OnTrack[SM]

CRM Success System

# Getting Started Guide for Project Champions

The **OnTrack CRM Success System** requires your active involvement to ensure your new system generates maximum return on investment.

Please read this guide thoroughly and ask questions if something is not clear or if you encounter any problems during your roll-out.

This Guide is for the **Project Champion**

# Welcome to OnTrack!

The **OnTrack CRM Success System** is a proven process designed to help you implement **Sage CRM** quickly and efficiently.

Your success is determined by your involvement level and adherence to this process, so please ask questions if something is not clear or if you encounter any problems during the roll-out. Hundreds of customers have successfully implemented CRM through this process and we look forward to you joining their ranks!

This program and these materials are meant for the **Project Champion** (the person or persons responsible for managing your CRM roll-out) and your CRM **Administrator**. In many companies, these two roles are served by the same individual.

Throughout this process, please use your **Microsoft Teams Collaboration Space** (**MS Teams)** to ask questions or request clarifications.

**Please read through this entire guide for important tips on:**

- Setting up and navigating **MS Teams** and the **Support Portal**
- Navigating the **OnTrack Hub** and training materials
- Finding general help to familiarize yourself with CRM
- Understanding your onboarding and implementation schedule

# What do I do as the Project Champion?

The **Project Champion** is a member (or members) of your team who takes personal ownership of your CRM implementation. The **Project Champion** needs to be strategically-minded, patient, and an effective organizer with authority and upper management support. They should also understand and communicate the benefits of the project across departments to ensure buy-in. They should be enthusiastic about the project and ready to take on the challenges of CRM implementation.

Although CRM implementations are complex and sometimes daunting projects, remember that you are not in this alone! The **OnTrack Team** will stay with you every step of the way to ensure your CRM project succeeds.

**A good Project Champion will do all of the following:**

1. Keep your CRM project aligned with your business goals
2. Set expectations and timelines
3. Act as a liaison between different roles, departments, and organizations
4. Ensure access, buy-in, and training for your team
5. Establish and maintain best practices
6. Ask for help from your **OnTrack Team** (us!)

# Table of Contents

# What do I do first?

The best way to start your implementation process is by being diligent and proactive. It's important to take the time to thoroughly review these materials to best ensure your team's success. You're holding a powerful resource in your hands; take advantage of it!

**Tasks to do before your Kick-off Call (First Meeting with the OnTrack Team):**

- Read through this entire guide
- Start educating your team about CRM and its benefits
- Confirm an upcoming 4-6 week period during which you and your team have the appropriate amount of time to focus on learning their new CRM system
- Follow the instructions to log in to the **MS Teams Collaboration Space** (see pg. 9)
- Say hello and ask questions in **MS Teams**!
- Access the **Onboard Roadmap Site** and begin looking at Stage 01 and Stage 02 (see pg. 15)
- Access the **Support Portal** and log a test case (see pg. 17)
- Submit your User List via **MS Teams**—names, emails, and roles for all CRM users (template available in **MS Teams > Files**).

## Did You Know?

Our team has hundreds of videos on CRM topics. Just go to:
**www.youtube.com/azamba**
And search for any CRM word or subject!

# Our Roles

Your **OnTrack Concierge** is your main line of communication with the **OnTrack Team**. Their job is to make sure that all of your questions get answered by the right people in a timely manner and to make sure your implementation is on schedule.

Your **OnTrack Success Coach** is your CRM expert and primary instructor for learning the usage and best practices of your CRM system. Your **Success Coach** leads your coaching calls and workshops.

Our **CRM Tech Support** is responsible for setting up and installing your CRM system on the back-end. They are also responsible for handling and responding to support tickets on more technical issues. Think of them as your "geek squad" for CRM!

# Your Roles

The **Project Champion** is a member or members of your executive or management team who takes personal ownership of your CRM implementation. They set expectations and timelines, ensure users are training on and using your new system, coordinate tech and troubleshooting issues with IT, and act as a liaison between users, managers, executives, and/or partners throughout the project.

The **Administrator** is the person in your organization in charge of the back-end of your CRM. Once they are acclimated, they are responsible for managing, editing, and customizing CRM to suit your company's needs. The **Administrator** is also often the **Project Champion**.

**End-Users** are everyone in your organization who will have login access to your CRM. This can include salespeople, customer service reps, and marketing people.

**Your I.T. Team** are the people who provide your Office 365 licenses and tech support.

# Prepare your Team

Salespeople are typically the toughest group to persuade to use CRM over their more comfortable older systems.

They are also the most important group to get on board.

Your sales team are your front-line CRM users. They are the people who will use the system the most, and who stand to gain the most from a successful implementation and adoption—but they will also bear the brunt of any failures along the way.

So before you begin training, you need to build buy-in from sales.

## Demonstrate value

Your salespeople want to sell. Anything that doesn't help them sell more, better, faster, or easier is in their way.

So how will CRM help them sell? It is up to you to convince them it will and show them how.

There are many, many ways CRM helps salespeople sell, but the short version is that CRM ensures your salespeople always have the information they need to more easliy:

1. Retain customers
2. Increase revenue per sales rep
3. Increase revenue per customer

Once your team understands the big-picture benefits, you can start showing them how the system will deliver on these promises.

## Anticipate Objections

Go to the next page to be ready to respond to common objections, as well as any other concerns your team raises.

## Get sales input early

The more top-down your CRM adoption project is, the less likely you are to get the kind of buy-in you need, and the less likely your sales team is to get the system they need.

Work together, get sales team members involved early, and ask them these 3 critical questions about their sales processes:

1. What do you want to do better?
2. What do you want to do faster?
3. What do you want to do easier?

Get their input early and often, and ensure open lines of communication so that little questions and concerns don't get ignored and become big problems down the road.

This is about practicality and optics; the more CRM looks like a decree from on high, the less you'll know about what's going on in the trenches, and the less likely your front-line users will buy in.

### Frame CRM as a journey, not a destination

CRM will not be perfect from Day 1. And that's ok! It's not meant to be.

With help from the **OnTrack Team** and your **End-Users**, the system will evolve and change over time to better meet your needs.

That means you need to establish processes to get regular feedback as you move forward with your CRM usage, not just during the roll out. This will help ensure sales people understand they are being heard and that you will take action to improve the system as needed.

## Common Objections (and how to answer them)

### We like our current methods

Whether it's your old CRM or some combination of spreadsheets, email, calendars, index cards, sticky notes, etc., every salesperson has their preferred method of tracking leads and accounts. Many of them are probably comfortable with their preferred system.

*Show them the benefits of CRM outweigh the difficulty of learning to use it.*

*Present it like learning to ride a bicycle: nobody is good at it at first, but with a little practice, you can go a lot farther and a lot faster on a bike than on foot!*

### Management will spy on us

Salespeople often hear "sales visibility" as fancy talk for "spying." Nobody wants to be micromanaged. But worse yet, salespeople could see CRM as a "gotcha!" system ready to kick them to the curb the moment they lose a few deals or fall behind on a quota.

*Do not think of CRM purely as a monitoring system. Your team will likely resist.*

*Instead, explain that CRM will be used to ensure everyone in the company is on the same page regarding customers to ensure successful, profitable relationships.*

### We'll lose our leads & accounts

If your sales team works on commission and does not have a history of collaborating on deals, a tool like CRM could look like an easy way to lose leads and accounts to other salespeople.

*With help from your sales team, identify who needs access to what information, and then explain how you will ensure the security of valuable information.*

*You may also need to update your sales process to enable better collaboration, in which case you will need to demonstrate the benefits of any new process to your team.*

### Sage CRM is not a good fit

If your CRM doesn't align with your sales processes, or is too inflexible to allow any deviation from those processes, you're going to frustrate your sales team. The best salespeople are creative, ambitious, and independent. They don't want to be tied down by an out-of-touch system, and you don't want that, either!

*Virtually anything in Sage CRM can be personalized to meet your business' specific needs and processes. Ensure that any workflows or automations you build into your system fit with the way your sales team operates—and make sure they understand this, too!*

# Common Objections (cont'd)

### CRM will slow us down

Salespeople aren't interested in data entry—they're interested in selling! Any time they lose to data entry and reports and whatnot is time they aren't spending selling, and nobody wants that.

*At first, CRM may slow down parts of the sales process. But over time it will speed your sales process up, and make it easier for salespeople to juggle more opportunities thanks to centralized, up-to-date information. Make sure you can communicate this net positive.*

### CRM is too impersonal

Some salespeople see CRM as a way of taking sales out of the hands of the salesperson. They see automation as artificial, standardized process as inflexible and uncreative, and AI as inferior to experience and relationship building.

*Emphasize CRM as a way to support salespeople, not replace them. Ensure that any workflows or automations you build into your system fit with the way your sales team operates—and make sure they understand this, too!*

### CRM is too complicated

This is especially common among salespeople who have either never used CRM, or have but were not adequately trained. CRM does a lot, and for people who don't get excited about technology for the sake of technology, it can seem overwhelming at first.

*Don't try to move too quickly, and make sure your team knows you'll give them adequate time and resources to learn what they need to succeed.*

### We don't trust the data

This is often code for "we don't trust marketing/customer service/accounting/whoever in our records," or even "I don't trust anyone but myself with my customer information."

Some of your team may have used a CRM full of bad data before, and don't want a repeat of that experience.

*Foster communication and trust between departments and team members.*

*Develop a plan with your sales team to prevent bad data or user error from damaging or destroying their records.*

## Did You Know?

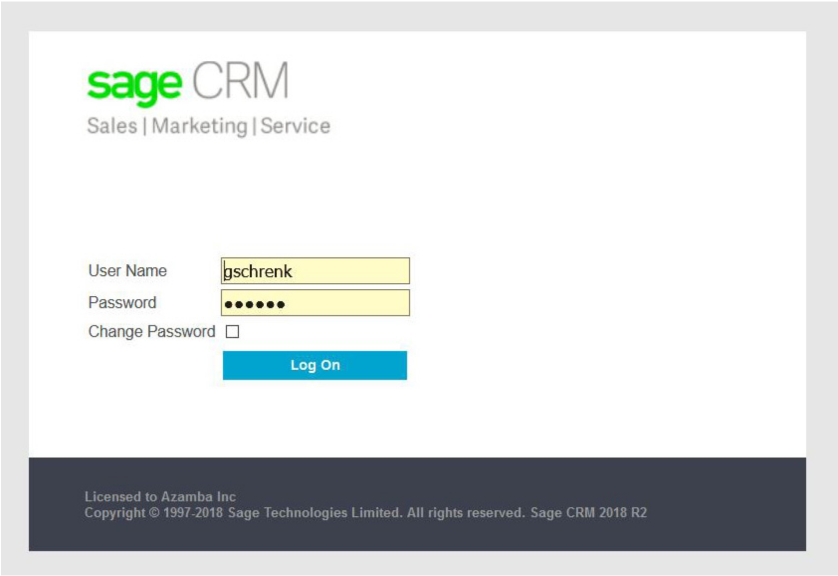
It's never too early to start gathering questions, concerns, and objectives from your **End-Users**. Put together a Word document and drop it in **Microsoft Teams** to keep them all in one place!

# Logging in to CRM

Your CRM instance is activated by the **Sage CRM Team** and/or the **OnTrack Team**. Please contact us for assistance or resolving issues regarding your instance activation.

The **OnTrack Team** Will also assign your new licenses and roles to your team as specified in the **User List** you have submitted to us. If you need to make any changes to who is assigned, please reach out to the **OnTrack Team**.

1. Go to your email and look for one from @azamba.com
2. Follow the link and enter your default credentials from the email
3. Change your password as needed and keep it somewhere safe.




4. You can bookmark your instance URL with your browser or create a desktop app for easy access.

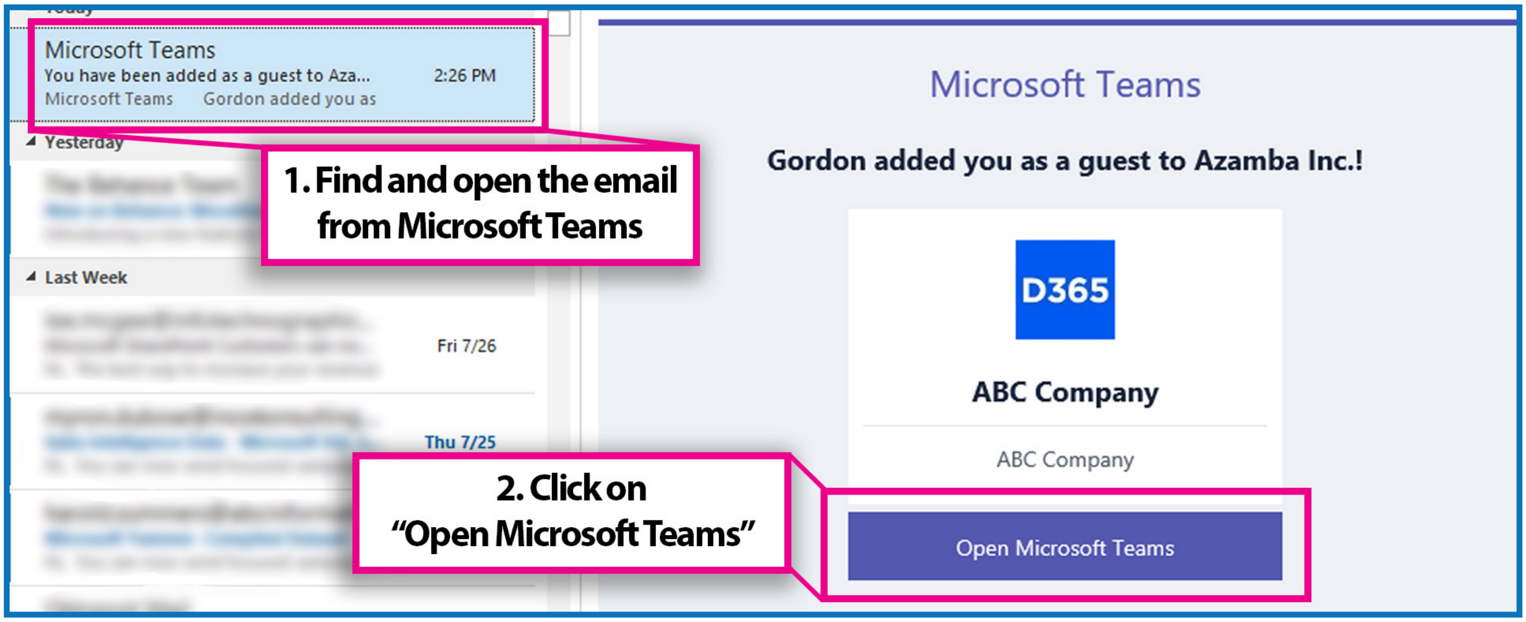
# Logging in to Teams

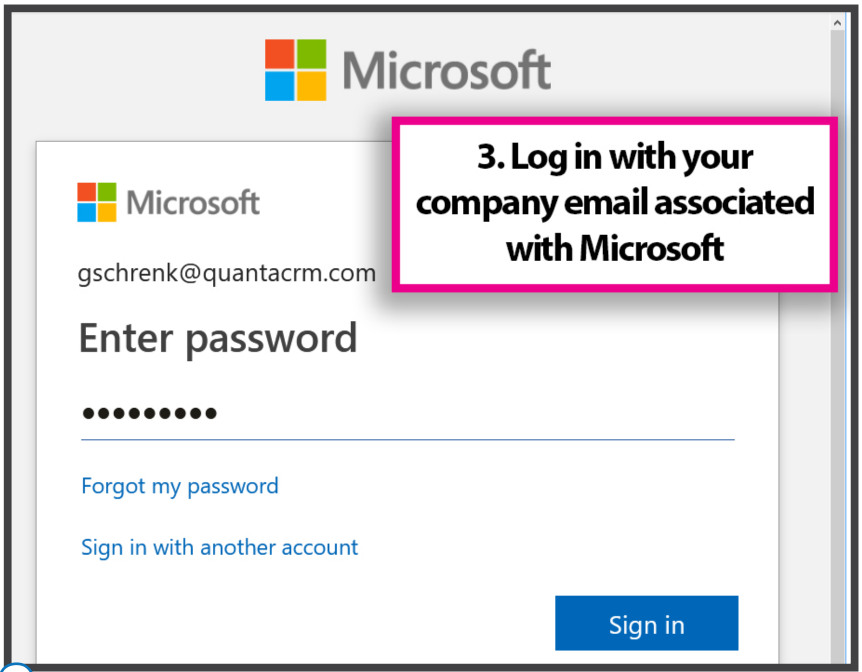
We use **MS Teams** as our platform for onboarding your CRM system. **MS Teams** will be the primary tool you use to communicate with your **Concierge**, **Success Coach**, and other members of our organization via a message board system.

Unlike email, **MS Teams** allows both of our organizations to stay informed with all discussions that occur (no more sending redundant emails!). **MS Teams** also gives access to our training materials via the **Onboard Roadmap Site**, as well as our **Support Portal**.

**MS Teams chat is great for:**

- Scheduling and organizing meetings
- Asking quick "where is" or "what is" type CRM questions
- Submitting questions lists and agenda lists
- Asking questions about the **OnTrack CRM Success System**

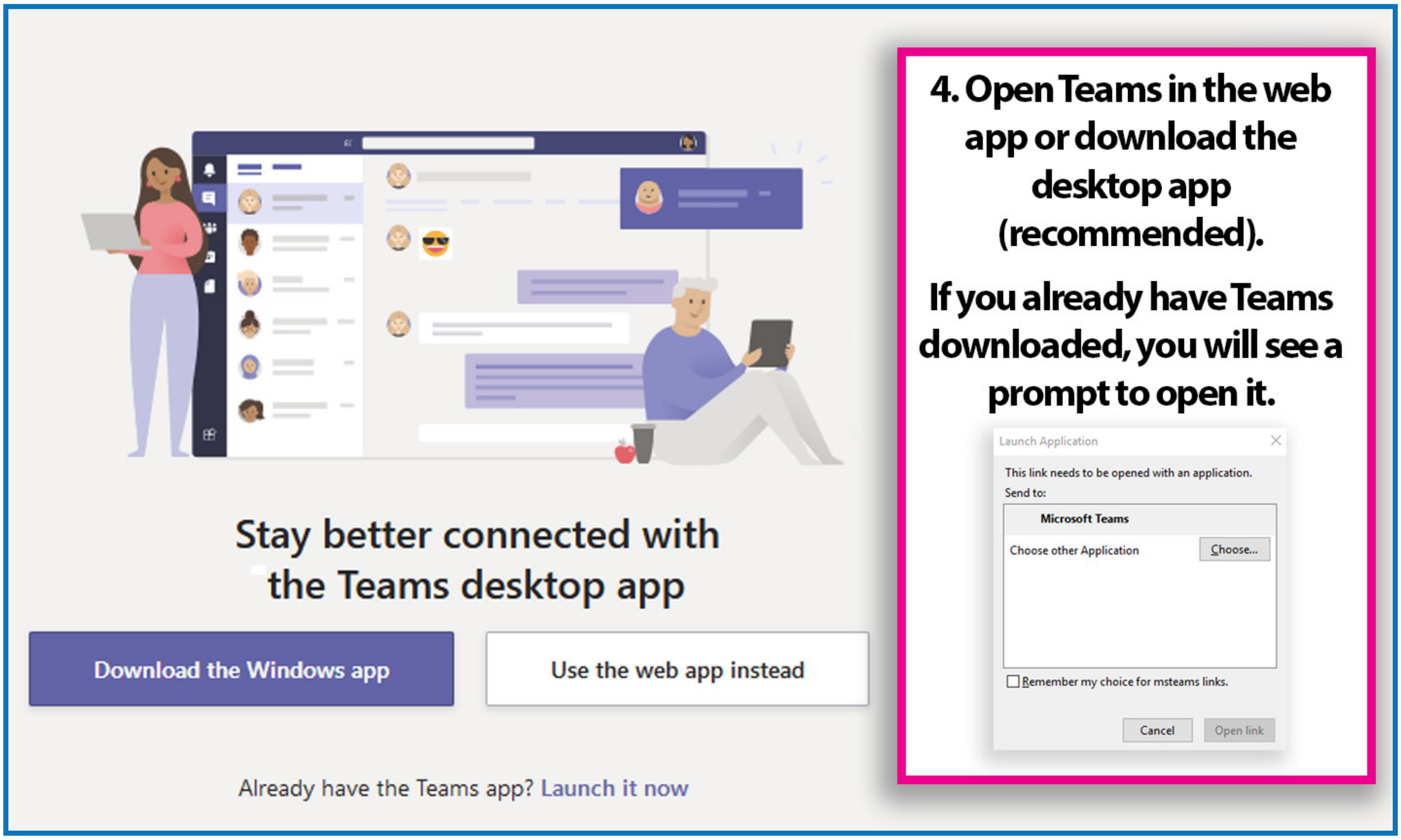



## Who has access to your MS Teams Collaboration Space?

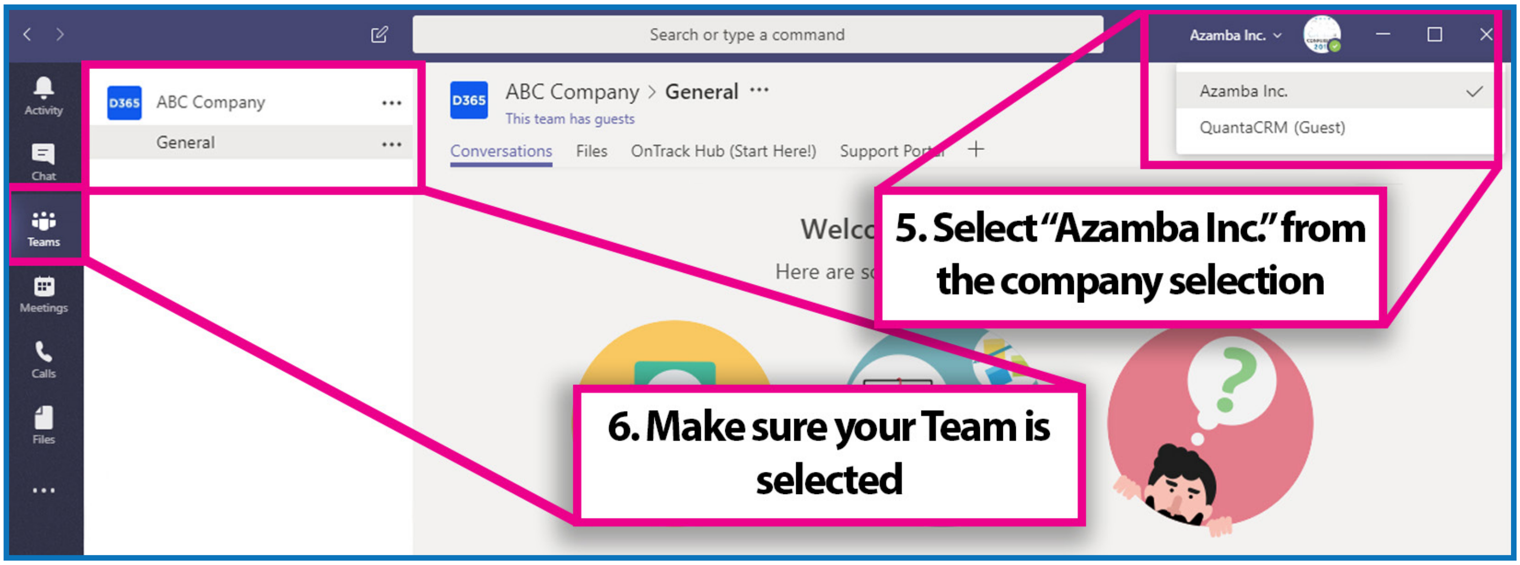
The **Collaboration Space** is reserved for you, the **Project Champion**, to communicate with the **OnTrack Team** to steamline your onboarding process. The **Project Champion** is responsible for being the liason for your company and communicating needs and concerns on behalf of your **End-Users**.

# Logging in to Teams (cont'd)




**4. Open Teams in the web app or download the desktop app (recommended).**

**If you already have Teams downloaded, you will see a prompt to open it.**



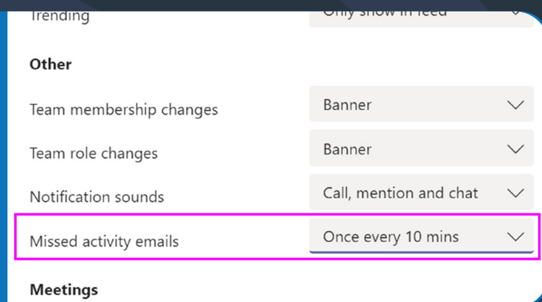

**5. Select "Azamba Inc." from the company selection**

**6. Make sure your Team is selected**

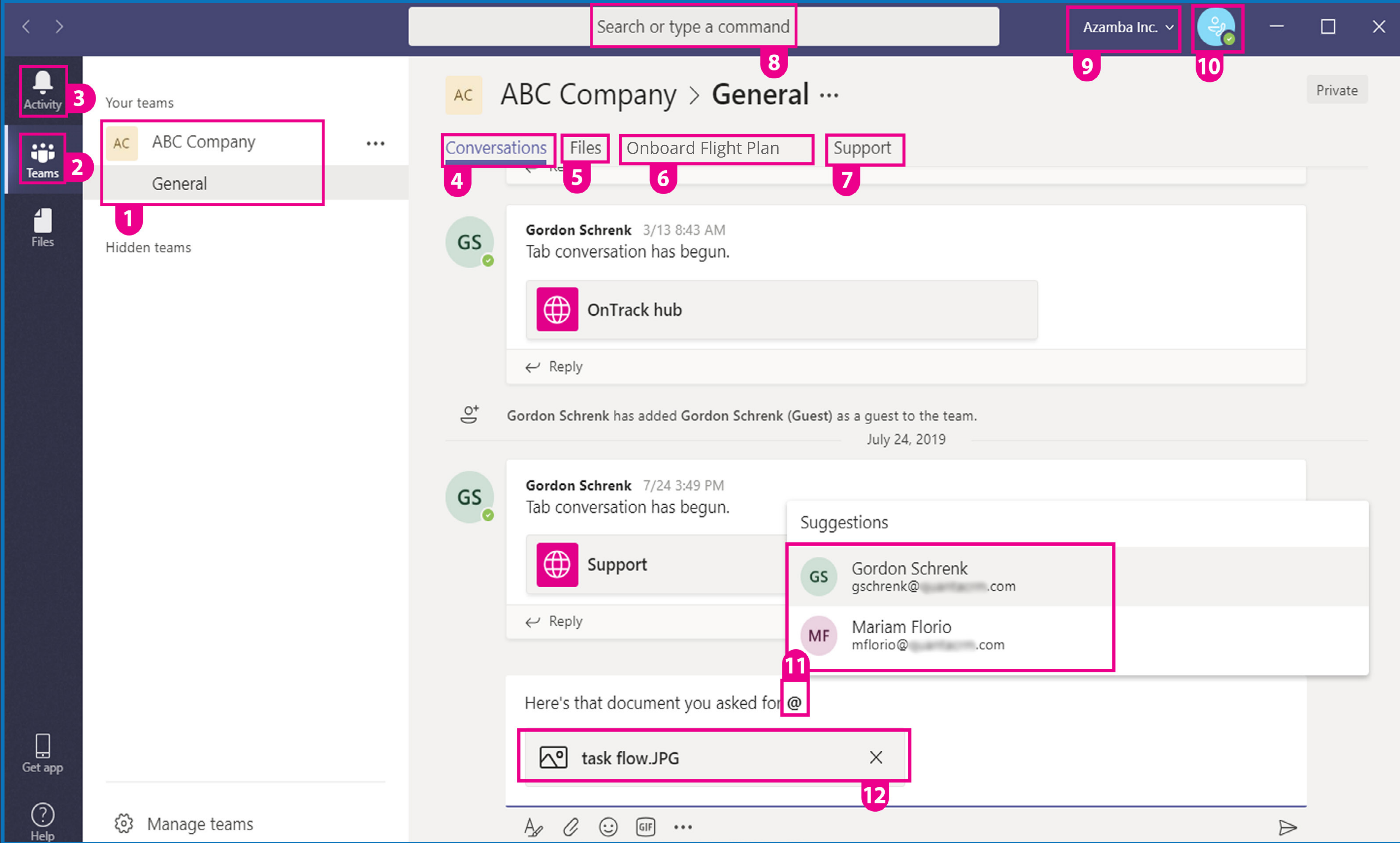
## Did You Know?

When not in use, **MS Teams** will email you after 1 hour when you have unread messages. You can get alerts sooner by going to:

**Profile (upper right circle) > Settings > Notifications > Missed Activity Emails**

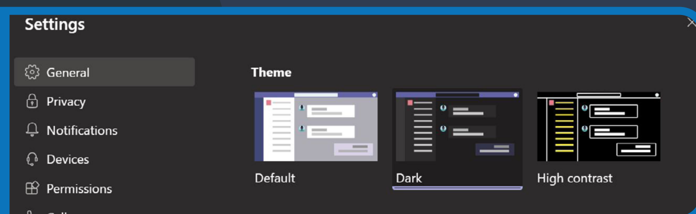


# Microsoft Teams Visual Guide




## Did You Know?

You can change MS Teams to **Dark Mode** by clicking on the **Profile Button** and going to: **Settings (upper right circle) > General > Theme**



# Microsoft Teams Visual Guide Key

### 1. Team & Channel

Your Team is named after your company. Your channel, called "general" by default, is what you click on to see the conversation, or chat, window pictured above.

### 2. Teams Tab

Click here to see all of your available Teams and Channels.

### 3. Activity Tab

Click here to see all recent communications and responses that you are a part of.

### 4. Conversations Tab

Click here to see the conversation, or chat window, pictured above.

### 5. Files Tab

Click here to see all files that have been uploaded or shared to your Team. Note that different Teams share their own files.

### 6. Onboard Roadmap Site

Click here to go to our implementation site, with step-by-step guides, schedules, and training videos that walk you through your onboarding process. Learn more on page 15.

### 7. Support

Click here to log a support case with our **CRM Tech Support**. Learn more on page 17.

### 8. Search Bar

Looking for a specific conversation? Type in key words here to get a list of all conversations that contain those words.

### 9. Company Toggle

You may already have an **MS Teams** account associated with your company. To see conversations with us, you can toggle companies by clicking here and switching to "Azamba Inc."

### 10. Profile Button (Settings Access)

Here you can change your profile image, access saved messages, and manage your **MS Teams** settings and preferences.

### 11. @ Mention

When you type "@" in the chat window, a list of members of the Team will pop up. By typing someone's name or clicking on one shown, you tag that person and they will get an alert that you are writing to them. This tool is great for getting faster responses!

### 12. File Drag-and-Drop

If you need to share a file or document with our team, you can drag that file directly into the chat window. When sent, your file will also appear in the Files Tab.

# Implementation Schedule

Below is a map of how we structure our scheduling and meetings. Because no two implementations are the same, we break our meetings and training into four stages, each with an estimated time frame. We want your team to get to your **Launch Date** on time to start receiving your return on investment as soon as possible. The more you and your team are prepared and available for training, the faster your onboarding process will be!

**WARNING: During this process, it is critical that you do not let your onboarding stagnate. Lingering for too long during these stages increases your team's risk of a failed implementation exponentially!**

To see what else happens in each stage, please go to page 16.

| | | | | | |
|---|---|---|---|---|---|
| STAGE 01 Prepare for your Rollout 1-2 Weeks | Kick-off Meeting | System Setup Meeting | Pre-Training Session | | |
| STAGE 02 Prepare your Champion 1-2 Weeks | Administrator Training Period (6 hr) | | Administrator Checkpoint (1 hr) | System Streamlining Session* | |
| STAGE 03 Train your Team 1-2 Weeks | Full Team Training Period (4 hr) | | Internal Training Recap | Sales Team Checkpoint (1 hr) | Launch Date |
| STAGE 04 Build New Habits 3-4 Weeks | Concierge Check-ins (2-4 calls) | | Coaching Call I* (1 hr) | Coaching Call II* (1 hr) | Coaching Call III* (1 hr) |

**Meeting with us** **Task conducted within your team**

* Premium/Preferred only

## Kick-off Meeting

You will meet with your **OnTrack Concierge** to plan out a start date for your training and for when to schedule your first appointments.

**Before this meeting:**

- Read through this entire booklet
- Follow the steps to access **MS Teams** as well as CRM

**During this meeting:**

- Log in to **MS Teams**
- Log in to CRM
- Log a support ticket

## Pre-training Session (Internal)

You will meet with your sales team to introduce what they can expect from their CRM implementation process. Use the materials provided in this guide to assist you in getting your team comfortable and prepared for training.

**During this session:**

- Address concerns and questions regarding your onboarding process
- Alert them to training timeframes and CRM usage expectations

## System Setup Meeting

You will meet with **Our CRM Tech Support** to give them system information that they need to set up and configure your new CRM system.

For this meeting, you should have had both your Implementation Checklist, as well as your User List filled out and returned. If you or your team have any questions about filling out your Implementation Checklist, you can go over them with our IT Team during this meeting.

## Administrator Training Period

The **Administrator** will take the **Admin Training Course**. We recommend reserving 6 hours over a several day period to complete the course.

**To Access:**

- Go to the **Onboard Roadmap Site > Stage 02** in **MS Teams**

## Administrator Checkpoint Meeting

The **Administrator** will meet with our team to review any questions you may have regarding the administrator training materials to ensure you feel comfortable operating inside CRM.

**Before this meeting (Required):**

- Submit your **Admin Questions List** via **MS Teams**

## System Streamlining Session

### Premium/Preferred only

You will meet with your **Success Coach** who will walk through and implement changes and configurations to your system so that your CRM is best suited for your business' specific needs.

If you are not a premium/preferred customer, you will be provided with materials that will train you to make these changes yourself.

**Before this meeting (Required):**

- Submit the **System Streamlining Form** via **MS Teams**

## Full Team Training Period

You and your team will take the **Sales Team Training Course**. We recommend reserving 4-6 hours over a several day period for everyone on your team to complete the course.

**To Access:**

- Go to the **OnTrack Hub > Stage 03** in **MS Teams** for the link to the **Sales Training Course** **to give to your** **End-Users**

## Internal Training Recap

You and your team will meet internally to verify that your staff has completed their training and to identify areas which require more attention. Keep notes about your review to share with your **Success Coach** at your **Sales Team Checkpoint**.

**During this meeting:**

- Compile a list of questions from your sales team and submit via **MS Teams** for your **Success Coach** to review

## Sales Team Checkpoint Meeting

You and your sales team will meet with your **Success Coach** to review any questions you may have regarding the sales training materials and to ensure your team feels comfortable operating inside CRM.

**Before this meeting (Required):**

- Submit list of questions from your sales team and submit via **MS Teams**

## Launch Date

You and your team will begin actively using your CRM system for your daily activities. It's now crucial that each of your users takes the time to get comfortable using CRM day-to-day instead of any older methods. It will be the duty of you, the **Project Champion**, to make sure **End-Users** are adapting to this change.

**After this event:**

- Post your questions about CRM in **MS Teams** as they arise

## Concierge Check-ins

Your **Concierge** will be calling in periodically after your **Launch Date** to ensure your onboarding is running smoothly

**During these calls:**

- Update us on your company's progress
- Express any needs or concerns
- Organize next steps

## Coaching Call Meetings

### Premium/Preferred Only

After your initial **Launch** period, you will meet with your **Success Coach** to go over more complicated questions and get hands-on assistance.

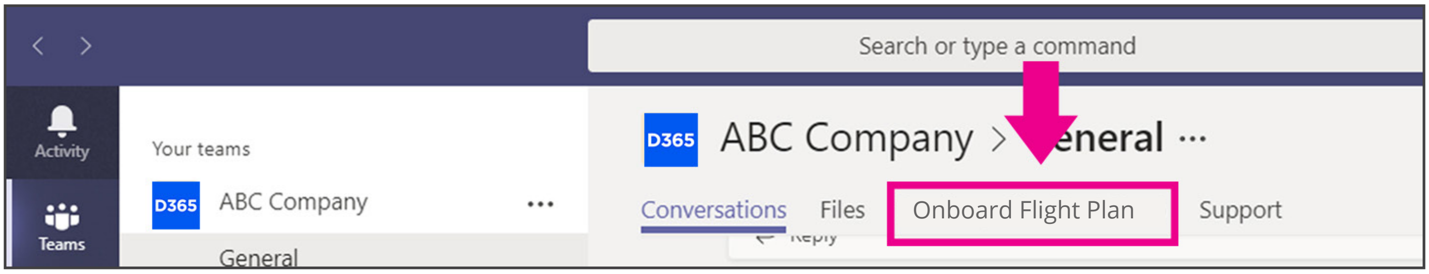
**Before these meetings:**

- Propose topics in **MS Teams** you or your **End-Users** would like to learn about more in-depth

# The Onboard Flight Plan

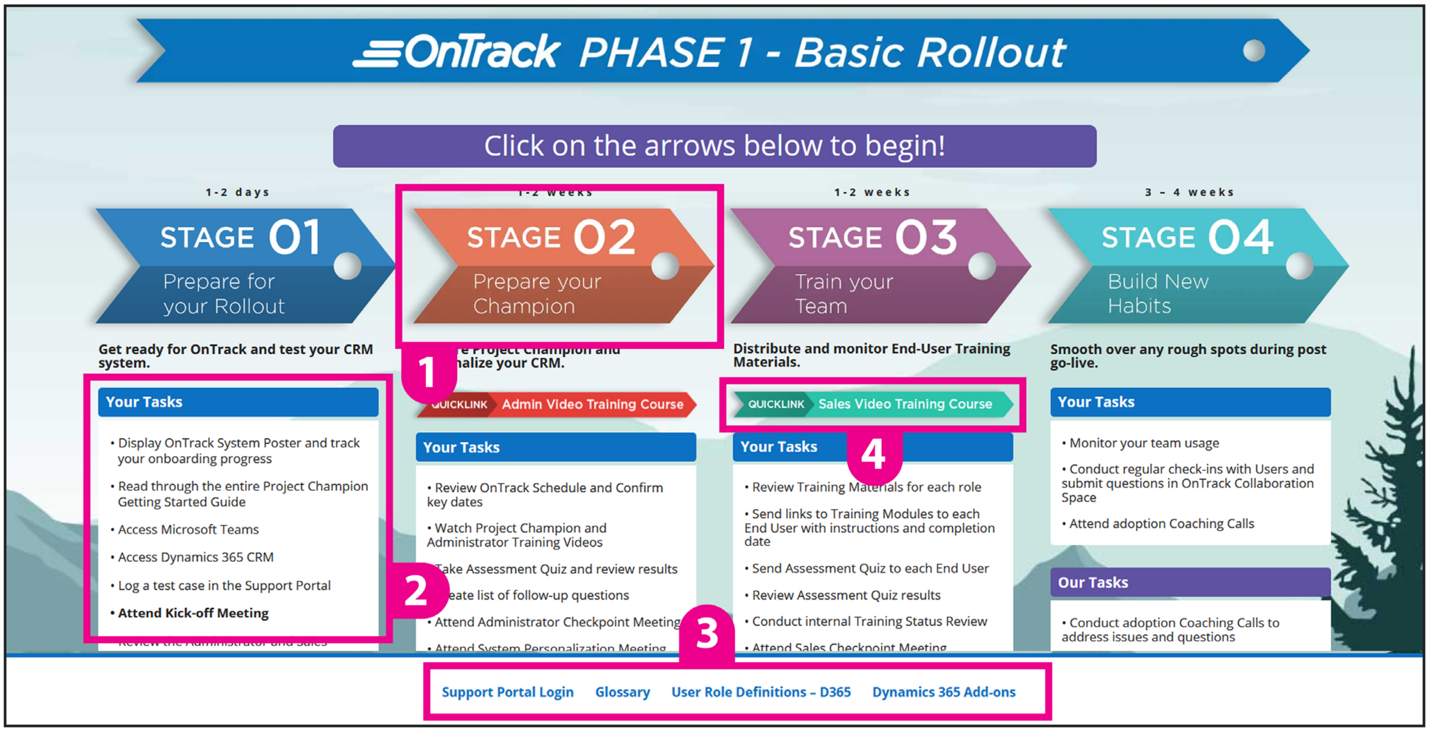
The **Onboard Flight Plan** is your home for step-by-step implementation instructions, onboarding calendars, and training materials including the admin and sales training courses.

## How do I access my Onboard Flight Plan?




From our **MS Teams Collaboration Space**, go to:

**General > Onboard Flight Plan**




### 1. Stage Arrows

Click on the arrows to explore each step in the onboarding process. These can include tasks, meetings, videos, and more.

### 2. Your Tasks

See a preview of all of the steps that need to be accomplished by your team during each stage or event.

### 3. Resources Menu

Scroll to the bottom for access to our resource section, which includes useful tools, references, and file links.

### 3. Quicklinks

Fast access links to important areas like the **Sales Team Training Course**.

# OnTrack Stages

**STAGE 01 - Prepare for your Rollout**

### Stage 01 - Prepare for your Rollout

Prepare yourself, your team, and your system for OnTrack Onboarding.

**STAGE 02 - Prepare your Champion**

### Stage 02 - Prepare your Champion

Roll up your sleeves and get to work! Complete OnBoarding training modules and streamline your system for a successful launch.

**STAGE 03 - Train your Team**

### Stage 03 - Train your Team

Get your team set for success! Introduce your streamlined app, distribute end-user training materials, and monitor internal progress.

**STAGE 04 - Build New Habits**

### Stage 04 - Build New Habits

Your system has launched (but your journey has just begun)! Encourage ongoing system usage, develop more in-depth knowledge, and implement continued system improvements.

# What's Next?

Your training may be complete, but your CRM journey has only just begun! After completing phase 1 training, your team can start taking advantage of our other resources like deep-dives, add-ons, system audits, and more.

Ask your **Concierge** or **Success Coach** to learn more about how we can take your CRM system to the next level!

# Did You Know?

Is someone who wanted to attend going to miss a meeting?

No problem! The OnTrack Team can record any of our meetings upon request ahead of time.

# OnTrack Support Portal

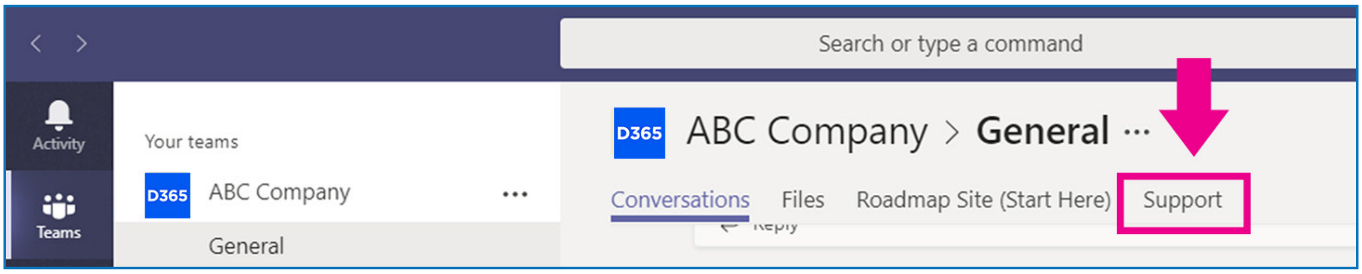
The **Support Portal** is for sending troubleshooting tickets to our **CRM Tech Support**. Filing your issues as cases ensures our staff can keep track of and solve your support issues in a timely manner. It is the responsibility of the **Project Champion** to file support tickets on the behalf of all of your **End-Users**.

**Use the Support Portal if:**

- You are having a technical issue with CRM
- There has been an issue with your setup/installation
- You are receiving error messages
- You cannot log in to CRM
- You require a data import
- You have a question for our support team

# How to Access

- From our **MS Teams Collaboration Space**, go to: **General > Support**




- Or from the web, go to or bookmark:
  **https://ontracksupport.microsoftcrmportals.com**

## First Time Login:

You will receive an invitation email from **Azamba** with an invitation code to the Portal. Please follow steps below to redeem the invitation and use the portal.

1. Follow the link sent in the invitation email
2. Click **Register** and follow instructions
   - We recommend you use your email address for your username

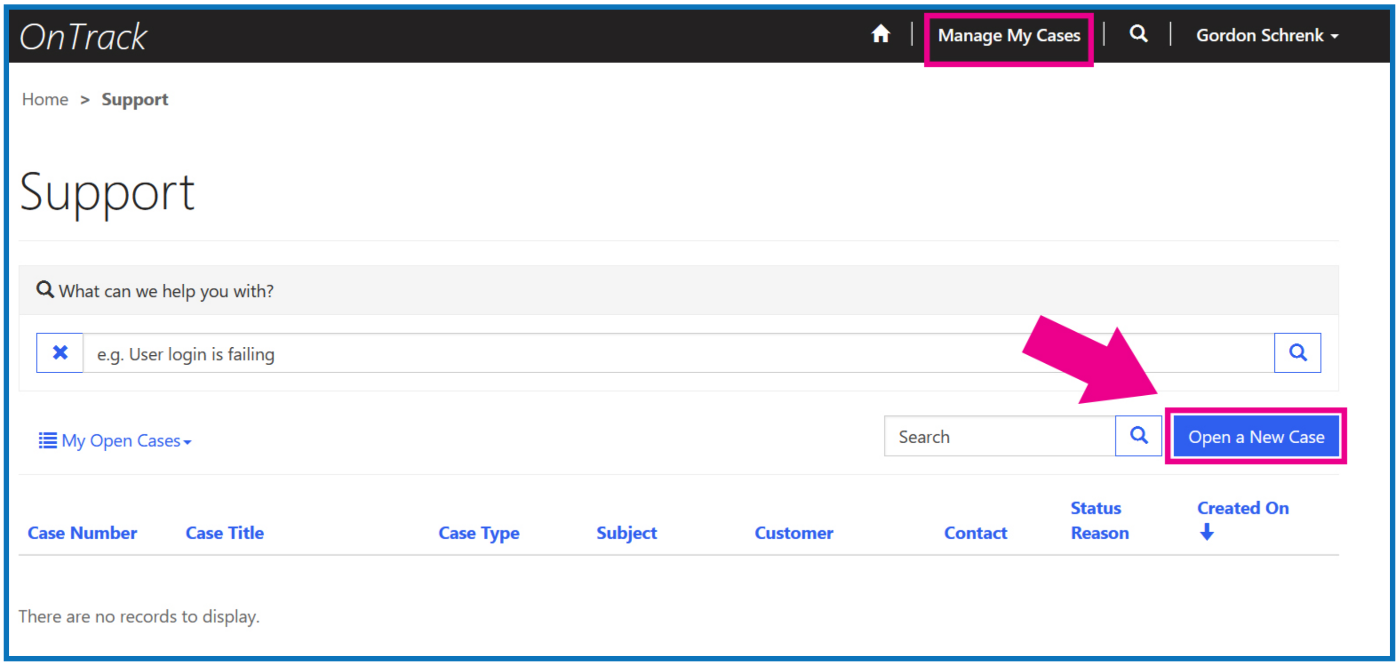
# OnTrack Support Portal (cont'd)

**3.** Then click on **Register**, fill in **Register for new local account** details, and click **Register** again.

**4.** After completing registration, you will be taken to a new screen. Please confirm your email if you get an email confirmation prompt. Click **Update** after making any further changes to your profile.

# Logging a Case

## To log a case, click on **Manage My Cases**, then **Open a New Case**




Fill out the form with as much information as possible to assist our **Support Team** in resolving your issue as quickly.

**Please note:** Support tickets are handled based on your plan and the severity of the issue. OnTrack also provides rates to expedite your support ticket as defined in your contract.

# Did You Know?

Your OnTrack plan allows you to file an **unlimited number of support tickets!**

So don't be afraid to reach out for help on anything you need!