MAXIMIZING TECHNOLOGY ADOPTION CHECKLIST

A fresh approach to change management

root

Overview

Change management is absolutely critical to the success of your implementation, but *traditional* change management doesn't do enough to drive the results because it fails to focus on the people involved in the change. The following guide takes a fresh look at the success factors that will help you drive a faster and higher return on investment through more effective user engagement.

In a recent client project post-mortem on a less-than-optimal ERP implementation, a project team member commented, "The external auditors said we were doing great because we checked EVERY BOX on our change management checklist. But we still didn't get the buy-in we needed, and the implementation failed."
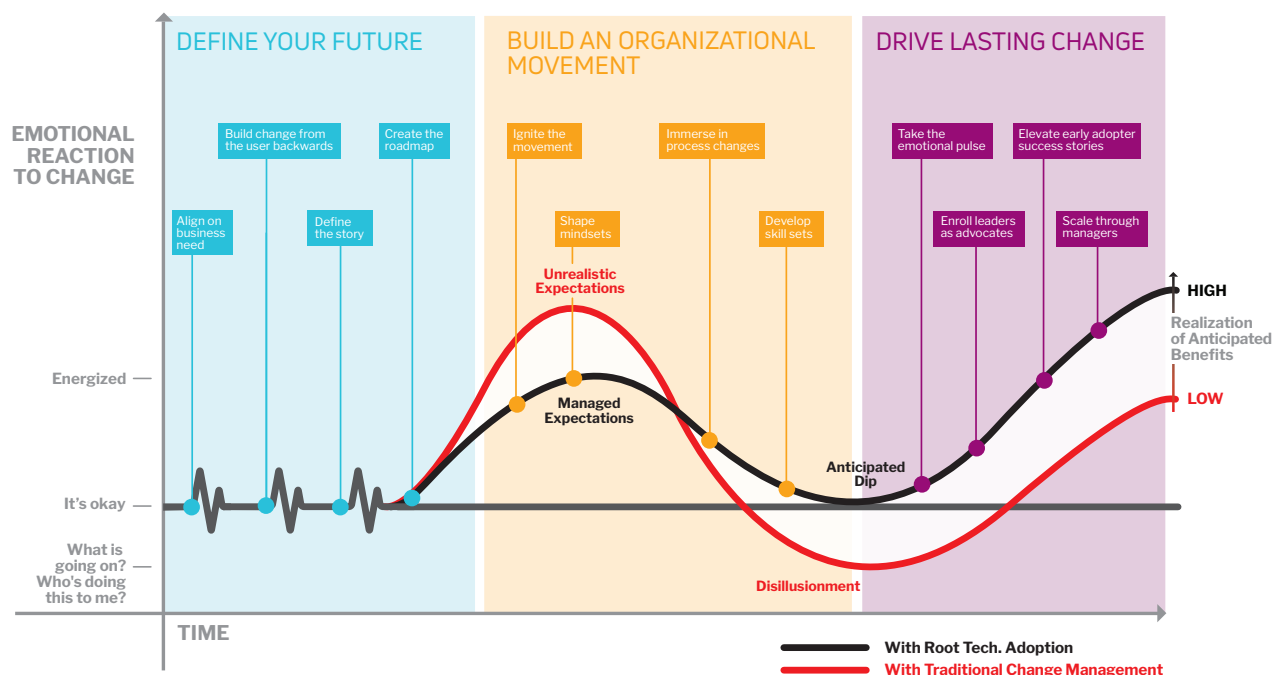
Completing each "task" is important, but even more critical is *how* you bring each step to life and how you engage your users in those steps.

So please use this guide as a high-level roadmap for your change management plan, but ask for our advice on how to optimize each step.
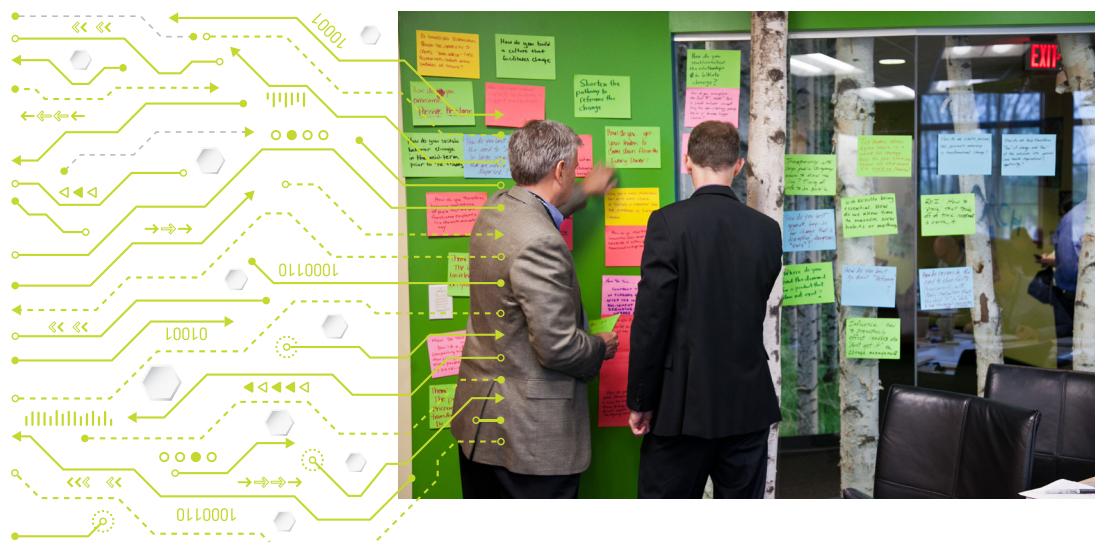
The 50,000-ft. View of a Change Process

An effective change management process follows the stages shown here to ensure lasting results. Take a deeper dive in the following pages to help bring it all to life.

THE ROOT TECHNOLOGY ADOPTION CURVE

DEFINE YOUR FUTURE

BUILD AN ORGANIZATIONAL MOVEMENT

DRIVE LASTING CHANGE

EMOTIONAL REACTION TO CHANGE

Build change from the user backwards

Create the roadmap

Ignite the movement

Immerse in process changes

Take the emotional pulse

Elevate early adopter success stories

Align on business need

Define the story

Shape mindsets

Develop skill sets

Enroll leaders as advocates

Scale through managers

Unrealistic Expectations

Managed Expectations

Anticipated Dip

HIGH

Realization of Anticipated Benefits

LOW

Energized

It's okay

What is going on? Who's doing this to me?

Disillusionment

TIME

With Root Tech. Adoption
With Traditional Change Management

Define Your Future

Align on the Business Need

✓ **Work with senior leaders/sponsors (outside of project team) to clearly articulate the business need and the desired outcomes of the new technology**

— Define metrics, create timelines, and set expectations to ensure project team and leadership expectations align

— Consider other competing strategic priorities or multiple technology integrations that will take resources or focus away from this initiative. Be sure to connect dots between them all.

✓ **As a project team honestly assess the changes required to introduce the new technology into the organization and think beyond the cost of the new system(s)/platform(s):**

— What are the different stakeholder groups? How many people will be affected?

— What business processes or user behaviors might have to change to achieve your desired outcomes?

✓ **Build an engaged and committed Steering Committee with the capacity to prioritize this project and who will remain advocates throughout**

OBJECTIVES AND OUTCOMES

— A burning platform for change and a crystal-clear picture of a compelling future state based on a common mental model (business leaders and project team) of business goals and metrics

— Recruitment of senior sponsor champions

Build Change from the User Backward

✓ **Using both qualitative (interviews, focus groups) and quantitative (survey) research, work with your defined user base to create a set of change management design principles based on:**

— What worked and what didn't with past technology rollouts

— What's working, what's not, workarounds, frustrations with current technology

— How employees like to be engaged and preferred training methods

OBJECTIVES AND OUTCOMES

— A set of change management guiding principles that will shape messaging, modalities, and user engagement

Define the Story

✓ **Align leadership/sponsors and project team on the overall narrative and each stakeholder's role in its success from the beginning by identifying:**

— Benefits to the organization and users and how success will be measured

— Business challenges this won't solve

— Behavior changes needed by the business

OBJECTIVES AND OUTCOMES

— A compelling story that provides "one truth" of the technology story – the foundation for all communications and user engagement

— Leaders who are comfortable telling a consistent story of success and, most important, understand their function's role in supporting the rollout and use of the technology

Create the Roadmap

✓ **Create a holistic change engagement roadmap, including your communications, awareness, stakeholder, and training plans on one timeline**

— Apply insights from employee feedback to map the key interventions along the entire change journey and formulate the stakeholder plan for every level of the business

— Map out the interventions based on how people tend to react to change (see the adoption curve above)

OBJECTIVES AND OUTCOMES

— Change engagement roadmap that offers a holistic view of the entire user adoption process

Build an Organizational Movement

Ignite the Movement

✅ **Ground the organization in what's coming and why at a high level**

— Ensure two-way conversation is prioritized to maximize engagement

— Communication vehicles should meet users where they are. These may include film, manager/leader-led conversations, interactive webinars, etc.

✅ **Engage a group of Change Champions to advocate, provide information to end users, and provide end-user feedback to the program team**

— Equip this group with change capability through skill building, focusing on areas such as *leading through ambiguity, storytelling to inspire,* and *facilitation of two-way dialogue*

OBJECTIVES AND OUTCOMES

— Communication vehicle(s) for helping users understand that change is coming – what to expect, when to expect it, and how to get more information

— Well-equipped and motivated group of Change Champions

Shape Mindsets

✓ **Before skills training begins, creatively engage your workforce in the why, what, and how of the technology implementation, and in particular how it connects to their role**

— Use storytelling techniques and two-way dialogue to help users understand why the technology is being implemented, what the business objectives are, and what's in it for them as users (WIIFM)

OBJECTIVES AND OUTCOMES

— Impactful and memorable user experience to engage the hearts and minds of users in the story behind the new technology, creating willingness to engage in training and adopt the new technology

Immerse in Process Changes

✓ **Educate, engage, and equip employees in any associated process changes**
— Provide a systems view of the process, help employees understand where their piece fits, and use scenarios and simulations to tackle potential barriers to process adoption

OBJECTIVES AND OUTCOMES

— Immersive workshop/experience that unravels the complexity of process change

Develop Skill Sets

✓ **Build training curriculum based on user preferences and design principles established in the Build Change from the User Backward step**

✓ **Provide multiple opportunities for learning before and after go-live to accommodate different ways of learning**

✓ **Allow time for the learning curve. After users have been using the new technology in their roles for a period of time, follow up with refresher modules that focus on additional functionality and benefits.**

OBJECTIVES AND OUTCOMES

— Training curriculum designed around user needs
— Series of compelling and engaging training engagements before and after implementation

Drive Lasting Change

Take the Emotional Pulse

✓ **Carry out multiple user pulse-checks throughout the change process to understand how users are adopting the new technology and how they feel about it**

✓ **Use the information to shape ongoing change plan/sustainment activities**

OBJECTIVES AND OUTCOMES

— Clear picture of pockets of both resistance and acceptance, to help shape ongoing activities

Enroll Leaders as Advocates

✓ **Ensure leaders have a clear and defined role in the sustainment of adoption efforts, including understanding how the technology connects with their goals and high-level knowledge of how to use the technology**

✓ **Create change capability among leaders through skill building with a focus on *leading through ambiguity, deliberate truth telling,* and *storytelling to inspire***

OBJECTIVES AND OUTCOMES

— Leaders are visibly engaged with user groups across the business

— Leaders have the capability to lead change (regardless of project)

Elevate Early Adopter Success Stories

✔ **Find the early adopters/advocates of your technology and tell their story to the rest of the user base through team huddles/meetings**

OBJECTIVES AND OUTCOMES

— Help users see that the new technology is creating differentiated performance among colleagues

Scale through Managers

✔ **Ensure manager incentives (financial or otherwise) align with technology adoption plans**

✔ **Lay out clear expectations for manager accountability**

✔ **Help managers of user groups have effective and compelling conversations with their teams by providing discussion tools**

OBJECTIVES AND OUTCOMES

— Sustained technology use because team members are clear on the required changes and their role-specific activities needed, and there is an ongoing focus on accountability
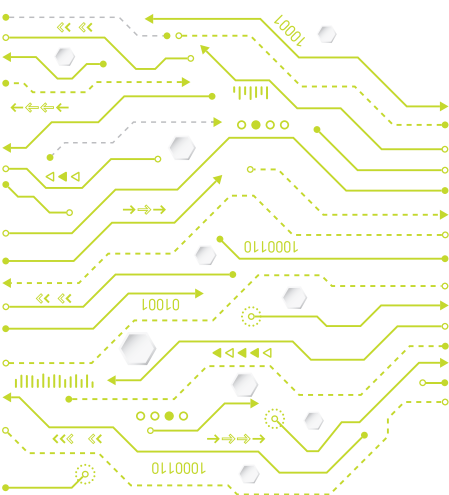
Driving effective technology adoption and ultimately organizational change is about listening to people, anticipating their needs, and then being agile and responsive as those needs develop and evolve. Thinking about change as a journey is key. There will be ups, downs, the expected, and the unexpected along the way. The goal with this checklist is to help you know what to pack.

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