# LEAD YOUR TEAM TO A GREAT START

SGROW

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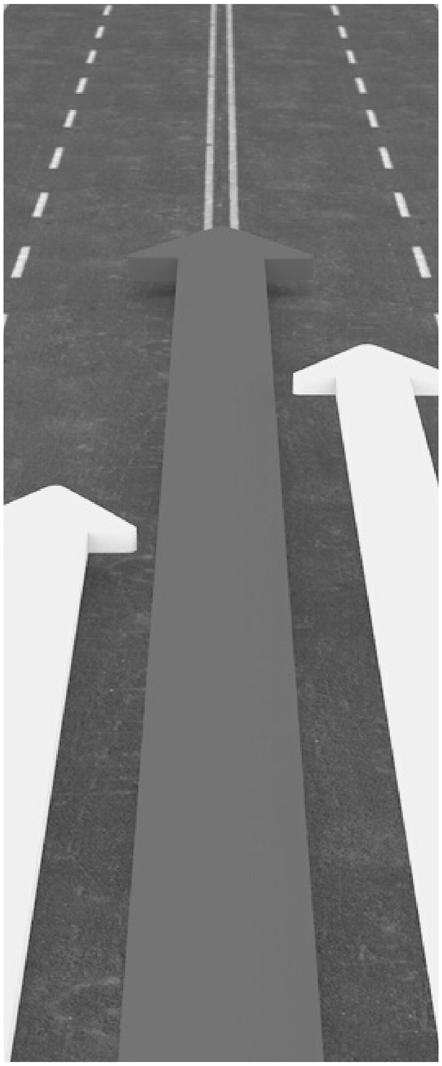
LEAD YOUR TEAM TO A GREAT START WITH S GROW



# WELCOME TO S GROW!

We're honored you chose our platform to bring more organization, consistency, accountability, and simplicity to your team.

In our experience, a team's successful adoption of a new CRM requires the right strategy from Day 1. However, if you're like other successful team leaders, you're busy overseeing business operations, working to create new opportunities for your agents, and providing stellar service to your clients.

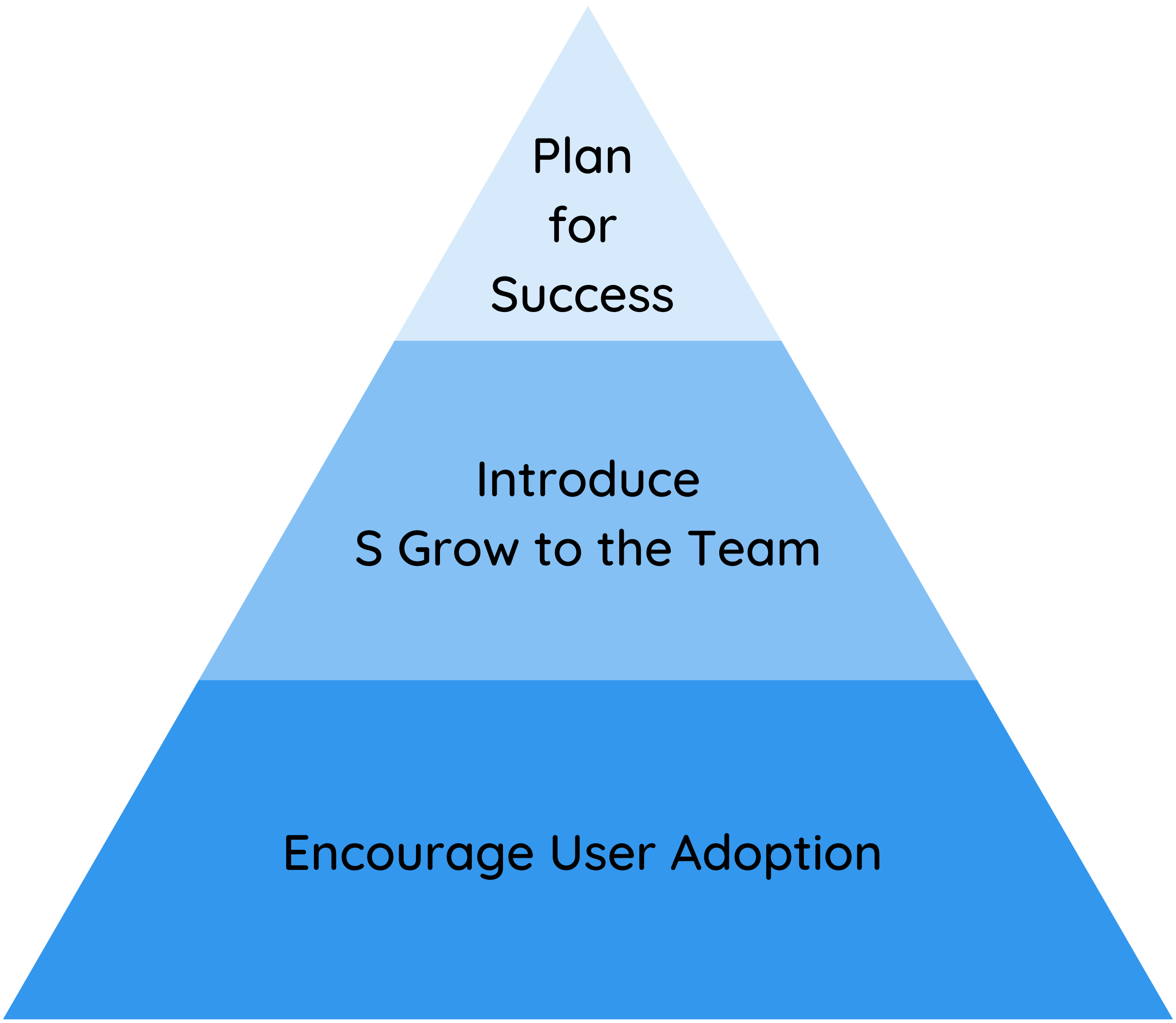
That's why we've compiled the most effective strategies in one place to prepare you for the roll out of S Grow within your team.

# WE'RE HERE FOR YOU!

You're not alone in this process. We're committed to your team's success. If you need support during your preparation, launch or adoption of S Grow, please reach out to our very capable team.

# A SIMPLE & PROVEN MODEL FOR CHANGE MANAGEMENT

There are numerous steps involved in designing a change management plan.  We've streamlined this process into three manageable phases to guide you and your team through this transition period.



# PLAN FOR SUCCESS

## PHASE 1

**Taking time now to create your plan for the rollout of S Grow will reduce the disruption that comes with a significant process change.**

# CREATE YOUR VISION

The first thing you'll want to do is go through S Grow's initial set up and training process yourself (see page 20).

After seeing S Grow in action, create your vision by answering the following questions:

- What do I want to accomplish with the use of a (new) CRM?
- Why is S Grow the solution?
- How will S Grow change our team operations?

Then, use your answers to create your Vision Statement.

Example:
*My vision is to provide you with a CRM that is easy to use, eliminates repetitive but necessary communication, and creates more visibility into your business to ultimately simplify your day and increase your income.*

**Wise Choice!**

Your investment in S Grow eliminates the lengthy and complicated process of analyzing, designing, configuring and testing that most CRMs require.

# PARTNER WITH YOUR ADVOCATES

When it comes to a new tool or process within a team, working closing with your advocates will help you to prepare an effective plan.

There are two places you can find advocates - within the S Grow team and within your team.

## S Grow Advocates

As we hope you know by now, our team is committed to your team's success with S Grow.

While we have team members available to connect with you over Chat and Phone, you also have a designated Client Services Manager. Your Client Services Manager is available to guide you through any step within this process as needed. Please reach out and let us know how we can support you.

# Agent Advocates

Think about the agents on your team. Who do other agents within the team view as a leader within the group? Who tends to embrace technology first? Who can you rely on to give you honest feedback? Now that you've identified your Agent Advocates, it's time to select a small group to approach with your plan to introduce S Grow to the team.

**Building Your Advocate Group**

Generally, two or three agents should provide well-rounded feedback but the size of your team should also be factored in. If your team has less than 6 agents, you may only need the assistance of one team member. If your team has more than 50 team members, you may want to include another agent or two in this group.

When you meet with your Agent Advocates, explain that your goal is to introduce a new CRM to the team and that you're looking to them to help with the launch. Be clear with your expectations and set deadlines for follow through. And, most importantly, encourage open, honest feedback throughout this process.

Next, share your Vision Statement and ask open ended questions for feedback, such as:

- How does the vision statement resonate with you?
- What do you think about the vision statement?
- How do you think the rest of the team will respond to this statement?

If the feedback session determines that the Vision Statement doesn't align with your team's culture or values, work with your advocates to fine-tune it.

Now you're ready to register your Agent Advocates as users on your S Grow account (go here to submit your request), and direct them to complete the initial set up and training process (see page XX).

Once the Agent Advocates have completed the on-boarding steps, meet with them to get feedback by asking questions such as:

- What do you think about S Grow?
- How do you see yourself moving forward with S Grow?
- What obstacles did you run into?
- Were you able to resolve those with the help of the S Grow team?
- What do you think the team's initial reaction to S Grow will be?
- What types of objections do you anticipate hearing from the team?

Don't forget to document this feedback so you can quickly refer to it in the final planning stage.

# PLAN YOUR ROLLOUT

With your own understanding of S Grow as well as an idea of how your team will respond to the rollout of a new CRM, you can create your rollout plan.

- Outline your expectations for each team member to complete on-boarding and begin using S Grow to manage their records
- Review Advocate Agent's feedback
  - Take action now to remove anticipated obstacles
  - Prepare answers for any objections (see our list of most common objections on page XX)
- Outline your message or talking points
- Ask your Advocate Agents to be prepared to share feedback during the session
- Schedule your rollout date

**Partner with Your S Grow Client Services Manager**
Your Client Services Manager can send your team members invitations to join your S Grow account at a specified time to make sure there's no confusion around the link to sign up.

# INTRODUCE S GROW

## PHASE 2

**The time has come to introduce S Grow to your team!**

# INTRODUCE S GROW TO YOUR TEAM

Gather your team to deliver your message to everyone at the same time.

- Share your Vision Statement
- Highlight the benefits of S Grow that will have the biggest impact for your team
- Clarify the WIIFM
  - Depending on your team structure, you may need more than one
- Stay ahead of your team's concerns by proactively addressing objections

## Introduction Resource

Using a slide deck presentation can help keep your introduction on track.

We know you're busy and may not have time to create a custom presentation for your introduction. That's why we've created a template to help you quickly prepare for your introduction session.

DOWNLOAD YOUR TEAM INTRODUCTION RESOURCES AT

www.SGrowCRM.com/Team-Launch

# PROACTIVELY REMOVE OBSTACLES

Going into your meeting prepared with resources to make this a smooth transition will help increase your team's initial buy-in, especially if there are team members who don't consider themselves to be tech-savvy.

- Allow agents to voice any concerns you didn't address initially
  - Remember, you've already prepared for this, so confidently addressing each concern will put your agents' minds at ease
- Explain how easy the system is to navigate and use (training takes 10 minutes!)
  - This is the perfect time for your Agent Advocate to share their experience
- Review Support Resources available
  - On-demand Training
  - Knowledge Center
  - Chat Support
  - Phone Support
  - Email Support
  - 1-on-1 Support from you team's Client Services Manager
  - S Grow manages list imports

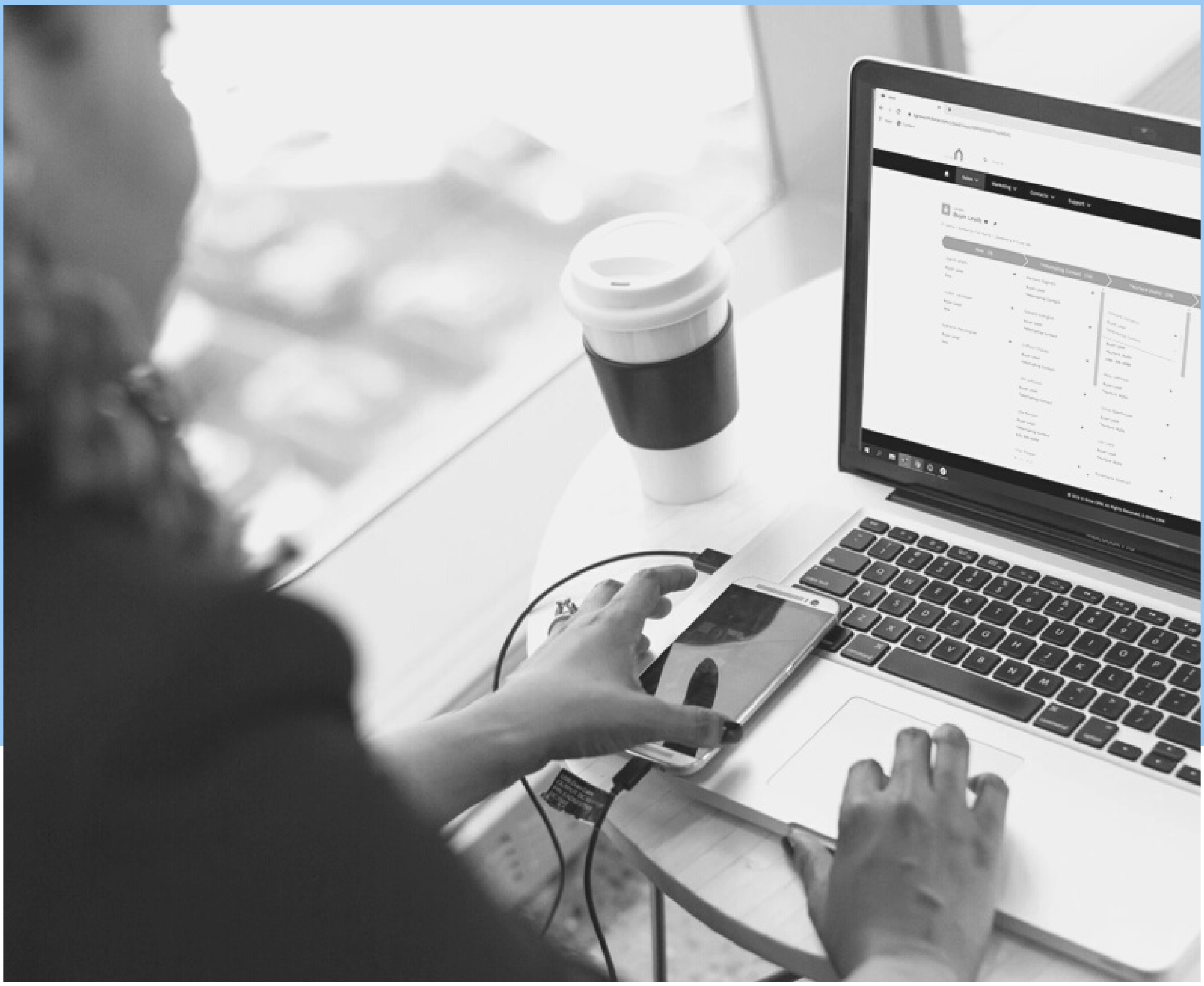

# SET EXPECTATIONS & HOLD TEAM MEMBERS ACCOUNTABLE

You've made an investment into your team's success. Get the most out of your investment by ensuring all team members are using S Grow to manage their records.

- Set realistic deadlines for each step of the on-boarding process
- Follow up with each agent to get verbal or written confirmation that they've completed the on-boarding process
- Adopt the policy that "if it's not in S Grow, it didn't happen"
  - All records should be managed in S Grow for reporting purposes

# S GROW ADOPTION

## PHASE 3



**System adoption goes beyond team members completing the on-boarding process.**

# KEEP YOUR TEAM MOTIVATED

## Celebrate Wins Driven by S Grow

- Report increases in lead conversion or ROI as a result of nurture follow up
- Announce new repeat or referral business received from the referral follow up
- Share a client review that highlights how S Grow supported a positive experience

## Offer Praise & Recognition

- Spotlight team members who are actively logging into S Grow
- Run contests or offer incentives periodically to increase usage or outcomes
- If team members pay a “tech fee”, consider waiving or discounting this for users who meet minimum usage metrics

## Frequently Review & Discuss KPIs

- Use data from S Grow’s Dashboard Reports in your team meetings when discussing production information
- Work with users who aren’t meeting minimum expectations to increase usage

## Provide Ongoing Support

- Include S Grow in your new hire on-boarding process
- Encourage team members attend S Grow’s free live training webinars periodically (or attend them as a team)
- Announce updates in S Grow during your team meetings
- Collaborate with the team's Client Services Manager if additional resources are needed

# LEAD BY EXAMPLE

If you still work with clients, be sure to manage and update all records in your S Grow account.

Register for and attend Live Webinar sessions or view a recent recording. Then, share something new that you learned with the team. Encourage your team members to occasionally attend these sessions as well.

# USE YOUR RESOURCES

The **Knowledge Center** in your S Grow account houses on demand resources to answer frequently asked questions and show you how to get the most out of the tools available in the platform. This is a great first place to look when you have a question or want to attend a live webinar.

The **Training Center** is the perfect resource to direct new team members to as part of their on-boarding experience. It also contains the instructions for newly added users to prepare their list to be added to S Grow.

And, of course, our team is available to support you and your team members. Our office hours are weekdays from 8:00 AM - 5:00 PM MST.

Chat with us in your S Grow account, call us at 855-533-9866 or email your questions to hello@sgrowcrm.com.

Refer to the Announcements tab on your account's Home Page for upcoming holiday closures and modified support hours.

# GROWTH & CHANGE

## WHAT YOU CAN EXPECT

Transformation is coming!

# THE PROOF IS IN THE NUMBERS

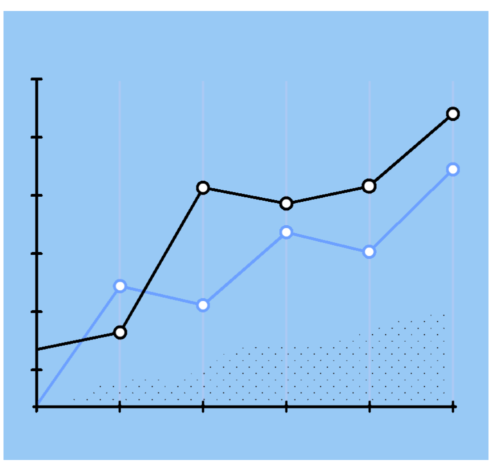
Change can be uncomfortable. Introducing a CRM, whether you're replacing another that wasn't working for your team or is a new tool for your business, may feel counterproductive as you shift a portion of your business focus for a short period of time during the rollout and adoption phases. We can assure you that your time and effort is well worth it.

## Return on Investment

80% of leads are lost or never followed up due to lack of a system and documentation. (1)

A CRM's average ROI is $8.71 for every $1 spent. (2)

Personalized and automated email marketing generates $44 -$51 for every $1 spent. (3)(4)



## Improved KPIs

29% - the average increase for sales per rep. (5)

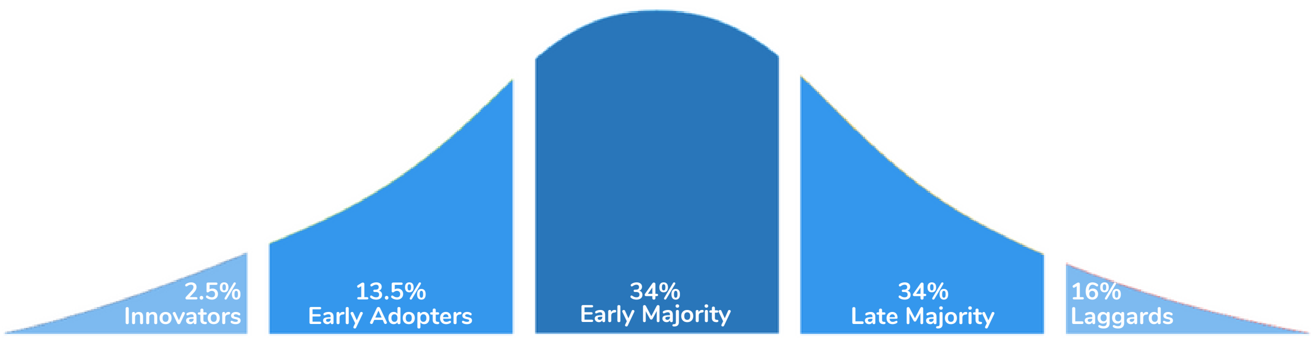
42% - the average increase in sales forecasting accuracy. (5)

47% - the average increases in customer satisfaction and retention. (5)

Sources: (1) AgentDrive.com; (2) NucleusResearch.com; (3) Litmus.com; (4) SuperOffice.com: (5) Salesforce

# PREPARING FOR CHANGE

Your team is likely a diverse mix of age, experience and personalities. The classic bell curve for user adoption provides insight on what you can expect during this transition period. Remain positive, celebrate wins with the team, and offer support to those who align with the late majority or laggard segments.




**Innovators** - Are risk takers, the first to adopt new technology without proof, and enjoy new ways of doing things. Since Innovators make up only 2.5% of users, so you may not have an agent in this segment (and that's okay).

**Early Adopters** - Similar to Innovators, but slightly slower to adopt a new CRM. They seek data to confirm their understanding of system benefits before quickly adopting. Early Adopters are natural influencers, and Agent Advocates mostly fall in this group.

**Early Majority** - Require evidence that a new CRM will increase their income before embracing it, and look to Early Adopters for proof. Once your Early Majority adopt the CRM, nearly all remaining agents will follow soon after.

**Late Majority** - Skeptical of change and risk-averse, the Late Majority require substantial proof before adoption. They may only use the CRM to avoid exclusion from the growing group of users within the team.

**Laggards** - Resist change and are reluctant to use a new CRM. They prefer "a traditional" or "their" way of doing things, and will adopt a system if it's the only way to complete a task or because everyone else is using it.

# OVERCOMING COMMON OBJECTIONS

Since it's human nature to resist change, it's reasonable to expect some push back from a few members of your team. At S Grow, we've heard most (if not all) of them.

**I'm too new to the industry / my list is too small.**
*"Every successful agent had to start somewhere. This is the perfect time to embrace a resource that will help build long term relationships with your contacts and reduce client attrition."*

**I'm not tech-savvy enough to learn new software.**
*"I understand your concern. I chose S Grow as our team's CRM is because it's very easy to use and they offer a variety of resources to make this a simple transition. Your confidence will increase substantially after you complete the initial new user training."*

**I've been using a different system and don't want to switch.**
*"I'm happy that you understand the value of a CRM. My goal is to have our whole team using the same system. We have chosen S Grow because it is simple to learn and offers the tools we need. Once your database has been moved over to S Grow, you can cancel your other system and save some money."*

**I don't have time to learn a new system.**
*"I appreciate how busy you are- I am busy, also! One of the reasons we chose S Grow is because the new user training can be done in under 10 minutes."*

**I don't want my contacts receiving automated messages**
*"We want to provide a consistent experience to all of our clients. The automated emails will save you time while still providing the client with the information they need."*

**I prefer to work out of my phone.**
*"Well, then this is perfect because there is a mobile version of the S Grow. You will still be able to work out of your phone!"*

# NEW USER ON-BOARDING CHECKLIST

| Action Item | Due Date | Completed |
|---|---|---|
| Complete your user profile | | |
| Review the four New User Training Videos | | |
| Explore your S Grow account | | |
| Add yourself as a Test Lead | | |
| Convert your Test Lead Record to Contact & Opportunity Records | | |
| Write down questions that come up or obstacles you encounter | | |
| Schedule a 1-on-1 coaching session with CSM | | |
| Attend 1-on-1 coaching session with CSM | | |
| Submit segmented list to S Grow for import into account | | |

**Our Team's Client Services Manager**

**Name:**

**Email:**

**Phone:**

**Office Hours:**