

## User Adoption of Customer Reference Management Systems

### ▣ Overcoming the Eight Most Common Hurdles

As customer reference programs (CRP) mature so do the enabling technology solutions. While there are still some formal programs that run their daily operations on Microsoft Excel, Microsoft Access or some other desktop productivity option, many have migrated to a centralized, Web-based enterprise platform. Now that reference management systems (RMS) have greater visibility, and require greater investment (development, subscription, administration, etc.), expectations for return on investment have risen accordingly. No longer is it enough to just implement a solution then take an “if you build it they will come” position, assuming guaranteed success. This is how it started for CRM systems in the 1990s. Companies quickly concluded that in order to realize the *promise* of CRM, they had to adapt it to business processes and user needs, provide ample and ongoing training, and take data quality seriously.

CRPs are also realizing that RMS implementations need care and feeding after initial launch to realize the key benefits of faster retrieval of willing customer references, customer overuse avoidance, broader reference access to a geographically dispersed sales force, and program scale enabled through self-service capabilities.

RMS adoption has one important advantage over CRM adoption: sales rep perception. CRM systems demand a lot from sales people and often the payback isn't immediately evident. It's not unusual to hear salespeople grumble that they spend too much time updating CRM and not selling. The way most CRPs use their RMSs salespeople aren't expected to *give* anything, they only *consume*.

That said an RMS still introduces change into an organization and most people resist change because it takes some work and there is an uncertainty regarding the cost / benefit relationship. While there are many possible hurdles to user adoption, and oftentimes those hurdles are unique to an organization, the following are the eight most common hurdles along with suggestions for erasing them.

#### ▣ MEASURING ADOPTION

Adoption means different things to different stakeholder groups. We view it at two levels: system use and financial impact. First, a concerted effort must be made to simply get users exposed to the RMS and to develop repeat traffic to the system. Awareness is half the battle. Second, the use of key functionality must be measured; whether that's reference requests submitted each month, use of customer content, percent of activity occurring inside the RMS versus on the “black market,” etc.

We feel it's important to point out that the use of any RMS is going to vary across the sales force. Here are a few scenarios related to frequency of use to help explain why:

- The reps that prospect more aggressively and have more activity will, potentially, be heavier users.
- The reps with higher tenure and an established pool of references may need less help from the system. Conversely, newer reps will rely more heavily on an RMS and a CRP in general.
- Key account reps don't typically need references as often, and when they do they're often sourced from within their existing client list.
- Reference activity is somewhat seasonal, especially if the reps are in Europe where summer holidays tend to fall in a strictly defined window of time.
- There will always be a percentage of the sales team that just doesn't adopt new technology/tools. It may be hard to imagine that a salesperson wouldn't use *everything* available to close deals, but that's the reality.

Taking just these examples into consideration, what is a reasonable user penetration percentage to expect? Probably not 90%. Maybe not even 80%. But 50% or higher seems reasonable. Based on any percentage less than 100% you may be tempted to determine that not all users need access to the RMS. That seems logical, but if getting acceptable adoption is a challenge from the get-go, the potential value of the RMS is further compromised if a sizable percentage of the sales force doesn't even have access. The better approach would be to bring more of the non-adopters into the fold through training rather than simply exclude them.

That brings us to the second key measure, financial impact. We find this is the ultimate measure of success. After all, you don't need to achieve 80% or 90% adoption if the financial measures for the RMS demonstrate that the ROI is 200%, 300%, 400% or more on an annual basis. The most common methods of financial measurement include *revenue influenced and sales efficiency*. The questions to be answered are: “How much new revenue (deals) has been influenced by the CRP/RMS?” and “How much more efficient is the sales team as a result of the RMS?” More on [customer reference program metrics](#) may be found on our blog [www.customerreferenceinsights.com](http://www.customerreferenceinsights.com)

Now, let's take a look at some of the adoption hurdles you can take out of the picture with the corresponding answers we offer.

### ▶ INVOLVE SALES

This oversight always surprises us, but it's so prevalent we have to lead off with it. The primary audience for an RMS is the sales team, yet how they search for information, how they use the system relative to their sales cycle, and the terminology/lexicon they use are often not taken into consideration in the design and population of the system. Ultimately the RMS must support existing processes or improve them to stand a chance of acceptance. A full understanding of sales processes in general, and customer reference/customer content use specifically, should be priority one. This can be done formally through a Web survey, or informally through focus group discussions or one-on-one calls with sales people. While this information should be in-hand prior to system design/configuration, it is also the first place to start if you've already launched an RMS and not yet achieved the adoption you had hoped for.

If your RMS has been up and running for a while and has achieved less than desired adoption, then keeping an ongoing stream of feedback coming from sales is the key to taking it to the next level. Most sales environments see more than their fair share of change, so staying in touch and rapidly adapting is just part of the game. How do you stay on top of the issues that translate into RMS changes? We will be providing more in depth information on this in our upcoming white paper on Customer Reference Program adoption.

### ▶ CONSOLIDATE SOURCES

One of the most important things you can do to ensure user adoption is to make your reference management system (RMS) the sole internal source of 1) RMS functionality, and 2) customer content.

For instance, if your system includes a way for users to submit requests for assistance finding references for things like site visits, reference calls, interviews, etc., you remove other, competing channels for submitting requests (e.g., a Web form on the intranet).

As a best practice, customer content, such as videos, case studies, podcasts, etc., should only be accessible in your RMS and you should then remove copies of the content from other internally facing systems such as SharePoint portals. There are several good reasons for this draconian approach. First, simplicity is essential in getting the desired behavior from salespeople. If information is scattered around various company systems, they'll generally continue to follow the well-worn, historical path despite your attempt to increase adoption of a new RMS. Make it easy for them to move into the future with you. You need to blaze a new path and the search for content will provide the traffic frequency and volume you need to effect change. Second, version control is always a challenge once the program's asset library reaches a certain critical mass. Trying to keep track of, for instance, four different versions of a case study will be next to impossible. But if it's made clear that there is only one place to find the up-to-date, officially sanctioned versions of content, the chance of users relying on versions on their hard drive will be minimized.

### ▶ FILL THE HOLES

Nothing undermines the credibility of a database system like holes in the data. What good is finding a reference organization if you can't tell what specific products or services are in use in that account? What's the point of finding out that an organization has people willing to be references for a particular product or service if you don't know if they're willing to participate in the activity needed (e.g., guest blog, analyst interview, etc.)? While this is important regardless of the number of records in the database, it's even more important when the database volume is relatively low, as is often the case in the early stages of building the database. We often recommend delaying the launch if there's a chance it will get a bad reputation due to spotty data. Some users just won't return: it was simply a waste of time already in short supply, and now you've got an uphill battle against bad word-of-mouth to fight.

Thorough, ongoing data population is not, as anyone who's been in charge of a database knows, an easy task. What's needed is a systematic and systemic process to continuously validate and update information either through automatic data synchronization with other reliable systems, or through manual updates. While it depends on company culture and management backing, you will not generally be able to rely upon salespeople to update customer information outside of pipeline data (and even that is a challenge for many companies). If you must rely on a manual updating approach, expect to institutionalize a "reach out and interview" process targeting those closest to customer accounts (sales reps, account managers, professional services, etc.). Taking a proactive approach to this perennial database problem will pay off in spades. Once the reputation for your RMS as the most comprehensive, accurate source of information starts to spread - now you've got positive word of mouth - hold on, 'cause it's going to be a fun ride! And you'll find that the path you were blazing (see "Consolidate Sources" above) starts to get well worn by many feet.



**▶ GET IT RIGHT**

A close second to incomplete data on the data problem front is inaccurate data. This could include old address or contact data, content that should have been retired because it refers to products or services that have been renamed or retired, or customers that are no longer referenceable for one reason or another. The first time someone relies on faulty data and gets egg on their face, or wastes time on a wild goose chase, they will find another solution and that will be their de facto choice going forward. Accuracy is even more difficult to assess than the completeness of data in most cases. Again, the RMS will be reliant on either accurate data from other systems/sources (e.g., company demographics from D&B) or on the information systematically gathered from reliable customer-facing individuals in sales or service. When it comes to content, a regular process (review/update/archive) must be implemented to ensure misinformation isn't being disseminated by the sales force. Product marketing often re-brands or "end-of-life"s company offerings. People quoted in case studies leave those companies. And what about all the content that's still utilizing branding from two years ago? Someone in the reference team or the larger marketing organization should have responsibility for monitoring and taking the necessary action related to content that's no longer accurate. A three, six or twelve month review cycle should be instituted and maintained. It seems like it could be a lot of extra work, but without it the confidence you've instilled in your users at the outset will be eroded, and you'll see the great strides you made in user adoption slide backwards at a rapid rate.

**▶ IMPROVE SEARCHABILITY**

Even if you're doing everything right with respect to complete, accurate data housed in a single source, a critical obstacle to adoption may still exist in the form of searchability. As Nietzsche might have said on this topic: If the perfect customer story exists in the database, but no one can find it, does it exist? There are a number of reasons that RMS databases fail to make finding information easy for users.

**Here are the most common we've encountered:**

- 1) no one took the time to find out how users look for information
- 2) terminology used makes sense to marketing or product marketing, but not the largest user population: sales
- 3) the system isn't designed to enable multiple search methods
- 4) user training wasn't provided

**Let's take a closer look at each of these.**

It's easy to make assumptions when deciding how information is categorized in an RMS. The basics such as industry and geography seem so obvious, how hard can it be to anticipate the rest of the search criteria? We encourage reference managers to review several months' worth of sales team email blasts related to requests. Create a grid and count the occurrence of things like # of users, product versions, partners used, system integration requirements, etc. Look for the most frequently used criteria, then strike a balance in terms of options offered in the RMS—too many choices and the system feels overwhelming; too few and it'll feel incomplete. Remember that the more criteria you support in the system, the more maintenance is required to ensure accuracy.

If you've been steeped in your company's marketing lexicon then you think of product solutions, frameworks and methodologies that make perfect sense as delivered from on high from the CMO's office. When the market responds to conceptual presentations of a company's offerings, sales typically adopt the lexicon and life is beautiful. More often than not, however, we've found that there are the data sheets and white papers, and then there are the conversations between sales people and prospective customers; and they don't use the same language. If the latter condition exists and the RMS is built around marketing's view of the world, the sales team will struggle to find what they need. Should sales be told to "get on board!" and that's that, or should accommodations be made to ensure they find what they need? Each company will take a different tack. But by simply being conscious of the potential pitfalls of not recognizing that sales may use different terminology, you'll be one step closer to gaining user adoption on this front.

You've no doubt heard that people learn in different ways because we're all wired differently. The same goes for search methods. An effective RMS search interface will provide a means for conducting a full text search for content, filtering based on specific criteria and even building more complex AND and OR queries. The trick, as we have learned, is to make the interface easy and uncomplicated to use for the majority of searches that aren't complex (80%), while also offering more advanced capabilities for the remaining 20%. The goal is to not leave anyone out if it can be avoided.

In a perfect world your RMS would have a zero learning curve. The reality is that we're all so busy today that sometimes it's not the complexity of an interface that prevents adoption, but the absence of time spent becoming familiar with the new interface. Naturally, when we hear "new tool" our tendency is to react with a sigh. We wonder just how hard it will be to get the hang of the company's latest and greatest answer to our productivity. Just the potential for frustration or lost time in the learning process is a good enough reason for procrastination. There's only one way around this and that's bite size, continuously available training. Salespeople will use the RMS when 1) they have a need, 2) that need can't be fulfilled through other avenues, or 3) they remember that there is actually a tool that can specifically assist them in this area.

For some it's weekly, for others monthly or quarterly. They need training—or hand-holding—when the need arises. An added bonus: Having an opportunity-dependent need at the time of training will lead to better retention as any adult learning theory expert will confirm. Offer a variety of learning options (e.g., live/Web, embedded help, step-by-step guides), but don't underestimate the importance of live training or help options.

### ▶ HIT CRITICAL MASS

If you've ever gone to a store to buy something expecting to have at least four, five, six or even more choices, but find only two, you can relate to the salesperson that arrives at the RMS search results page only to find one or two relevant options for her needs. In the first example, would you return to the store?

Whether referring to the quantity of customer references or customer content, user adoption is dependent on critical mass to be successful. Many of our customers spend 30-60 days building the mass of the database before launch to avoid the experience one has shopping in a big box store 15 minutes before closing on a Sunday evening: "Hello? Anyone home?"

Although it's not possible to recommend a specific quantity that guarantees a good first impression, the real question is "How much is needed to 'wow' the sales force relative to what's available today? Your sales team could provide that feedback. The best approach is to ask the question based on sales scenarios and specifically, segments. We think of segments as a combination of industry, geography, product/service/solution, etc. Some segment references will be in more demand than others and understanding the priorities will help determine the requisite, corresponding quantities of references and content. Typically priorities are driven by where the highest reference demand is today, and where the company's strategic focus will be tomorrow.

### ▶ REMOVE THE HOOPS

At a bare minimum your RMS should be accessible to any authorized user with a Web browser. The promise of a well-conceived RMS is anytime self-service. Without a significant self-service capability your customer reference program (CRP) will be difficult to scale and will be very resource intensive. This is hard on everyone in the CRP team (we've yet to find a CRP that's had too many resources!) and makes it even harder to secure funding. Beyond Web accessibility and self-service functionality, the ideal situation is to make the RMS accessible from within the sales team's home system. This is typically the company CRM application, but it might be a sales portal, etc. More and more companies are implementing single sign-on capabilities to minimize the need to memorize a multitude of passwords unique to the systems used on a regular basis. If your RMS cannot be integrated into sales' core system the next best thing is to make links to the RMS visible and remove the need for a separate login. Remove any hurdles to getting to all that awesome customer information and increase the rate of adoption.

### ▶ CONCLUSION

As you can see, there are a variety of causes that can undermine user adoption of an RMS. It's natural to want to throw your arms up in the air and write off your lack of progress to sales people just being difficult to corral, like herding cats. It's also easy to focus on the wrong things related to the technology. If the underlying data is bad, no technology solution will do what you want it to do. But there are some clear, explainable reasons for lack of adoption that an attentive, determined CRP team can address and overcome. Begin with a thorough, honest self-assessment of your situation. The good news is that adoption issues aren't so mysterious, and with a focused effort you can achieve a realistic and reasonable RMS adoption level by approaching this exercise with more science than an art.

Our intent with this paper—as well as the other tools that we've produced for the customer reference community—is to provide you with ideas and insights to achieve continuous improvement. Our knowledge base is the result of extensive work with customer reference programs of all sizes, worldwide.

We will be publishing a companion paper, "*Customer Reference Programs: A Guide to Increasing User Adoption*," which addresses the challenges of driving adoption of a Customer Reference Program in general. Other related tools in our growing library include the [Customer Reference Program Maturity Model](#) which provides an evolutionary roadmap for establishing and maintaining a comprehensive, world class Customer Reference Program, and the [Customer Reference Program Marketing Plan](#) which provides a step by step plan and timeline for establishing a formalized Customer Reference Program.

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