



1.0 Adoption Metrics

This document will outline user adoption goals and provide a framework to proactively measure adoption through the use of Analytics and Dashboards. In addition, it will immediately help you get started by reviewing the existing dashboard and reports downloaded from the App Exchange directory.

It is important that the application is set up to attract usage - but how do you know if you do not measure? Logging in is not necessarily a sign that the user community is using the application to its full potential. Questions to ask yourself are (1) Are your users consistently using the tools provided to them? (2) Are your users sporadic? (3) Do you notice a spike in usage after training then they fall off the radar screen 3-4 weeks later? (4) Are your users providing "quantity" activities (i.e. number of opportunities) as well as "quality" activities (i.e. pipeline velocity)?

We have found that some companies are not sure what to measure when it comes to adoption. It can be confusing. It is important to have a framework for what you want to measure. Our recommendation is to get an executive team in a room to develop the common set of key performance indicator metrics (KPI) they want for their team and company. These KPI's should measure business benefit and be based on desired business process performance. Use KPI's to design the reports that monitor activities critical to consistent usage and adoption of the business processes. Equally important is the training and use of Reports and Dashboards by management to allow for real time, at a glance review of metrics. If the managers, senior managers, and executives do not define KPI's and monitor them regularly then adoption, consistent usage, and data quality will suffer.

Below we outline key areas you should consider when measuring adoption.

1.1 Adoption - Usage

The first tier of reports and metrics you need to define are around login. If users are not logging in, this is your first measurement of adoption and basic level of success. In addition, it's important to know if they are actively updating data and creating new contacts, opportunities or cases depending on your role in the organization. This is the most common place to start. Are my users logging in and using the application?

Table 1.1 is a list of suggested baseline metrics that can be tracked. The frequency is up to the individual company however we suggest, weekly, monthly, quarterly and/or yearly. You may define additional metrics and components for your own organization.

Metric	Frequency
# Users Logged In, Last 7 Days	Weekly
# Users NOT Logged In by Last Name, Last 7 Days	Weekly
# Accounts created by Owner Role, Last 120 Days	Monthly
# Opportunities Created by Owner Role, Last 60 Days	Monthly
# Contacts created by Owner Role, Last 120 Days	Monthly
# Activities Completed, Last 60 Days	Monthly
Accounts Last Modified by Owner Last, 120 Days	Monthly
Neglected Opportunities by Role, Next 60 Days (> 30 Days Last Modified)	Monthly
Open Tasks by Assigned Role, Current and Previous FQ	Quarterly
Users NEVER logged in	Weekly

Table 1.1

1.2 Adoption - Data Quality

Data quality is valuable to include in your framework to measure adoption. If certain fields are not filled out or filled out incorrectly, adoption may be comprised. Do users know which fields are critical? Have they been communicated to effectively by management so they understand the expectations and the link to business process success?

Regarding data quality, many things can affect bad data. If people are not using these tools as a component of their job, this can also reflect bad data which could hold a company back from gaining valuable insight into their customers, understanding the competitive landscape, and affect the bottom line. Looking at critical fields and making sure users are filling them out correctly is important. It is not recommended to have too many required fields but it's important for users to understand why certain fields are important to them and their company. For example, having competitive information helps reps down the road if your competitor is acquired or merged. This could re-open an opportunity that was thought to be lost. It also helps marketing build campaigns and helps product management understand who they are losing against most. It affects many areas of your company so it's important to monitor this level of adoption.

Table 1.2 is a list of suggested baseline metrics that can be tracked. The frequency is up to the individual company however we suggest, weekly, monthly, quarterly and/or yearly. You may define additional metrics and components for your own organization.

Metric	Frequency
Opportunities with a Close Date in the past, Last 60 Days	Monthly

Stage opportunities are entered, Current and Previous FQ	Monthly
Prospect Accounts missing # Employees, Last 60 Days	Monthly
Lead Rating on Converted Leads, Current and Previous FQ	Monthly
Accounts with all key fields populated, Current and Previous FQ	Monthly
Accounts missing Rating field (or any key custom fields)	Monthly
Key, non-required or conditionally required fields, filled out	Monthly

Table 1.2

1.3 Adoption - Business Performance

Correct usage is good but only if the usage reflects business performance and compliance. For example, using analytics to measure the number of calls is not the same as measuring the types of calls and at which level the calls are being made which are critical to closing business. Additionally, comparing this figure to the number of opportunities closed is a sign of effective selling and productivity gains.

It is also important to look for patterns and trends. Reviewing monthly sales trends exposes performance patterns and communicates where the trouble areas exist. In addition, drilling into the types of opportunities your sales organization is winning and losing will show how sales reps are spending their cycles and what activities are leading to success for the company.

Table 1.3 is a list of suggested baseline metrics that can be tracked from a sales management perspective to help measure adoption. The frequency is up to the individual company however we suggest, weekly, monthly, quarterly and/or yearly.

Metric	Frequency
Pipeline by Owner or Owner Role, Current and Next FQ	Monthly
Activity Type by Assigned, Last 90 Days	Quarterly
Win Ratio, Current FY or Current and Previous FY	Quarterly
Monthly Sales Trend, Current and Previous FQ	Monthly
Open Leads by Owner Role, Open-Not Contacted, Current and Previous FQ	Quarterly
Deal Types Opportunity Owners are winning, Current and Previous FQ	Quarterly
Deal Types Opportunity Owners are losing, Current and Previous FQ	Quarterly

Table 1.3

2.0 Summary

Successful adoption has great returns; it can give you an overall value of the health of your organization from the top down. As you gain this visibility, it will help you prioritize as a company what areas you really need to focus on, what areas you are falling down in, and where you need to improve. Whether you are just rolling out salesforce.com in your company or have been using our service regularly and are struggling with adoption, this document will help you build upon your adoption strategy.

A best practice for building and rolling out these dashboards is to define as a company what your core metrics will be and build these dashboards. If you are reading this data sheet, you have already downloaded the Adoption Dashboards from the App Exchange directory and can add/delete from the existing components. Another best practice is to create management dashboards to track team activity, pipelines, win/loss, top deals, and historical trends. Equally important is to create individual dashboards for individual contributors can track their own success. To facilitate in this exercise, especially if you have a lot of users, it's best to create a "template" dashboard and instruct users to clone it and change the running user.

For ideas to help you further develop sales success metrics, customer service and support, and marketing metrics, click on link below:

http://www.crmsuccess.com/browse/content_detail.jsp?id=00630000002WPErAAO

