



Beyond login rates: three key areas for measuring adoption

Now that your Salesforce CRM application is implemented and set up for your business needs, it's time for your users to dive in and start using it. But how do you know if your users are really getting the most from Salesforce CRM? The best way to tell is to proactively measure adoption rates.

Tracking user logins is a good start, but it's not enough. Because it can be confusing to figure out what to measure, you need to develop a framework of key performance indicators (KPIs). To come up with these metrics, we recommend involving key stakeholders—managers, senior managers, and executives—to determine KPIs based on business benefits and desired process performance. If you don't define and regularly monitor KPIs by incorporating the reports and dashboard features in Salesforce CRM, you may find that adoption, consistent usage, and data quality will suffer.

If you haven't done so already, check out the AppExchange for adoption dashboards to track login activity and new records added by users.

Abstract

User adoption is key to making Salesforce CRM successful. To make sure you stay on track, you need to be proactive about measuring adoption. This document outlines three key areas for measuring user adoption.

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Choosing adoption metrics

Consider these three key areas when choosing metrics to measure user adoption:

1. Usage
2. Data quality
3. Business performance

1. Usage

Your first measurement of adoption—and a basic indicator of success—is login rates. You also need to ensure that users are actively and consistently updating data and creating new contacts, opportunities, and/or cases, depending on their roles in the organization.

Below is a list of suggested baseline metrics to track usage. Which metrics to use and how often to track them depends on your unique requirements, but we've provided some guidelines to get you started:

Usagemetric	Frequency
Users logged in – last 7 days	Weekly
Users not logged in by last name – last 7 days	Weekly
Users never logged in	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	Monthly
Open tasks by assigned role – current and previous	Quarterly

2. Data quality

Data quality is a valuable metric for measuring adoption. Looking at critical fields and making sure users complete them correctly is important. If certain fields are not filled out, or are filled out incorrectly, it may compromise user adoption. Designing a protocol to ensure users fill out all fields in a consistent and accurate manner creates strong data integrity and reliability, which translates into higher user confidence and adoption.

Below is a list of suggested baseline metrics to get you started in tracking data quality:

Data quality metric	Frequency
Opportunities with a close date – last 60 days	Monthly
Stage opportunities are entered	Monthly
Prospect accounts missing # employees – last 60 days	Monthly
Lead rating on converted leads	Monthly
Accounts with all key fields populated	Monthly
Accounts missing rating field	Monthly
Key, non-required fields filled out	Monthly

3. Business performance

Usage should also reflect business performance and compliance. Ensure that your users are not just logged in, but are using the application in a way that enhances business effectiveness. For example, measuring the types of calls, as well as the level at which calls actually close the deal, is more effective than just measuring the number of calls. You should also build analytics that will uncover patterns and trends that track performance levels and identify trouble areas.

Business performance metric	Frequency
Pipeline by owner or owner role	Monthly
Monthly sales trends	Monthly
Activity type by assigned owner	Quarterly
Win ratio for current and previous fiscal year	Quarterly
Open leads by owner role – open not contacted	Quarterly
Deal type by owners winning – current and previous quarters	Quarterly
Deal type by owners losing – current and previous quarters	Quarterly

Successful adoption is critical to your CRM success. It gives you an overall sense of your organization's health from the top down. As you gain experience with adoption metrics, you can prioritize those areas where you need to focus, adjust, and improve. Whether you're just rolling out Salesforce CRM or have used it for a while, drive up your user adoption rates to get the most from your solution.



For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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