

Considerations for driving high user adoption with new technology solutions

Purpose

This paper, written by Enabling Technologies, outlines the impact of a proper change management strategy on project success and basic considerations that should be taken to ensure users adopt new solutions.

Positioning Statement

No IT project will enjoy true success without user adoption of the full suite of new features. This behavior is known as *consumption* of new technologies, and critical in achieving true return on investment. Engaging users through proper change management strategies improves chances for adoption success and reduces the chance of shadow IT, the phenomenon through which users seek out unapproved technologies to meet business needs.

The correlation between a strong change management campaign and high user satisfaction/adoption cannot be denied. Enabling recently compiled survey results for clients over the past six months, measuring results for clients that followed our change management approach versus those who didn't. Overwhelmingly, clients leveraging a formal change management approach recognized higher rates of user satisfaction and adoption. Using Microsoft's objective NSAT survey scoring system to validate data, customers following Enabling's change management approach achieved scores of "World Class" while those not following a formal change management approach scored "Needs Analysis".



Clearly, a strategic change management strategy engages users and drives higher rates of adoption. This paper will address key areas in formulating a change management strategy when deploying new technologies.

Core Tenants of a Proper IT Change Management Approach

Enabling's approach to change management is built on years of practical experience and more than 1,400 successful UC&C deployments. Our strategy hinges around maximum user engagement without over-taxing internal resources. Starting with proper planning and discovery, and including proper user communications and training, Enabling's approach has proven successful time and time again for clients both large and small. In this paper, we will touch on what Enabling considers to be the core principles of a successful change management initiative when deploying new IT solutions.

Takeaway: True project success is directly related to a change management strategy that engages users and fosters high rates of adoption and consumption of new features.

Properly Planning the Change Management Strategy

As Benjamin Franklin said, "by failing to prepare, you are preparing to fail." This credo holds true for the change management strategy associated with new technology initiatives. Yet in many cases, we see clients fail to plan the change management strategy and instead focus almost solely on technical aspects of the project. This strategy introduces a great deal of risk; after all, what new IT initiative is successful without high user adoption? And perhaps more importantly, without users that fully embrace the new feature set, leading to true ROI?

Planning the change management strategy need not be overly taxing or complicated. Instead, focus on key tenants of change management specific to your organization. Host discussions with the technical project team, stakeholders, executive sponsors, and the voice of the user – often HR or internal communications teams. Reflect on your past several projects first, and honestly make note of change management services (such as communications or training) which were (or, as the case may be, weren't) provided to users. Identify gaps in the approach, and what the impact was to project success. From here, openly discuss perceived barriers to adoption of the new solution. Combining notes from these first two topics, work as a team to discuss how communications, training, pilot groups, launch parties, and user satisfaction surveys will be leveraged for your initiative.

It is also important to document this plan and review with the team to ensure buy-in. Assign responsibilities, and either create a separate project plan or weave change management tasks into the technical project plan. After all, a plan will ultimately be unsuccessful without execution.

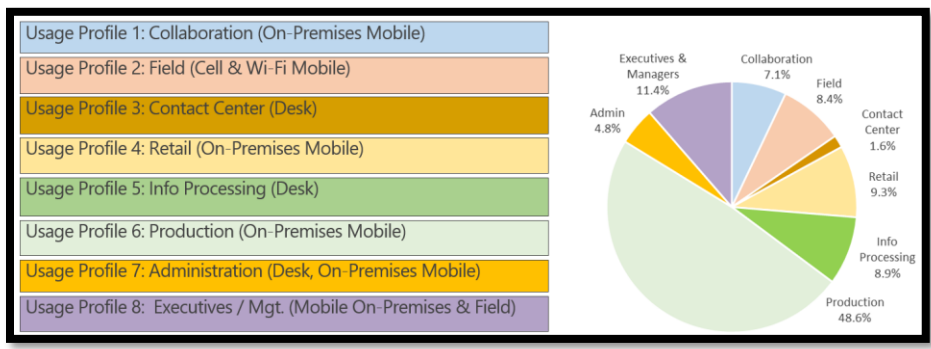
Takeaway: Without a proper plan that evaluates historical change management opportunities and focuses on improving services moving forward, your technical initiative is at risk before the deployment even starts.

User Communications That Resonate

Without a doubt, users are inundated with communication in today’s digital workplace. Garnering readership is more difficult than ever, particularly when email is the most commonly used delivery vehicle. With new IT initiatives, it is of paramount importance that pending changes are communicated with users. How does one cut through the inbox noise to ensure users are informed?

First and foremost, embrace a “what’s in it for me?”, or WIIFM-based communications strategy. Write with the user’s perspective front of mind, and provide compelling reasons as to why the new solution is beneficial. Most importantly, ensure these reasons/system features are applicable on a personal level specific to how the user communicates and performs their job duty. The first step in this process is defining user profiles present in the environment. Usage profiles allow for grouping of users in your organization by how they communicate as opposed to traditional methods such as by department, site, etc. By working through usage profile discussions, you will gain a deeper understanding of communications needs and traits of your users, and ensure your WIIFM-based communications resonate.

Simply put, a Usage Profile is a summary of the communications patterns and technology requirements for a group of users who work in similar business processes and have similar communication technology needs. Enabling advocates that eight (8) Usage Profiles comprise 90% of all employees regardless of industry vertical. These eight Usage Profiles are defined as such:



Once profiles are defined, determine which features of the new solution are most attractive for each group. Document these features as your “WIIFM” points to be covered in communications. WIIFM-based communications ensure your message resonates *by usage profile*. Salient points that resonate with a CEO may be considerably different than those that excite an engineer, or mobile sales representative. By communicating with users in a user-first perspective, you will realize higher rates of engagement, readership, and excitement with new solutions.

Also, ensure your user communications are fun, engaging, and resonant through use of theming. Far too often IT communications are quite plain, and focused on details such as rollout dates, what to expect during the cutover, and other somewhat antiseptic project details.

Unfortunately, readership of such communications is often low, leading to challenges with training attendance and ultimately rollout success. Build communications that are visually appealing and themed consistently to create awareness with readers. Have fun, and engage users with WIIFM information that demonstrates how new solutions will benefit them. Through this approach, readership will increase and ultimately drive project awareness, training attendance, and adoption success.

Takeaway: Define your usage profiles, and develop a create and fun WIIFM-based communications plan to cut through inbox noise and truly engage users.

Engaging Users with Meaningful Training

No two users learn the same way, yet many organizations continue to embrace a “one size fits all” approach for training on new technology solutions. The reasons for this are many, but oftentimes resource constraints or a lack of experience in providing training are primary culprits.

Unfortunately, many organizations report struggles with training attendance and user knowledge at point of rollout. To combat this, it is important that a formal training plan is developed and inclusive of multiple avenues for learning. A combination of classroom training, webinars, lunch-and-learn sessions, and white-glove training for key staff should be leveraged. Additionally, self-paced learning options should be provided. Consider use of a learning portal stocked with information on the new solution, even if just an internal SharePoint site. Users are human beings, and as such individuals. When it comes to training, ensure your plan provides different learning vehicles to ensure users can learn in the format they prefer.

Also, always ensure your training plan is formally documented. In many cases organizations postpone the training discussion until the rollout is imminent, and training sessions are at best cobbled together. Ideally, your holistic training plan should be developed well in advance of the first pilot group and content prepared. What’s more, ensure your training content supports the strategic objectives of the project. Understand what stakeholders and the project team is looking to accomplish, and ensure content shapes user behavior along these lines. For example, if the organization is rolling out Microsoft Office 365 with a focus on document collaboration, provide training sessions that highlight OneDrive for Business as a tool for storing and sharing. In short, use training to help drive project success and ROI by ensuring users are well versed in using specific facets of the technology in line with strategic goals.

Takeaway: Develop a formal training plan that incorporates live, remote, and self-paced learning materials to allow users to learn in the format they find most appealing. Use training sessions to drive project success by understanding strategic goals for the new initiative.

The Strategic Importance of Pilot Groups

Many organizations miss a golden opportunity to ensure change management success through lack of proper piloting. Simply put, enabling 10-15 users in the IT department for new solutions prior to the rest of users is *not* a true pilot.

When deploying new solutions, first ensure your pilot group is representative of the organization. Include members from each usage profile, and as applicable each site. Include employees from all roles in the organization, from top to bottom. Strive to find members that will provide candid feedback without overt negativity – that is, don't select pilot members that are well-known to be problematic or pilot members that are known to be overly accommodating of new technologies. Also, ensure your pilot group is manageable in size. Typically, 5-10% of users are more than sufficient.

It is also important that you are fully prepared for the pilot. Prior to extending the new service to users, all planned communications and training should be developed. Support teams should be prepared to support these users. A welcome communication should be generated calling out the opportunity being provided pilot members as well as the expectation that surveys be completed at pilot's end. Pilot members should receive communications in the weeks leading up to go-live, and also be provided the planned training options. In short, the pilot group should operate much like a miniature version of the planned production rollout.

Also ensure your pilot has a clear beginning and end. One common slip that we see is the "perpetual pilot". In the end, this leads to lack of user engagement and confusion amongst the pilot group. Lastly, once the pilot has run its course, send an anonymous survey to all pilot members seeking feedback on the new technology, the feature set, the communications received, and the training provided. In this manner, you will gather a great deal of strategic insight into your change management approach. This will allow you to make any necessary course corrections prior to the solution's general release.

Takeaway: Don't confused basic UAT testing with a true pilot. Create a robust pilot group that will provide you with strategic insight on your change management approach to ensure you're on the mark before the production rollout.

Once the Dust Settles – Change Management Strategies Post-Rollout

It is also important that your change management strategy doesn't end with the production rollout. Many users don't fully retain information from training, and it is often necessary to continue training and communicating on nuances of new solutions to drive full adoption. Take heart though, your ongoing change management strategy need not be a significant drain on resources.

Enabling's approach to going change management hinges around continued self-paced learning, user surveys, communications, and training. Self-paced learning provides users with tools to continue to

grow into new solutions, while rotating surveys shed light on areas of weakness regarding adoption or feature consumption. Continued communications help subtly shape user behavior and push solution features, and ongoing training helps to solidify user knowledge. We call this phase of the change management approach all this phase of the change management approach **syndication** as the heavy lifting has been completed. In this phase, savvy clients are able to continue reaping the benefits of increasing user adoption with a minimum of effort.

Takeaway: Don't let your change management strategy stop at point of rollout! Continue to strategically offer change management services that drive user behavior.

Final Takeaway:

A winning change management strategy should be rooted in the practical, and focused on offerings that engage users with WIIFM-centric messaging. Enabling's approach has proven successful with clients large and small, and from all industry verticals. To learn more about how our team of dedicated change management experts can help you realize viral user adoption, visit <http://enablingtechcorp.com/Solutions/Maximizeit!/StrategiesforViralAdoption.aspx>

