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Focus on the End-User To Illuminate the Path to ROI

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Here's an all-too common scenario. As a large international organization grows, its sales managers have lost visibility into the activities of their reps and are increasingly unsure of the accuracy of their forecasts. The management team decides to implement a standardized CRM solution that promises powerful lead handling, opportunity management and forecasting tools, so the sales managers can be confident their teams are producing at full capacity. At the same time, the new-order management software will streamline the order management process. The management team expects additional benefits in a number of areas including increased win rates and higher average transaction values.

The business case is built, and decisions are made on the fact that the CRM system will cost (software, infrastructure, services and personnel) \$1.45 million to deploy and is expected to yield an ROI of \$750,000 annually. If these figures are correct, the software will pay for itself and begin putting profits into the company's coffers within 24 months of deployment.

But something unexpected happens along the way. The outside sales force tasked with using the new system finds the software awkward to use and complains that the software "doesn't work" and is slow. Several months after the deployment, as much of 90 percent of the functionality is not being exercised. The inside sales force, which started off enthusiastically, has stalled in its use. That's because the reps complain that the software is "counterintuitive," and the ISR manager, worried that it's affecting their call rates, is not enforcing its use anymore. The back-office personnel find the software cumbersome to adopt into their routines and ultimately create their own workarounds to get results.

This common end-user behavior is creating an insidious new form of "virtual shelf-ware," a condition that results when management thinks the application is deployed, but in fact, the adoption is only partial adoption and non-compliant.

That nightmare scenario is based upon the very real circumstances experienced by a global company in the financial services industry. It was deploying a brand-name CRM package to 10,000 globally distributed end-users. And it's pretty much the situation I faced when I met with the company the first time.

Adoption stalled

I worked for a software vendor that sells a product for experience and performance management (EPM), a type of software that is becoming an increasingly popular weapon to directly attack the problems of adoption and effective, efficient use of enterprise applications like CRM and ERP. This is an excerpt from my recap memo after our first meeting.

User adoption of the CRM application has been stalled by a number of factors affecting field productivity. There are complaints about poor response time, remote users can't access the system, and it's not clear if there are system problems or if they are just using the wrong procedure. And across the board there are complaints that things take "twice as long" with the new system. In the absence of comprehensive and representative data, many discussions regarding application performance are based on reported user impressions, limited visual observations, and occasional stopwatch timings. This has resulted in extrapolations about the performance of the whole system that are inaccurate, and lead to decisions that are not in the best interest of the business.

Executives at the company I was working with decided that an EPM solution would help them with their deployment issues. The first results came, almost immediately, in the area of end-user support. One of the inside sales reps in the call center was experiencing problems. The information communicated to the support team from the help desk was very sketchy and incomplete. In the past, the CRM support team would spend hours on the phone with the inside rep, often having to make costly onsite support calls to deal with such issues. However, the EPM system enabled a dramatically different approach.

'Team members noticed that virtually every end-user was making the same errors on these screens.'

Through the management console, the support team reviewed the inside service rep's actual experience with the application and found that, although her response time was well within the under-three-second goal, the rep was generating four times more user errors than her peers. By looking at a record of her actual interaction with the application, the team found that the rep was using an incorrect process to validate the customer information (a common process step in many different transaction types). Armed with this insight, the rep's supervisor was able to instruct her in the proper customer validation process, and the so-called "problems with the system" were resolved.

Key Performance Indicators (KPIs) that report user errors on an aggregate level were useful in resolving another vexing issue. There were grumblings in the outside sales force that the opportunity management screen was difficult, slow and cumbersome. When the application team reviewed the KPIs, team members noticed that virtually every end-user was making the same errors on these screens. The first instinct was to schedule an e-meeting retraining

session. But a closer review of the recorded workflow for a representative sample of users revealed that the errors were being caused when the sales reps were trying to put data in extraneous fields on the screen. The fix was simple. No retraining was needed. The application team removed those fields from the screen, and the errors were eliminated. Not only was the issue resolved but also, the end-to-end transaction time improved by 25 percent.

A common misconception about end-user monitoring solutions is that they are only needed by big companies with large end-user populations. But our experience has shown that similar problems derail CRM implementation in small companies and large companies alike, stopping both from reaching their ROI goals.

It's true that you can't manage what you can't measure. But without a strategy to measure end-user adoption, as well as gather insight about the end-user's experience and actual performance with the application, many IT organizations are left with the reality that they can't manage and improve end-user adoption and proficiency.

For the business executive and CIO who need to drive the highest possible levels of adoption and efficient, effective use of core enterprise applications, expertise and performance management systems are becoming a priority. As the financial services organization I worked with learned, only with the insight into end-user metrics that an EPM system can provide can you really know if your core enterprise applications are delivering an acceptable user experience; if application users have adopted the applications; and if users are executing key processes effectively and efficiently. And that's the key to achieving business value and ROI from the application investment.



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