

E-BOOK

THE DEFINITIVE GUIDE TO CREATING A SMOOTH SAP CRM IMPLEMENTATION



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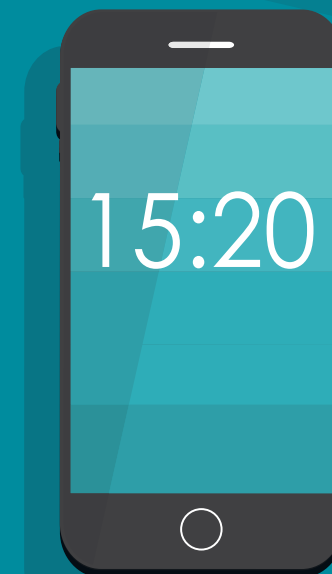
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INTRODUCTION

This white paper is addressed to CRM Managers and IT Professionals who are planning on implementing a CRM application from SAP. Its content is not technical, but oriented towards business and implementation processes around the introduction of SAP CRM applications into an organization. The Cloud-based SaaS version, 'SAP Cloud for Sales', is gaining a lot of traction in the SAP market due to the multiple benefits of simplified infrastructure, rapid deployment, easy upgrades, reduced costs and government-standard security. These are all 'back end benefits', but to a CRM user on a sales desk the back end makes little difference when faced with adopting the application and working efficiently with it.

The same challenges to increasing adoption levels persist as with the traditional on-premises model, but there are now Cloud-based tools which can make a significant difference to adoption level outcomes and the benefit realization timescale.

The most often quoted rationale for implementing CRM is that it offers a holistic customer view and will significantly improve the customer experience (e.g. the National Bank of Canada 2015). However, not all SAP CRM projects deliver the anticipate benefits in the planned timescale.



POOR ADOPTION LEVELS

A recent (2013) survey by the Institute of Sales & Marketing Management (ISMM), found that 77% of organizations in the UK now use a CRM system – but that of these, some 40% are not satisfied with the results. Other studies reflect this and identify that the failure reasons are far from being technical, and there is no reason to doubt that this applies in most countries.

MyCustomer.com (2011) quotes Samantha Kinstrey, a training company manager:

“For example, with something as isolated as Microsoft Word, anyone can start it up, write a document, save it, print it, and close it down. This gives users complete control of the process from start to finish. Beginning, middle and an end. In the case of CRM, users may be involved in a beginning and perhaps middle, but not often an end and so forth. Training is the only way to give employees this level of understanding – and without it, employees will lack the necessary understanding to ever make the CRM system perform well. This is unlikely to be heralded as an epiphany. But it does beg the question why CRM training is therefore so often undercooked.”



DELAYED BENEFITS

It is generally accepted that many complex applications such as CRM do not always deliver their benefits expectations in the planned timescale, and 'soft' aspects figure frequently amongst the reasons for benefit shortfall or delayed flows. These issues can result from a number of causes such as:

- Inadequate budget and rushed, late training.
- Sub-standard business process analysis and re-design often arising from poor user consultation compounded by complex business processes to be implemented.
- Users not fully understanding their part in the overall CRM process and how other CRM users depend on the accuracy and completeness of their data input.
- Low quality/generic training materials - vanilla, no tailoring for the customer, customization and processes.
- Sub-optimal training delivery – e.g. generic vendor trainers not understanding the specific customer business processes, being product, not business, focused; vanilla training on a customized system.

- Viewing training as a cost - One-time training courses do not equip a customer for employee churn – training is an investment in an asset both human resources and the training collateral for re-use.

In SAP CRM, several of these issues may be seen in particularly complex projects such as those that use of Customer Relationship Billing (requiring the integration of IS-U and CRM). These failures are clearly serious when it comes to CRM, as this should be the spearhead of the business and disjoints here soon become obvious to customers – and hit the bottom line.

Inadequate budget is outside the scope of this paper, but if a budget should prove to be inadequate, then that is a symptom of poor planning. It is usually the case in steps later in the implementation process– such as training, but by then it is too late.

The irony is that with the rapid growth of the cloud – and the ramp-up of SAP Cloud for Sales, many of the technology issues have been simplified. The spotlight is now on the processes and the people, and here we consider some of the issues that training presents for complex applications, particularly SAP Cloud for Sales.

CHAPTER 1 – 5 CHALLENGES HOLDING BACK YOUR SAP CRM TRAINING

#1 Training Models and Timescales

This is probably the most complex of the challenges as it embodies several aspects. Traditional training approaches are expensive (particularly when the downstream effects of poor provision are costed), and when budgets are under pressure then 'late in the schedule' activities in a project plan come under pressure. The need to train large numbers of staff late-on in often slipped projects puts pressure on trainers and staff alike with traditional training delivery models breaking down.

These issues are exacerbated where complex implementations using Tier 1 products such as SAP CRM are involved.

The effort involved in a trainee absorbing training material is considerable, and there is a balance to be struck between starting training early and leaving it until as late as possible. Both approaches have their problems:

- Early training means that knowledge retention rates will be low for trainees, and refresher training may be necessary. Last minute business process changes or workarounds may also affect training needs. Users may 'go live' feeling inadequately trained.

- Late training compresses the time available for knowledge take-on and may overload trainees; again, retention may be an issue. Users may 'go live' feeling a high degree of frustration.

Then there is the need to provide repetitive training as new staff are taken on. For example, Nu-Skin Inc. (2015) chose to implement SAP CRM because call center staff was turning over rapidly, resulting in the company losing money on repetitive training. They needed to shorten the time for handling a call, reduce errors and escalations, and minimize callbacks. Traditional training models are 'lumpy' and therefore costly in this respect. Training ROI is reduced markedly.

#2 Knowledge Retention

Trainees have a tendency to forget what they have learned shortly after training. A much quoted 'rule-of-thumb' is that trainees forget 67% of what they learn within 48 hours. Whether the numbers are accurate is debatable, but the principle is widely accepted (for a fuller discussion see Thalhémier 2010). It is axiomatic that the more complex a business process, then the lower the retention rate is likely to be. This presents a training challenge in which the 'push' model of training (a fixed body of knowledge to a set of trainees in a specific location and timeframe) is not tuned to individual learning styles and knowledge absorption rates. This is clearly more acute when an implementation is under way and formal push models are

the norm so that the training boxes can be ticked (the typical IT view).

#3 User Errors and Repeating Mistakes

Poorly trained and /or poorly motivated employees can make mistakes that can cost a business a lot of time and money. Users become nervous when faced with major changes to the business process in which they are involved. Poor training and preparation for change can affect their individual job performance, appraisals and rewards and create significant workforce stress and tension.

The outcome can hit the company's bottom line hard and it can take years to recover from the results of a poor customer experience offering.

When a full scale CRM implementation is underway, having departmental 'superusers' to provide transitional user support may not be enough, even with full help desk facilities configured. Anyone who has been through a major ERP implementation will recognize the potential for major disruption, which is compounded in customer-facing systems such as CRM. This problem can be very acute when a distributed sales force – even worldwide – has to be trained. ContiTech.de (2015) is one such company, with sales representatives from Asia to South America and all the issues that entails from timezones to language and culture.

The training challenge here is to ensure that user errors and repeating mistakes are identified, trapped, handled and fed back into training collateral and processes. This is not straightforward with the 'push' model of training as the feedback cycle can be quite protracted.



#4 Repeating Questions

Some tasks or actions are hard to complete and may require a degree of additional training and support. In these matters, employees keep asking the same questions which also cost a company time and money.

Family Dollar Stores Inc.(2015) was faced with a need to extend the range of customer payment options to include, for example, food stamps. As a high volume, low cost operation with 50,000 employees across 7,400 stores (and undergoing rapid growth), significant challenges were to be expected with staff training and the potential for many repeat questions. The last thing they would have wanted from their SAP CRM implementation was a high volume of aborted POS transactions and frustrated/lost customers.

One training challenge in such circumstances is to efficiently collate questions and recognize repetition, and adjust training collateral and processes to cater for them. Of course, where a more 'customized' interaction is required, then the challenge is compounded. The basic question may repeat, but the specific answer may depend on a variety of factors.

#5 Smooth Updating and Change Management

When Processes are updated or software is changed it can throw a company into disarray. For example, HSE24 (2015) is a 24 hour TV shopping channel. Implementing SAP CRM led them to business process changes post-implementation. These arose because when

they had access to the full customer picture they identified a customer segment (behavior based – 'choice order' shoppers) which was expensive to service and therefore offered HSE24 some significant cost saving opportunities. This necessitated retraining of staff to handle the changed business processes.

All businesses are undergoing continuous and accelerating change, and if a firm cannot change its processes smoothly then disruption will result. This presents an ongoing training challenge.

Cloud CRM – a Faster Rollout?

Aside from the issues mentioned above, there is a more fundamental challenge to SAP Cloud for Sales rollout. The Cloud deployment enables much faster rollout of the application than for the traditional on-premises model, but to optimize roll-out speed it is necessary to ensure that all the accompanying rollout processes and required toolsets do not slow down the process. For organizations faced with complex rollouts across many countries, regions, divisions and user segments, the traditional training and support model is a drag-on progress.

CHAPTER 2 – 3 SOLUTIONS FOR BETTER SAP CRM LONG TERM ADOPTION

Before we look at solutions, let's briefly consider basic strategy. Arguably, SAP CRM projects are business-driven and IT supported, whereas ERP projects are IT-driven and business supported. This necessitates business buy-in for the CRM implementation strategy and plan - which is usually drafted by the IT department. This is a key concern and should be addressed upfront.

SAP CRM is a Tier 1 product and is used by the largest and most complex of organizations. The definition of 'largest and most complex' could for example have any (or all) of the following scales:

- Number of users (e.g. National Bank of Canada with >2,000 users)
- Number of products (e.g. Stanley Black and Decker has 50,000+ products)
- Complex sales orders with several hundred line items
- Number of sales outlets (e.g. Asian Paints with 40,000 dealers in 60+)
- Worldwide user span (e.g. number of countries)
- Number of salespersons/agents (e.g. NHS24 with > 1,600 users and 5 million clients)

There is no 'one size fits all' for adoption success. The detailed factors will depend on where a company fits within these measurements, but the principles are universal.

#1 Implement Effective Change Management

Effective Change Management is absolutely essential in CRM because the application touches every functional area within a business, and in many cases it may directly touch customers through a portal (increasingly so with the Cloud delivery model). SAP CRM is designed to punch holes through information silo walls, impacting almost every functional area of the organization. There will certainly be significant ego driven obstacles to overcome.

The principal guidelines here are to:

- Recognize all stakeholders – this includes customers, because CRM is the interface and its implementation will affect customer responses to a vendor's staff and perhaps even customers through a portal
- Prepare stakeholders for the paradigm shift to cloud CRM, design and promote key messages to support the change
- Consult with stakeholders and involve users in detail from the early stages

- Survey the employees, identify and neutralize inappropriate attitudes to change
- Monitor attitudes and provide regular project progress updates.

Rigorous change management practices are critical to success.

#2 Design an Appropriate Training Strategy

In the light of earlier comments about 'large and complex' organizations with multiple functional/information silos, the key aspects to consider are:

- Identifying the wide range of user segments, types and geographical distribution.
- Selecting an appropriate mix of training delivery channels including on-demand, self-study and automated, customizable training support tools.
- Ensuring that training materials are customized and that a minimum of material is generic.
- Selecting a Training Manager who can clearly demonstrate success in a similar Cloud SAP project using the latest training techniques and tools .
- Ensuring that the strategy is durable and not a one-off approach, by investing in collateral and delivery channels that can be re-used and dynamically tuned.

- Providing an adequate training budget

It is essential to recognize that sub-optimal training cause a project to fail. SAP CRM projects are rarely cancelled, but some projects may limp along with frustrated users and represent a painful cost to the business instead of delivering the anticipated bottom-line benefits in the timescale expected. Fixing a 'limping' project may require significant additional expenditure and that will certainly include additional training.

Training needs to be dynamic, flexible and cloud based, just like the CRM application itself. The 'pull' model is better suited to the purpose.

#3 Pilot the Project and Implement Incrementally

With airplane pilots, there are old pilots, and bold pilots, but there are no old bold pilots. The same applies to project managers. Even more so with SAP CRM projects. A pilot project is essential – whether defined by product category, geographical area, operating division, customer or other segment, it is critical that the software, tools and techniques are piloted.

Beyond performance and functionality, pilot project review should include critical appraisal of training techniques, channels, delivery agents and – most importantly – user adoption and feedback. It is important to be prepared to change thinking at this point, before a problem gets multiplied across the wider organization.

A pilot project is the opportunity to get it right. Any project manager who wants to point to successful SAP CRM implementations should plan on pilot projects and incremental implementation. The objective is to maximize SAP CRM adoption, optimize the user experience and eliminate the possibility of users 'working around the system' for whatever reason, be it political, personal convenience or supposed time saving.



CHAPTER 3 – TECHNOLOGY THAT CAN HELP IMPROVE YOUR SAP CRM USAGE

Several companies have stepped up to the challenge of optimizing CRM adoption levels and improving the user experience using technology solutions. Three such solutions are:

SAP Business Intelligence Adoption Rapid-Deployment Solution (2015)

Improved reporting is often cited as a key driver for implementing a new system, and with CRM touching all areas of a business and offering to provide a comprehensive customer picture, reporting/enquiry tools are fundamental. This offering from SAP assists users by:

- Resolving user adoption issues by building trust in the data using the data reconciliation reports.
- Identifying the appropriate reporting tool for a need by explaining the differences between the available tools (e.g. SAP BusinessObjects Web Intelligence for ad hoc reporting and Xcelsius for dashboards).
- Removing user confusion by using the data availability report.

For CRM specifically, it spans:

- CRM Marketing Analysis: Major businesses run multiple simultaneous marketing campaigns Understanding the

performance of each campaign in lead generation and costs is essential and this scenario covers both lead management and campaign management.

- CRM ERP Integrated and Standalone Sales Analysis: Helps sales executives manage and plan sales activities and pipeline, drive sales revenue and manage their sales performance.
- CRM Service Analysis: Using this tool, it is possible to rapidly deploy a preconfigured, fixed-scope footprint of SAP CRM at a known cost.
- CRM Sales Analysis for BI Platform: provides analytics key performance indicators (both strategic and operational), which helps data analysis and informs decision making.

Miller Heiman Connector

Miller Heiman Connector (2015) enables users to couple process with technology to improve process adoption and enhance sales outcomes. The MH Sales planning and communication tools have bi-directional data-sharing capabilities and all information entered is synchronized with SAP CRM using Connector.

Therefore, Connector eliminates the time-consuming and error prone process of entering duplicate data. Users are able to leverage the reporting and analytical capabilities of SAP CRM to track sales

process usage in order to help drive adoption-. The outputs also enable strategy testing.

Taken across the whole user spectrum of SAP CRM, front-line sales people do not usually demonstrate the highest levels of adoption when new systems are implemented, unless they see very clear individual benefits.

The Miller Heiman Connector clearly offers a significant practical incentive of time saving and error rate reduction.

Additionally, the technology provides salespeople with a simpler way to manage and communicate their sales opportunities. Sales managers have visibility into their team's account strategies. The information available helps them coach the required process steps to develop individual selling skills.

WalkMe – Online Guidance and Engagement for SAP CRM

For those who are implementing the cloud-based version of SAP CRM applications, WalkMe is a great tool. Functionally rich, it is a training toolset which enables a business to simplify the online experience and eliminate user confusion. It encourages self-service, accelerates training and drives increased levels of software adoption.

This SaaS solution simplifies SAP Cloud for Sales software usage. It provides direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully, learning while they

work. WalkMe removes the barriers of entry from other enterprise software platforms during an implementation, increases user productivity while lowering helpdesk requests, and reduces training time and costs.

It addresses the key challenges of training users in SAP CRM:

- Flexible on-demand 'pull' training allows flexible timescale and fit to individual work schedules and learning capacity
- Highly customizable to business processes and individual user roles
- Ensures continuous learning and maximizes knowledge retention
- Collation and answering of repeat questions
- Collation of user adoption statistics
- On-line, real-time, in-process user support
- Eliminates retraining
- Maintains the investment value of training

With SAP Cloud for Sales, rolling out the application after pilot to other business segments is much easier than under the old model of on-premises CRM. WalkMe eliminates the old training model and therefore ensures that a faster rollout can be achieved with higher levels of user adoption than would otherwise be the case. When SAP Cloud for Sales is live, any required additional business process changes can easily be accommodated on the fly.

Summary: A Product Manager's Checklist to Balancing UX with Agile development

Available survey data indicates general disappointment with 'success' and user adoption rates in CRM projects. We have no reason to believe that these figures differ for SAP CRM. It is clear that there are still several challenges to higher CRM adoption rates, although the technology issues have largely been overcome with SaaS/Cloud deployments where SAP is the ERP system as well as the CRM solution.

The 'soft' or people oriented challenges include those relating to change management in the silo-busting CRM scenario where processes and data collation are very complex and users may not be fully informed of the importance of their part in the overall set of business processes. Users may be widely dispersed both geographically and functionally. Indications are that training and user support is generally suboptimal.

Possible solutions to these challenges include more sophisticated change management, new training and support paradigms and narrower pilot implementations. The trick is to identify and eliminate user issues at an early stage. This would enable design of optimal training and support solutions.

There are several different technology solutions which can provide enhanced user support, including applications connectors (Miller Heiman Connector) and reporting choice assistants (SAP BI Adoption Rapid Deployment Guide). Also, online real-time, process training and user support tools (e.g. WalkMe) exist which offer ongoing ROI instead of being booked as a one-off project costs.. WalkMe eliminates the old training model and channels and supports faster rollouts with higher adoption levels.



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ABOUT WALKME

WalkMe™ makes your software fast and easy to use with no major changes needed.

WalkMe™ helps product managers quickly introduce new and advanced features, accelerate customer orientation, reduce support costs and improve overall experience and loyalty.

Leveraging the WalkMe™ interactive technology, product managers can ensure their customers have a simple, smooth & burden-free experience, eliminating confusion and frustration.

- Boost Adoption Rates
- Accelerate Onboarding Times
- Increase Activations and Continued Use
- Empower Customers to Work Confidently
- More Up-Selling & Cross-Selling
- Promote New and Advanced Features
- Lower Customer Support Costs
- Reduce Attrition and Churn
- Open New Channels for Communication and Customer Feedback

- Raise Customer Experience & Loyalty
- Take Care of your Global Audience
- Open New Communication Channels

Product managers can ensure their product is instantly usable with customers, while also allowing for rapid-fire updates.

Moreover, WalkMe™ simplifies the customer experience, reduces your customers' frustration of familiarizing themselves with complex tasks, and creates the smoothest path to customer satisfaction.

