EBOOK

LOVE AGAINST THE ODDS - HOW TO MAKE YOUR CRM APPEALING TO BOTH BOOMERS & MILLENNIALS

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Introduction

To be successful, software needs to be developed with the end user in mind. Software developed in the 1990s was tailored to the Baby Boomer and Generation X populations. Now that Millennials are becoming the majority of the end users, software that was developed more than a decade must now must be re-imagined or re-designed with the Millennial in mind.

Are these generational differences really that substantial? Yes. Millennials think very differently than Boomers. They grew up with personal computers. According to Forbes (2013), 74% of non-millennials agree that millennials offer different skills and work styles that add value to the workplace. No generation before has had as much access, technological power or the infrastructure to share their ideas as quickly as the millennials. They are used to speed, multi-tasking, and working on their own schedule. These can be great assets in a knowledge economy which values end results over the process. Millennials are self-sufficient; they prefer to find answers to their questions online rather than asking supervisors or external vendors for help.

Companies need to consider several key points as they determine how to get the most out of their CRM systems: How can systems encourage high-adoption for Millennials? Should CRM applications be redesigned to meet the needs of the Millennials?
Strategically, there is no doubt that CRM is here to stay, even as a part of the larger CEM concept of total customer experience management, but what is the way forward for CRM at the tactical level (the next 5-7 years)?

To answer that, we will take a quick look back at how far CRM software has come since the 1980s, and how CRM software can be made more appealing to the Millennial use. We will explore tips on how to design CRM training and overall tips for increasing CRM adoption amongst Millennials.


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Chapter 1

ANYBODY REMEMBER THE ROLODEX? THE EVOLUTION OF THE CRM

It all started with the Rolodex, the rotating file device used to store the personal information of business contacts. Most Millennials have only seen this in movies because, in the 1980's, the Rolodex was digitized. And with this, came a new age – the beginning of contact management software. The first contact management software platforms were simple applications that were stored on people's PCs. These systems were used by the Customer Service Department. Meanwhile the Sales Departments was using Sales Force Automation (SFA) software.

In the 1990's, organizations came up with the ingenious idea to combine the two software packages -- contact management software and SFA -- to create a more comprehensive, web-based technology. This merger formed the seeds of the modern-day Customer Relationship Management platform, or the CRM.

The seeds of the modern-day CRM came from the ingenious idea to combine contact management software and Sales Force Automation software.

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This new platform offered contact data integration, response management, lead management, campaign automation and marketing business intelligence. The platform became a way to do market research and stay on top of customer needs and behavior.

With the new CRM, there was a new fluidity between the sales, customer service and marketing departments. Through shared information and understanding, these departments began to find synergies between themselves, and cooperate on projects which led to increases in customer satisfaction.

The CRM began including more and more services until it included Salesforce automation, data warehouse technology, opportunity management and customer relationship management.


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The Shift to the Cloud

In 1999, the industry underwent a fundamental shift – it began transitioning to the cloud. Salesforce released its first cloud-based CRM in 2007. In this way, because customer data resided in the cloud, the CRM could be accessed wherever, whenever. Employees could log in to the CRM system, simultaneously, from any Internet-enabled computer or device. The CRM could now be accessible from any smartphone or tablet.

Popularity soared. CRM Magazine reported that, "in gathering data from more than 1,200 companies worldwide for our 2014 SPO study, we saw the total number of sales organizations leveraging CRM increase to 82.9 percent. This represents a significant increase from the 48.7 percent adoption rate reported a decade ago."

> **"The number of sales organizations using CRM has increased to 82.9%, a significant increase from the 48.7% adoption rate from a decade ago."**
>
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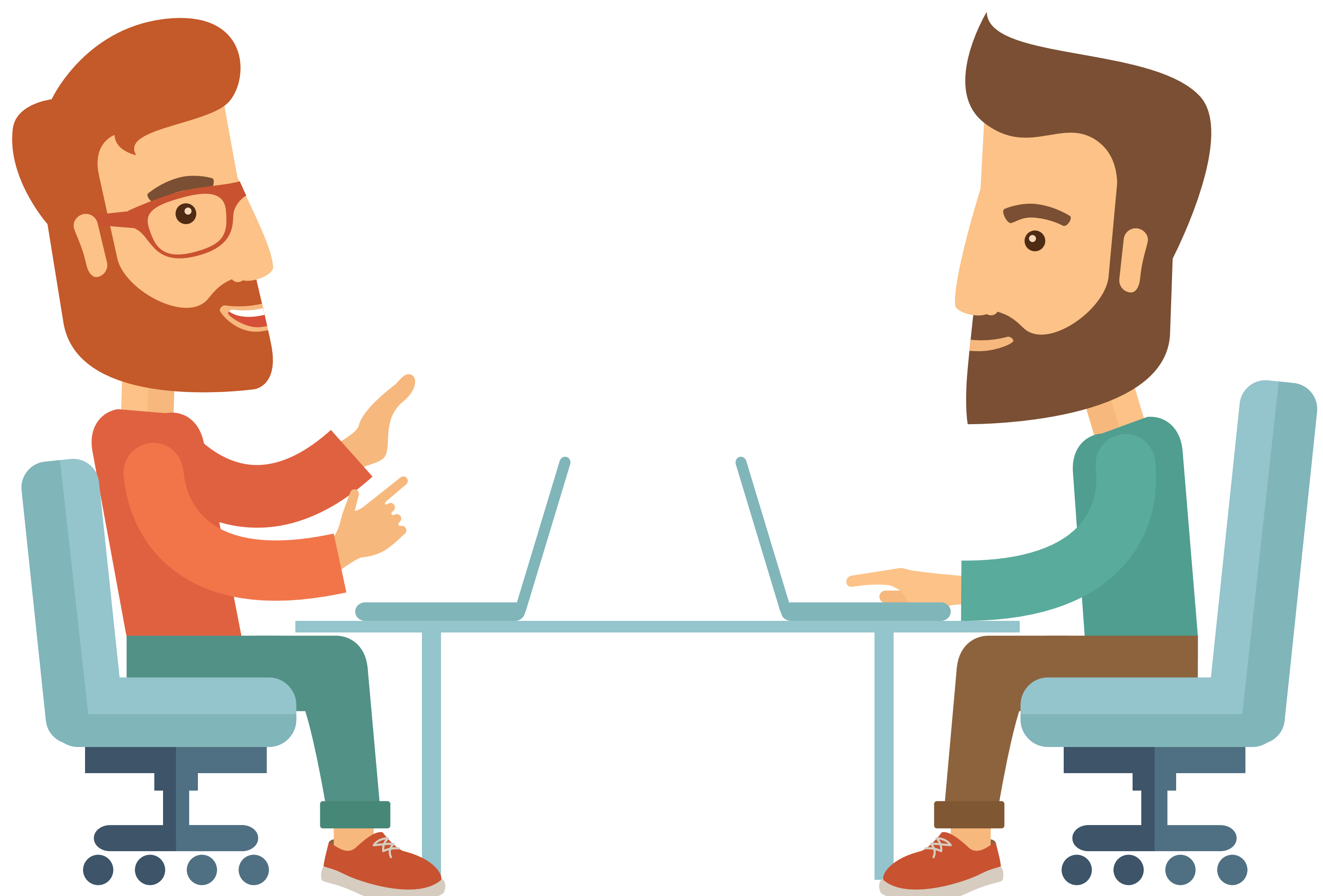
The CRM has succeeded in staying relevant by proving its worth to the industry. It has evolved with the times in terms of adding necessary functionalities and shifting to the cloud to become more fluid, and accessible, especially to mobile users.

Now, the next stage in the CRM evolution is strengthening its appeal to the new generation of user – the Millennial.

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Chapter 2

HOW TO DESIGN CRM TRAINING OPTIMIZED FOR MILLENNIALS

A professor can give the most fascinating and thought-provoking lecture, but unless he/she is speaking the same language as his/her listeners, that lecture is unfortunately going to go to waste. Are you speaking the same language as your workforce? Make sure the language you speak is the one your listeners can understand. Your listeners are increasingly people who belong to Generation Y – Millennials (and very soon, the up-and-coming Generation Z).

Millennials are a tech-savvy generation, who live and breathe connectivity. They expect a seamless online experience where information is immediately at their fingertips. Millennials interact with processes and tools differently than the generation before them, the Boomer generation. They have different communication habits and user habits. They think differently and, as a result, they learn differently.

Considering this, employers have been grappling with how to alter training programs to better fit the Millennial way of thinking.

“One of the biggest challenges senior sales leaders face is how to onboard and train Millennials. This is particularly true for more established sales organizations who have used traditional classroom-based sales training programs as their primary method for training new sales hires” (SalesReadinessGroup.com).

Redefining the Training Landscape -- Digital Solutions and Visual Stimuli

There has been a major shift in training methods since the Boomer generation. Most Millennials prefer to learn through visual stimuli (and generally, information is more easily absorbed through infographics and presentations) and through web-based training. As a result, online training or e-learning is becoming the new standard – typically using online tutorials and webinars. Many experts agree that e-learning is here to stay, not only because it appeals more to the younger generation but also because it is more cost-effective than classroom-based training. An increasing number of organizations are adopting these simple solutions. According to Jeff Cobb, the Managing Director for Tagoras, “nearly 90% of the organizations we surveyed said they are using e-learning to deliver education or plan to within the coming 12 months.”

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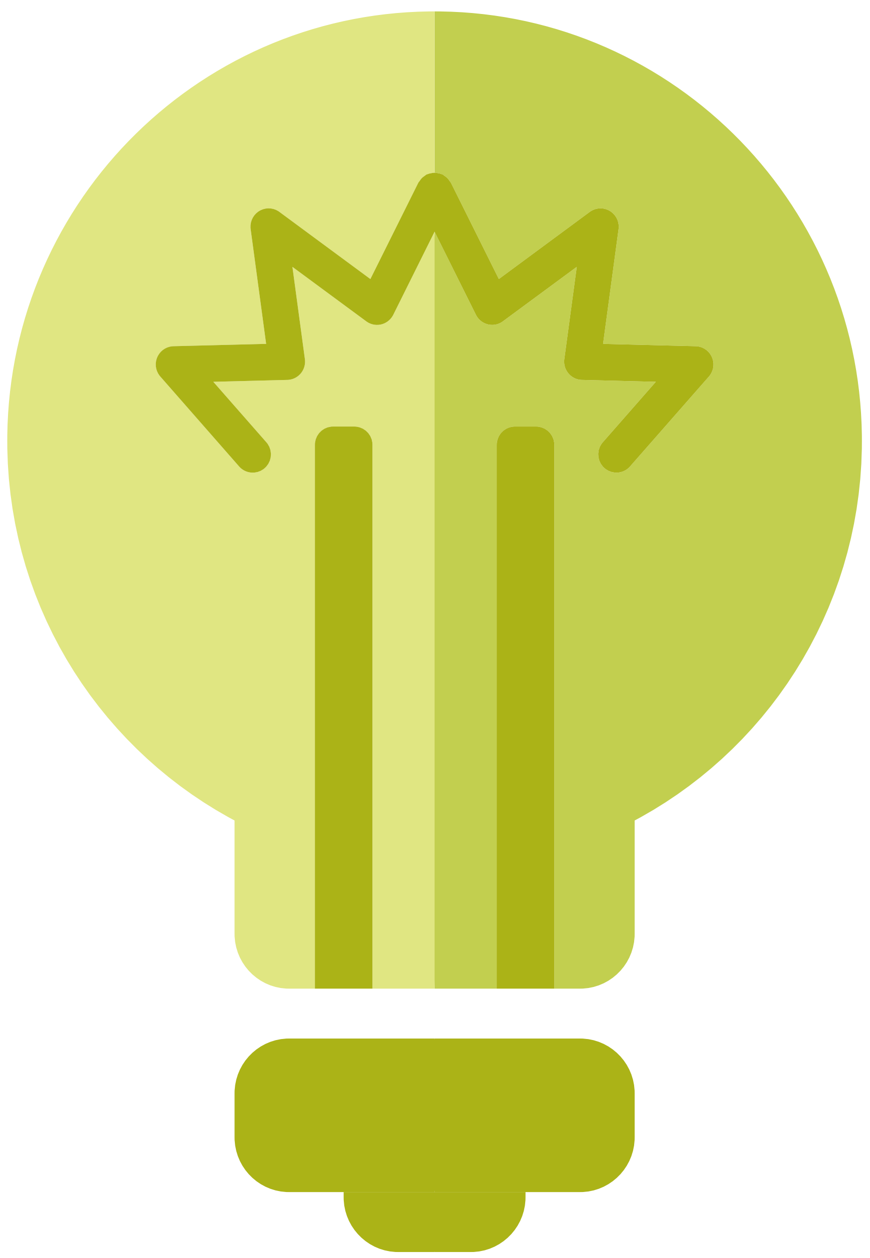
Leverage Online Guidance Systems, Similar to GPS Devices

Maps are passé. Millennials utilize GPS devices to provide them with step-by-step instructions in real time on how to get to new locations. Millennials have become accustomated to being guided by virtual guidance systems and become very uncomfortable when they have to navigate on their own.

Play to this strength by utilizing virtual guidance systems, much like GPS devices, in employee training programs. Real-time guidance technologies embedded in their CRM systems keep Millennials in their "comfort zone". These technologies have matured in the past couple of years and are becoming more powerful. Some even provide contextual step-by-step guidance; provide personalized instructions and navigation tips to the user.

Monitor Progress and Give Feedback

Monitoring training progress through online apps is an effective way to gauge how far employees have come and highlight areas in need of improvement. Such an app can identify process "choke points" that affect performance (and may in fact be systems issues unrelated to the user).

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Chapter 3

5 TIPS FOR INCREASING CRM ADOPTION AMONGST MILLENNIALS

The use of supportive technology is a high priority if a company wants to achieve high CRM adoption rates. In this changing environment, what are the ways you can increase Millennial adoption of CRM systems? Here are 5 strategies.

Tip #1: Set Clear Onboarding Objectives

Setting clear onboarding objectives early on is critical to avoid disaffection. Training objective-setting, application demonstration and coaching is obviously necessary during the early training stages. This sets the stage and if properly planned and executed (in line with the previous chapter), will create significant engagement and start to cement software adoption.

Underpinning this stage is the need to design the training so that it aligns with the characteristics of Millennials – connected and tech-savvy. This approach should ensure that the user's experience of the software while delivering customer service is optimized and in line with what they expect from the kind of applications integration and functionality they use in their personal lives.

> **Modern-day training must be aligned with the characteristics of Millennials – connected and tech-savvy.** Click here to Tweet.

Tip #2: Demonstrate the Value of Using CRM

New staff should clearly understand the important part that they play and their individual roles in the overall business and how it is reflected in CRM processes. This scene needs to be set for them, but it doesn't end there. Although online flowcharts can help with this, as a reference point they tend to be fixed in nature and require "research" by the user. The days of folders of "desk instructions" are long gone. Generation X got by with cheat sheets. These are not for Millennials. Millennials don't do paper research – it must be made online and user friendly.

Anything that can be done during training to demonstrate the power and flexibility of the application system (such as automated walk-throughs, context sensitive help, videos and team collaboration functionality) should be emphasized. There are emerging toolsets available that can help in this regard, particularly for cloud-based CRMs.

Tip #3: Monitor Performance During and After Training

User progress should be compared to training objectives and monitored

objectively. “If you don’t measure it you can’t improve it.” Give trainees feedback, untainted by subjective judgement. Millennials like giving and receiving feedback – they like to have their voices heard through providing survey feedback and the transparency of being subjected to performance evaluations. Toolsets which will collect this data are available. A great new way of tracking user performance is through software which can, in real time, monitor a trainee user’s performance, and figure out where there is a process choke point.

> **User progress must be monitored objectively. “If you don’t measure it you can’t improve it.”** Click here to Tweet.

Tip #4: Provide Real Time Support with New Tools

The Boomer and Generation X CRM decision-makers should research appropriate toolsets – and implement them in the CRM environment. This will help meet Millennials on their home ground, providing advanced user and process support. Newer tools can provide suitable real-time process support – this addresses both the context issue and immediate need (“I have a frantic customer on chat right now and I need to escalate this issue – but I’ve never seen a problem like this before”).

The tools are increasingly incorporating Artificial Intelligence (AI) functionality (such as used in Apple’s Siri). A key additional benefit is that these toolsets also work for Boomers. They may not offer a silver bullet solution, but they will certainly address the issue of the generation gap by providing better support to Boomers while simultaneously satisfying the tech/behavioral needs of the Millennials.

Interactive, context-sensitive guidance systems are the newest, hottest trend in self-help tools. These tools (such as WalkMe) guide users through their work processes with step-by-step instructions. The typical feature set includes context sensitive guidance, multi-media support, user behavior monitoring and analytics.

> **Interactive, context-sensitive guidance systems are the newest, hottest trend in self-help tools.** Click here to Tweet

Tip #5: Reinforce Training to Make Users Comfortable

Implementing appropriate toolsets of the kind outlined above, both during initial training and continuous on-the-job will provide continuity for the user and reinforce what is learned during training. The user can get right to work with a minimum amount of expensive boot-camp training. High configurability, including the ability to personalize support for the user, enables real-time support to minimize Millennial downtime and frustration.

Supporting users with effective toolsets and providing objective, numerate feedback will increase software adoption rates (and also help to quickly weed-out low performers).


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CONCLUSION

Effective CRM systems and outstanding customer service are key differentiators for leading companies – they need the highest adoption rates and low staff turnover if they are to compete effectively. Adopting the correct training approach is essential if Millennials are to be effectively engaged.

Supplementing the CRM software with suitable toolsets (such as WalkMe™) will provide synergy and deliver maximal Millennial adoption, but at the same time it will offer additional support to the Generation X users – and improve their adoption levels too. This will also bridge the generation gap.

Want more information for professionals about CRM?
Join over 10,000 people who receive free monthly updates on what's hot in CRM by entering [CRM Simplified] and filling out the sign up form.

ABOUT WALKME

WalkMe™ provides a cloud-based platform designed to help CRM managers guide and engage employees through any online experience. WalkMe™ simplifies CRM usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. WalkMe™ removes the barriers of entry from other CRM systems, and increases user productivity while lowering helpdesk requests, and reducing onboarding and training time and costs.

As a result, both during the initial CRM orientation process and beyond, managers can empower their users so they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid errors through even the most complex processes.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage.

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Is CRM Onboarding Taking Too Long?