

10 ways to ensure successful implementation and user adoption of a new CRM – How one firm did it and saw tangible ROI immediately

A case study on Ferguson Wellman and UNAPEN's client relationship management system, CLIENTLOGIX™

A few years ago, Ferguson Wellman Capital Management, Inc. started becoming increasingly challenged by the way the firm's outdated CRM technology seemed to hold data hostage more than making it available and useful. The data center served as a gate keeper instead of allowing the information to flow easily to the users who needed it.

The firm began evaluating their options and defining their business needs. They looked for a modern system that would serve as a business intelligence platform for the way Ferguson Wellman did business. The new CRM needed to be flexible, customizable and able to handle all of the data by sitting on top of the firm's data management system. They also needed their data integrated with their portfolio accounting system.

The Director of Information Systems at Ferguson Wellman, Shawn Swagerty, said, "We found the answer to all of these requirements in UNAPEN's CLIENTLOGIX." But Swagerty also knew that finding the right system was only one small part of the battle. Successfully implementing a new CRM, or any new system, takes hard work and dedication from the entire firm that is adopting it.

Swagerty was familiar with the barriers to successful adoption of a new system, so he was determined to make the implementation and adoption of CLIENTLOGIX a positive one. Looking back on how he approached implementing and adopting the CRM in the firm, Swagerty was able to identify 10 things he did to make sure the implementation of his new CRM system was successful.

Ferguson Wellman, based in Portland, Oregon, has been serving clients ranging from individuals, unions and corporate retirement plans to endowments and foundations since 1975. Shawn Swagerty, the Director of Information Systems, has been with Ferguson Wellman since 1997. Swagerty is responsible for deploying technology strategy and overseeing new and existing network systems and services for the firm.

1. Don't try to do it alone – support from not only top management but firm wide is the first step to achieving user adoption. Swagerty said, "I've learned not to go it alone. You've really got to get support from top management and then a lot of deep and broad buy in from everyone in the firm."

2. Swagerty put together a "CRM Migration Team," made up of heavy users of the firm's data. They would be used as a sounding board for decisions made during the migration of systems to CLIENTLOGIX. This created ownership and early knowledge about the system by key players in the firm.

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3. Once CLIENTLOGIX was installed onsite, Swagerty formed a "CRM Implementation Team." This team was responsible for ensuring that data clean up was resolved and that users were adequately trained and were adopting the system. Include people from various departments and levels within the firm on your teams to ensure firm wide understanding and adoption.
4. Understand the dynamics among the users in your firm and adapt your teams and strategies accordingly. Swagerty said, "I found that one department was the most difficult to get on board. So we pulled another manager from that department onto the team, one that was respected and technologically adept. He helped bring other people around."

5. Keep everyone informed about the project's progress – when people know what is happening, they are more accepting of the change. Firm wide communication is also necessary to keep expectations reasonable as the project moves along. For example, Swagerty reminded his firm, "The project's not done when the server is installed. That's when the work really begins. Over time, using the new CRM will become less about the burden of change and more about the benefits for the firm."

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6. Training must be mandatory and ongoing for users. Everyone is busy and a new system loaded with features can be overwhelming. Ferguson Wellman created core competencies for each job description and followed through to make sure everyone knew how to do what was required of them. They held internal training in addition to the official training days provided by the vendor and depended on members of the Implementation team to share knowledge about the system with their departments.

7. Documentation! Documentation! Documentation! Instructions for using the basic and complex functionality within CLIENTLOGIX were provided and enforced so everyone used the system consistently. Documentation of Ferguson Wellman's unique business processes that were built into CLIENTLOGIX was also created. Swagerty warned, "If you don't establish your business rules, your data can become a mess."

8. Weekly meetings with heavy users and various members of the firm were held to address questions and to encourage collaboration among users. These meetings, which started as a way to answer ongoing questions about the system's basic functionality, continue even now, eight months after implementing CLIENTLOGIX – and will continue into the future.

The meetings have evolved into an open discussion on how to further improve operations through the use of the CRM.

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9. Take measures to prevent users from falling back to the old ways of doing tasks. Swagerty made sure to remove the firm's former CRM from computers so users had to embrace the new CRM's functionality. Swagerty recalled, “We had to get everyone used to the new ways of doing things. For example, don’t ask your assistant for a phone number, here’s how you look it up.”
10. Create ownership by allowing users to identify which customizations are necessary and to define how processes should work within the system. Swagerty said, “After creating the core team, the weekly meetings with heavy users is probably the most valuable. They come up with good ideas. They know their jobs better than the IT department.”

So you may be asking yourself, is my firm ready to invest this kind of time and energy into a CRM project? If not, maybe a generic, off the shelf CRM will be enough to fit your needs. However, if you are looking for a CRM that adapts and grows with your firm, like Swagerty and Ferguson Wellman, it's going to require selecting the right CRM for your business and then developing a strong strategy for implementation and adoption.

The good news is that implementing a CRM like CLIENTLOGIX that is built for your industry and working to customize it for your firm pays off. Swagerty said, “We’ve been able to stop using a series of complicated, outdated data queries and parsing in byzantine spreadsheets for our

quarter end reporting. CLIENTLOGIX allows us to extract our data in an automated fashion, dump it out to Excel and you're done."

Ferguson Wellman has also seen the tremendous benefit of other features in their CRM, even though they've been using CLIENTLOGIX for under a year. Swagerty identified the Notes/History function, which allows all contact with clients to be captured and preserved within one system, as one of the most beneficial features of a CRM. Swagerty said, "If someone leaves the firm, we still have their notes/history. That knowledge doesn't walk out of the door with them."

Another function of ClientLogix that Ferguson Wellman has found very valuable is Dynamic groups – the magic behind eliminating much of the manual effort. This feature means so much to Ferguson Wellman that in eight months, they have developed over 100 groups. These groups quietly maintain themselves within CLIENTLOGIX and track important pieces of information so that people no longer have to. For example, Swagerty said, "We have one dynamic group built that states when the last meeting with a client occurred and we have another that tells portfolio managers that they haven't met with certain clients in the last month/quarter/year." This has virtually eliminated the need to manually search for the last contact with a client.

This is only the beginning of Ferguson Wellman's success with their new CRM. Swagerty is confident that as they mold ClientLogix more and more to their business by adding customizations and building their processes into the system, the valuable functionality and return on investment will only grow from here.

About UNAPEN

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