

## Tips for using incentives and rewards to boost adoption

How can you get users onboard with Salesforce CRM? How can you get them to realize its value and encourage them to use it? Try incentive and reward programs—they're a proven way to engage and motivate people. Incentives can take different forms, including recognition, cash, points, or actual rewards. For example, one customer gives away iPhones to the strongest adopters each quarter. Another hands out monthly Starbucks coffee cards to those who convert the most leads.

- **Measure usage** – Before you can reward usage, you need to know who's doing what, how often, and how well. To get that information, go to the AppExchange and download some of the free adoption dashboards created by salesforce.com. The most popular of these are the [adoption dashboards](#) and a [sales activity dashboard](#).
- **Tie compensation to usage** – One of the strongest measures to boost adoption is to tie usage to compensation. Build use of Salesforce CRM into your job descriptions and performance evaluations. And adopt the mantra, "If it's not in Salesforce CRM, it doesn't exist." It's an easy way to make sure user behavior aligns with your business objectives.
- **Ensure data quality** – In addition to requiring that users enter data into Salesforce CRM, be specific about both timeliness and quality. For example, reps should enter prospects and early-stage opportunities immediately, rather than waiting until just before closing a deal to enter data. Use picklists and validation rules to enforce these standards. You can also use the free [data quality analysis dashboards](#) to analyze the quality of the data your team enters.
- **Make adoption fun** – Decide what behavior you want to reward most—such as proposals or on-site demos—and then reward the top performers as part of a game or contest.
  - **Create a reward points program** – One way of encouraging and tracking progress is to give people points. For example, a 90 percent login rate for the month could earn 10 points. Users can cash in accumulated points on a special Web site ([www.incentivemarketing.org/](http://www.incentivemarketing.org/)). Or start by giving users a certain number of points and then subtracting points when they do something wrong, such as not entering required information.
  - **Monthly newsletters** – Start a monthly newsletter with tips that reinforce your business processes and highlight success stories. You could include a quiz—for example, have users guess who has the largest pipeline this quarter, what campaign generated the most revenue, and so on. Get it right and get a prize.

### Abstract

User adoption is key to making Salesforce CRM a success. To ensure high rates of user adoption you need a long-term strategy, with ongoing efforts to drive adoption.

Find out how to make incentives and rewards part of *your* adoption strategy.

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# Best practice

- **Make a game of it** – Because your implementation is a work in progress, it’s important to keep users engaged. A great way to do that is to make training creative and fun with games such as Tic Tac Toe (divide into teams and ask questions about functionality until someone wins), Jeopardy (create categories on different topics, divide into groups of 2 or 3, highest points win), and Poker Hand (get a card for asking and answering questions ... the best poker hand wins the pot).
- **Engage the team spirit** – Break user groups into teams and have them meet at regular intervals (for example, quarterly) to get their feedback and suggestions. Use the application’s ideas or cases functionality to track feedback and then let your admin judge the best ideas. The winning team gets dinner, tickets to sporting events, or something similar.
- **Reward mentorship** – Assign team mentors, then reward the mentors of those teams that get good results. Try lunches with the executives, where they can get visibility for themselves and their teams.
- **Use peer pressure** – Let’s face it—sometimes rewards just don’t do the trick. In such cases, you can use disincentives to get people to comply. For example, a “wall of fame–wall of shame” page, which highlights those at the top and bottom of the leader board, can be a strong motivational tool. A real-life example of this approach comes from a customer who created a dashboard called “Clean Your Room” to discourage negligence such as stuck opportunities, pushed opportunities, and accounts with no recent activity.



#### For More Information

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

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