Chapter 2 Discussion Guidelines and Exercises

1. Pg. 15 – Do you agree that most salepeople are NOT innovative in use of technology? How about the salespeople you know? Could they perform better if given new technology?

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2. Pg. 15 – the author asserts that younger people have more exposure to technology. Does this mean they can learn new technology faster? Is this your experience?

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3. Is it possible that salepeople’s goals are different from managements? When?

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4. Pg 16 – salesperson resistance can be based on being required to change their processes to fit the CRM system processes. Which is better for the company, salesperson creativity and freedom in their operational procedures, or all salespeople to conform their processes to the CRM system processes?

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5. Pg. 16 – is it possible that requiring conformity to CRM processes is both good and bad? Good in that processes are more routine and orderly and data is easily aggregated across regions, but also bad in that creativity may be stifled? Reflect, record, discuss

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6. Do you think that implementing a CRM system will change the power structure within your company? Will more information made available by a CRM system

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7. How might implementing a CRM system will change employee job performance in your company?

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8. How much would you expect that work routines would change if a CRM system was implemented at your firm? Would work routine changes be welcome or trouble? Which work routines need to be changed? Ponder then discuss.

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9. Page 16 - If you want to redesign a work routine, map out the screens and functionality that you would like to implement.

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10. Page 16 - How do you think your sales reps would react if you told them tomorrow that you are implementing a CRM system that they must use instead of Excel?

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11. Page 16 - Sometimes when new CRM systems are implemented there are errors that need to be fixed. Actually many small and large problems may arise.

a) if you were the manager of the implementation how would you react?
b) how will your employees that will be using the system react?

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12. The result of a CRM implementation is that information is shared much more. Information about you, information about your employees, and job performance. How would you feel if you or your employees showed up by name more often on analytics dashboards of reports? Less anonymity, can mean more public scrutiny.

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13. How prevalent is negative affect in your department or company? How prevalent is sarcasm, mockery and shaming? (Negative affect can harm implementation efforts).

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14. Why is it important for members of each department and process to be involved in the selection and purchase of new enterprise software such as a CRM system? (pg. 17)

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15. Often employees fear change and potential loss at the workplace, especially when new IT systems are implemented. Is employee fear a potential reality and problem at your company? How would you manage that? (pg 17)

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16. Do you agree with Chalmeta (pg 17) whom argued that salesperson technophobia can be reduced if salesreps understood CRM’s importance and benefits?

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17. From what you know about CRM systems, do you think it will be easy or hard to sell your employees on their usage of the CRM system and ceasing to use other Excel based solutions (pg 17).

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18. Salesreps and other employees are notorious for keeping private notes and spreadsheets about their customers and processes. CRM systems are meant to replace most of this private data. To what extent do you think your employees will continue to maintain personal spreadsheets, cling to old processes, and hide customer information?

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19. Regarding the prior question, what could you do to reduce employees clinging to old processes and systems?

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20. If your company will implement a CRM system, what would be the best to encourage and convince your employees that the implementation is beneficial to them?

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21. What are your reasons for considering a CRM implementation? Is it to improve managerial oversight, to improve employee performance?

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22. One outcome of CRM implementation is more detailed process information and improved ability to see employee/team performance. The manager will have more detailed reports. What would you do with these reports? Would managers at your company use them to micromanage?

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23. Page 18 – Sometimes shifting from Excel to CRM systems also includes initial problems. The result may be that the commission based employees actually bring home a smaller paycheck. How would this affect your sales reps and would you consider a different pay-system to make up for initial troubles?

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24. Page 19 – Would implementing a CRM system bring transparency and scrutiny to employees at your company? Is this a problem?

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25. Page 19 – Imagine you were to announce at your next sales meeting that CRM software was being implemented. If one employee stood asked “what’s in it for me?” and you noticed everyone else at the meeting was interested in your response; what would you say?

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26. If a CRM at your company would replace reliance on spreadsheets, what ‘amazing functionality’ would you be hoping for in the CRM system?

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27. Do you have (or plan to have) an IT staff to fix CRM problems that new program users are sure to have? What is your plan to support employees during and after implementation? CRM systems mean switching from Excel (which is very flexible) to an enterprise system (which are less flexible).

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28. Pg. 21 – Better quality CRM systems take work away from salesreps, while poorer quality CRM systems give more paperwork to salesreps, or drive the need for more admin support. What would you do to ensure you choose the best CRM system?

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29. To what extent do you believe that job descriptions will need to be re-written if you implement a CRM system?

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30. How hard do you think it would be to have salespeople integrate CRM software into their daily routines? Which work processes would be harder to switch over to CRM?

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31. Do you think users of CRM at your company would feel like they are being controlled?
Which people? Which departments? Why?
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32. How many hours of CRM training do you envision each employee needing?

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33. Often it is recommended that old and new computer processes are run in parallel for 3 months to make sure the numbers and reports match from both systems. Is this possible at your company? If not why?

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Assignment #2

Perform a preliminary analysis of your employees and company’s CRM readiness and write up your responses to the following questions.

a) Can the employees that would be using a new CRM system be trained easily
b) would they perhaps be defensive about using new technology
c) are the employee work processes understood well enough by management to be transferred to a CRM system?
d) Are there any company politics that would likely arise?
e) Are there any likely ‘problem employees’ that would be resistant and perhaps vocally resistant to a new CRM implementation?
f) Are there any employees that might quit rather than sit in computer training?
g) What processes would be switched over to the CRM system?
h) Which employees should be included in the CRM planning process?