



Transitioning from Salesforce.com to SharePoint CRM

History of Salesforce.com

Salesforce's management is full of smart marketers. They understood the psychology of humans and software when they hit the ground running over a decade ago. We take our hat off to their insight and creativity in leading the masses into a new way of using CRM software – delivered as a service (SaaS).

While the majority of software companies were still clinging to their Windows applications and a few were hanging off the ledge of web-based .NET systems, the guys at Salesforce put an introductory product on the market with the new and exciting brand of “No Software” along with, in my opinion, a hyped up world tour that got everyone so excited with being part of the in-crowd that they signed up by the millions.

And the rest – as they say – is history. Once the millions of paying customers were in place it became a simple task to entice developers around the globe to build Salesforce applications. This strategy succeeded because the interest of potential users piqued at the prospect of all that Salesforce third party products could offer. Users could have all of this if only they signed up for a year – which they did, in droves.

As time passed, Salesforce became the de facto premiere CRM to use. Ask the question “what CRM do you use?” and the answer would inevitably be stated with pride “We use Salesforce!” It was a simple marketing model that was convincing to a public frustrated with their early CRM failures and who were now ready to see the benefits they had been promised by Windows CRM Vendors. Organizations around the globe jumped on the new concept, wanting to believe that the resolution to CRM failure was to eliminate the software part from onsite servers. Needless to say, the strategy worked like a charm.

History of CRM and SharePoint Flex

Our core team got into the CRM software business before CRM was even called CRM. Early CRM systems were developed for Real Estate agents who had a heavy marketing focus. This type of software was geared toward the business to consumer market and the individual user. CRM came into being when organizations pushed for centralized databases, which gave birth to the concept of CRM as we know it today – primarily business to business.

It’s an interesting history, because the acronym “CRM” was heavily contested by the CRM pundits at that time.

They tried hard to change the name to something more inclusive, such as “Relationship Management - RM” or “Business Relationship Management - BRM” but when Microsoft came out with their own CRM the acronym for this type of software was sealed for good.

Our company meandered through the many minefields of CRM over the ensuing 2 decades. We participated in the evolving CRM space as trainers, consultants, technical supporters, integrators and developers. We became resellers of CRM products around the globe – from Windows to Web.

Since its inception, CRM software has failed to deliver a respectable ROI and failure rates have been too high. Despite it being harder and harder to be competitive without a CRM system, far too many companies failed to get more value than what an “ad hoc central contact list” provided them. The industry as a whole continued to pump up the “feature hype” as a solution to the problem.

It was this persistent situation that drove us to wrestle the CRM software beast to the ground and figure out what needed to change in order for organizations to start really profiting from their efforts.

What we learned

If there is one constant that we have learned over the years it is that users want simplicity. Unfortunately, however, as the years were passing so was the race to develop more features than users knew what to do with – marketing wars was the #1 focused effort for software companies. What became important is “who had the longer list of features and functions and who could get more awards?”

Users' needs were no longer important. Users were lost in the fray of the giant software companies battling it out. The prize was worth billions of dollars as companies globally realized they needed better customer and prospect relationship management systems to handle their changing landscape of sales.

Many business people have the misconception that everyone except their company is "doing CRM". In fact, there are many companies who are "doing CRM" poorly and spending a lot of money but getting little value in return – apart from making software vendors (and their shareholders) very wealthy!

There are a few simple formulas for success. In general terms they are:

- Less is more – don't try to resolve all your problems in one go.
- Improve continuously – build upon the early successes.
- Begin with the end in mind – know the end goal and work steadily toward it.

To find an answer to why companies continued to experience CRM failures and were still paying high fees every month, we looked to human psychology.

When Salesforce became cool

Somewhere along the way, using Salesforce became the in thing to be doing. While in my opinion, everyone knew it was expensive; users seemed to feel good that their company had the latest and greatest software – regardless of the price or fit for the business.

But after some years passed, even the once new shiny software seems like more work. The same old issues from the Windows days started to show up. Your team was not prepared for the changes; so more resources were thrown at the management of the system. It's not as rosy as it was at the beginning when everyone was so enthusiastic about the new software. You've learned by this time that to really get buy-in from your users you have to give them something they want – business information from your internal systems.

You start looking at what is required to connect the systems. You start sweating. Suddenly the reality of the situation is here today. To make this information available to the sales people you have to connect your valuable ERP data.

In love with the interface?

Recently I was speaking with a VP of Technology who attended a Salesforce presentation with his business users. They were excited by what they saw on the demo and wanted to sign up immediately, but this smart fellow reminded them “What you see on the screen depends on data that you will have to enter with consistency!” He reminded them that they had not collected information with the current system they had. He was able to bring the group back down to the reality that this was a prepared demo. How many situations like this occur without an IT Director in the room to bring a little reality to the situation?

In your business it may have become obvious somewhere along the line that Salesforce was a lot more resource intensive than anyone thought it would be. All the features, functions, third party products and no-code options are great but if you are paying for them and not taking advantage of them, it may not be the wisest financial decision. One day the CFO or CEO may start asking “what are we getting for this investment?” and the game begins to change. New options once again start to be evaluated.

Why CRM falls on IT to deliver results

Back in the “old days” business managers often made the software purchase decisions but those days are gone. Recently a client of ours had to incorporate 5 different systems that had been used for managing the sales processes of her company. An IT Director would never have allowed that to happen. Business people typically do not know how IT systems work (or don’t work) together. They usually don’t have the necessary knowledge of scalable options. Non IT people are therefore too often wowed by features and functions, which is why software companies like Salesforce have been wildly successful. That is their target market.

CEO’s don’t need to understand technology but they certainly need to understand the balance sheet and sometimes the CEO will need to step in and make a firm decision. Recently, we heard of such a situation where a CEO asked what the \$250,000 per year spent on their CRM was bringing the company in return and since no one could answer the question, it was cancelled. Just like that!

The organization had to scramble to keep data being managed. CEO's have no time for expenses that cannot be justified – and rightfully so.

Asking the tough questions

Folks in IT are capable of asking the tough questions. They are not as apt to fall hook, line and sinker for fancy features they know their users cannot utilize. IT people ask questions about options regarding connectivity, scalability, integration options, data access, permissions, privacy and the protection of business intelligence. They look realistically at the results that can be attained and manage expectations internally. The people in IT know that they are accountable and will need to defend the decisions they make. Therefore, CEO's who put all software purchases in the hands of IT Managers are making the right decision.

It's been a few years since you and many others have 'followed the crowds' and signed up with a CRM such as Salesforce and maybe now you are starting to weigh things up, looking at what you have spent and what you've received in return. In my experience and opinion, you know with certainty the company you manage IT services for has likely not realized the benefits they signed up for. You believe it is your duty as the person responsible for technology to find a better solution – a less expensive solution – one that you can manage internally. Perhaps it has been the CEO or CFO who has asked you to start looking for a solution that can support the business' sales efforts without costing a fortune? Whatever the reason, here you are....

SharePoint CRM

Smart organizations know the power of leveraging their assets and investments. We believe that leveraging existing licensing fees to another software application is the smart thing to do. It is now possible for organizations to free themselves from the constraints of stand-alone CRM systems that license by the user and to start taking advantage of their existing licensing with Microsoft and SharePoint.

The key to successful CRM is to:

- Keep it simple
- Move the change in slowly
- Get people working together
- Offer something that users want
- Support your users to adapt to change and understand their role within it

Our product, SharePoint Flex, was developed to allow organizations to use their own smarts, their own methods and processes to drive best practices that will propel their businesses forward.

We learned that people use about 20% of any software application when the software is not personalized to their business, and possibly less. They will use 80% if the software is custom configured for their business.

The word customization strikes fear in businesses because they relate it to the word expensive. SharePoint Flex is designed to be easily and inexpensively configured.

We focus on making the 20% of functionality everyone needs as efficient and easy to use as possible because we understand that salespeople should be selling and not filling in forms.

Moving on from Salesforce

Once your organization has determined that the SaaS pricing model no longer works, naturally, you will be looking at other options. You may wish to review vertical market products for your industry or extensions to your existing ERP system? Considering making your own CRM is not a road we would recommend you go down. Whichever system you end up purchasing, here are the general areas you will be involved in.

1. Create a project team

You definitely do not want the entire weight of a movement from one CRM to another on your shoulder. Select a Project team that is small enough, perhaps 2-4, but that represent leaders from key business segments. Ensure they are committed to the change and that they understand the business. We definitely do not need saboteurs at this point but rather management leaders.

Steps to take with your project team

- Evaluate your data and the current way the existing CRM is being used to track sales with the project team.
- With the team's agreement, eliminate the pieces of the current system that are not consistently used. The goal is to make the process for users simpler – definitely not more complicated.

- Make copies of all the screens in your current CRM just in case someone comes back at a later date with a request.
- Develop a list of the key reasons to use each of the modules, along with fields and any specific requirements that you uncover. Prepare this for the new CRM vendor so they can quickly get up to speed with the specific needs.
- List what users and management wants to get out of the CRM.

2. Bring your CRM vendor on board

Bring on your new CRM Vendor as early as possible and start to lean on them to coach and assist with the process of quickly and efficiently replicating the good things from your current CRM and at the same time helping you eliminate functions which are irregularly used.

Steps to take with the new vendor

1. Ensure they understand:

- a. Your fundamental business relationships and how your sales staff sells.
- b. Your structural layout – including branches, divisions, territories.
- c. Your sales staff – how long they have been with the company and some of their challenges.
- d. Your current industry challenges and situations.
- e. Your existing front and back end software systems and how they relate to each other.
- f. All existing sales related software.

2. Sign an NDA if you have any concerns about your intellectual data.
3. Speak to existing customers to find out what level of after sales service they have received.

3. Data discovery

The first thing to evaluate is always data.

- What type of data do you have in Salesforce?
- Can you export all of the data?
- Will your export have a key field in each table where lists can be reconnected?
- Is there any structure to the data the users are entering? Policies in place?
- Are emails/ documents stored in the CRM? Are you able to extract these?
- Is your Sales data tied to your ERP data?
- Does the data need to be cleaned up before you import to the new CRM? If so, who will do this and how long will it take?
- Once you understand what the users are doing currently you can assess the data situation that will be required to move forward with your new system.

What to look for

- How current is your sales data?
- Who are the regular users?
- Are they using Opportunities?
- Do they save documents?
- Are they using Templates?
- Are there a lot of duplicate account records?

- Do they log new business as leads or as accounts?
- Export a list and ensure that you can do the same for all the modules in your current system. Send this file to your new CRM vendor to ensure there are no gotchas when you are finally ready to move.

4. Sales process definition

Now that we understand the data situation, we can turn our attention to the primary reason we use a CRM system and that is to manage sales related situations. Whether those sales situations are in relation to new business or existing customers, the primary focus now is on the current sales procedures, policies, methods and systems.

What to look for

- Is the Leads module used? What type of data is in it?
- When was the last time anything was entered or modified in the Leads module?
- Look for consistency in use – notice the patterns and the last time it was used. This will tell you whether they have any level of commitment to this module.
- Assess the current use of Opportunities and logged communication.
- Are some of the Opportunity fields consistently used where others are not?
- Is there a structured sales process and/or corresponding sales steps or stages they follow?
- Do they track their tasks and interactions as they relate to Opportunities?

- Do they use tasks to communicate with other members of the sales team?
- Do they participate in team sales or is the Opportunity system segmented by solo Account Rep?
- What do they use for doing Quotes and Estimates? Are there standard templates they use?
- What role does Outlook play? Do they save email communication to the CRM?
- What reports are being regularly used and by whom?

5. Specifics

Here are some specific steps you can take now that you know the data situation, how the current system is used and your new CRM Partner is up to speed on your business.

- Get a sample dataset imported into the new CRM system to see how it fits.
- Replicate the steps currently being used in the existing CRM system to ensure people can at least do what they have always done.
- Bring on a few of the keen sales team members and sales management to begin the refining process of the sales system (unless you have a sales consultant on staff or working with you).
- Get everyone involved to write down what they want out of the CRM.
- Define a Pilot Start Date and a Go Live Date that is realistic. Give yourself about 2 months.
- Gather details on the current situation with desktop software – versions etc.

- Get the CEO behind the initiative by putting out a notice to all involved parties.
- Define the information and analysis required by management (that relates to opportunity management). Ask them what they would like to know – this question is easier than what reports they want to see.
- Pencil out any procedures, processes and methodologies that people like and are working – giving results – to the company and / or users.
- Ask the users what they liked or didn't like with the current CRM.
- Ask the users what part of their work they find inefficient and if they could change they would.
- Talk to marketing and find out what systems they use and what marketing activities they participate in.
- Get copies of any marketing collateral sales people used, along with templates.
- Determine how the sales people quote new business. Do they use a specific software or do they use Word/Excel?

6. Reconstructing the new CRM

With all the information above on hand you are now ready to reconstruct your more affordable CRM system with the assistance of their professional services group. Each module will be recreated and each process and method that was on the “keep list” will be set up. Note that if there was custom configuration in your current CRM this may have to be recreated in the new system. Once the new CRM is ready you can provide demonstrations to different parties to both educate them and get their buy-in.

Look for people who want to lead the change. You are getting ready to hand the project over to the project team leaders so ensure they are fully aware of their next steps.

7. Launching

This is one of the phases of a software implementation that can take on any number of variations and it really depends on the organization's construct as to what will work best. Some organizations are very organized while others are more informal. What is important is that your folks are not encouraged to think, "oh here we go again". By delivering clear and consistent messages throughout the design and development phase everyone should be on board with the program by the time you launch!

Think about your organization

- How long have they worked for the company?
- How computer savvy are they?
- What percentage of their day/week do they spend on the road?
- Do they collaborate in team selling activities? Or is this a new initiative you can tag onto the CRM?
- Are there any administrative layers that the sales people can lean on – customer service or inside sales staff?

This is just a software change – not a process change. Emphasize that little is in fact changing except the tool they use to manage their sales activities.