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CRM User Adoption

Why is it Important

How to get it

Management's Role

Training

User Experience

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Poll Question 1

What is your current CRM status?

A: Not looking

B: Searching Immediately

C: Planning for next year

D: Purchased a new CRM and getting ready to implement now

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User Adoption – Why is it Important

Data Collection

Strategy

Employee Motivation

Investment

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User Adoption – How to Get it

TOP DOWN SUPPORT

USER FRIENDLY CONFIGURATION

TRAINING

LEVERAGE THE TECHNOLOGY

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Top Down Support – Management's Role

- **Drive Project**
  - Selection
  - KPI's
  - Design
  - Implementation
  - Training

- **Use The CRM**
  - Sales coaching
  - Marketing strategy
  - Executive reporting

- **Reinforcement**
  - Regular training
  - Continuous improvement

LEADERSHIP

Support
- Teamwork
- Strategy
- Motivation

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Team Involvement

Discuss Current Usage

Give Tools to Increase Effectiveness

Streamline Processes

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Project Implementation & Data Migration

Methodical and Structured Project Plan

Coordination and Project Management

Workflow Consultation

Data Migration
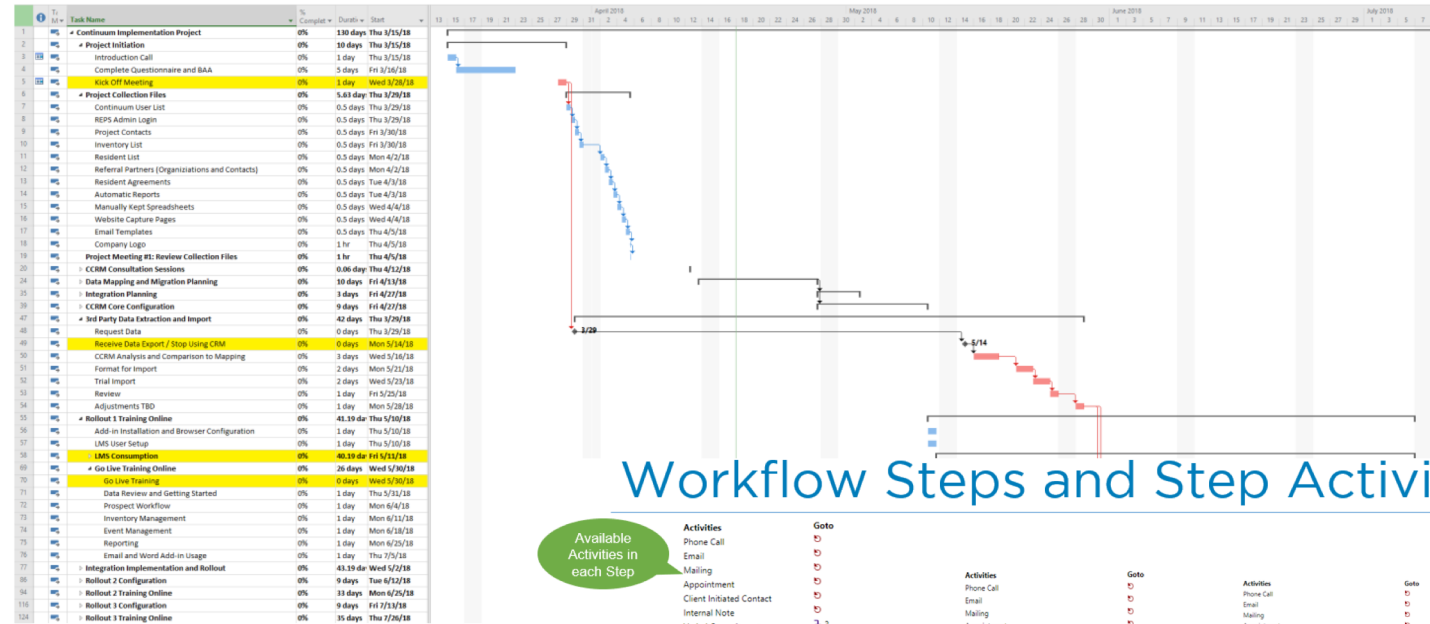
Workflow Steps and Step Activities

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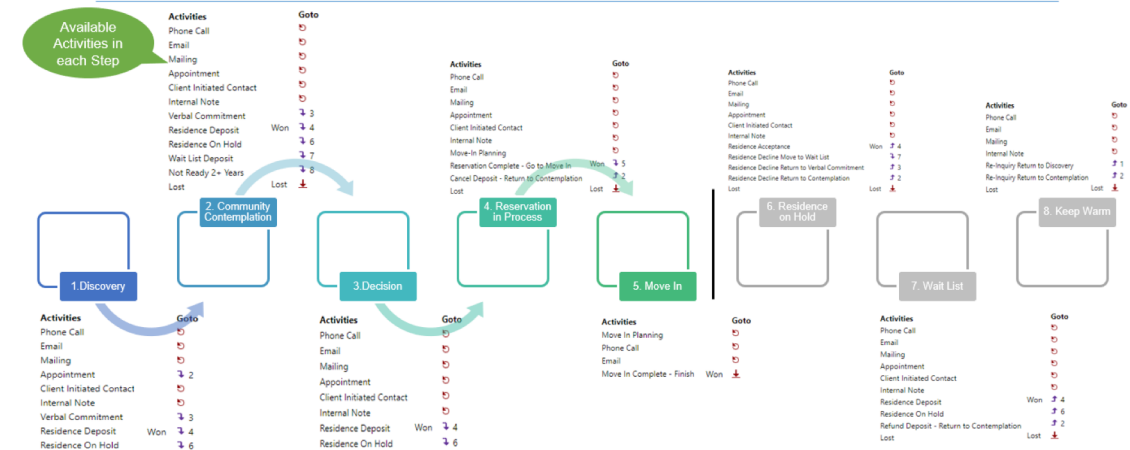
User Friendly Configuration

Ease of use

Tailor to User/Role/Community

Incorporate your culture

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Training

Appeal to all learning styles

Role based training

Training sales process

Support after the project

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Appeal to all learning styles

Visual

Audible

Verbal

Kinesthetic
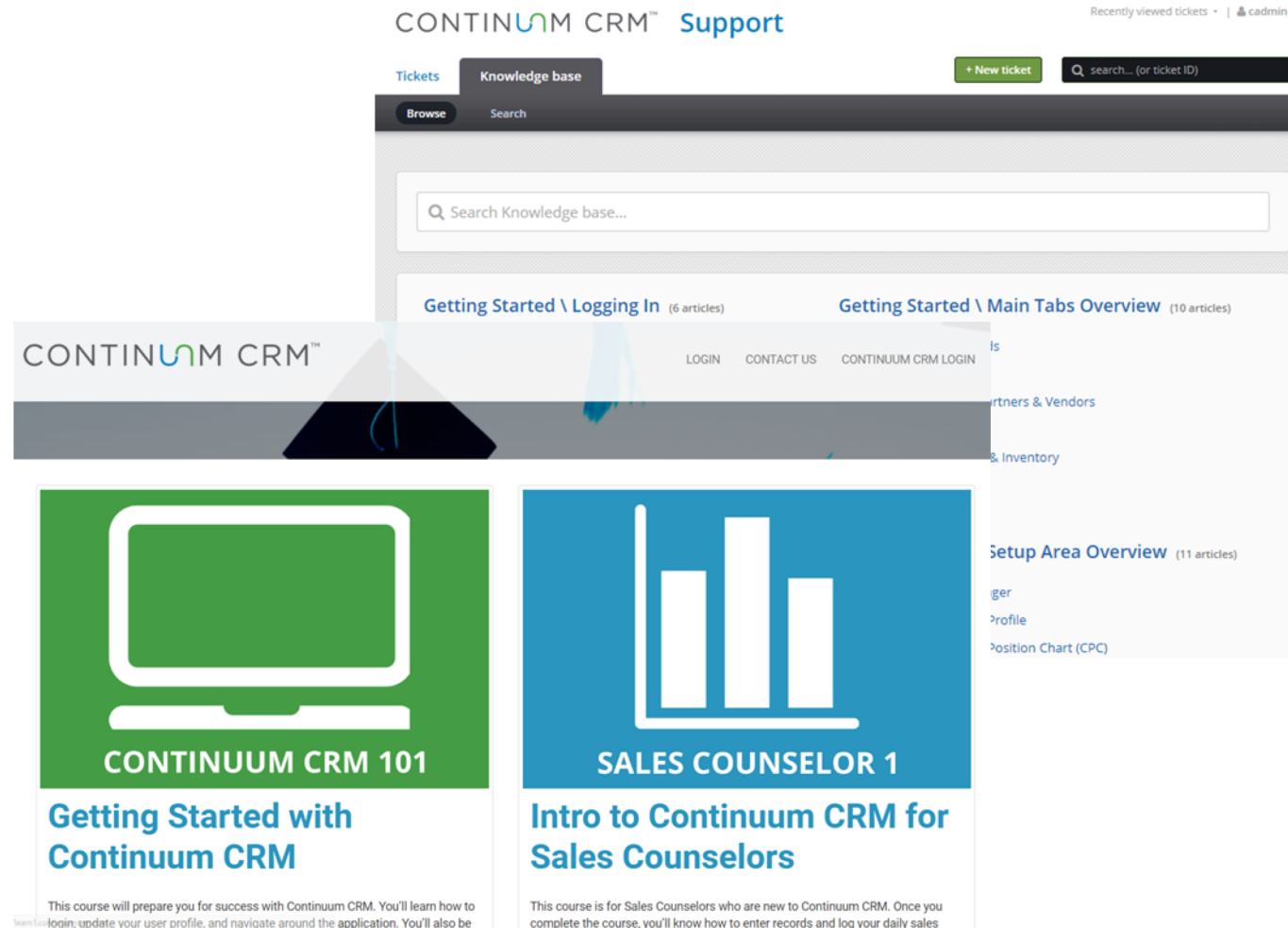
Role Based Training

Sales Counselor

Sales Support

Marketing

CRM Administrator

ONLINE EDUCATION

IT'S TIME FOR LEARNING

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Poll Question 2

Does your organization currently follow a defined sales process?

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Sales Process: Why does it Matter
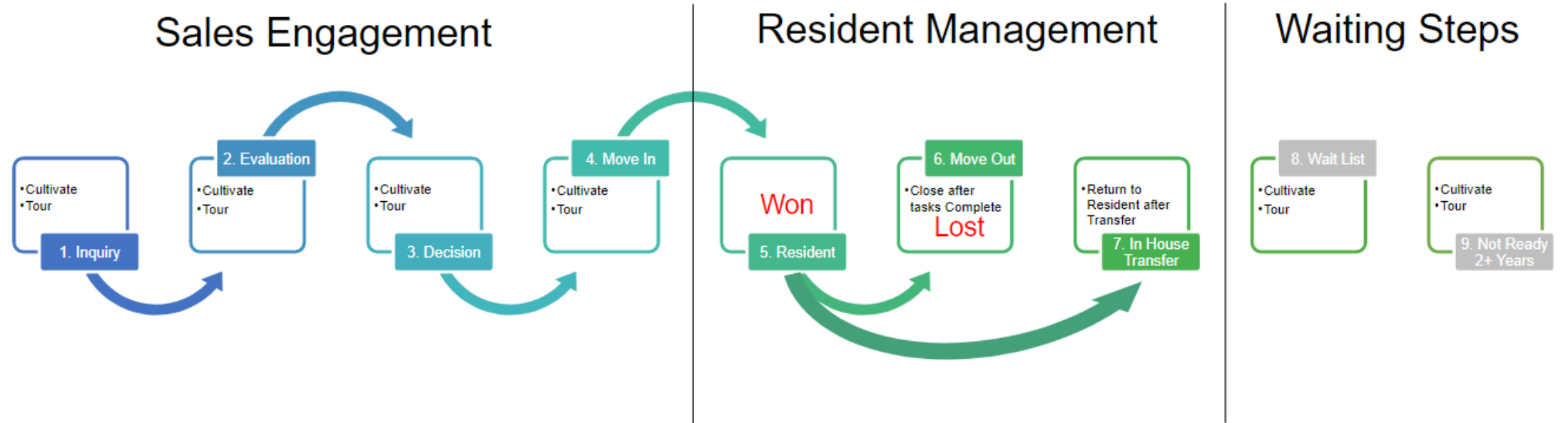
Purposeful Engagement

Forward thinking

Reinforces consultative selling

Incorporates _your_ process and language

Ongoing Support

KNOWLED GE BASE AND FAQS

ONLINE SUPPORT DESK

PHONE SUPPORT

REMOTE SESSION TECHNICAL AND CONFIGURATION SUPPORT

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Poll Question 3

Do you feel like your team leverages all the functionality of your current CRM?

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Leverage The Technology

Workflows

Custom layouts and data fields

Integrations

Email marketing

Prospect readiness scoring

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Workflow

Prospects follow your community's Sales Process

Each Workflow Step represents a different stage in the Buyer's Journey
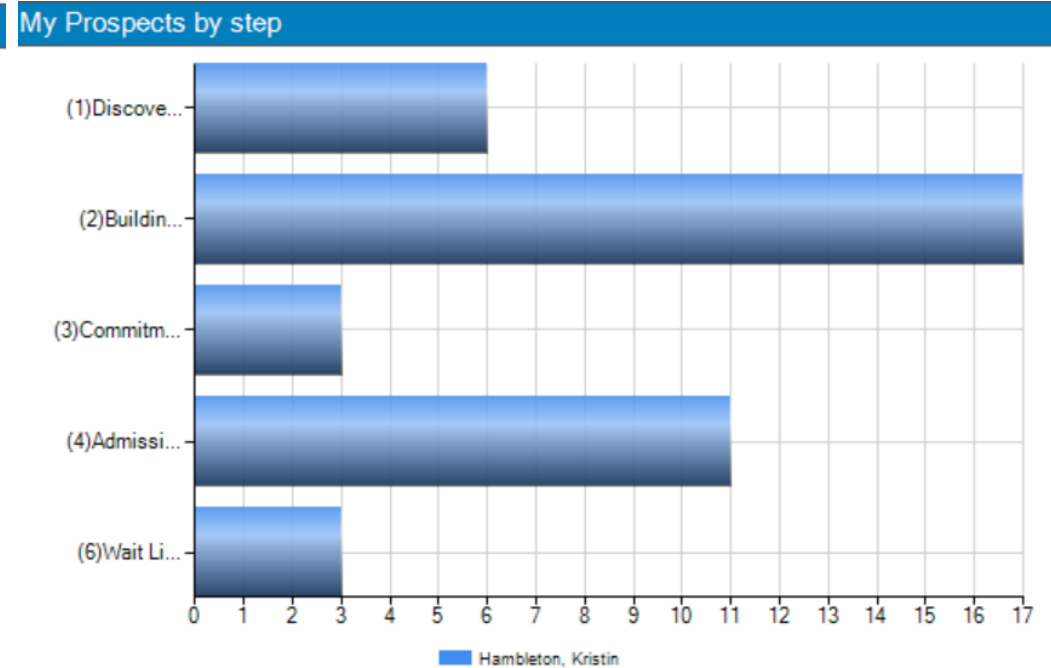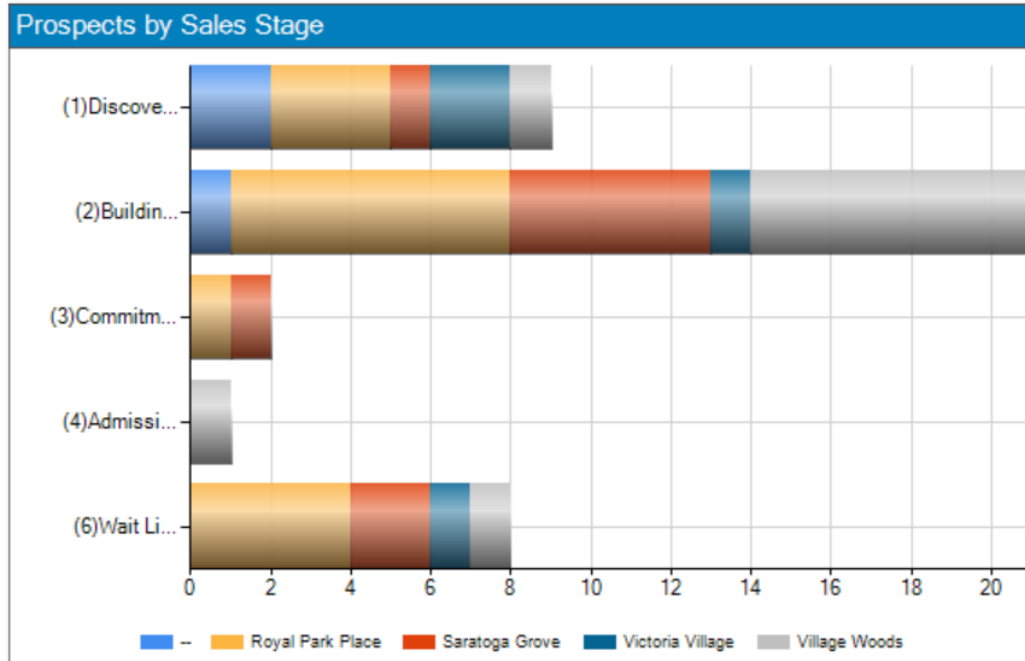
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Unlimited Layouts and Custom Data Fields

- Red/Yellow/Green
- User/Role/Community
- Experience Tailored to Individual

Integration

Eliminate duplicate data entry
Provide visibility into and within other applications

Continuum CRM offers:
Custom API Integration

Webhook Integrations
    Site Staff Chat, Hubspot, Act-On etc.

Office Application Integrations
        Outlook
        Word
        Excel
        GSuite Calendar

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Web Lead Capture/Assignment

- Use on any Web or Landing Page for Digital Lead Capture
  - RSVP for Events
  - Submit Contact Requests
- Auto-populates Inquiries from the Web into Continuum
  - Emails an Auto Response to Inquiry
  - Assigns Inquiry to User or Queue based on Routing Rules
  - Email Notification of New Inquiry

◄ Back to Events

Monday, August 20, 2018

The Saint John's Bible Public Viewing

The Saint John's Bible is the first handwritten and illuminated Bible commissioned by a Benedictine monastery since the advent of the printing press more than 500 years ago. The one-of-a-kind Heritage Edition of the Saint John's Bible is a full-size fine art edition of the original manuscript created under the direction of Donald Jackson, the artistic director of the original manuscript. Each volume received finishing treatments by hand, and only 299 sets of the Heritage Edition were created.

As a participating organization of the Benedictine Health System, this special opportunity is brought to our community with support from Benedictine Health System to honor the 125th anniversary of our Sponsor, the Sisters of St. Scholastica Monastery, Duluth, Minn.

Map | Satellite | Hammond uth Troy

Event Registration

First Name*

Last Name*

Email*

Phone*

Number Attending*

1 ▼

Submit

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Email Marketing and Tracking

Tracking and Statistics
- Delivery
- Bounces
- Opens
- Clicks

Unlimited Custom Templates

Schedule Email Delivery

Personalize your Email Templates

Individual Results of who Clicked, Opened and etc....
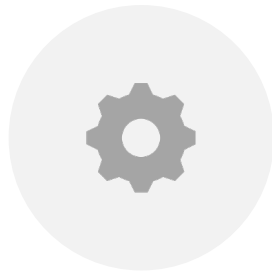
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Prospect Readiness Score

Objective Scoring Tool

Based on Prospect Engagement
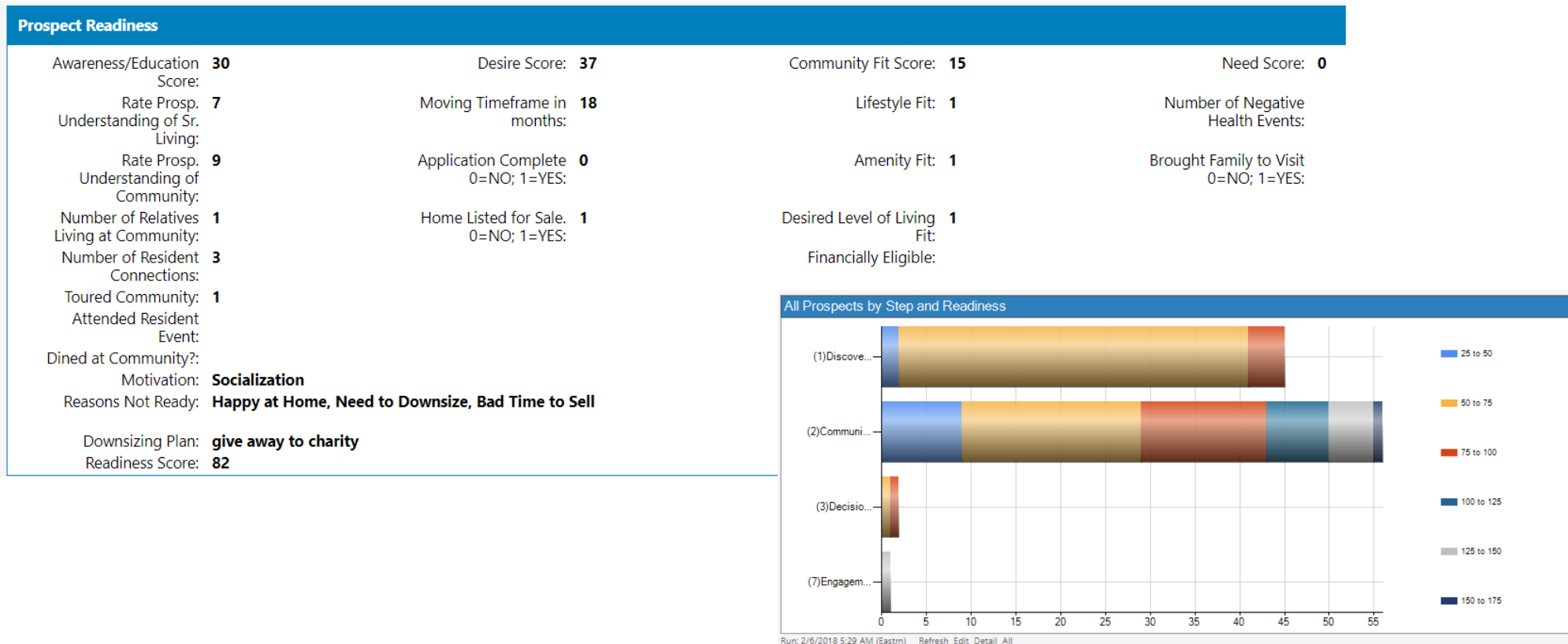
Successful User Adoption

TOP DOWN SUPPORT

USER FRIENDLY CONFIGURATION

TRAINING

LEVERAGE THE TECHNOLOGY

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Why Continuum CRM

CRM Functionality	Project Rollout
Conforms to *your* culture	Project Management
Customize *your* terminology	Learning Resources
Prompts user for next steps in the buyer's journey	Customer Support

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Thank you!

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