



CRM Onboarding

Pipeliner CRM

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Consider the Costs of Getting CRM Up and Running

There are many issues to take into account when choosing a CRM solution. But chief among these considerations should be onboarding—that is, how easy is it to implement, train your users on, and administrate your new CRM solution?

There are several reasons to pay attention to onboarding:

- The longer it takes to integrate and bring the system online, the longer it will take before your CRM solution begins showing a return on investment.
- The same is true for the length of time it takes to train your users. This is especially significant if a CRM application is complex and has a long training runway. The most important CRM users are your sales reps. How long can your company afford sales rep downtime while they're training on CRM, even part time? Another factor is that salespeople are slowed down in sales velocity as they're having to train, while they're forced to work back and forth between existing solutions and the new CRM solution.
- Administration can reap serious cost when it comes to implementing a new CRM solution. With traditional CRM applications, there is training needed for CRM administrators. Then once the solution is up and running, it can take one and sometimes more full-time administrators for CRM.

This White Paper addresses the various factors of CRM onboarding in detail—and illustrates with real-world numbers how Pipeliner CRM addresses these issues for a fraction of the cost of its competitors. We have also added in data from our Customer Satisfaction Survey to assist you in further deciphering the differences between Pipeliner and the competition.

1. Administrative Onboarding

When an organization decides on a CRM solution, the task of integrating it into the company falls upon IT staff or system administrators. They must port data in, integrate CRM with existing applications, test it in a live scenario, make CRM live, and get users trained on it.

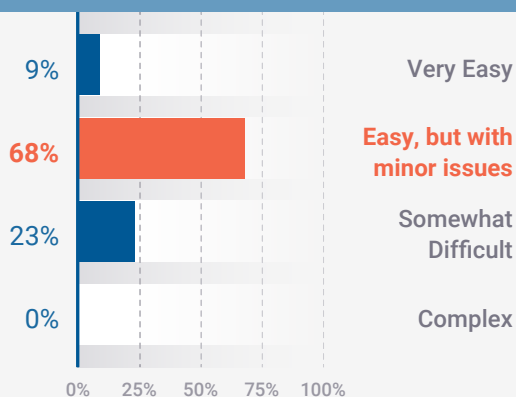
The length of time it takes for onboarding, and the investment of resources in terms of personnel, should be a crucial factor in deciding on a CRM solution. While user training is an overall part of onboarding, for the purposes of this section let us set that aside (we'll be examining it separately) and simply examine it from an administrator's role.

Complexity as a Guide

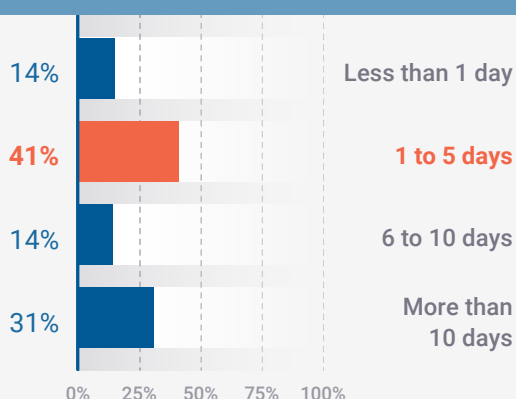
The complexity of the system is an important clue to the speed and expense of onboarding.

You can discover its complexity by reading about the system on the web, or better yet by obtaining a demo and trying it out. The number of parameters that need to be set, the functionality that needs to be tailored to your needs, the number of user roles that need to be defined and set, the difficulty of integrating the CRM system with your existing

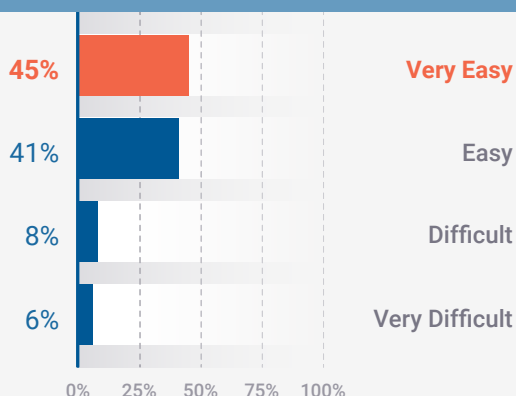
1. How complicated was it to get Pipeliner CRM up and running at your company?



2. Once you decided to go with Pipeliner CRM – How long was the Pipeliner CRM onboarding process at your company?



3. How was the implementation and roll-out of Pipeliner CRM in your organization?



applications, the ease with which data can be ported, and other factors can all be indications of a system's relative complexity.

Developers contend that complexity should not be an issue when it comes to fully supporting your company's customer relationships. This argument, however, holds less water as time goes by. Companies don't have time to wade through tomes of documentation—or worse, through hours, days or weeks of administrator training—just to onboard their CRM application.

Some Hard Figures

How long does it take to onboard the most common CRM solutions versus Pipeliner CRM?

We took a look at the onboarding claims of our most frequent competitors, and this is what we found:

30 days. — Salesforce.com

"A matter of days or weeks." — Oracle CRM

"Can take weeks or months." — Sugar CRM

"In a very simple installation, about 4 weeks." — MS Dynamics CRM

"A matter of weeks." — SAP CRM

Note that these are claims made by the companies themselves, and due to the complexity of these applications it's quite likely the statements are optimistic.

We know how long it generally takes a new client to onboard Pipeliner CRM. But we went one step further and actually asked our customers several multiple-choice questions about the speed and ease of onboarding Pipeliner CRM, so you wouldn't have to take our word for it.

When asked how complicated it was to get Pipeliner CRM up and running at their companies, 77% of Pipeliner customers surveyed found Pipeliner "Very easy" or "Easy, but with a few minor issues".

— survey question #1

Instead of our competitors' stated weeks or months to get CRM up and running, 41% of Pipeliner CRM customers reported that it took "1 to 5 days". 14% said it took "Less than 1 day", while another 14% stated that it took "6 to 10 days". — survey question #2

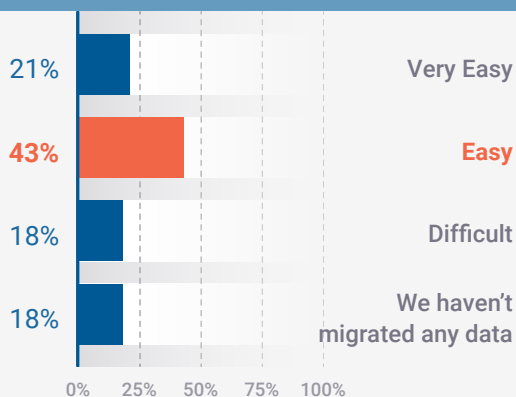
In our Customer Satisfaction Survey, we asked how easy the implementation and rollout for Pipeliner had been. The vast majority—86%—answered "Easy" or "Very Easy".

— survey question #3

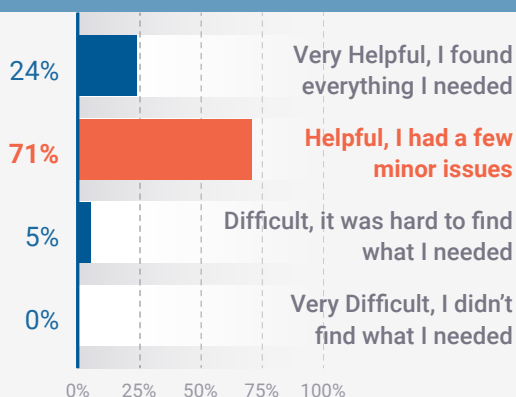
An important aspect of getting a new CRM up and running is data migration. 64% of respondents in our Customer Satisfaction Survey stated that data migration into Pipeliner was "Easy" or "Very Easy."

— survey question #4

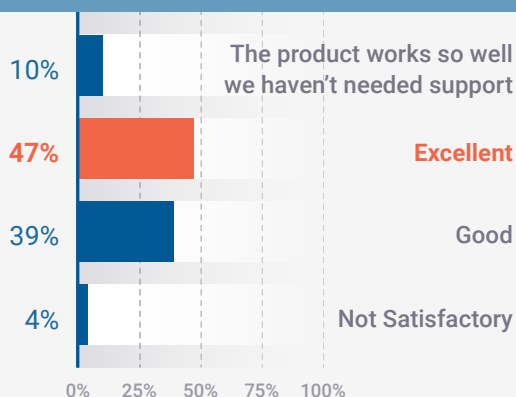
4. How easy was it to migrate data into Pipeler CRM?



5. How helpful were the Pipeler CRM product and web site?



6. How would you rate Pipeler's customer support?



To assist onboarding, Pipeler provides an in-depth help function within the product as well as assistive materials on our website.

71% of those surveyed said that they found most of the help they needed in the product help or on the website, with only a few other issues needing more inquiry. Another 24% reported that they found everything they needed within those resources. — survey question #5

New customers onboarding a new CRM system may require support, so we asked about the quality of Pipeler support in our Customer Satisfaction Survey. 86% of respondents replied that support was "Good" to "Excellent." — survey question #6

Pricing

Of course pricing affects onboarding, and costs of ongoing use. You'll often find that for the more complex products, the pricing model tends to be complex as well. Below are listed pricing models for the 5 competitors cited in this White Paper—and then Pipeler's.

Salesforce.com

Prices per user / month, billed annually.

Salesforce Essentials: Out of the box CRM for up to 5 users: **\$25** (no customization or extra features)

Lightning Professional: Complete CRM for any size team: **\$75**

Lightning Enterprise: Deeply customizable CRM for business: **\$150**

Lightning Unlimited: Unlimited CRM power and support: **\$300**

Oracle CRM

Prices per user / month, billed annually.

Oracle CRM on Demand: Pricing begins at **\$75**

The single-tenant Standard version: **\$90** (whereby Oracle dictates the maintenance and upgrade schedule)

The single-tenant Enterprise edition: **\$125** (whereby the customer dictates the maintenance and upgrade schedule)

Oracle customers may deploy Oracle CRM on Demand for **\$110**

Sugar CRM

Prices per user / month, billed annually.

Sugar Professional: **\$40**

Sugar Enterprise: **\$65**

Sugar Ultimate: **\$150**

Microsoft Dynamics CRM

Prices per user / month, billed annually.

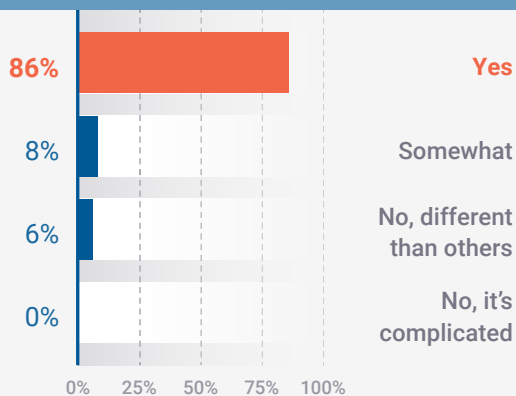
Dynamics 365 for Sales Professional: **\$65**

Dynamics 365 for Sales Enterprise: **\$95**

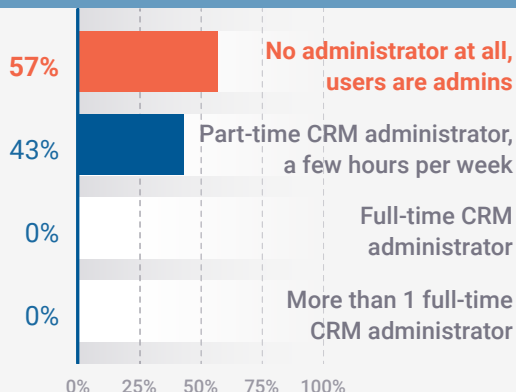
Microsoft Relationship Sales: **\$130**



7. Did you find the Pipelinier CRM pricing model simple and straightforward?



8. With regards to Administrative time for Pipelinier CRM, does your company require:



SAP CRM

Prices per user / month, billed annually.

Costs for SAP CRM can be a bit misleading, because in addition to the CRM cost the client must also pay for the SAP ERP platform, along with additional models needed for additional functionality. The three top tiers are:

Enterprise SCM: \$199

Enterprise Standard: \$149

Team User CRM Sales: \$89

SAP also requires a minimum of 15 user subscriptions.

Pipelinier CRM

Price per user / month, billed annually.

Pipelinier offers 3 versions of its top-rated CRM, at 3 different price points, to meet the needs of businesses of all sizes.

Starter: Basic sales management, tracking and collaboration: **\$25.**

Business: Full CRM functionality, advanced reporting, customization and unique productivity features: **\$65.**

Enterprise: Full enterprise CRM functionality with advanced reporting, advanced customization, integrations and services: **\$85.**

SEE WHAT YOU ARE PAYING FOR

Subsequent Administrative Demands

A certain amount of focused administrative time will be required to get a CRM system onboarded and into operation. The amount of time and effort, as stated earlier, depends on the complexity of the system.

But what about after the system is up and running?

All of the competitors we mentioned usually require a minimum of one to two full-time CRM administrators, depending on the size of the company. Especially when added to the cost of the CRM application itself, this is a substantial investment for a company. Additionally our competitors can require days to weeks of training for administrators.

According our survey of Pipelinier CRM customers, none require more than a part-time administrator. And administrator training can be done in a matter of hours or, at most, a few days part-time.

— survey question #8

2. Training of Users

In the scheme of onboarding a CRM solution, user training takes a considerable amount of attention and effort. This is no surprise, as the majority of CRM ROI rests on how quickly users can be brought up to speed, and how involved they will become in actually using the system.

As with overall implementation, the length of time to train users depends to a large extent on the complexity of the system. But complexity also has a profound effect on another aspect of user training, and beyond that the actual adoption of the CRM solution: their willingness to use it. In the past far too many companies have more or less ignored user adoption. IT executives chose the CRM application, company executives approved the purchase and gave the go ahead, and nobody ever looked back. The sales reps—not only a company's front line of business and revenue but the primary users of CRM—were never consulted.

Is it any wonder that most salespeople are bitter about CRM applications?

The users' willingness to use a system, which of course has a direct impact on training, hinges on yet another factor.

Ease of Use

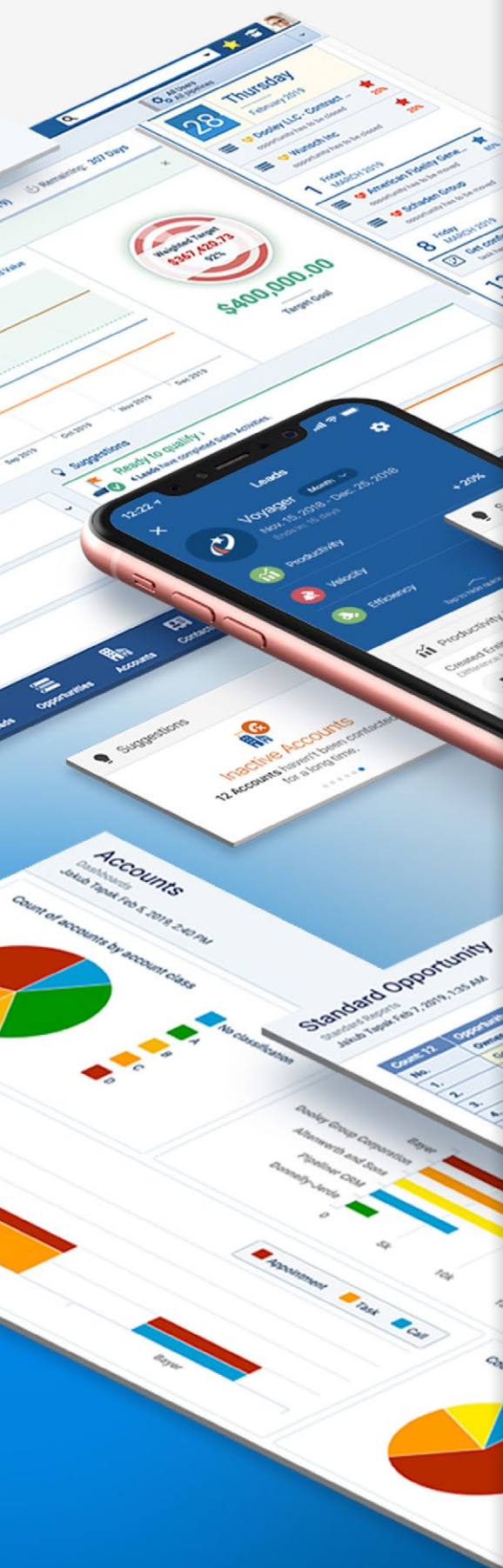
Perhaps the most overused term in software marketing is "ease of use." But this much-hyped buzzword does tell a very important tale, especially on the topic of CRM—so much so that you won't find a CRM developer anywhere that doesn't make this claim.

But the fact is that traditional CRM solutions have been anything but easy to use. They have been complex, difficult and time consuming to train on, and the target of endless complaints. In fact, if you were to randomly poll salespeople on CRM, you would find the far majority responding negatively.

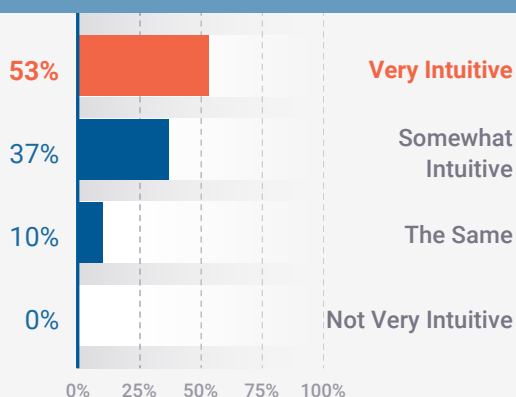
The underlying reason for this animosity is that CRM applications have not been designed to aid salespeople in their sales, but as reporting mechanisms so that sales reps can be managed.

When a CRM solution is intuitively designed from the beginning with salespeople in mind, three things happen:

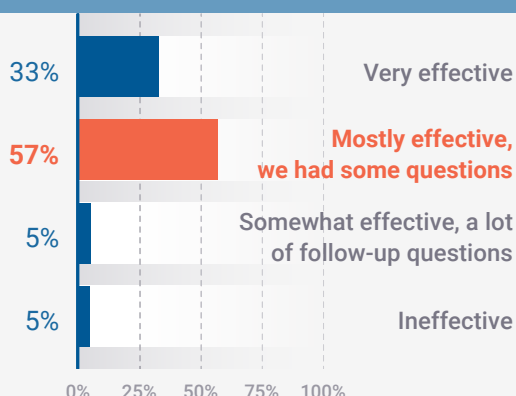
1. Training takes less time, because salespeople are actually enthusiastic about using the product.
2. The ROI happens much more quickly because salespeople are actually using it, and not the other solutions (their own spreadsheets or notes) they might have had in place previously.
3. Because the application is designed to facilitate a salesperson's job, it is factually intuitive and easy to use.



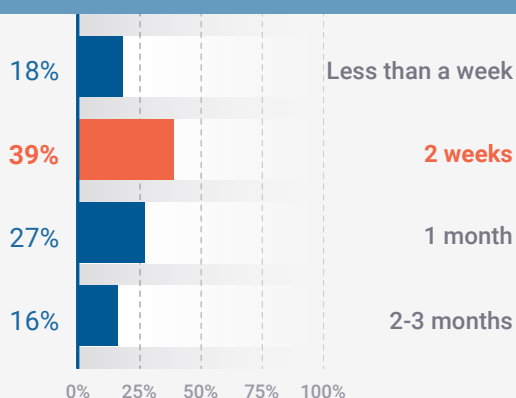
9. How intuitive do you find Pipeler CRM to use compared with other systems?



10. How effective was the Pipeler CRM training for your sales reps and company personnel?



11. How long did it take for your users to become proficient using Pipeler CRM?



Training Time Comparisons

Fortunately or unfortunately, no CRM developer, not even the leading ones, actually states how long user training will take. However user training would normally be included in the overall onboarding time, as quoted above.

You can more or less gauge the user training runway yourself, though—just have a look at the complexity of the system, and the different functions that each user must learn. A factor to consider is: How intuitive is the application, and how well does it natively fit in with the functions of a sales rep's job? That will certainly be key to the speed of learning for a salesperson.

In our Customer Satisfaction Survey, we asked how intuitive users found Pipeler to be. 90% found Pipeler to be "Intuitive" to "Very Intuitive."
— survey question #9

Training Efficiency

Another aspect of training to examine is the efficiency of the training offered by the vendor. If you Google a particular CRM application along with keywords such as "user training" or "sales rep training" you will find courses offered by that vendor and others, along with evaluations of training. You may be in for some surprises. For example, one course offered by Salesforce.com is 42 hours long. Another company offers advice on "overcoming endless Salesforce training" and yet another on "overcoming sales rep resistance" to learning and using the application. None of these would serve as rousing endorsements for that particular product.

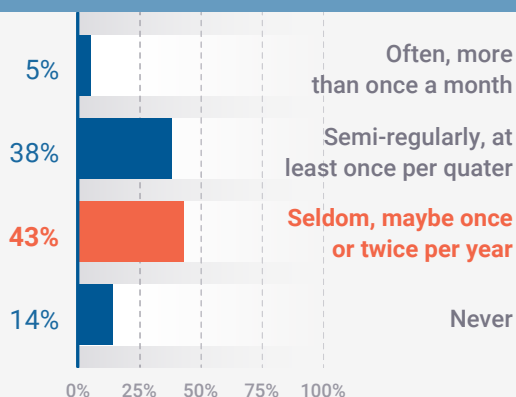
All of the others offer many courses of varying lengths—and the fact that these vendors have to offer courses at all is an indication that training users on them is a complicated affair.

Because Pipeler CRM was designed to be intuitive for users, training is commonly done in as little as a few hours to a few days. No formal training courses are offered or required.

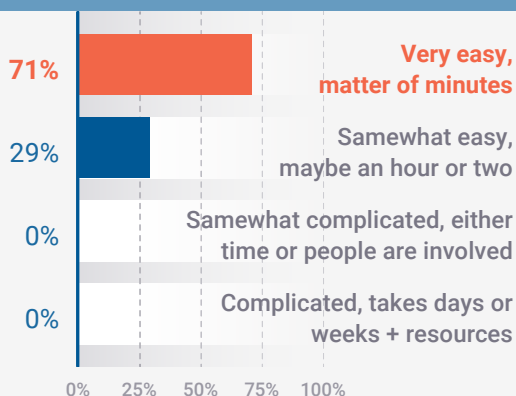
How efficient is our user training? Turning back to our survey of customers, 33% of our customer survey respondents stated that our training was very effective and the company was able to get up and running with Pipeler right away. Another 57% stated that they still had a very few questions after the training, but these got answered right away and they were off and running. — survey question #10

In our Customer Satisfaction Survey, 58% of those surveyed stated that it took 2 weeks or less to become proficient using Pipeler. — survey question #11

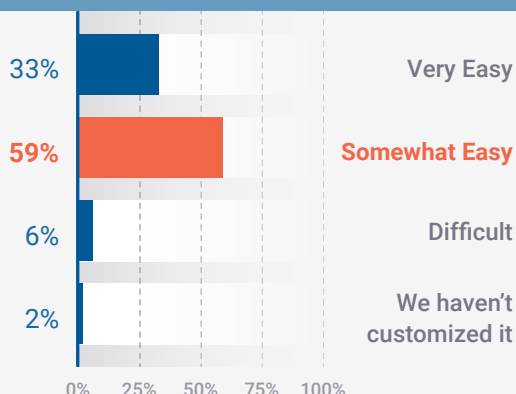
12. On average, how often do you change your sales process stages or the custom field templates within Pipeliner CRM?



13. When you do have to change your sales process or field templates within Pipeliner CRM, how easy is it?



14. How easy do you find Pipeliner CRM to customize?



3. Flexibility

Another key factor in onboarding CRM is the customization of the application to a company's sales process. In the last few years the importance of a company's sales process has taken a considerable spotlight. Companies with a tried-and-true sales process have consistently higher revenue and better sales velocity than those that either don't have a sales process or pay only passing attention to it.

Forward-looking companies utilize a sales process that is dynamic—that changes to reflect variations in the market, economy, product or service improvements and sales innovations. A company that casts their sales process in stone is ignoring the one constant of the universe: change. What happens when a sales process—or any of its steps—becomes outmoded or improved? Suddenly sales reps are off of that sales process and onto one of their own making, each rep potentially acting on their own “sales process.”

When this happens it also has a profound affect on sales management. When a sales process is established and agreed upon, and all reps are following it, management is simplified because the sales manager knows exactly in which direction salespeople are going with each of their opportunities. But when that sales process isn't used, confusion and chaos result because the sales manager is trying to keep a handle on all in-progress opportunities.

CRM and Sales Process

Many CRM developers have taken the sales process into account and have enabled their products so that they can be customized to a company's individual sales process. Doing so allows a company to better organize opportunity management and makes for a more intuitive application.

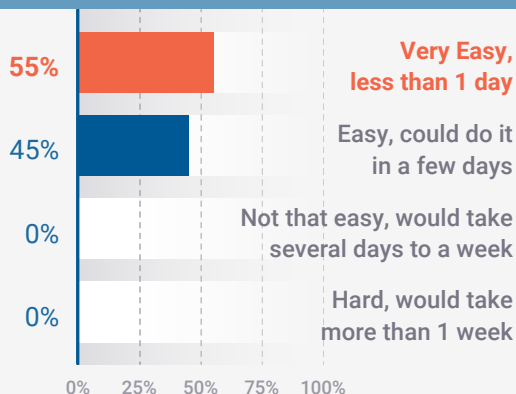
But once the CRM application has been so customized, then what? If a sales process should be dynamic, how easy is it to change within the CRM application?

If you've ever tried to do this with a traditional CRM application, you already know the answer. But simply try Google-searching instructions for any of the CRM applications we've mentioned, on how to change the sales process once it has been established. For some you won't even find such instructions. It can become so complicated that, as we had reported by one of our clients, it can require the hiring of an outside CRM consultant to accomplish it.

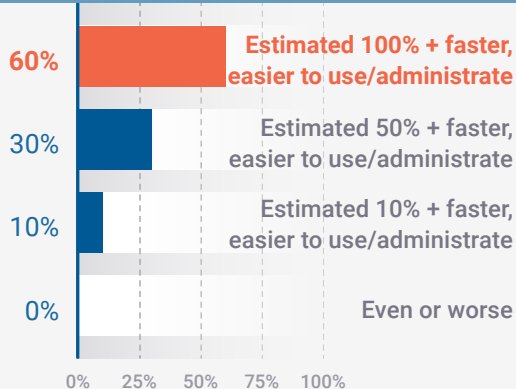
Conversely, Pipeliner CRM was designed with the dynamic sales process in mind—it can be changed very simply in minutes.

We discovered by surveying our customers just how important a dynamic sales process is to businesses today. 38% change their sales process at least once per quarter, while 43% once or twice a year. It's no surprise such companies are using Pipeliner CRM—to go through

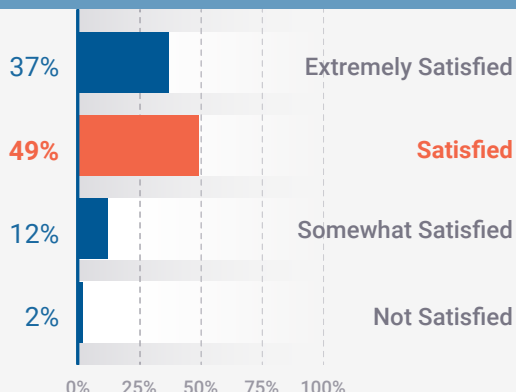
15. If you were to leave your company, how easy would it be to pass on your knowledge of Pipeliner CRM to someone else?



16. How does Pipeliner CRM compare to other CRM solutions you have used in the past?



17. Overall, how satisfied are you with Pipeliner CRM?



a complex evolution every time the sales process must be changed is unthinkable. — survey question #12

We also asked these customers how easy it was to change their sales process in Pipeliner. 71% replied that it only took minutes, while 29% reported an hour or two. — survey question #13

In our Customer Satisfaction Survey, 91% stated that they found Pipeliner “Somewhat Easy” to “Very Easy” to customize. — survey question #14

Transference of Knowledge

There is another aspect to flexibility which is quite important, especially when a sales rep leaves a company—The Handoff. When someone leaves an organization, they need to hand off their work to someone else so that the departing salesperson’s sales can continue without a hitch.

If a CRM application is complicated, this can be an overwhelming proposition. Not only does the incoming rep have to learn a complex CRM application, but must also understand the pending sales within that CRM application. If another existing rep is taking over the departing rep’s sales it will be easier because the “new” rep already knows the CRM application. But if CRM is complex, it can also be a problem of picking up every ongoing opportunity just because tracking them is difficult.

Hiring and training a new sales rep is always a lengthy, costly and somewhat risky undertaking. The last thing you want is to add the risk that of having opportunities fall through the cracks or be lost altogether.

Once again, Pipeliner CRM excels here.

When our customers were asked how easy it would be to pass on the knowledge of Pipeliner CRM to someone else, 55% replied that they could do it in less than a day, while 45% replied that it would only take a few days. — survey question #15

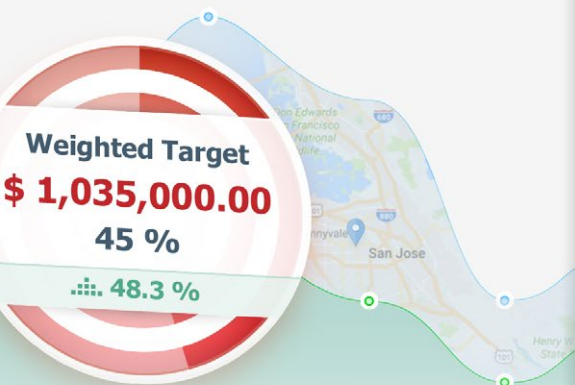
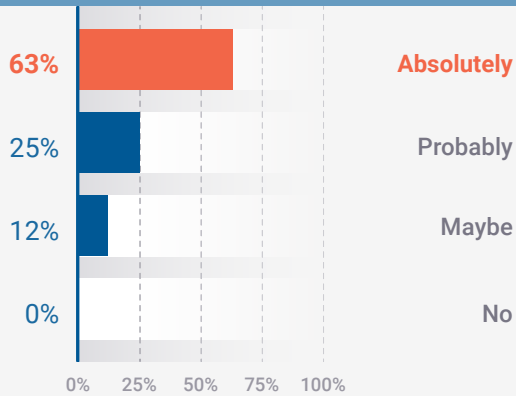
4. Direct Comparison

We have spoken throughout this White Paper about the various ways Pipeliner’s chief competitors compare with Pipeliner. But what did our customers say when directly asked about how Pipeliner stacks up against CRM applications they had used in the past?

60% estimated that Pipeliner was 100% (or better) in being faster, easier to use, and/or administrate. 30% estimated that Pipeliner was at least 50% better in these areas. — survey question #16

In our Customer Satisfaction Survey, 90% stated that they found Pipeliner “Intuitive” to “Very Intuitive” in comparison to other CRM systems. — survey question #9

18. Would you recommend Pipeliner CRM to others?



Additionally a very telling statistic from this survey was that 86% stated that they were “Satisfied” to “Extremely Satisfied” with Pipeliner, and 88% would recommend Pipeliner to others. — survey question #17, #18

5. Find Out For Yourself

As always, you should never take anyone’s word for it, even if they are a trusted source. This is especially true when it comes to an application as vital and basic to a company’s operation as a CRM solution.

We of course recommend giving Pipeliner a demo run. But for any other CRM systems you try, we highly recommend taking the onboarding factors we have discussed in this White Paper fully into account.

As you demo the product, fully find out or get a good estimate of:

- How long the product will generally take to onboard.
- How much administrator time is involved in onboarding.
- What administrative resources will be required after the product is up and running.
- The time and effort involved in training users.
- The flexibility of the application is when it comes to changing the sales process.
- How easy it is for a new rep to pick up CRM and ongoing opportunities from a departing rep.

With any major undertaking, you strive to “start it off right.” With CRM, “starting off” means onboarding. If your onboarding is relatively painless and quick, you are up and running with your new CRM solution and it is already paying for itself. With Pipeliner, onboarding requires a fraction of the cost of its competition. We think you’ll find, as our customers have, that Pipeliner is equally as cost-efficient and effective after onboarding, and from there on out.

**Fast onboarding
is just one of Pipeliner CRM benefits.**

★ SEE ALL BENEFITS