are involved in thinking of the possible renewals in sales processes. The consultants make sure that using new system and/or adapting to new practices and procedures is pleasant and smooth.



1

There is a regular review of activities coming up in sales meetings and through them the progress of sales cases, each salesperson's activities in CRM, the fulfilment of objectives at the level of individuals, teams and the company as a whole, the balance of the sales pipeline, if there are obsolete deals or deals that are standing for too long, etc.

2

Usually after **about 2–3 months some kind of refresher training** is required – it may be just peer training inside a team or specific external training on specific topics. An update of the created instructions / playbook may also become topical if shortcomings have been identified.

3

At approximately **3–4 months, a plan is made to expand the use**. At deployment, all functions (e.g., appointment calendar, several reports) are rarely activated right away because there is not enough data in the system yet. Once data has accumulated, a review is made to see if the use of the functions should be increased and if additional training is needed because of that.

4

6 months -> active use and CRM reporting are continued. Possible integration needs and process development or creation of new ones are assessed at least quarterly.

Finally

Just like other corporate systems, CRM is only as good as the data entered in it. However, the change does not happen in a moment, but patience and long-term work to change the ways of working are required. Repeating things make them commonplace.

Deployment must always be planned. Throwing a new system at users has never brought good results and never will, so it is good for management to remember to set aside their own time for the new system and do the ground-work properly.

Successful system deployment takes place together, not only by users.

If you feel that you will not succeed in making the CRM system part of daily work using the methods presented in this guide, consider acquiring a partner. At Zimple, we have the experience of dozens of Pipedrive deployments and we do long-term planned work with our customers.

What is Zimple?

Zimple is a Pipedrive consulting boutique founded in 2020. We began our operation only a couple of weeks before the world closed due to the global pandemic. Despite the challenging start, we have become the biggest Pipedrive partner in Europe within under a year.

How? We believe in what we do. We know what we do. We also have the best team to implement whatever we have the guts to imagine.

In a short time, we have become the biggest Pipedrive partner in Europe and we are your reliable partner in all matters concerning Pipedrive. Our strengths include efficient Pipedrive deployments, consulting, training, add-ons and integrations. Our Pipedrive-certified professionals reveal even the deepest ratholes in your sales pipeline and bring order where it is needed.

Together with us, you make sure that your salespeople have the best prerequisites for the efficient and competent use of Pipedrive and continuous development of sales.

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