# End User Adoption and Change Management Process

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# What is End User Adoption?

It’s one thing to provide a new technology tool to your end users. It’s quite another to get them to use the tool.

And it's still different for them to use the new tool proficiently.

When your end users fully utilize a new technology and make it part of their daily work habits, they have “adopted” the new tool.

This guide references a real project tasked with migration of roughly 10,000 users to a cloud based communications and collaboration technology.

Huge thanks to Vallorie Weires from Enabling Technologies.
Her expertise on the Adoption and Change Management (ACM) process is extensive and invaluable.

# Why do you need an end user adoption and change management process?


Some people say that new technology should be so easy to use that no training is needed. But any technology that offers more than cursory capabilities requires education to utilize the full potential of the tool.

Yes, the user interface should be simple and intuitive.

But communication and collaboration tools must meet many different types of user needs, and feature depth introduces complexity.

An intentional and complete end user adoption and change management process will help maximize the use of new technology. Increased usage maximizes the ROI (Return on Investment) of the money spent on the technology.

# Benefits

Each stage of a formal process builds on previous stages. This increases efficiency and ensures that nothing is missed. A successful process can:

- Influence project success and perception
- Improve IT reputation
- Increase user engagement
- Reduce turnover
- Streamline or decrease the burden on support staff

## Case Study

On a prior project, two groups implemented the same new technology within the same company.  Group A emphasized end user training and communication. Group B did not.

At Go Live, the help desk tickets proved the difference in outcomes. Group B  was less than half the size of Group A, yet its members filed *twice* as many tickets.

Both groups were using the same technology. The difference was in the training and support for the change.

Group B experienced:

• More (and very vocal) user frustration

• Frantic Day 1 support due to user questions that were covered had they attended training

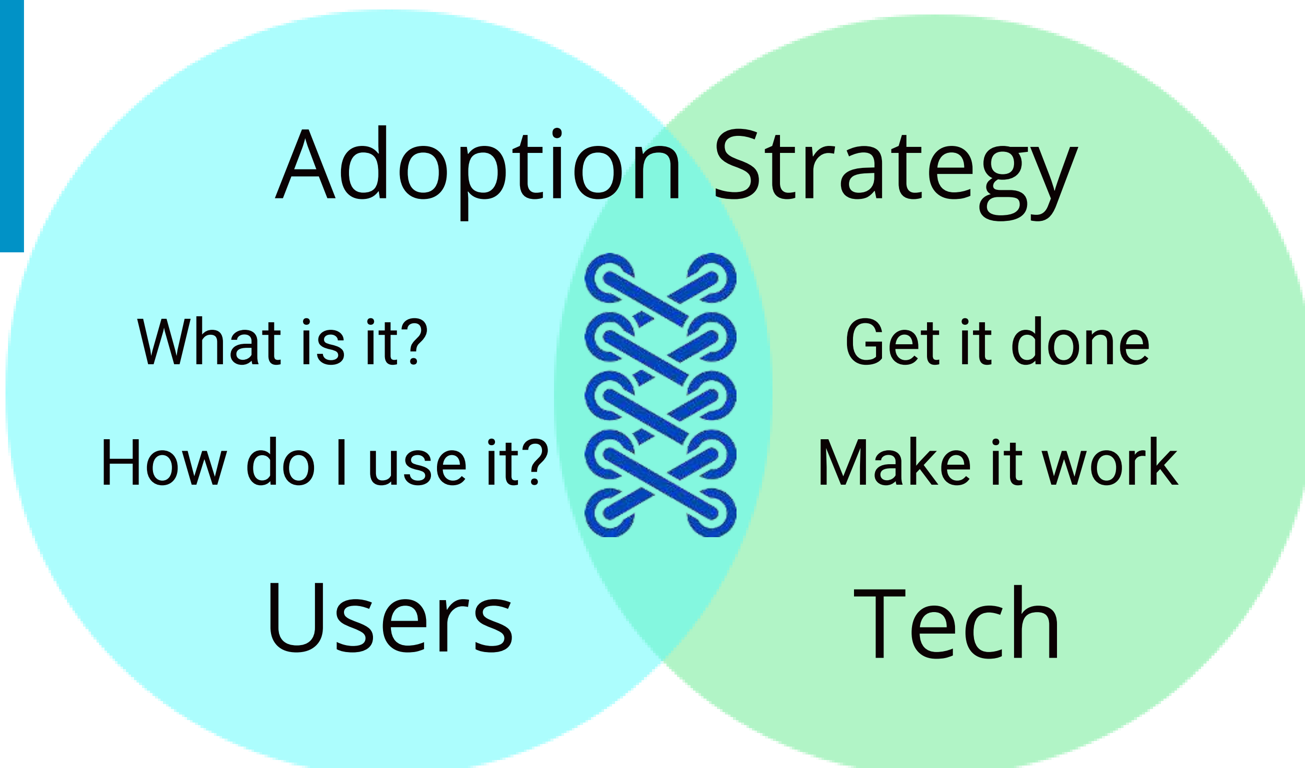
# How do you increase end user adoption?

There are four parts to the ACM process: **Discovery**, **Planning**, **Execution**, and **Reinforcement**.

Every phase is designed to take the user perspective into account. The process requires interviews with staff to understand their technology, communication, and collaboration requirements, as well as their preferences and desires.


Diagram courtesy of Vallorie Weires, Enabling Technologies

# Tying Things Together




This process isn't just about bringing users along for the ride. It intentionally (and transparently) designs the ride WITH and FOR the users. The ACM process aligns with a typical project process, but focuses on the human side of the project, rather than the technology itself.

In the end, the intent of any new technology is to improve the experience for the users. Doing this requires an understanding of the various ways that the current technology is used, and how the new tool will impact users.

While the technical part of the transition must be done correctly, the project will ultimately fail if the new tool is not used correctly. The ACM process focuses on the users and on what is needed to promote the adoption of the new technology and ensure project success.

Discovery

## Understanding Your End Users

Ideally, this phase of end user adoption should begin along with the technical discovery for the new technology solution.

In the discovery stage, your focus is on documenting who uses what tools, how they use each tool, why they use it, and how can to improve their experience (with existing or new solutions). This allows you to identify differences and commonalities, risks and barriers, and deep needs among the user population.

With the information gathered in discovery, you will be able to:

• Define user personas and how each persona uses the tools.
• Anticipate and document the expected impact of the technology change for each persona group (more on that later).
• Use this information to select the technology that will best meet the needs of your users.
• Establish the strategic roadmap to best support your staff later during transition.

Defining Personas

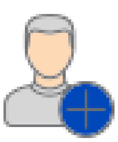
## The Foundation for End User Adoption

A “persona” is a representation of a group of users with common characteristics. For example, every organization has executives who often work (and communicate) differently from other staff members. They may travel more, or have assistants who screen their calls.

The intent is to group your staff into user profiles that represent common work practices for each group. These profiles, or personas, are high level descriptions of how each group uses the technology, and often includes challenges and goals for each group.

On a recent project that moved 10,000 users to a new UCaaS technology, eight personas were used to represent the users:

**Executives** – Attend a lot of meetings, and travel often. Have staff who manage communications on their behalf. Require reliable tools that are easy to use. Utilize multiple devices (desk, mobile, tablet) and need uniformity across devices. Need contact management.



**Admin Assistants** - Need to answer and screen calls for executives. Attend a lot of meetings. Utilize desk and mobile devices and need uniformity across devices. Need contact management. Need collaboration tools. Need to know status of other users.

**Answering Positions** - Function as first point of contact for callers. Duties are often shared with others. Need to coordinate call routing with availability. Need to know status of other users and have easy way to transfer calls. Need contact management.

# Defining Personas

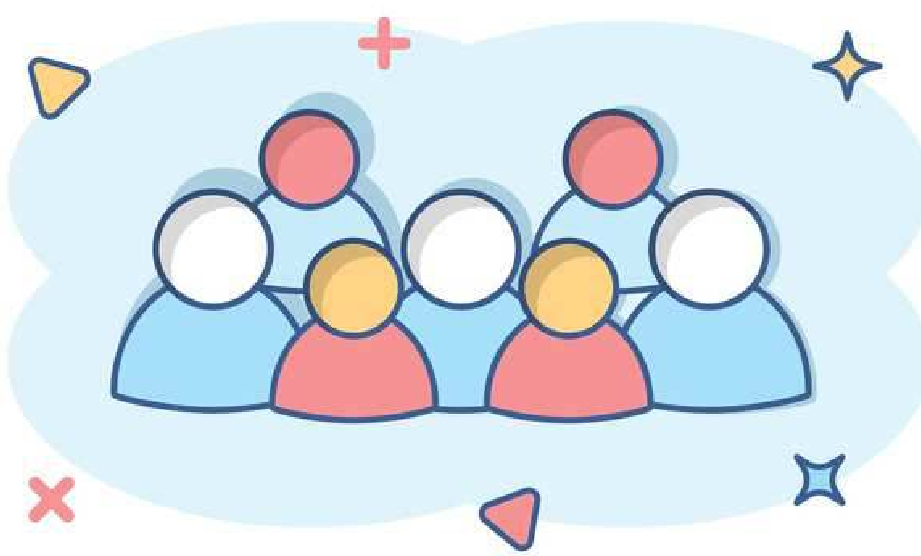
**Standard** - On site user without corporate cell phone. Attends meetings 2-3 times daily. Does not answer calls on behalf of others. Need contact management. Need to know status of co-workers.

**Remote** - Work from outside of corporate location. Attend meetings 1-2 times daily. Need clear audio. Utilize video to attend meetings. Want to have equal footing with on-site attendees. Need to know status of co-workers.

**Field** - Out of office job primarily investigating issues and resolving problems. Use mobile device to stay in touch with co-workers and coordinate activities.

**Help Desk** - Heavy phone user who shares incoming call load with other staff. Use mobile device when leaving desk to assist staff. Need contact management. Need to know status of co-workers.

**Conference** - Device that resides in a huddle or conference room. Must support audio and video conferences. Must be easy to use.



# Personas

Each type of persona used communication and collaboration tools in different ways, so it was clear the proposed new tool would impact some groups more than others. Developing the personas allowed the project team to make informed decisions about what device types to offer, what type of training would be the most beneficial, and how best to communicate with each group.

Creation of the personas required the team to:

- Understand of the daily workflow for each group and how technology tools are used today
- Assess the potential gaps and impacts of the new solution
- Articulate benefits of the new solution, based on specific needs and workflow for each group
- Document future user experience and transition journey
- Establish theWIIFM (What’s In It For Me) for each group, for communications and training, including preferred training methods
- Define user success criteria and metrics

# Benefits

Other sources agree that an adoption and change management are important. Here are some other studies from analysts and change management firms:

Businesses move **twice as fast** on their digital transformation journey once the staff and management collectively understand the importance of their digital path ahead. (Gartner)

Companies are **2.5 times more likely** to financially outperform their peers when a good change management practice is in place. (Towers Watson)

**143% of the expected ROI** is achieved from organizations with an effective change management program, while organizations with little or no change management only achieved 35% of expected ROI. (McKinsey)

Organizations with an excellent change management strategy are **6 times more likely** to meet or exceed objectives. (Prosci)

Here is an example of a persona framework document created by Microsoft, which you can find here under “Examples Personas and Workstyles”.


The format of the persona information should be adjusted so that it is useful and applicable in your environment.

Once you have grouped your users into persona profiles and documented the needs and motivations of each group, you have the foundation needed to move to the next step.

# Planning


## Putting Your Discoveries To Work

This phase builds on the discovery output and user personas. You will develop a blueprint for driving user awareness of the upcoming change and empowering users with the knowledge and skills needed to adopt the new tool. This includes the creation of a communication plan and a training plan.

Planning

# Creating An Effective Training Plan

The availabiltiy of training is a big factor in creating a positive perception of the new tool, whether users attend or not. The fact that help is available feels like a safety net to many users.

There is no “one size fits all” training plan. The amount and depth of training that you offer should be determined based on the impact of the change for each persona group. Personas whose daily routine will be significantly impacted by the change will have the highest need for training.

Here are some factors to consider when creating a training plan:

## 1 Will training be voluntary or required? And if required, how will the requirement be enforced?

There can be several factors that determine the answer to these questions, including:

- Company culture
- Workforce considerations (union requirements, etc.)
- Impact of training time on daily work and business operations

## 2 In what format(s) should training be offered?

During the persona development, preferences for particular learning style should be documented. Typical options include:

**How to Videos.** Great for visual learners and those who don't like to read.

**Quick guides.** For users who want quick answers without wading through a lot of detail.

**In depth guides.** For those who love the detail.

**In person classes.** These ensure that staff makes time to attend training, and is great for asking questions and clearing up confusion.

**Remote classes.** Meet the needs for users for whom attending an in-person class is difficult.

**Instructor Led.** Having a live instructor allows attendees to ask questions and clarify their understanding.

**Self-service.** For those who want to be able to look up answers when questions arise.

## 3 Resource creation: do you develop, outsource, or scavenge?

Once you establish the format(s) of the training, it's time to determine what resources are needed and how to obtain and/or develop them. Some considerations include:

**Type of resources needed.** How many users do you plan to train? How many of the above formats do you plan to provide?

**Skills.** Who will create guides, videos, class curriculum? Who will teach classes? Should training rooms be reserved? Where will these resources reside?

**Costs.** How much do you have to spend?

# Planning

**Specific governance requirements.** Are there any union considerations? What are the corporate policies regarding training? Are there considerations for ensuring that certain areas are staffed during training?

**Regulatory requirements.** Are there privacy or safety requirements that must be managed?

**Use case needs**. It’s typically best to schedule users with similar requirements to attend classes together. This allows their special needs to be addressed without boring other attendees.

**Impact of change.** The greater the anticipated impact of the new tool, the greater the need for training.

**Your final training plan should outline:**

- Who to Train
- When Training Must Occur
- Which Modality? (Can Vary by Persona)
- What to Include in Each Session
- Content to be Developed or Cultivated
- Resources Assigned to Execute

## Creating An Effective Communications Plan

Similar to the training plan, there is no "one size fits all" communication plan. An effective plan is tailored to the unique organization and its staff. In most cases, the daily use cases and the way each persona consumes information may be different (sometimes greatly different).

Have you been on the receiving end of a communication that tried to cover multiple experiences? At what point did you quit reading because nothing in it applied to you? Audience awareness is a guiding factor when determining how many communication streams are needed. You might need a few special communication streams, based on how users are expected to be impacted by the change.

Note that having multiple communication streams doesn't mean that every communication is completely customized. Typically, it starts with one main template and information is tweaked as needed for impact.

A one size fits all plan can cause users to ignore the communications and eventually generate additional burden on the help desk and project team.

Planning

## Creating An Effective Communications Plan

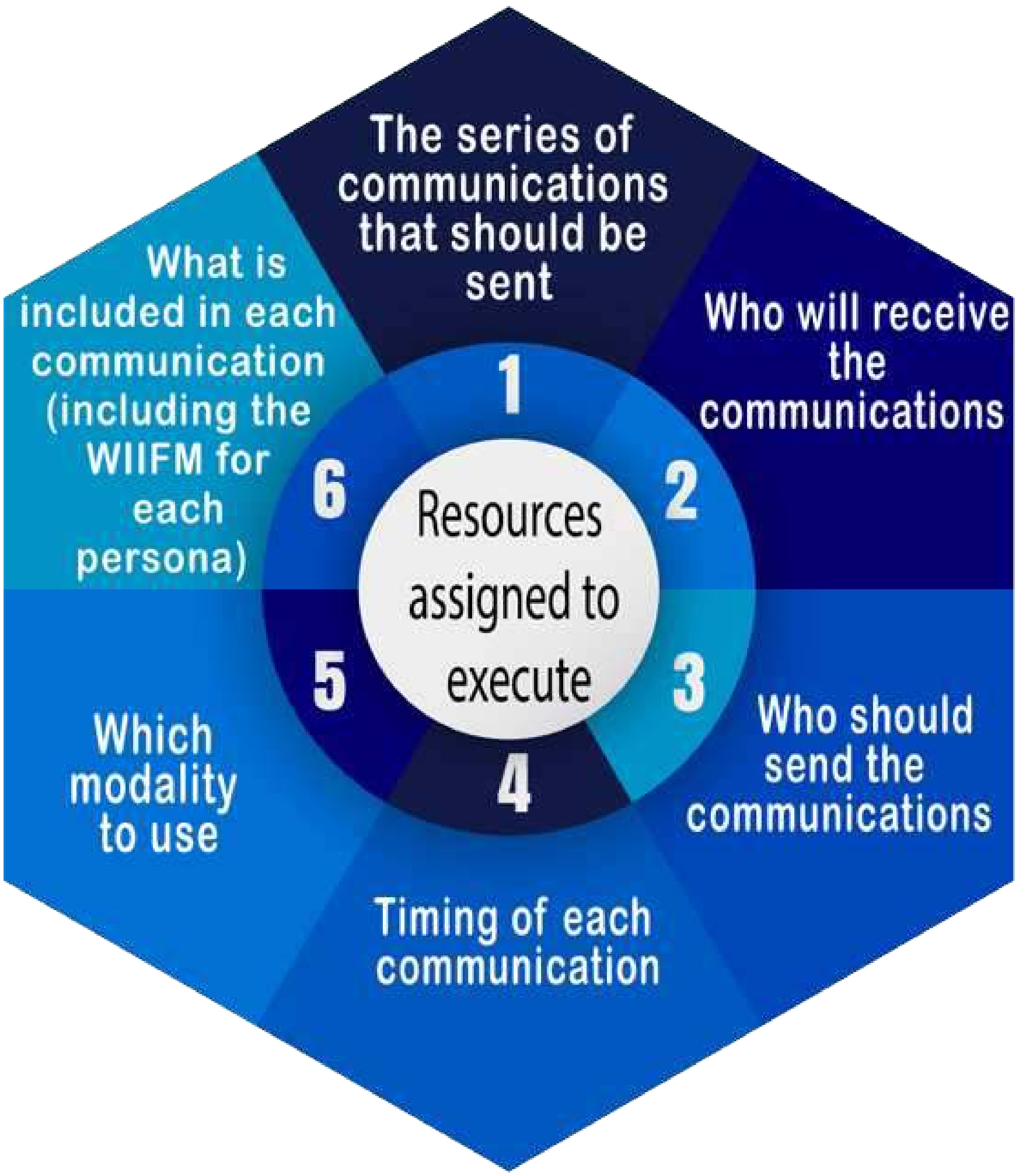
Answering the questions below will help you create a custom plan optimized for your needs.

- What is your corporate communication culture?
- Should a project sponsor to drive communication?
- What is the best way to communicate the project vision and objectives?
- What method of communication resonates with users?
- Does this change by persona?
- How many personas require separate communication streams?
- Which personas can be combined for communications purposes?
- How to best include WIIFM within communications?
- What is appropriate timing for communications?
- How many communications should be sent?
- Who will send communications?
- Should communications be tailored based on the user’s device (hard phone, soft phone, etc.)?

Planning

## Creating An Effective Communications Plan

**Your final communications plan should outline:**



# Execution


## Follow Your Plan

If you’ve spent time in the discovery and planning phases, the good news is that your work is mostly done. In the execution phase, you follow your plan.

# Execution

You have developed custom technology adoption experiences for users based on what they said they needed. Now the goal is to translate that information into helping usersto be successful with the new tools.

The users should feel that you have seen and heard them, and that you are meeting their needs.

But don’t let your guard down just yet. The key to success at this stage is having the resources available to respond to issues as they come up.

For example, your training plan will be enacted during the execution phase. This means that you need to:

Create or scavenge the training materials (based on your plan)

Designate and populate your training repository

Determine the space (real or virtual) to be used for the various types of instructor led training

Create a training schedule

Communicate the training options to your users (using your communication plan that was previously developed).

It’s important to include time in the project schedule for follow up and to handle unexpected issues.

**Real Life Example:**

On a recent project, the team was migrating 10,000 users in phases to a new UCaaS solution. During the migration, the UCaaS provider made a major update to their software that changed the user interface.

This resulted in significant effort for the ACM team on the project. Some users had already been trained on the old user interface and they had to be contacted and given updated information. Training documents had to be revised and updated. The curriculum for upcoming classes had to be updated with the new information, and the instructors had to be informed and prepared to deliver the new information.

In addition, the project migration schedule allowed 1 day after the migration of each group for the technical team to resolve issues reported by the users.

Fortunately, the staffing on that project was sufficient and the ongoing rollout schedule remained unaffected.

# Execution

There are a lot of factors that could impact the amount of time you need to allow for follow up, including:

1. The number of users moving during each phase (more users = more follow up time needed)

2. The amount of training consumed by the users (untrained users tend to generate significantly more help desk incidents)

3. The extent of the change created by the new tool and its impact on the user’s daily work (more change with higher impact means a higher probability that additional support will be needed)

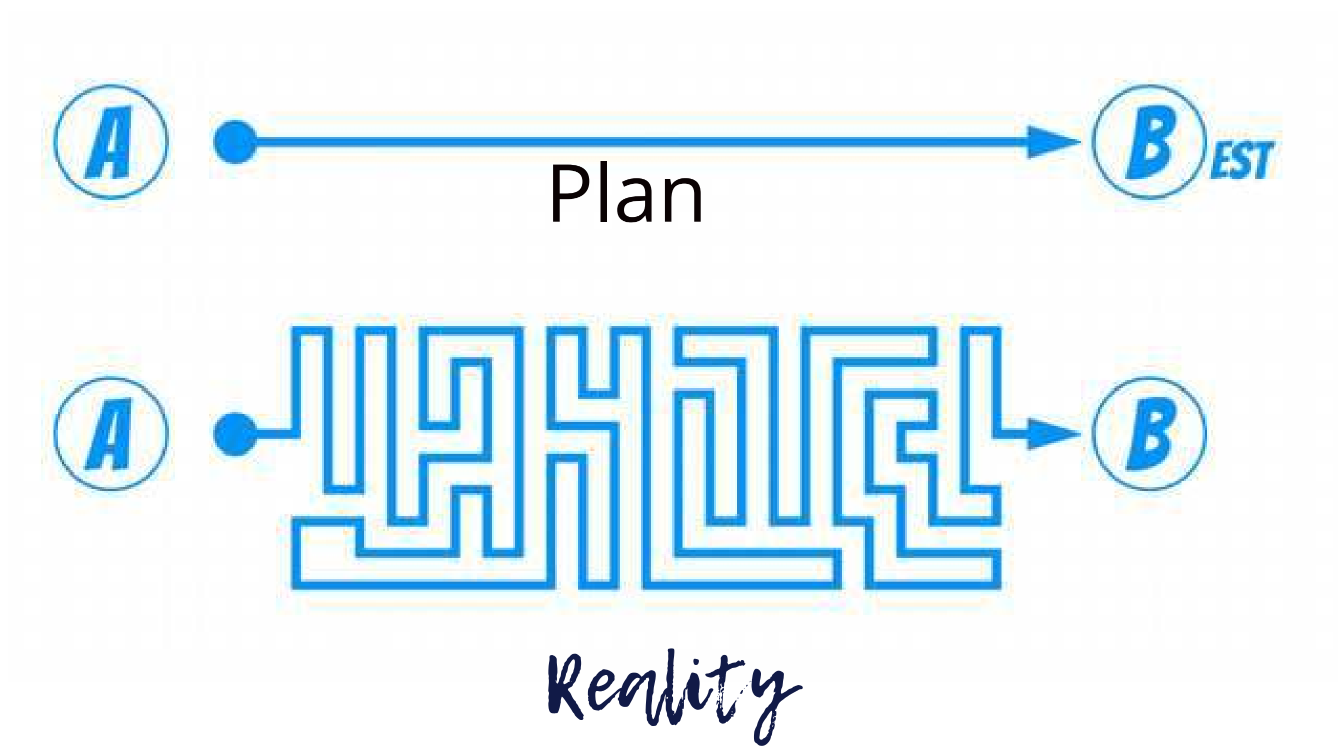
# Execution

If you are migrating users in phases, the execution phase is also the time to adjust and optimize your plans going forward based on your real-world results and user feedback.

As your plans turn into actuality, you will likely need to fine tune them. You may find that you need more (or fewer) communications to the users. You may find commonality of help desk incidents that can be resolved proactively by adjustments in the training curriculum, resources, and materials.

In the project I mentioned before, we adjusted the communications plan to include device specific communications that provided soft phone users with headsets one set of information, and desk phone users with information specific to their device.

We also found that the staff who answered calls from the public required additional configuration information, so we added this to the process.



Reinforcement

## Feedback and Support

In my experience, this phase is the most commonly missed step in any change project. Ironically, it also is often the most critical factor in the perception of the project success.

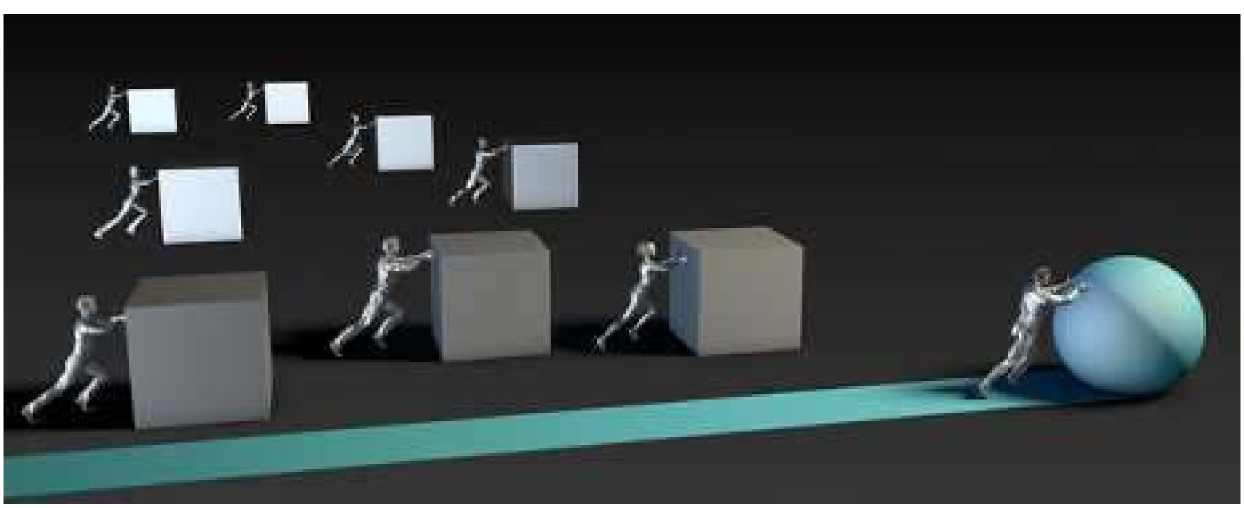
# Reinforcement

This phase includes a lot of tasks that require interaction with users:

**Non-technical Q&A support.** This is typically support for user questions that can be provided by the training team, and doesn't include configuration changes that require an engineer to address

**User satisfaction surveys & analysis.** In addition to asking users to answer a survey, the results should be shared with user representatives in a format that makes them easy to understand. Any results that indicate changes are needed should be acknowledged.


**Updates of materials & training**. This is an ongoing requirement. Updates and enhancements will occur during the life of the technology. If materials are not updated, they become useless. New and even existing employees will no longer have a reliable resource and the utilization of the tool will drop.



# Reinforcement

**Ongoing recognition of user concerns and feedback.** The need for this is greatest during and after the migration process. However, there will always be new users, and existing users may change jobs and require different skills. A mechanism for reporting questions and concerns is essential, along with a process for responding to users. The response should thank them for their input and lets them know what to expect (even when nothing will change).

It doesn't have to be time- and resource-intensive, but it does have to be intentional.

From a user perspective, the feedback loop is a simple thing: they share something and either we either address it and take action, or we don't. Users either feel seen and heard, or they stop sharing feedback because it feels like their input doesn't matter.

# Reinforcement

It’s important to plan for reinforcement at the beginning of the project.

During persona discovery, you can learn how people want to be acknowledged.

That knowledge sets the stage for reinforcement later.

These sequential steps produce optimal reinforcement:

**Capture Input**

**Demonstrate how you are acting on it**

**Acknowledge ALL feeback**

**Schedule sessions for long term feedback**

# Reinforcement

When users provide feedback, you must respond. This doesn't mean you always respond to the user with "yes". The fact that you read and respond to user feedback is the most important factor. If you do make adjustments or improvements, communicate them to users, so they know their feedback was heard. Take advantage of this important opportunity to improve user perception.

Of course, we all know that users will ask for things that are just not feasible (or even possible). In that case, a simple thanks for their idea and a quick explanation of why the request can't be met will let users know that their input didn't fall into a void.

Ideally, you should assign a specific person to manage this during and after the project. Plan to continue the feedback loop through the support team on an ongoing basis.

An intentional reinforcement phase demonstrates the value of employees and shows that you listen to and embrace feedback. When it makes sense, prove it by using the information to take action and improve processes (and let users know about that you did it).

The most critical component of this phase is setting user expectations about what you'll do with the feedback, and then doing it. Recognize that failing to follow up will be detrimental to the IT reputation in your organization.

# Summary

A formal end user adoption and change management process is an important component of a successful project. It addresses the people part of a technology project. It improves how that technology is adopted.

And, in the end, isn't every new technology intended to improve results for the people involved?