

Change Management

Be the Change You Wish to See in Your HubSpot CRM

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James Wanke

- Principal Services Consultant at HubSpot
- SaaS Customer Success & Implementation background
- ProSci Change Management certified



Mark your calendar



Wisconsin's Premier
Marketing and Sales Conference.

2024

- One day, local event
- Thought leadership and tactical breakout sessions
- Great networking opportunities

CHANGE

TECHNOLOGY

CHANGE

EFFICIENCY DRIVEN

SCALABLE

TECHNOLOGY

CHANGE

PROACTIVE

EFFICIENCY DRIVEN

SCALABLE

BENEFICIAL

TECHNOLOGY

CHANGE

PROACTIVE

HIGH IMPACT

EFFICIENCY DRIVEN

ENHANCEMENT

SCALABLE

BENEFICIAL

TECHNOLOGY

TRANSFORMATIONAL

CHANGE

MINOR

PROACTIVE

OPERATIONAL

HIGH IMPACT

EFFICIENCY DRIVEN

Anticipated Reaction to Change Announcement



Real Reaction to Change Announcement



Only **32%** of people are **open to leaving their comfort zone** when presented with a change

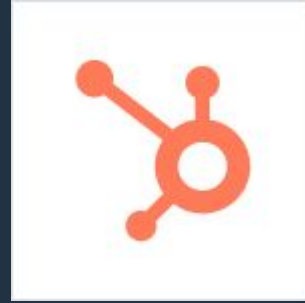


The remaining **68%** immediately feel **fear and discomfort**.

[According to a Forbes research study](#)

Current CRM Change Landscape

CRM Market Overview



- ~842 CRM platforms listings on G2
- 91% of companies over 11 employees have a CRM
- Typical CRM evaluation process timeline is 3-4 months

[Review42 2023 CRM Statistics](#)

CRM Change Landscape

48%

Sales Execs and Decision
Makers report their
**current CRM doesn't
meet their needs**

-Forbes

52%

Report their CRM issues
are **costing them
potential revenue
opportunities**

-Forbes

89%

Companies see
**significant revenue
bump** after
successful CRM
implementation

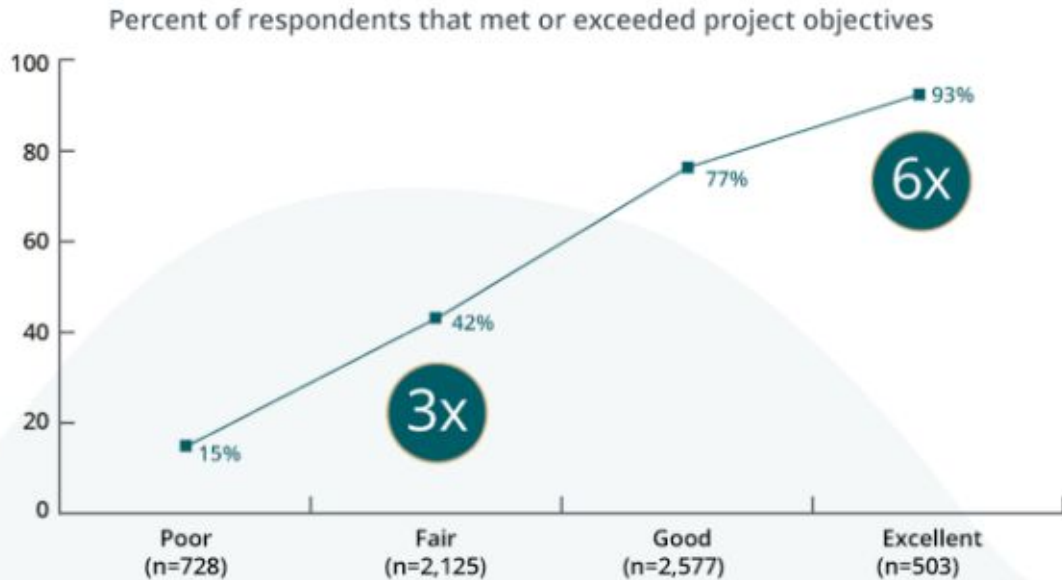
-Freshworks

“**50-70%** of CRM projects resulted in losses or failed to gain or improve organizational performance.”

GARTNER survey
November 24, 2022



Organizations who focus on change management achieve incrementally greater success with change projects...



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019

Excellent Change Management:

6X

More likely to achieve project objectives

5X

More likely to stay on or ahead of schedule

2X

More likely to stay on or under budget

What is change management?

What is Change Management?

Change Management Definition

An enabling framework for **managing
the people side of change.**

- ProSci



A

Awareness - Of the need for change

D

Desire - To participate and support the change

K

Knowledge - On how to change

A

Ability - To implement desired skills and behaviors

R

Reinforcement - To sustain the change

Change Management Influences



Adoption & Satisfaction

Are users actively using the platform as intended?

Does it provide them & the organization daily value?



Project Success

Did we complete the project on time?

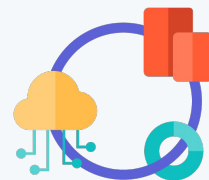
Did we complete the project on-budget?



Business Results

Have we achieved projected ROI?

Have we driven better business outcomes & growth?



Future Changes

Does the change impact (positive or negative) our future change abilities?

5 Critical Change Mistakes

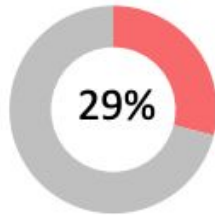
1. Ineffective Executive Sponsorship

- Sponsors are often unaware of their expected role
- The right sponsor makes all the difference
- Establishes & reinforces the vision and credibility for the change

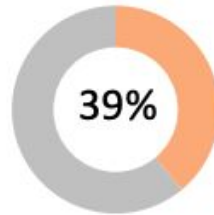


Sponsorship correlation with change results

Percentage of projects that met or exceeded objectives based on sponsor effectiveness



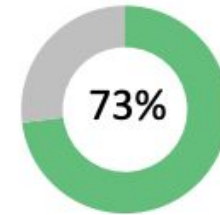
Very ineffective
sponsors



Ineffective
sponsors



Moderately effective
sponsors



Extremely effective
sponsors



Research Insight

[ProSci- Avoiding Change Obstacles](#)

2. Inadequate Communication

Often a result of:

- Starting communications too late
- Not communicating frequently enough
- Inability to align the message with the appropriate sender/receiver



3. Resource misalignment

- Most often caused by underestimating the change
- Improper budgeting & timeline
- Unclear roles, responsibilities, and bandwidth



4. Inability to measure change effectiveness

- How will we know this was the right change decision 6 months, 1 year, and 3 years from now?
- What **realistic** outcomes are we expecting to see?
- What systems do we need in place in order to measure our results?



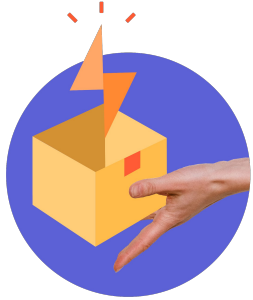
5. Failure to address change resistance

- Acknowledge and plan for resistance upfront
- Proactively identify who resisters are likely to be
- Determine root cause of resisters
- Utilize champions to help address



Recipe & Tools for successfully switching to HubSpot

RECIPE



Successful Change

Prep Time: 2-3 months
Cooking Time: 6-12 months



Ingredients List:

- 1 Active, Executive Sponsor
- 2 Change Leaders (process experts)
- 1 Change Advisory Board
- Robust Change Communication Plan(s)
- 3-5 defined & measurable business impacts
- 1 strategic roll-out plan

Tools/Equipment Needed:

- Reason for change (why now)
- Expected business impact from change
- Budget for platform & services
- Appropriate timeline
(ideally implementation time + ~2 months overlap)
- Culture for change success

The right ingredients make all the difference...



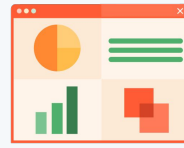
Informed, Active Executive Sponsor

Identify, coach, and prepare executive sponsor for active involvement before, during, and after change



Identify & articulate current pain points

Understand pain with existing platform, processes, and adoption. Estimate the business impact (revenue, churn, reporting, forecasting)



Define alignment with 3-5 year plan

Tie new technology change to planned objectives. Be clear on how they're related and how this change will impact them

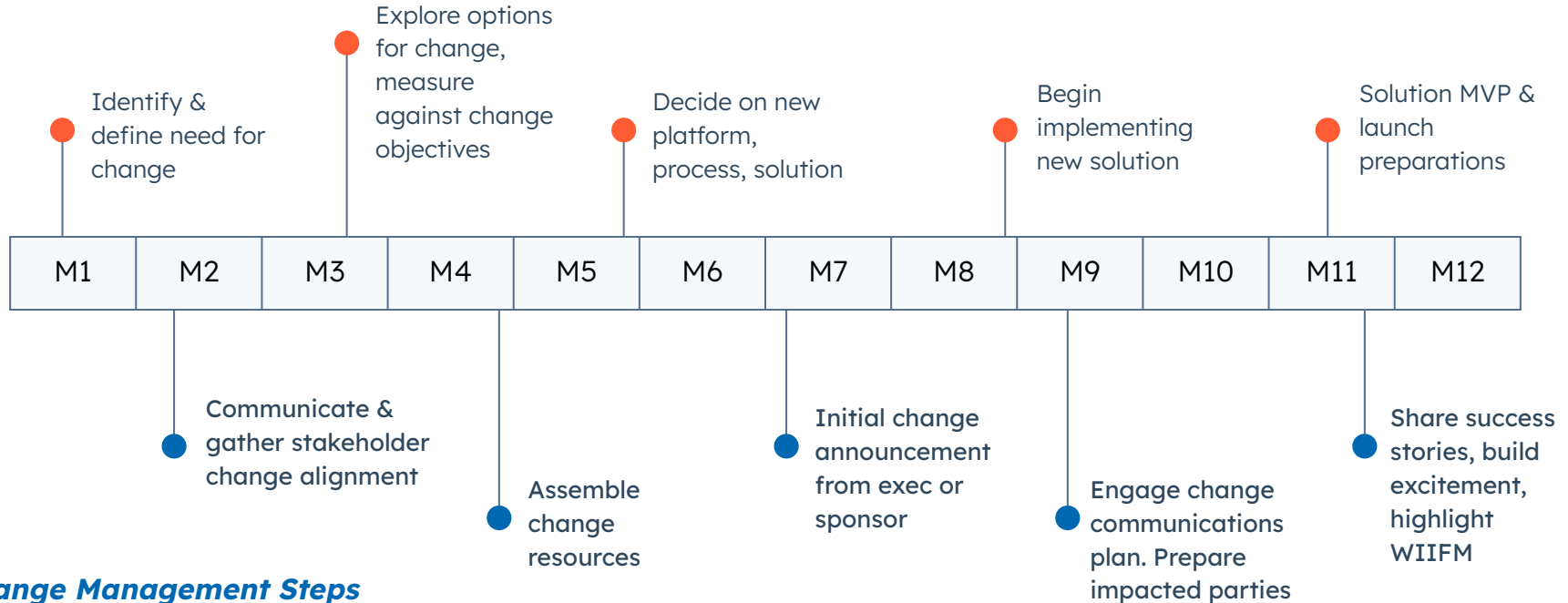


Invest in doing it right the first time

Don't engage a change without the proper resources, time, and budget. The 'next time' is always more difficult

Change Timeline: Example

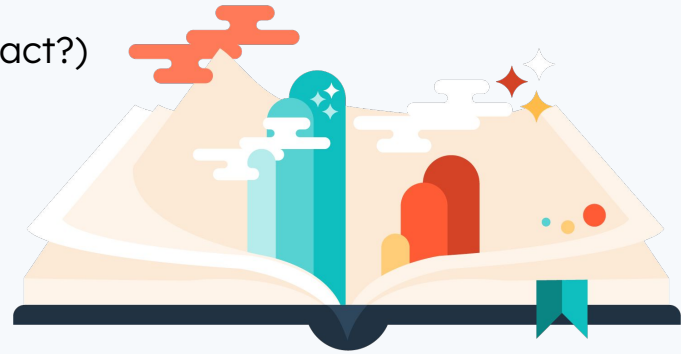
Change Execution Steps



Change Management Steps

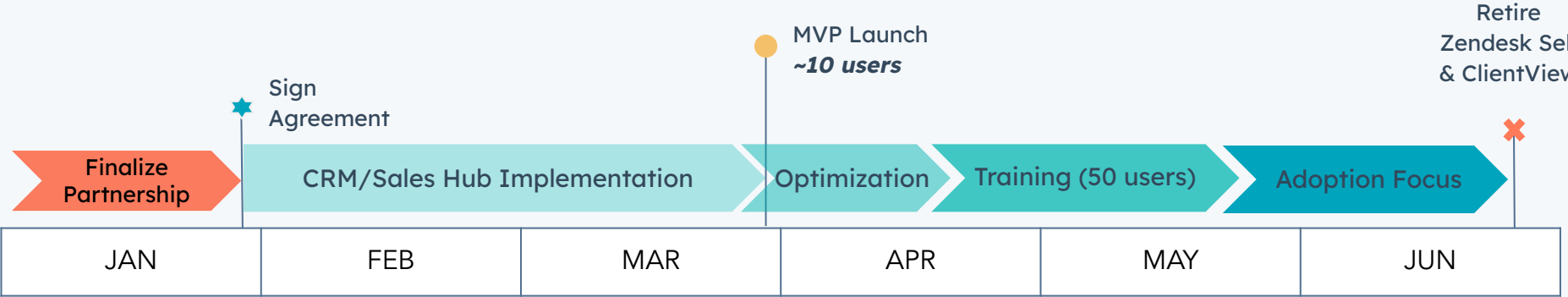
Create your strategic roll out plan

- Define your MVP
(Minimum data/functionality we need to have desired impact?)
- Account for project constraints
(timeline, resources, business cycles, etc)
- Consider a phased approach
(A
- Utilize past change experience to inform
(How was current CRM implemented? What worked/didn't?)



Strategic Roll Out Example

Retire
Zendesk Sell
& ClientView



- ✓ Final approvals and review
- ✓ Finalize Phase 1 Scope
- ✓ Assign Onboarding team
- ✓ Schedule kickoff meeting
- ✓ Align Peloton project team

- ✓ Migrate data from Zendesk Sell (*partner-led*)
- ✓ Create repeatable data model structure for global roll-out
- ✓ Redefine global sales process
- ✓ Re-build ClientView workflows in HubSpot
- ✓ Pipeline Creation
- ✓ Sales Productivity Tools
- ✓ Build Reports

- ✓ Complete final migration items from Sell (attachments & open deals)
- ✓ Optimize Marketing to Sales handoff
- ✓ Test/validate ClientView replacement
- ✓ Dashboard distribution
- ✓ Create training materials
- ✓ Execute training sessions
- ✓ Communicate joint platform plans



Tools for creating your HubSpot justification



Improving Productivity Per Rep

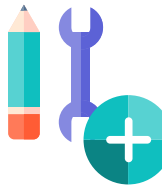
What your competition
is likely doing



Strategy #1

Add more people

and/or



Strategy #2

Add more tools

The Problem: Cobbled Tech Stacks

Sales reps navigate an average of **13 point solutions** as part of their company's tech stack.

[Source](#)

95%

agreed that reducing time spent on non-revenue generating activities would help them meet quota.

86%

agreed that reducing time spent on non-revenue generating activities would increase their paycheck.

25%

said updating Salesforce or another CRM frequently takes time away from selling.

The Problem: Low CRM Adoption

New sales productivity research shows **sales reps use just 62% of their tech stack.**

55%

of respondents don't use tools they find extraneous

50%

don't use tools without useful integrations

36%

don't use tools when there's an easier workaround

[Source](#)

The Problem:
Lost productivity
(+ \$\$\$)

Sales reps spend 41% of their average workday **not selling**, costing companies approximately **38% in revenue** per quarter.

[Source](#)

The Solution

To **scale faster**, you need to streamline your systems, reduce your total cost of ownership, and make it easier for sellers to sell.

What could your team do
with **41% more time to sell?**

What could you do with:



A streamlined
tech stack



A highly
adopted CRM



Less duct tape



More actionable
data and insights

With Sales Hub™



The Results

 **50 days**

Faster Time to Ramp

50 days. That's how long it takes to activate Sales Hub, on average.¹



76%

Better Deal Close Rate

Professional and Enterprise customers see their deal close rate increase after 6 (52%), 9 (72%) and 12 (76%) months.³



126%

More Deals Closed

Professional and Enterprise customers see a 126% increase in deals closed-won after 12 months.²



50+

Sustained Year Over Year Growth

The majority of Sales Hub customers with 50+ paid sales seats saw their deal-won revenue, number of deals closed-won, win rate, and average deal size remain stable or improve year over year.⁴

What we don't need to tell you

- 1 Your CRM is only as useful as the data inside it
- 2 With a crafted CRM platform instead of a cobbled collection of tools, you won't have to factor in:



Monthly subscription fees



Time pulled from internal teams



Gaps you're plugging manually



Integration costs



Ongoing challenges onboarding new hires



Third-party resources

Our Solution

Customers with



Marketing Hub™



Sales Hub™

See a **144%** increase
in deals closed after
12 months**

Who use workflows,
Close an average
of **508% more** deals**

Our Solution:

Marketing Hub + Sales Hub

FROM

Lack of alignment

Botched hand-offs

Bad, missing, or conflicting data

Inconsistent messages

Untimed Outreach

Lack of collaboration



TO

Aligned marketing & sales teams

Seamless and automated transitions

Single source of truth

Consistent & personalized messages

Timely engagement

Increased trust and collaboration

Partnering with HubSpot will support...

- **Marketing and Sales Alignment** - Single Customer Record + Seamless Handoff
- **Quick Time to Value** - Ability to Scale Quickly with new acquisitions
- **Ease of Configuration** - Tool that works for you, not you working for the tool
- **Intuitive & Easy to Use UI to Drive Adoption** - Rapid Execution
- **Integrated Ecosystem** - Scale and Extend the Power of the Platform (IFS integration)
- **Minimal IT Involvement** - No Certified Architect Needed
- **True Partner Relationship** - Consulting, Support, and Strategy

CRM Change Success Stories

**AVISON
YOUNG**

23% to 90%

CRM adoption in four months

Real Estate

 **Sandler Training**

40% more

adoption and one full-time employee freed up

Consumer Services

ResellerRatings 

76% less

customer churn and a 30% increase in contract value

Consumer Services

marq

\$77,000

savings per year and 50% saved on tech costs

Software and Technology

ARC

100%

user adoption and 133% more new business growth YOY

Professional Services

 **SMASH
MY TRASH**

12 → 165

franchise partners and 288% revenue growth

Professional Services

[HubSpot Case Studies](#)

10 MIN

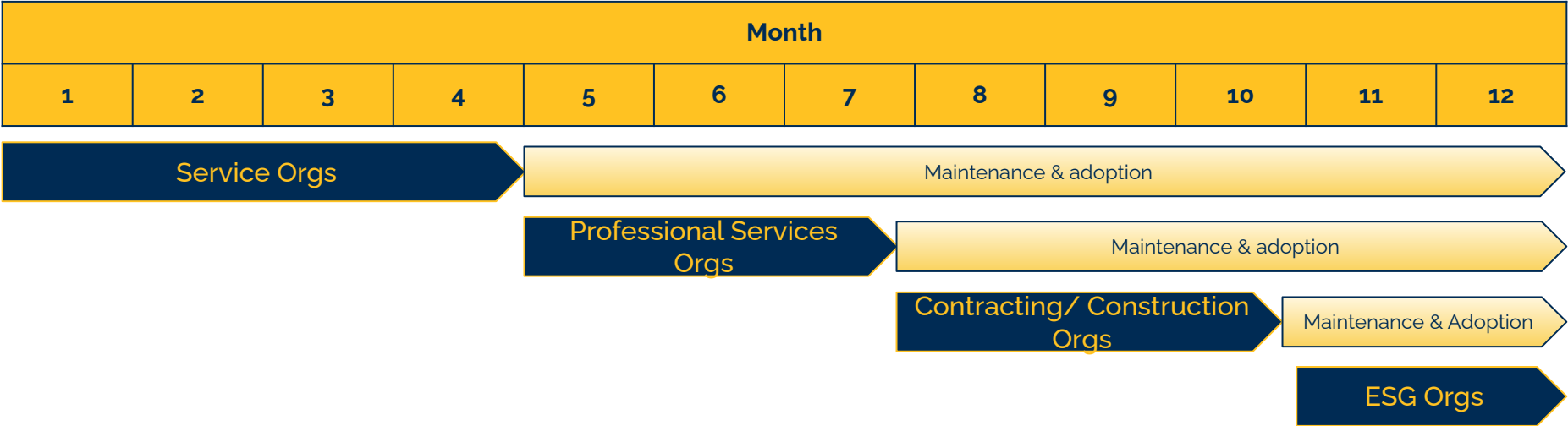
Q & A

Complex roll-out example

Option 1



Option 2



Don't approach your CRM change...



- ✗ Effective, Frequent Communication
- ✗ Active Executive Sponsor
- ✗ Proactively address change resistance



Effective Change Communication...

- Is accomplished via multiple channels
- Explains and reiterates the WHAT, WHY, and WHEN
- Provides a safe space for questions and feedback
- Eliminates misinformation by only sharing what is known



Key change resources for success



Change Manager

Employee(s) leading the change management programs. Ideally, leader(s) who have a background in conducting structured change efforts in organizations



Change Advisory Board

Team of high-level members from various departments that control the life cycle of change across all processes



Change Process Owner

Responsible for defining and supporting the overall process involved in change management

Reference [BMC Change Management Roles](#) for more details

Measuring change effectiveness

Choose & Define your success metrics:

- Platform adoption & usage
- Business growth (cross-sell/upsell)
- Time saved by reduction of manual tasks
- Increase in employee satisfaction

Before, during, and after the change:

- Benchmark current/previous state
- Establish a cadence to review and share your results
- Be open to adjusting based on results



Change Resistance: Root Causes



Lack of needed skills/knowledge to change



Organizational culture is change resistant



People leaders fail to effectively lead & promote change

Create a Change Communication Plan

CHANGE MANAGEMENT COMMUNICATIONS PLAN TEMPLATE

PROJECT NAME	PROJECT MANAGER	VERSION NO.
		0.0
ORGANIZATION	DATE CREATED	VERSION DATE
	00/00/0000	00/00/0000

Identify affected stakeholders and describe required communication

EVENT / ACTION / STRATEGY	PROJECT PHASE(S)	EST. DATE OF EFFECT	TARGETED STAKEHOLDERS	REASON FOR COMMUNICATION	METHOD OF COMMUNICATION
Announcement of Change	1.5	14-Jan			
Change Implementation Training	2.3, 2.4.1, 2.5, 2.6	19-Jan			
Activity 1		Jan-Feb			
Activity 2		Feb			

Communication Plan Tips:

- Pre-plan
- Target each change stakeholder group at least twice per month
- Be cognizant messaging and sender/receiver relationships

[Smartsheet Change Management Templates](#)

Infuse change management into your next change...

- To make your project **3-6x** more likely to succeed
- Improve user adoption and satisfaction
- Create a healthy change culture

