

5 Ways to Increase User Adoption in Microsoft Dynamics 365 for Sales (CRM)



You invested in Dynamics 365 (CRM), but your team isn't using it?
Don't worry, you aren't alone!

Did you invest in Microsoft Dynamics 365 (CRM) only to discover that no one is using it?

Are your users stuck in their old habits instead of embracing the new system?

Don't worry! You aren't alone.

User adoption is the biggest issue businesses face when implementing Microsoft Dynamics 365.

Here are five tips that are sure to increase user adoption right from the start. You don't have to be the bad guy: no more nagging calls asking your team to enter the information in Dynamics 365 and no more weekly reminders to your team to track their email correspondence. Have a winning game plan from the start!

Get Buy-In From Your Team



It's important to have your entire team get behind the upgrade to Microsoft Dynamics 365. Without their buy-in, it will be impossible to fully utilize Dynamics 365 the way it is intended.

Getting the whole team to embrace the transition starts from the top and will have a trickle-down effect. It's imperative that those in leadership positions demonstrate a positive attitude regarding the change. Beyond their attitude, they must use the product and lead by example in the adoption process.

In addition to buy-in from management, try rounding up one person from each team to be a Dynamics 365 captain. This person, who is passionate about the upgrade, can serve as a valuable resource to others in their department, helping to answer the everyday questions that are sure to arise.

Define Your Goals

Outline your Microsoft Dynamics 365 goals with your entire team. When presenting your goals, include information like overall timeline, testing plan, and the plan to phase out the old systems. It's important to reinforce the reason for upgrading, for example, if you are upgrading to Dynamics 365 to streamline sales processes, then make sure each goal supports that initiative.



Don't Forget to set SMART Goals

Specific

Measurable

Attainable

Relevant

Time-bound

Minimize Initial Customizations



A common misconception is that businesses need to fully customize a system before implementation, but requiring employees to “guess” what they want customized in a new system is unrealistic. We recommend having each Dynamics 365 team captain schedule a meeting two months after the initial implementation of Microsoft Dynamics 365; this would be a time for their team members to bring customization needs to the table. From there, the team captains would meet with the company leaders to discuss and prioritize the alterations needed.

Try These First!

- Create a few dashboards
- Add new fields to a form
- Set up a workflow

Include Email Integration



Since Microsoft Dynamics 365 is the ultimate sales tool, it's important to integrate with your email provider. Microsoft Outlook seamlessly integrates with Microsoft Dynamics 365. This connection allows your team to track your emails to the lead or contact records in your Microsoft Dynamics 365, so anyone on your team can view the correspondence. You can also track emails to a particular promotion, campaign, or event that your company may be running.

What Does It Mean?

When integrating Dynamics 365 & Microsoft Outlook, you'll see two new options to record emails. Here's what they do:

Track: Tracks the Outlook email to the email address in Dynamics 365, whether contact or lead.

Set Regarding: Tracks the Outlook email to the email address AND a specific entity in Dynamics 365, such as an event.

Provide Dedicated Team Training

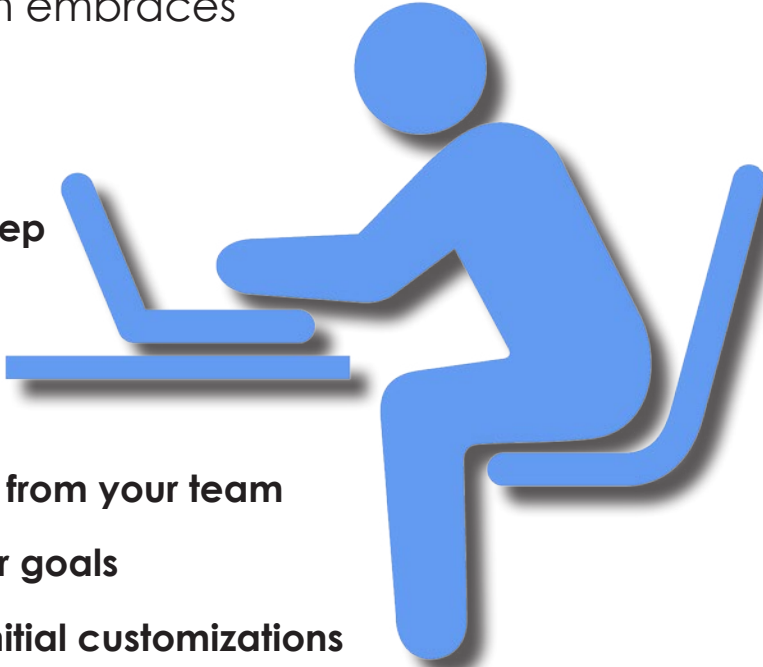


The key to success is providing team members the opportunity to learn how to use Dynamics 365. Hold weekly training sessions for your team, covering specific tasks within Microsoft Dynamics 365 that you want them to incorporate into their daily routines.

During each meeting, set aside time for users to ask questions and notify you of any issues impacting their user adoption. This feedback loop is vital for initial implementations, and it helps users feel supported in getting past obstacles in the new system.

Ultimately, implementing a new system takes time and money, but it's an investment that is sure to move your business forward, especially when your entire team embraces the change.

We hope you'll keep these tips in mind when it comes to user adoption for your company:



- ✓ **Get buy-in from your team**
- ✓ **Define your goals**
- ✓ **Minimize initial customizations**
- ✓ **Include email integration**
- ✓ **Provide dedicated team training**

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Our latest development of **Business Applications** will work to simplify business processes across all industries. It's never been easier to have the world at your fingertips. These add-on applications fully integrate with Microsoft Dynamics 365 for Sales, providing 24/7 access for your entire team.

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Software Management: Designed for Software Publishers and VARs, this app is the ultimate time saving tool for your team!

Tax Processing: Taxes are complex and ever changing, but processing them doesn't have to be!