

Incentives to Inspire CRM Success

- By Christina R. Fritsch, JD, Founder and CRM Success Consultant

Research by respected industry organizations indicates that up to 70% of all CRM implementations may fail to meet expectations, which can result in a significant loss of time, resources and credibility.

The good news is CRM Success is possible! One of the primary keys to CRM Success is maintaining motivation – and a good way to inspire this level of motivation is to provide incentives to let your team and end users know that their participation and hard work are not only essential, they will also be appreciated – and rewarded.

To create and maintain motivation, various incentives should be a key element in your CRM planning and budgeting. Gifts and giveaways reward efforts, foster enthusiasm and encourage teamwork. They can also be used to encourage friendly competition to encourage the firm or individuals to achieve goals or meet deadlines. Specific examples and types of incentives include:



Ideas to Inspire CRM Utilization and Participation

To get the “right stuff” from your staff, try giving them a little ‘stuff’ as an incentive. Incentives can be provided to assistants and other key staff whose help is needed to accomplish CRM tasks. Provide some good stuff to their attorneys as well for a little – or a lot – of additional motivation. Here are a few ideas to inspire you and your team:

- **Data ‘Cleaning’:** To encourage cleaning up contact data in Outlook or the CRM system during or in advance of a rollout, offer house cleaning services from a local provider.
- **Data ‘Massaging’:** To encourage deduplication, categorization, adding contacts to lists or other ‘massaging’ of data, provide chair massages or spa gift certificates.
- **Data ‘Detailing’:** To encourage enhancing contact data in the CRM system, offer auto detailing gift certificates.
- **‘Boosting’ Contact Information:** For users who ‘boost’ contacts with industry, business, news or other types of beneficial information, give them a boost with a Starbucks or gas gift card.
- **Hunt for CRM ‘Treasure’:** To encourage end users to use the system to locate key pieces of information related to contact management, business development or relationship intelligence, have a CRM treasure hunt. For each person who finds all the ‘treasures’ in the system, or for the ones who do so the most quickly, offer chocolate gold coins or other goodies.
- **‘Feed’back:** When they feed you valuable information to enhance system success, feed them back with any number of goodies. Remember, one of the keys to CRM Success in a law firm is food.
- **‘Get-away’ from the CRM:** Provide a weekend getaway to people who have worked the hardest to help achieve CRM Success.
- **Activities for Activities:** It can be challenging to get users to enter activities, but these key pieces of information about business development and marketing activities with Clients and prospects can be

incredibly valuable. For the people who enter the most relevant activities, plan a fun off-, on-site or virtual activity.

- **Time for 'Over-(or over and above) Time:** For individuals who go over and above or spend extra time to assist with CRM Success, offer extra vacation or comp time off.

Contests

Never underestimate the power of competition to drive CRM results. The following are some ideas for contests that can add a little friendly rivalry – and increase your success exponentially:

- **Quizzes:** Send out daily or weekly questions that require users to explore the CRM system to find an answer. Make it interesting by including fun or little-known facts about attorneys, staff or Clients.
- **Team Competition:** Assign offices, practices or groups of assistants and/or attorneys to teams and assign tasks to accomplish and reward winning teams with prizes. Track their ongoing results electronically or with printed materials posted in the offices.
- **Raffles:** For projects that need to be done by a number of people during the rollout or ongoing over time, offer raffle tickets for achieving task milestones, numbers of records worked or other set goals. Each ticket is then entered in a raffle drawing for a significant gift or gifts that will be awarded publicly to the winners. This helps reward assistants who may work for individuals with varying numbers of contacts, giving everyone a chance to win.

** Extra Tip for Success: One of the best ways to enhance the participation in and results of a competition is to require that the winning group or team not only have the best results, but also that they have 100% participation within their group to get the prize. Peer pressure can be a great motivator!*

Food

One of the best ways to encourage adoption and enthusiasm cannot be overlooked: Food! So many successful firms have so constantly and consistently extolled the importance of this incentive that we would be remiss if we did not mention it. Never underestimate the power of pizza - or donuts or cookies or sandwiches - to motivate end users to attend meetings and to drive positive behavior and results. Here are just a few ideas for utilizing the goodness of goodies:

- **Breakfast Briefing:** Brief your staff or attorneys on CRM updates and provide breakfast.
- **Bagel Break:** Let groups take a break from their normal morning routine – and maybe do some CRM tasks together.
- **Lunch-and-learns:** Lunch meetings should be used regularly to reinforce key concepts over time.
- **Brown Bag Break:** Get together with colleagues for lunch – and do some CRM tasks together.
- **Cookie / Brownie Breaks:** Give them some sugar to keep up energy in the afternoon to work on CRM tasks.
- **Pizza:** No matter how you slice it, it's always a firm favorite.
- **Sweeten the CRM Deal:** Provide candy (especially chocolate) for help with ongoing CRM tasks. Actually, you can provide chocolate anytime for anything really.
- **CRM 'Happy'ness:** Organize happy hours to celebrate milestones or achievements.

Praise

When it comes to inspiring results, two of the most powerful (and too often overlooked) words in the

CRM Success dictionary would have to be, “good job.” But these are not words often found in *Black’s Law Dictionary* – or any other book in a law firm. In fact, based on the number of times these words are heard in some firms, you might think you would only find the words in a foreign language dictionary.

But sometimes motivating CRM Success requires learning a new language. Studies show that for many people, praise can be a stronger motivator than even money. And when people receive criticism without praise, it can actually lead to de-motivation and a decrease in results.

Of course, if no one in your law firm is overly critical, praise may be unnecessary. If however, you find yourself laughing hysterically after reading that last sentence, a little praise may be worth a try. There’s also an added bonus to using praise: it won’t negatively affect your firm CRM budget since it’s free. So praise early and often, privately and, even better, publicly.

Ideas for Incentives

Here are a few more ideas for the types of items that can be provided to inspire system utilization or assistance with important CRM efforts.

Type	Incentive Examples	Purpose	For Whom	Given By
General Incentives	Options that people can choose from such as gift cards or other cards	To encourage participation and / or reward accomplishments	Assistants / Secretaries	Marketing Team / Trainers
Awards / Recognition	Announcements of user accomplishments posted on the firm e-mail or intranet or in the marketing eNewsletter (contacts shared, new information updated, business developed)	To reward participation and use of the system on a regular basis	All users	Marketing Team / Trainers
Certificates	Printed or electronic certificates	For certification of completion of training or performance of tasks	Assistants / Secretaries	HR / Supervisors or Marketing
Firm Swag	Let people choose from firm branded items such as shirts, hats, water bottles, mouse pads, etc.	To encourage participation and / or reward accomplishments	Assistants/ Secretaries / Associates	Marketing Team / Trainers
Time off	Extra vacation, comp or personal time	To encourage participation and / or reward extra time spent on CRM-related tasks	Assistants/ Secretaries / Associates	HR / Supervisors or Marketing
Food	Any kind	For anything	Everyone	Marketing Team