A Study of Training Handouts and User Satisfaction for Customer Relationship Management (CRM) Software

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Abstract: The objective of this paper is to study how to design a training handout for students or employees when using Microsoft Dynamics CRM. The research method we used in this research is utilizing the measurement of user satisfaction survey in the design process to improve the training manual. We concluded that both technical and theoretical aspects were needed when running a program successfully.

Keywords: Business process management, Microsoft Dynamics CRM, curriculum packages

INTRODUCTION

In the today's world, customer relationship management (CRM) is one of the primary segments when doing business. In the perspective of customers, they have a plenty of options. Unless companies strive hard to make the customers come back to their products, they might not buy the same product. Furthermore, if there is a better product available in the market, customers would buy the better product. Therefore, competition between companies is fierce. The 2013 Gartner report mentioned the reasons why the worldwide CRM market experienced 12% growth in 2012 (Columbus, 2013; Correia, Dharmasthira, & Pang, 2013).

In 2013, CRM Switch organized a survey of 752 employees working in the U.S. based companies (Chipman, 2013). The survey provided market share of customer relationship management (CRM) programs. As a result, Microsoft Dynamics CRM is ranked the second highest and constituted 20% of CRM programs. The highest program was Salesforce by 39.8%. Other major competitors included Oracle, SAP, Sales Logix and so on. Microsoft Dynamics CRM was used widely throughout companies with one to 100 employees. The proportion of Microsoft Dynamics

CRM was lower in bigger companies. In other words, this means that Dynamics CRM is a great tool for small-sized companies.

Microsoft Dynamics CRM is a tool that allows companies to manage their customers efficiently (Microsoft Dynamics CRM, 2012). There are three criteria for CRM, which are sales, marketing and project management. In addition, it is composed of three modules, which are Sales, Marketing, and Service. The primary module in Microsoft Dynamics CRM is Sales, since it manages the entire sales process. With sales data, employees can utilize marketing module and sales module.

The objective of this paper is to study how to design a training handout for students or employees when using Microsoft Dynamics CRM. The research method we used is utilizing the measurement of user satisfaction survey in the design process to improve the training handouts. The measurement tools used in the thesis are based on the Technology Acceptance Model (TAM) (Venkatesh, Morris, Davis, & Davis, 2003).

SALES MODULE IN MICROSOFT DYNAMICS CRM

Sales module in Microsoft Dynamics CRM allows users to manage their customers coordinately. By depending on the number of people who want to access the data in CRM, companies can issue multiple user ids and passwords in the company's server. Therefore, employees have better accessibility and visibility of the data.

Figure 1 is a representative sales process in Microsoft Dynamics CRM. First of all, a lead has to be created. The lead is a potential customer. Every lead includes a topic which explains why the customers is the lead. Second, an opportunity is created by qualifying the lead. By depending on the topic, stating opportunity products is beneficial. Third, a quote is developed by the data entered in the opportunity. Fourth, an order is placed if the customer decides to buy the product based on the provided quote. Finally, an invoice is made. The subsequent handout was provided as a training handout (See Appendix A). Forty graduate students participated in the survey after completing the handouts.

Figure 1: Sales process in Microsoft Dynamics CRM

LITERATURE REVIEW

There is a few studies regarding training for Customer Relationship Management. Hsu, Lee, Wang, and Chung proposed (2012) using the procedures of competency-based training (e-CBT) model for customer relationship management. The procedures of e-CBT model are e-learning through registration -> self-learning -> qualification. However, CRM mentioned in their paper is not referred to CRM software but customer relationship management skills. Kao, Chen, and Lee (2012) studied whether video-clip instructions have an impact on learning CRM software for brand management. The result shows that there is "no significant difference in perceived ease of use and perceived usefulness with or without the instruction videos." They also found that a cross-discipline curriculum would benefit student learning CRM software.

RESEARCH METHODS

When participants were done with running the program, they were asked to finish a survey. The survey included questions about participants' interest in Microsoft Dynamics CRM after following the instruction for Sales module, if the procedure of creating an invoice was easy to follow, the responsiveness of user interface, user experience of screen design, and comparison between MS CRM and Microsoft GP if participants have ever tried Microsoft GP.

For the first survey, the three questions asking basic information about participants were not included. However, starting from the second survey, more questions were added to analyze participants, and investigate the relevance between participants' traits and the result of the survey. The added questions asked the participants about their gender and degree level. The question asking if they have tried the instruction in the last week was also included, because for the first conducted survey there were some errors which would be discussed later in the thesis. Each question had five rating scales ranging from one to five. One refers to 'not at all' and five refers to 'strongly agree'.

Participants of the survey were 30 graduate students in Masters of Science in Information Systems (MSIS) and 10 graduate students with their majors in Supply Chain Management (SCM) at Eastern Michigan University. Majority of MSIS students have experiences in supply chain programs and customer relationship management programs such as SAP, Microsoft GP and etc. SCM students relatively have less background about CRM programs. However, CRM processes are relevant to supply chain processes, which will make it easier for them to understand the flow of CRM better than MSIS students. Figure 2 on the next page is the survey questionnaire provided to participants.

Microsoft Dynamics CRM User Satisfaction Survey

Thank you very much for completing all steps in handout. Please fill out the survey.

* Required

Did you participate in the last week's survey?
- ◯ Yes (This is my second time)
- ◯ No (This is my first time)

What is your gender?
- ◯ Male
- ◯ Female

Are you a undergraduate or graduate student?
- ◯ Undergraduate
- ◯ Graduate

Microsoft Dynamics CRM was interesting to me. *

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strongly Agree

The procedure of creating invoice was easy to follow. *

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strongly Agree

The user interface of CRM was responsive. *

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strongly Agree

The screen design was user friendly *

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strong Agree

The speed of CRM was fast enough. *

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strong Agree

When compared to Microsoft GP, CRM is much easier to use
Answer only if you have tried GP before

     1   2   3   4   5

Not at all ◯ ◯ ◯ ◯ ◯ Strongly Agree

Submit
Never submit passwords through Google Forms.

Figure 2: Survey questionnaire

RESEARCH RESULT

First Survey

The first survey was conducted on March 25th, 2014 during IS 627 (Business Process and Identity Management) class. There were 13 participants who are MSIS students at Eastern Michigan University. Prior to conducting the survey, there were issues when logging into the system. The server was not working well, which made participants unable to log in. Each student was given a user ID and a password, so that each of them can try different input data. Figure 2 shows the survey response.
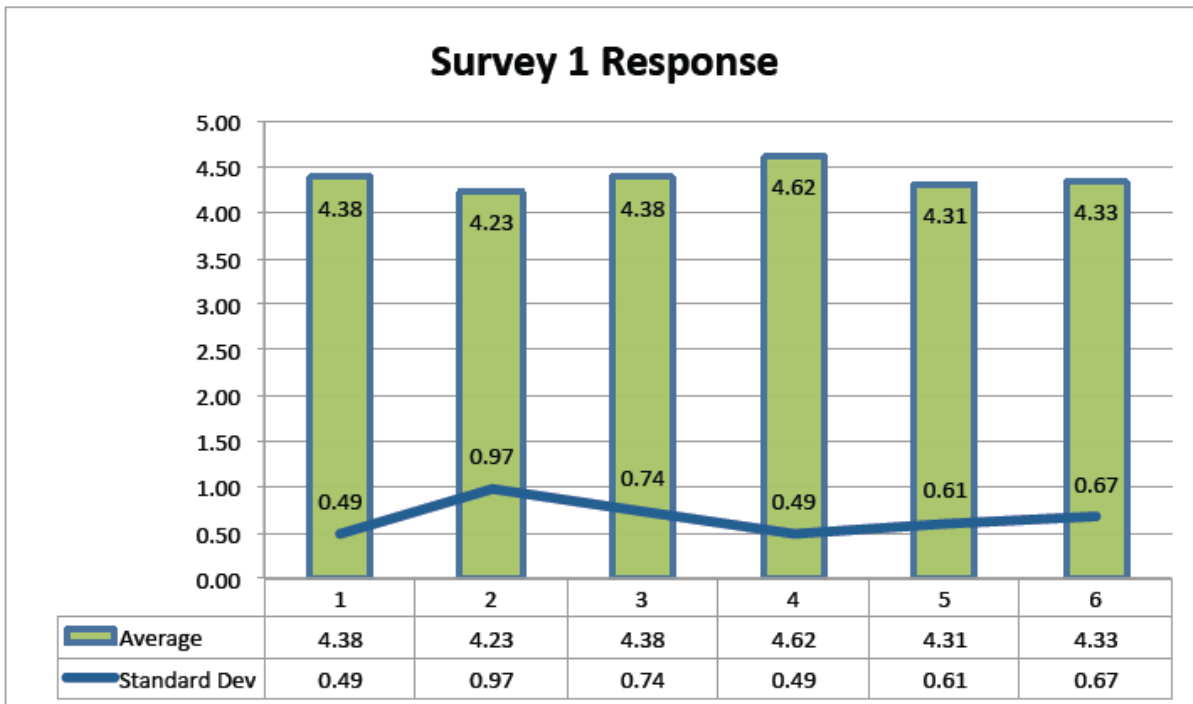

Survey 1 Response

	1	2	3	4	5	6
Average	4.38	4.23	4.38	4.62	4.31	4.33
Standard Dev	0.49	0.97	0.74	0.49	0.61	0.67

Figure 3: Survey 1 response

Participants tend to respond with high score. The averages of each question ranged from 4.23 to 4.62, which means that they were satisfied with their experiences on Microsoft CRM. Although participants rated Microsoft CRM relatively high, there were complaints about the manual. Most of the complaints were printing errors occurred while converting the file and issues with pop ups. The errors were fixed in the second survey, however, the result was different from my expectation.

Second Survey

The second survey was done to same participants as the first survey except for one participant. There were 17 participants in total, and most of the people who were not in the first survey In other words, they have already tried the instruction prior to the survey. We predicted that people would be more satisfied in the second survey than the first survey since errors were fixed according to participants' critiques.

The second survey was conducted on April 1st, 2014 to IS 627 students. To improve survey results, we participated in the class. It took 20 to 50 minutes for them to finish the survey. Some students asked me about minor questions related to manual, such as how to find a created lead. Unexpectedly, user satisfaction decreased comparatively. The average of each question ranged from 3.92 to 4.15. My pre assumption was that people would be more satisfied since the pop ups were working well and some equivocal terms and figures were fixed.
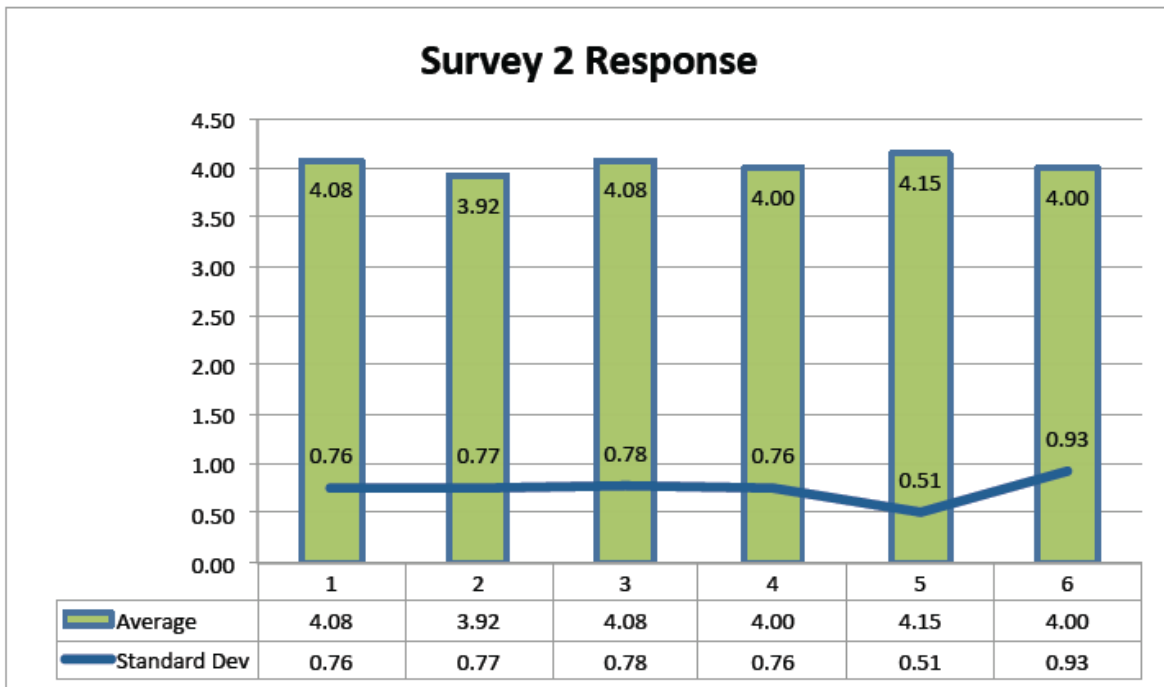
Figure 4: Survey 2 response

Figure 4 above is the bar chart based on the average of survey 2 responses. The second question, which was asking the easiness of creating the invoice, got the lowest score. When the survey was done, there were a plenty of comments about the instruction. Rather than discussing how misleading the instruction was, most of the students suggested improvements. There were complaints about printing quality of instructions. However, this did not have a large impact on the survey.

When we reviewed the comments on the instruction, it was found out that participants' attitudes towards the survey was contrasting to their attitude towards the first survey. Particularly, they were more specific and intense in the second time than in the first time. As we attended the class for the second survey, it could have affected participants' position. We perceived they were more engaging in the second survey.

Therefore, we could conclude that the presence of the survey conductor has an effect on the result. Running the identical survey more than once had more impact than we expected. For the second survey, it was inferred that participants had higher expectation. Annotations they left on training manual were highly critical. They were detecting every step that was unclear. Also, when people try out same material twice, they can notice some issues they could not notice before. Therefore, participants were able to figure out more about the program than the first time they tried it.

Third Survey

The third survey was coordinated on April 9th, 2014 to 10 graduate students majoring in Supply Chain Management (SCM). The average of overall survey scores was higher than the second survey. SCM students have different backgrounds from MSIS students. They were familiar with sales processes as well as supply chain processes. There was only one student who has tried Microsoft Dynamics CRM before.

Most of the students have tried Microsoft GP before, which helped them with getting used to a new program. There were more students who were interested in Microsoft Dynamics CRM than the students participated in the second survey. However, they did not find it easy to follow the procedures in Microsoft CRM.
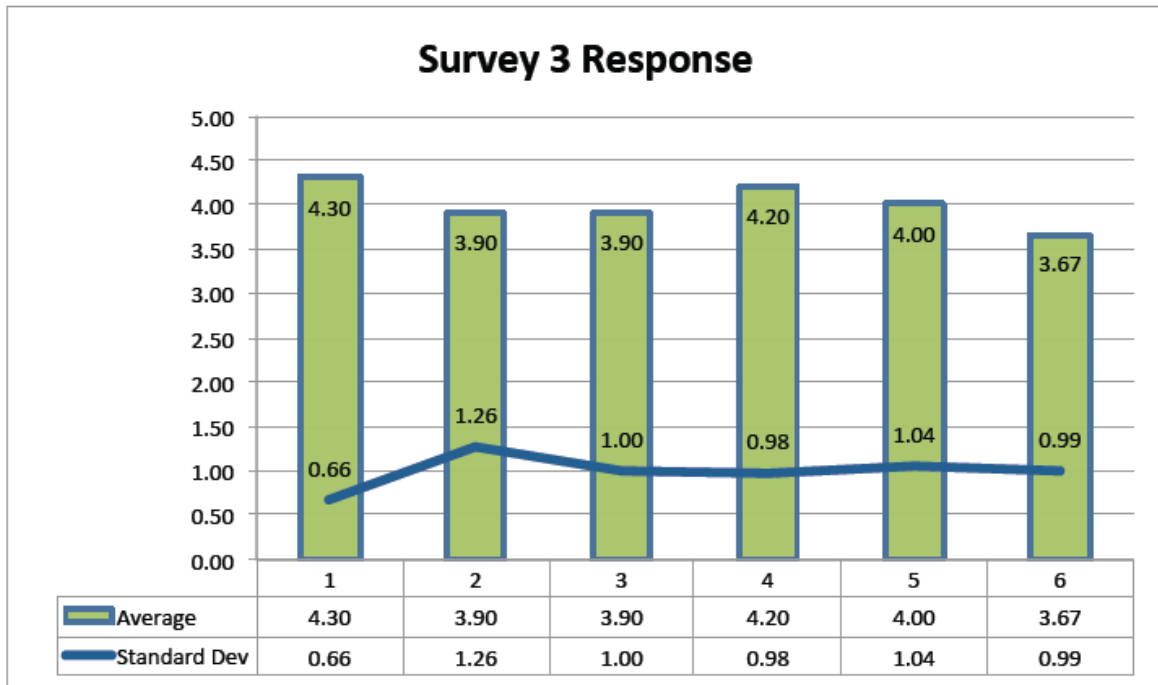
Figure 5: Survey 3 response

CONCLUSIONS

The survey provided some helpful insights into the training manual. It was inferred that the interaction was somewhat satisfying for graduate level students. The overall average for all questions was 3.76, which means that they were slightly satisfied with Microsoft Dynamics CRM. Figure 6 compares three difference survey results.

According to User Acceptance of Information Technology (Venkatesh, Morris, Davis, & Davis, 2003), there are several key factors affecting behavioral intention and user experience. They were gender, age, experience and voluntariness of use. In contrast, factors affecting behavioral intention and user experience with the training manual we provided were majors (academic backgrounds) and previous experiences.

Participants were first divided into two groups sorted by their majors, then divided again into two more groups sorted by their prior knowledge with CRM. Students' majors were Information Systems (IS) and Supply Chain Management (SCM). Students with IS majors have strong program application backgrounds. Therefore, they were proficient at dealing with various programs which enabled them to be less anxious when running a new program. MSIS degree requires students to execute various information system related programs such as SAP, Microsoft GP and etc. Consequently, they were more familiar with running a different program.

Nonetheless, students with IS majors struggled with understanding the sales procedure. They did not have hard time understanding concept, but apprehending the process entirely was challenging for them. When we were participating in IS 627 class, we recognized that they were uncertain about the flow of the sales procedure. For instance, coming up with topics in a lead and choosing a product was demanding unless exact data was provided. Students with SCM majors were stronger in understanding the procedure comprehensively. However, they were not familiar with executing a program they have never tried before. Only one student had tried Microsoft Dynamics CRM previously.
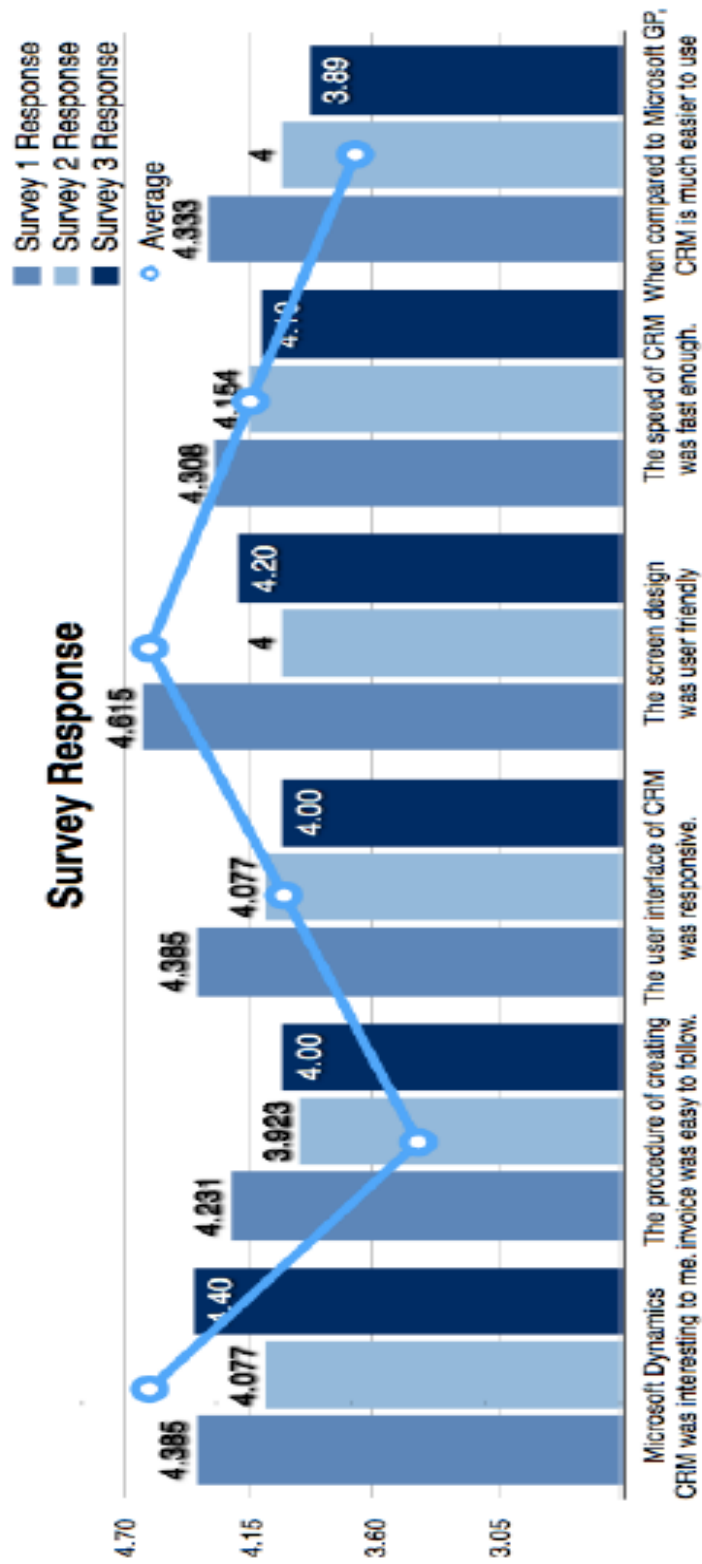
Figure 6: Comparison of three survey results

We concluded that both technical and theoretical aspects were needed when running a program successfully. Therefore, when Microsoft Dynamics CRM is provided to employees, they need to be familiar with handling unfamiliar programs and need to be taught underlying supply chain and sales processes. The second group, which categorized participants into two groups by their previous experience with CRM, also provided an interesting insight. The participants' standpoints were different in the first survey and in the second survey. Since they have tried the same manual before, they gained more confidence in the second survey. Also, they were more engaging, as we could find significantly increased number of comments.

Most of the comments were suggestions rather than detecting errors. There were some comments which were catching minor errors, but we could hardly find any major issues. In the perspective of users, they want a program that can be used easily, responsive, and fast regardless of their backgrounds. We could observe that even students with computer related backgrounds wanted a program that is ease of use. As a result, prior to teaching employees Microsoft Dynamics CRM, employees need to understand related knowledge. They need to be acquainted with the Microsoft Dynamics CRM's definition of a lead, an opportunity, a quote, an order and an invoice. Microsoft CRM's terms are not contrasting from their original meanings but used in a different context.

Appendix A
Sample of the Training Handouts

Training Handouts for Microsoft Dynamics CRM

1. Log on to http://50.241.208.85. Your user ID and password will be provided.

* **Before you start, make sure pop ups are not blocked. Follow these steps if they are blocked.**

• Internet Explorer 7, Internet Explorer 8, and Internet Explorer 9

• Click the Tools icon (it resembles a mechanical gear), and then click Internet Options.

• Click the Privacy tab, and in the Pop-Up Blocker area, click Settings.

• In the Address of website to allow box, type the URL that you use to access Microsoft Dynamics CRM. Your Microsoft Dynamics CRM URL will end in "dynamics.com".

• Click Add, and then confirm that the URL has been added to the Allowed sites box.

• Click Close, and then click OK. For the changes to take effect, restart your browser.

2. When you log in, you will see Dashboard, which looks like following. Click on Sales, which is on the bottom left side of the screen.

(Tip) You can always change view of the list by clicking as following.
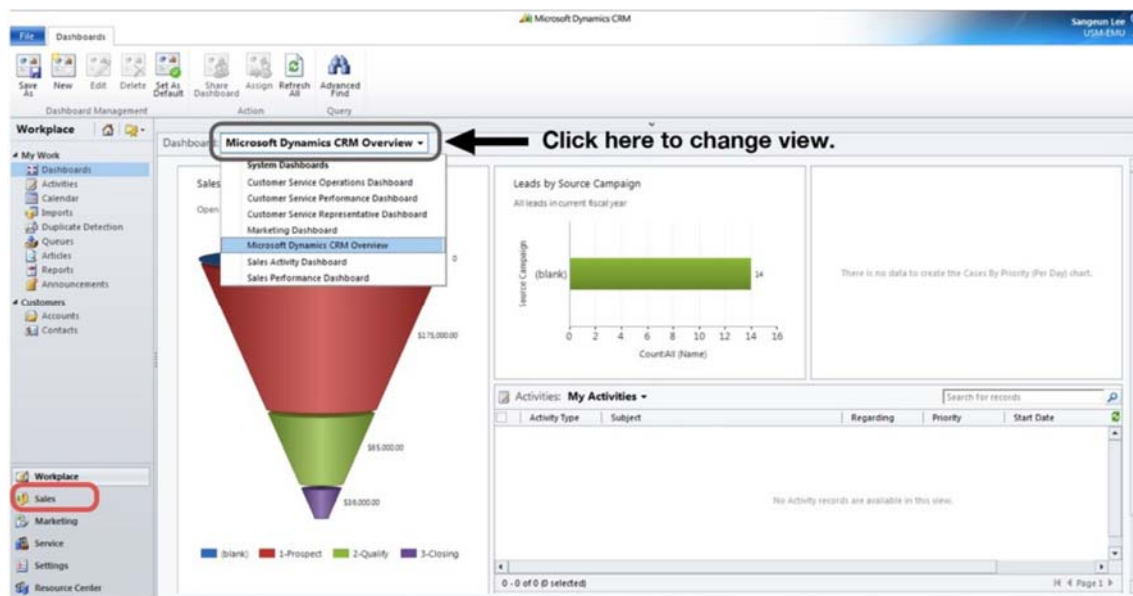
3. Then, you will see Leads in Sales module.

Leads

Leads are referred as potential customers who can be either qualified or disqualified. These leads are not in your contacts and accounts yet. By qualifying Leads, you can add them on contacts, accounts and opportunity. Lead is important, since it can be converted to opportunity. When leads are converted, they are qualified.

Let's start from opening the list of Leads.
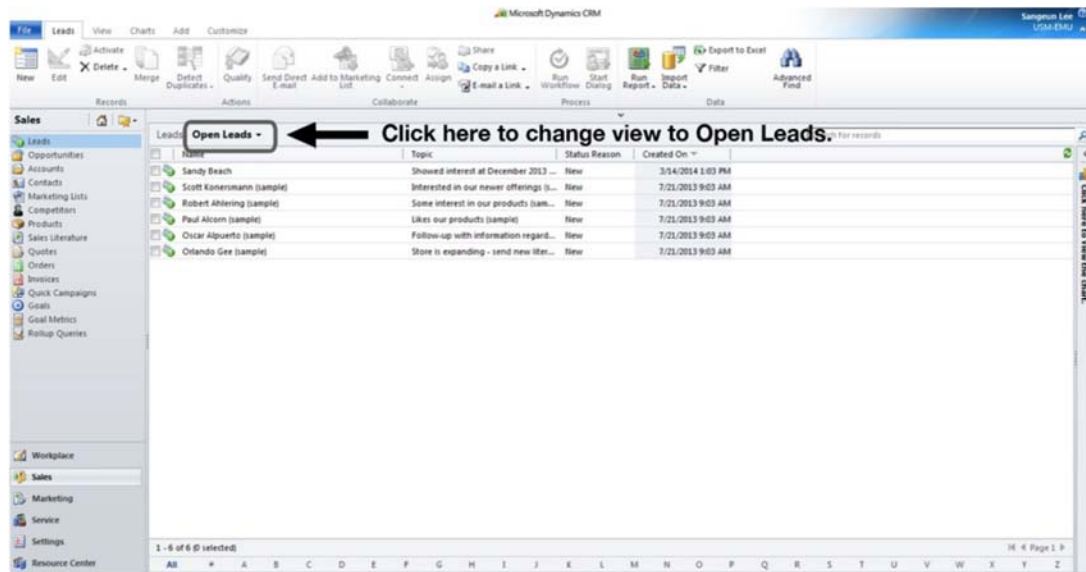
As changing the view in Dashboard, you can change the view to Open Leads as above. Then, click on the New button on the ribbon menu.

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Biographical Notes

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