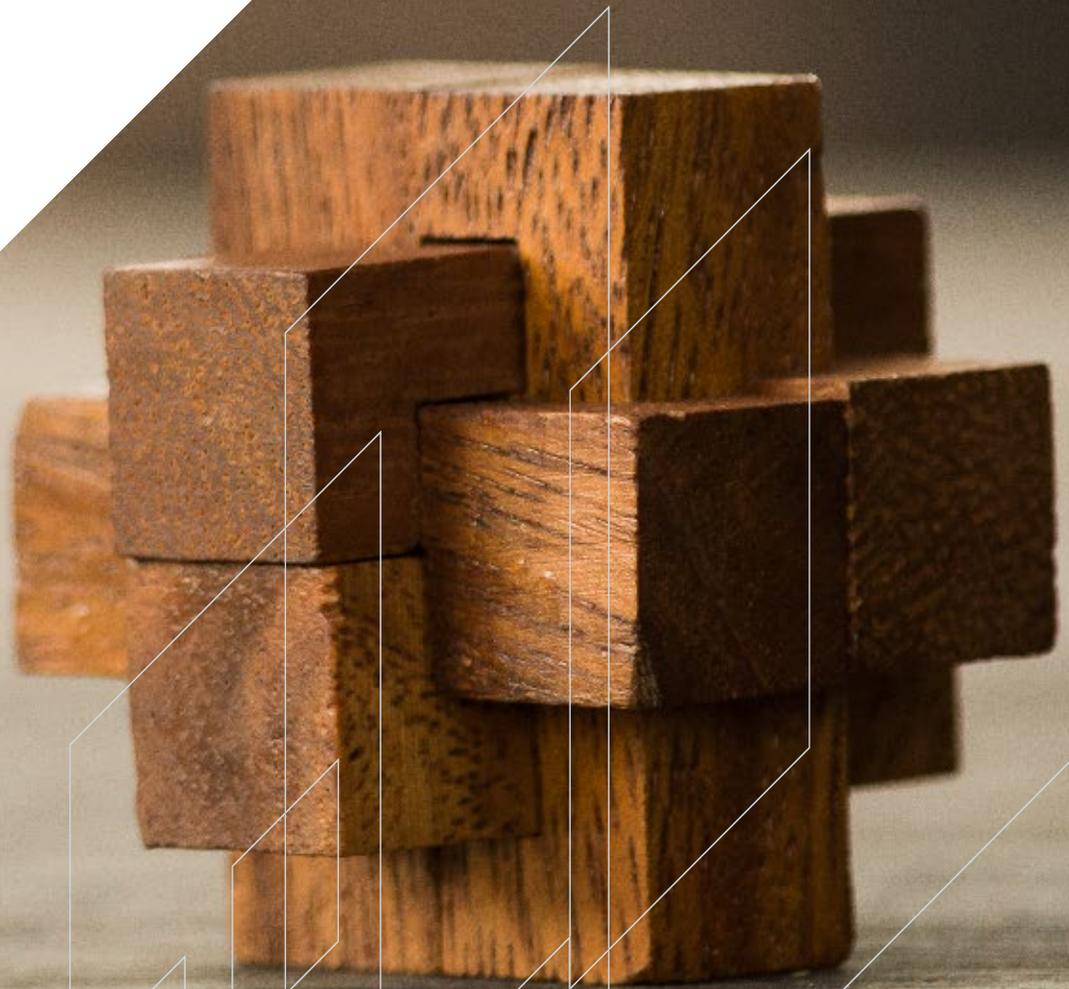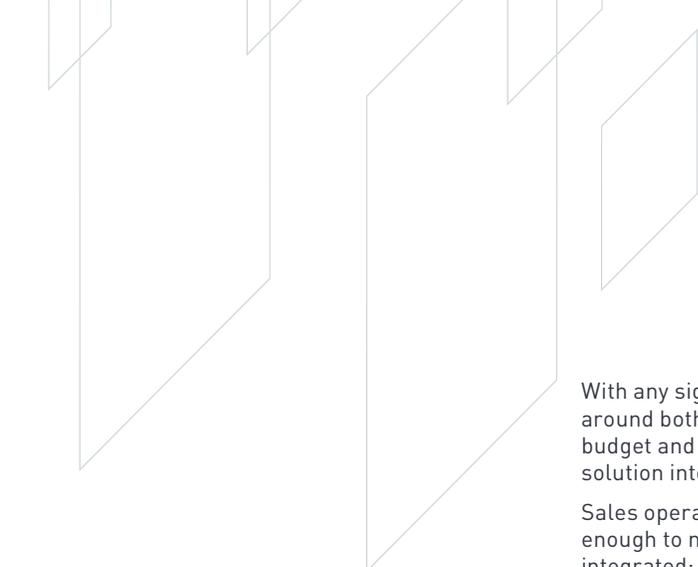# Nine Steps to Tackle Three Common Challenges of Sales Ops Technology Implementations

By Arun Balakrishnan and Gokul Gururajan

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Technology and business alignment issues can be expected when executing any large-scale sales ops project, but in our experience, project leaders often give too little attention to three common challenges that can significantly hinder complex implementations.

Scope creep, difficulties integrating the new system with the technology around it, and poor user adoption can be potential showstoppers if not properly thought through and executed.

Best practices can smooth these issues by keeping communication flowing, setting expectations for all stakeholders, and establishing responsibility and accountability to get the project completed.

With any significant technology implementation, you expect to encounter issues and conflicts around both technology and business. IT must balance business flexibility with project budget and scope; minimize disruption to the existing ecosystem; and integrate the new solution into the current architecture. In short, IT needs to contain disruption risk and cost.

Sales operations, meanwhile, has its own set of challenges. The solution must be flexible enough to meet both current and potential requirements; business goals need to be integrated; and users must be trained to use the tool to its full advantage. In short, business must drive the organization faster.

We hear these implementation problems pop up in discussions with sales operations vets every day. If they were easy to solve, they would have been solved. The good news is that there are best practices that can reduce these challenges and increase the chances of a successful project. Based on our experience, here are common system implementation problems and the best practices that we've used to conquer them.

Issue No. 1: Scope Management

As a project marches through requirements and design planning phases, other ideas will surface around business needs that could potentially be addressed through the solution— and some of these ideas actually are good ones. However, if proper scope management isn't in place, these good ideas turn into anchors that can drag down the project by adding to schedule and cost, leaving everyone dissatisfied.

One of the projects that we worked on had a very tight timeline to roll out several applications to the field. It was designed to align with other strategic initiatives that were already planned and there was absolutely no wiggle room. It was imperative that we had a good scope management process in place because missing deadlines would have been catastrophic.

Our Best-Practice Guidance:

+ **Clarify scope from the outset.** Begin with an assessment activity that includes interviews and workshops with multiple stakeholders at different levels of the organization to establish a clear list of must-have features. This list should be reviewed with senior leadership to gain buy-in among all stakeholders.

+ **Form a consensus around feature prioritization.** Within the scope management process, having well-defined criteria for prioritization is essential to preventing distractions. A strong project management officer (PMO) makes sure that all items are addressed at the right time by the right set of people, and that decisions are made in a timely manner.

+ **Communicate regularly with all stakeholders.** Consistent communication to the broader sales ops organization and upper management allows everyone to be aware of critical issues and the reasoning behind decisions. In addition to the PMO, another key role here is a senior leader who is intimately familiar with the project and can help facilitate discussions and broadcast decisions on scope.

Issue No. 2: Parallel Integration

An alignment and roster system is one of the most central and interconnected pieces of any sales ops technology solution. Replacing these intricate systems sometimes feels like performing a heart transplant and requires a great degree of care to complete successfully.

We helped a client accomplish an alignment and roster project in which more than 80 downstream systems were consuming data from the existing system. It would be an understatement to say that the team was anxious to ensure that we didn't disrupt this delicate ecosystem.

Our Best-Practice Guidance:

+ **Conduct methodical research.** Proper research is required to understand the current consumers and data providers in the existing ecosystem. This research also will help identify risks and plan a design approach to address them.

+ **Develop a transition road map.** Building a careful system-by-system transition plan allows for a more gradual timetable for downstream systems to start using the new outputs, but in a familiar format. This gradual approach creates more time for a full switchover to the newer formats.

+ **Develop parallel runs.** Nothing builds confidence more than producing outputs from the new system and matching them to results from the original one. Start doing this during implementation and through user acceptance testing to minimize the need to keep the old system for longer than necessary.

Issue No. 3: Poor User Adoption

The greatest technology implementation in the world will fall apart if end users don't use it as intended. A common problem occurs when the new system works well from an organizational perspective but is shunned by the field because the legacy system was customized to the reps' needs. One client recently complained to us: "They didn't understand the big picture of why we wanted to go away from the customized, Excel-based solution that they were using. They didn't appreciate the benefits. They wanted what they used to have."

In one project for which we were rolling out several applications as part of the client's new sales operations initiative, we were tasked to ensure a high level of adoption. The client's field forces, which numbered in the thousands, had bad setbacks with an earlier transition, so the pressure was on to deliver a good user experience this time around.

Right from the start, we worked closely with business, IT and sales leaders to showcase how the applications would enable the field to work in a simple and intuitive manner. We utilized the full flexibility of our application suite to make the screens as simple and user-friendly as possible. And in key meetings to establish requirements, design and, most importantly, user acceptance testing, we included representative field personnel to capture their ideas and feedback.

Our Best-Practice Guidance:

+ **Manage user expectations.** Have end users involved in the planning and implementation process from the beginning, for example, offering insights on what they'd find beneficial in a new system.

+ **Excite users about benefits.** User adoption isn't just about rolling out new tools and processes. It also involves changing people's mindsets. Position the transition as a positive step that will make their lives easier and more productive. One way to excite the field is to create demonstrations that showcase the system's improved functionality. Also, use marketing techniques to sell the solution, such as teaser videos and countdown emails in the last 10 days prior to release.

+ **Train before and after you go live.** Training shouldn't stop when the go-live switch is thrown. Use ongoing instruction to reinforce new features and functionality. This enables users to gain confidence and familiarity with the solution, and to be able to help train and familiarize other new users.

Big sales ops technology projects are complex. They involve a wide variety of stakeholders with different viewpoints, different expectations and different criteria for success. Areas like scope management, integration and user adoption are especially tricky in this regard. Tried and tested best practices such as strong governance and good communication can be put into place to help deliver a successful project.

About the Authors

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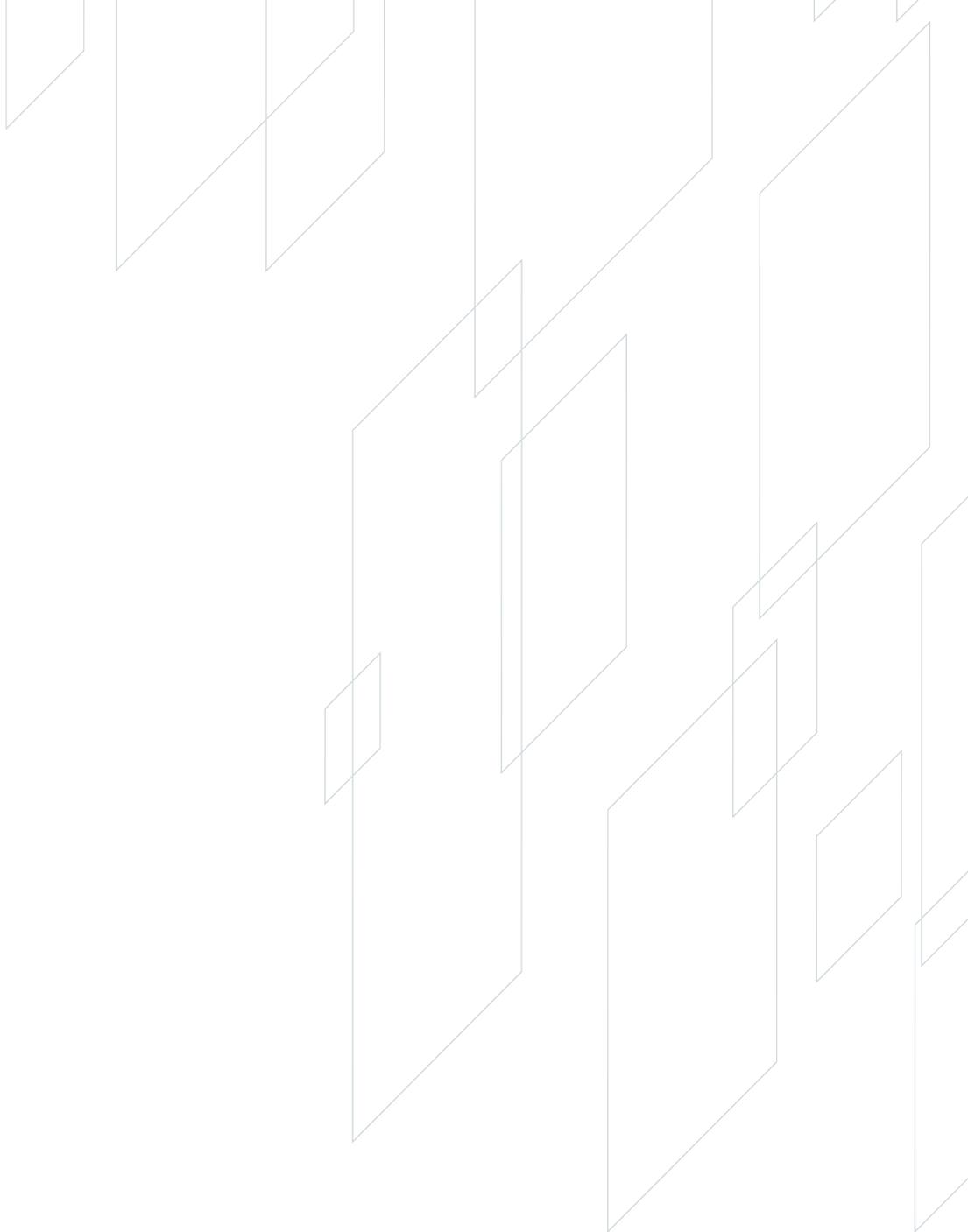
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