CRM Refresh

HOW TO INCREASE THE USER ADOPTION FOR YOUR DYNAMICS 365 APPLICATION

Microsoft Dynamics 365 • Increase User Adoption • Refresh for CRM-Systems • Sales Processes

"Implementing a CRM system will do absolutely nothing for your business. However, the continued and effective use of it will." – Bobby Darnell

Consulting, training and development with 🖤 made in Germany within the 🏃 Reply Group.

Some reasons for low user adoption....

Management vs. user perspective

- Implemented requirements not equal to user needs
- Often, management needs are served first and foremost
- The user does not see any benefit that comes from the CRM

Misleading user expectations

- The CRM is too complicated, nobody can handle it
- Data "does not fill in itself"
- Fear of transparency – loss of individual know how and knowledge

"Extra work, without added value"

- Lack of incentives for usage
- Missing attention for non-usage
- Lack of role models / key users

Insufficient integration in processes

- CRM lacks proper integration into existing processes
- Employee workflows do not get better, faster, more efficient, more convenient

...and how to increase the user adoption!

„CRM Refresh" – an approach developed by Reply

Reply has developed and tested in practice a methodology that helps companies to develop CRM systems into a real competitive advantage and to encourage users and management to use them.

Innovation & Change Management for Proven Success

The method combines approaches to product, innovation and change management. The approach leads to demonstrable success, both for CRM systems that have been in use for a long time and for new implementations.

Why Reply?

- Focus on user adoption for best possible return on investment
- Partner of leading CRM vendors; system-agnostic methods
- Market leader in digital experience

Challenger | Follower | Market leaders | Accenture

Deloitte
IBM — Reply — Plan.Net
Diva-e — Valtech
Syzygy — Init — PwC
T-Systems MMS — Digitas Pixelpark
Intive — fischerAppelt — Diconium — Adesso
Mindcurv — Team neusta — Capgemini
Ausy — KPS
Exxeta — Valantic
NTT Data — Wipro

Size of points represents total revenue in Germany

Source: „Der Markt für Digital Experience Services in Deutschland 2022" - Lünendonk

The "CRM-Refresh" Approach

ABOUT

- CRM Refresh helps your organization to optimize their Microsoft Dynamics 365 CRM and **increase user adoption** among their staff

- It **compresses months of work into a few days** by gaining real user feedback, validating ideas quickly, and aligning expectations within the team

- **A Workshop and research format** which can be delivered onsite, hybrid, or remotely in German & English
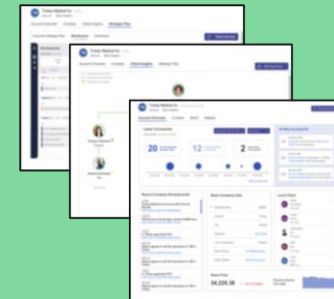
OUTCOMES

Pain Point Analysis

Product Vision

Non-functional Prototype

Action Plan

What are you waiting for?

- Do you want to **evaluate** a project idea?

- How can I **digitize, automate and streamline** my marketing and sales **processes**?

- Do you have questions about **opportunities** for **customer experience** management based on the Microsoft Dynamics 365 ecosystem?

- What is needed to drive **business outcomes**, improve **operational efficiency**, and create **exceptional customer experiences**?

- How can we enhance our customer journey, such as through **chatbots**, self-service **portals**, or **AI-powered** recommendations?

- Do you need **best practices** and hands-on support from our motivated experts?

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