Information Management User Adoption
Explained

- Begin your journey to user adoption
- Increase return on investment
- Make change management wildly successful

Contents

Introduction

New technologies and processes offer impressive return on investment and breathe new life into organizations, helping them grow and become more efficient. But, they carry a potential downside that you may not have considered. Technology rollouts can disrupt people's routines and create confused, unhappy and unproductive employees, especially when implemented without understanding the impact on people's established processes.

Employee dissatisfaction with a new technology might sound like a minor, short-term problem that an organization should be able to wait out, but that is not usually the case. Too often, it turns into a long-term issue, where workers dislike the new technology for legitimate reasons that did not occur to the decision makers. In extreme cases, workers may create workarounds to avoid using the new technology, rendering it a "very expensive mistake."

This guide can help your company sidestep these hazards by looking at what drives—or impedes—user adoption of a new technology and how to make the path to adoption as successful and smooth as possible.

About this guide

Do not let the small size of this guide fool you. It can make a huge difference to the success of your Information Management (IM) project. In just a few easy-to-read pages, IM User Adoption will help you:

- Understand the importance of user adoption and change management.
- Think about your users' rational, emotional and instinctive reactions to change from a psychological perspective.
- Construct a more people-centric software implementation that is more likely to be enthusiastically adopted.
- Learn practical strategies to keep user needs at the forefront of any software implementation.

Who should read this guide?

This guide is written for people who have a stake in new technology implementation in a business or organization. If you are reading this, you are probably an IT manager, information user or knowledge worker who regularly works with content and information. That said, you do not need any special knowledge to understand the information presented here.

Beyond the guide

After reading this guide, visit www.opentext.com/training to learn more.

Chapter 1

Understanding user adoption

In this chapter

- Understand why user adoption matters
- Acknowledge the disruption
- Span the adoption chasm
- Create value with adoption

The potential value of a new technology lies not in the technology itself, but in how it empowers people to work smarter and more efficiently. New technology can improve operational performance, increase an organization's ability to innovate, enable people to collaborate more efficiently and effectively and improve decision-making. However, these benefits are only possible if users accept and incorporate the new system into their daily work life. This acceptance is what we mean by user adoption.

Many organizations make the mistake of assuming they do not have to worry about user adoption unless a change affects a lot of people. They think, "Oh, it's not that many people who will use the new software, they can figure it out." That kind of short-sighted thinking is a recipe for confusion, frustration and user error—not to mention loss of productivity and staff turnover. Enthusiastic user adoption is a critical factor in achieving the highest return on investment (ROI), no matter which software you implement and how many users it affects.

This chapter explains how user adoption affects the bottom line in ways you might not have considered.

Why user adoption matters

Employees drive software implementation success. You can buy the best software on the market, configure and customize it to reflect all your business processes and automate as much as possible, but if employees do not use it, it is not worth your investment. That is really the bottom line.

While a new application's technical benefits may be clear to the management team who chose it, they often are not obvious to the employees, who may consider the new software disruptive. It forces them to change their processes in a way they may resent. If employees do not understand the reason behind the change and what the upside is, they are not invested in its success.

If a new software implementation causes users to fall behind in their work tasks because the design or processes are different or because they lack training, it diminishes the ROI for the new software rollout and the organization may experience:

- Decreased user productivity.
- Increased time needed for training.
- Slowed processes.
- More staff turnover.
- Increased time to correct errors.

So, why not just implement mandatory training on the new technology? It sounds good in the abstract, but often fails in real life. Training without understanding and buy-in will not solve your problem because it will be created and delivered in a void. Only if employees are invested in the success of the new software will they be interested in learning about it.

Acknowledging the disruption

Remember that it is not just the decision makers' schedules that get disrupted when a major software change occurs. Every person who uses that software will experience a change to their daily work routine and productivity will likely decrease temporarily while everyone learns the new system. Smart managers expect this and plan for it.
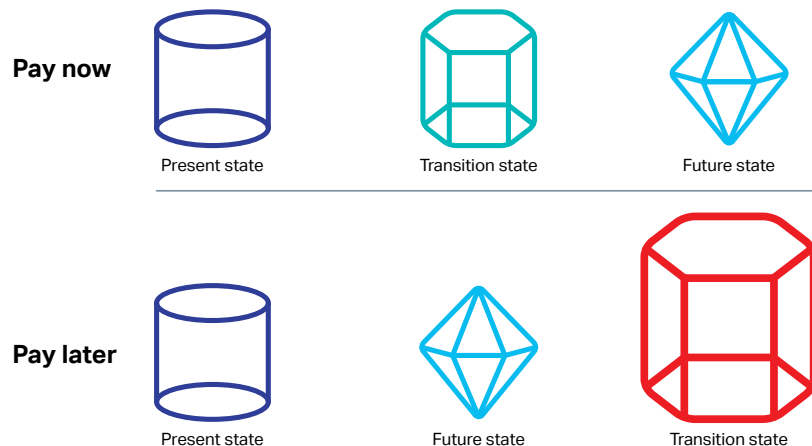

Figure 1-0: Transitioning sooner versus later

Organizations cannot avoid costs associated with the disruption of changing processes. They will either invest in changing the process at the beginning of a project and plan a transition period or will pay later for lost productivity and experience a long and slow process to catch up. And, be aware, the process to catch up is often more expensive and stressful for everyone.

Spanning the adoption chasm

One of the most common mistakes business leaders make is to tie all of their expectations to the performance of the new technology they are implementing. They invest the bulk of the project money in acquiring the new technology and they look to that new technology to deliver an ROI directly. They fail to realize the impact that the people involved have in determining the project's success or failure.

Resistance to change is natural, yet seldom planned for adequately. As a result, many deployments struggle to cross the adoption chasm. The technology adoption lifecycle (TALC) illustrated in Figure 1-1 was first described by a researcher who was surprised by the resistance of farmers to adopting new, more profitable hybrid corn varieties. It also applies to almost any change process. See the drop off between the enthusiastic adopters and everyone else? That is known as the chasm, and that is where change processes live or die, by having the momentum to move past it (or not).
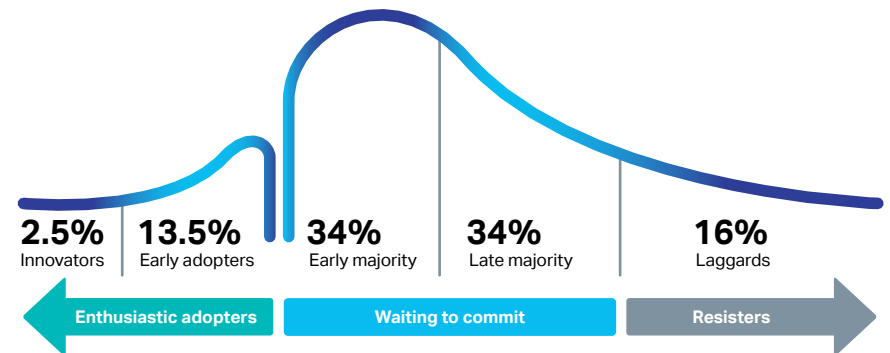

Figure 1-1: The technology adoption lifecycle (TALC)

Complexity is one factor that causes projects to stall in the chasm. The technology can be complicated and so different from users' previous experiences that it takes a long time for them to adjust. Or, they just will not. If the technology is too complicated, the learning curve may be too much to handle. Another important factor is effectiveness. Employees want to get their jobs done. For the most part, they are not invested in using one tool versus another.

If they can get their jobs done with the new tool just as easily as with the old one, most will accept the change. However, if the new tool disrupts their ability to complete assigned tasks, people may take it personally, feeling as though their reputations, credibility or regard may be on the line. Often, this pride in productivity is behind what seems like stubborn resistance to change. Managers should listen to employees' stories, acknowledge their frustrations, answer their questions and act to remove any impediments to adoption.

Adoption creates value

The potential value of a new technology lies in the new and improved behaviors and practices that might emerge when the technology is introduced to and adopted by staff. Value builds when people willingly change the way they behave and discover why the software offers better ways to do their work, boosting operational performance, increasing the organization's ability to innovate, simplifying collaboration and improving decision-making.

Chapter 2

What's in it for me?

In this chapter

- Understand why employees resist change
- Target each of the three brain modes
- Discover strategies for user adoption

Why do people resist some changes and enthusiastically adopt others? The simple answer is that people accept change when they understand and desire its benefits, in other words, when they can answer the question, "What's in it for me?"

For example, think about what happened when smartphones became available. Billions of people flocked to them within a few years, abandoning landlines and desktop computers, because they saw the benefits and wanted them. Smartphones practically sold themselves when the public found out what they could do. On the flip side, think about what happened in the early 2000s when Segways were introduced as a revolutionary transportation mode to decongest cities. Dismal failure, right? The public rejected that change because Segways had no compelling benefits.

Why employees resist change

Remember, most people do not resist change just to be stubborn. There is almost always a reason for the resistance. Employees might resist change for several common reasons:

- **Possibility of more work:** Will the new system be more cumbersome or time-consuming to use than the old one?
- **Job insecurity:** Will the new system cause changes that may make people's jobs less secure?
- **Disrupted routine:** Will the new system force users to change their usual processes?
- **Impact to performance:** Will the new system be more skilled than the user?
- **Beyond the comfort zone:** Are there things about the new system that might cause unanticipated problems?
- **Poor information:** Has the new system been forced on workers in an insensitive or disrespectful way?
- **Discredited position:** Will the new system decrease the status or power of a user or group?
- **Lack of confidence in management:** Does management share users' priorities and have enough information to make decisions that support them?

Successful user adoption requires finding out the reasons for resistance, determining their root causes and making changes that resolve them.

Fight or flight

The human brain decides for us if we accept something with reasoning or run away from it based on instinct. If we can reason with change, our emotions are positively affected. If we feel threatened by change, maybe out of negative experience, our emotions will negatively affect us and an instinct to run away becomes dominant.

Effective user adoption efforts must look rationally at a situation and determine what users need. When presenting the decision to users, an objective and educated case for the benefits of the new software is crucial.

However, reason alone is unlikely to influence every user, because some types of resistance are based on emotion or even instinct. By looking at user behavior and decision-making from emotional and instinctive perspectives, you can uncover hidden fears, pain points, frustrations and desires. You can then formulate information and questions that help users understand what is in it for them at all three levels of thinking.

Five strategies for user adoption

Resistance is natural, yet seldom considered. Smart managers expect this and plan for it. If change is being managed, the chasm is crossed without leaving an expensive footprint of a stagnated implementation. To help people discover what a new technology rollout can do for them, any organization can use the following five important strategies:

- **Concentrate on people, not technology.** When dealing with a large software change program, it is easy to get caught up in the new features and functions. Think about the users' perspectives. Develop a change strategy and communications plan around showing everyone the great possibilities they now have at their fingertips. People are not interested in the features but in how they can use them. Listen to your users and create a program that concentrates on the features that make their lives better.

- **Coordinate between the IT and change teams.** While your IT people ensure the software operates well and the system is secure, they often do not consider "people issues," such as convenience and ease-of-use. When the change management team takes over, it may be frustrated that the system is not as user friendly as it could be. Connecting the change management and IT teams from the onset of the project can minimize friction and better address user requirements, while adhering to security, performance and functional requirements.

- **Involve users.** Have a sampling of your actual users perform user acceptance testing (UAT), do not rely only on third-party testers. Applications must not only be functional and secure but also usable. Users must be able to perform their duties with the new software.

- **Understand your organization's learning culture.** Many great learning tools and training techniques are available. eLearning and virtual classes, for example, are cost effective and allow users to learn at their own pace. However, they also require a specific learning culture where users are accustomed to a virtual environment and happy with the freedom and flexibility it provides. Some users will still want the personal care and interactive environment of a classroom with an instructor who can respond to questions.

- **Keep documentation up to date.** At the beginning, when the new software is delivered, the documentation is completely accurate. However, as time progresses, software is updated, changes are made and documentation becomes out of date. Updating it may not be prioritized as highly as it should be. This may mean user manuals and training courses do not match the actual software, which is confusing and frustrating for users trying to learn. Keep all instructions up to date.

Chapter 3

Making software implementation people-centric

In this chapter

- Understand the OpenText adoption lifecycle
- Employ change management

The previous chapters have explained the importance and the challenges of user adoption, a crucial part of any major software change. This chapter explores how to accomplish it. It includes the four stages of the OpenText adoption lifecycle and discusses change management planning.

Introducing the OpenText adoption lifecycle

Adoption should be a key theme running throughout any project. A successful adoption strategy begins well before the software is deployed and remains in use throughout its lifecycle. OpenText's adoption lifecycle applies a people-centric lens to the challenge of change and adoption. The complete strategy is executed over four stages.

Stage 1

It is vital to think about adoption from Day One. Most of the work that contributes to successful adoption is done in the early phases of a project. To succeed in this stage, you must:

- Understand the user experience so you can deploy software to fit the way people work.
- Connect your IM vision to your organization's overall business strategy.
- Ask about people's day-to-day tasks, what they want to see improve, what works and what doesn't.
- Understand how your organization works. Audit your organizational culture by listening to its stories.
- Get support from the executive sponsorship to identify key stakeholders, champions and change agents.

Stage 2

The design of the new or upgraded software sets the stage for adoption success. Make sure that you:

- Involve people who will be affected by the change in the design.
- Develop a plan on how your organization is structured into departments and groups.
- Align your vision with the corporate vision.
- Set guiding design principles.

If you have had the software for a while, but it is not adopted, look for the bright spots. Get teams or departments to share what they found interesting and how they use the technology to achieve their goals.

Stage 3

While the features are important, the overall experience of the service is paramount. Implement for overall experience and then consider the following:

- Enable a network of champions.
- Craft an ongoing learning strategy.
- Embed the learning strategy into people's daily routines.
- Build comprehensive, targeted, ongoing communication plans.

Stage 4

Habits take time to develop, change is ongoing and there will be resistance as well as opportunities. Monitor and adapt to deliver better experiences by:

- Starting early to allow habits to form.
- Adapting and evolving.
- Supporting the people to make adoption pervasive.
- Keeping training tools and documentation up to date.
- Ensuring new habits are fully embedded into the business.

Employing change management

Even when a change is positive, it can still cause angst and anxiety in the short term. User productivity takes a nose dive when people become stressed over learning something new. And, because they are being less productive, self-esteem falls and they experience feelings of inadequacy. Emotional reactions to change are natural and unavoidable. The main question is how best to manage them to produce more clarity and less confusion. How do you make emotions fuel a project rather than blocking it?

Change management creates a plan for an organization to successfully roll out a software tool and minimize resistance. It enhances a key factor for a successful implementation: user satisfaction. It determines what people need to excite, inspire and nudge them to make the new software a daily habit and for it to become what is designed for: a tool to make work life easier.

Figure 1-2: Change management phases within projects

Change management starts at the beginning of a project, building a solid foundation for successful user adoption. It includes these phases:

- Assessment and analysis: Determine where the organization is today and what the outcome should be. User adoption is a large portion of a successful outcome. Create and execute a plan that makes it happen. Make sure the organization is ready to introduce change.
- Communication: Get help from management to communicate and show support for the change. Carefully select subject matter experts and knowledge champions for the project and connect them to the relevant experts and leaders. Let all affected people know what is coming and when, and how it will affect them.
- Effective user onboarding: Transition people to the new system, providing them with the support and training they need for success.

Figure 1-3 describes managed changed and user adoption as a process moving from shock and denial, contrasting the process with and without change management. Notice that managed change results in less of a drop in anger and fear and increases much earlier towards acceptance. It hits commitment at a turning point, while unmanaged change never reaches it. Change management assists with the transition from the old to the new world by preparing the organization, managing the transition and reinforcing the adoption process. The impact is minimized and controlled and the return on investment is high, as people are strategically guided through the change.
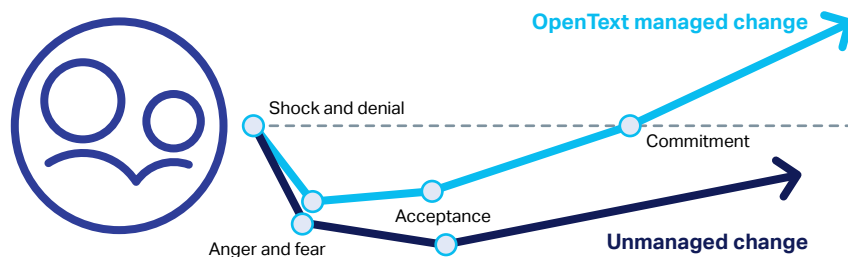

Figure 1-3: Managed change for faster adoption

Chapter 4

10 considerations for IM user adoption

In this chapter

- Learning strategies for user adoption
- Planning ahead for success

This chapter provides 10 tips to help your organization achieve successful Information Management user adoption.

Prepare to answer the question "What's in it for me?" Do your homework at the beginning of the project. Investigate the different work areas and tasks your employees have to accomplish each day, so you can demonstrate why and how the new software tool benefits the users in their daily work.

Start early: Include key users in the project right from the beginning and seek out the opinions of the people who will be using the software daily. For users to enthusiastically adopt new software, they must feel like their work is easier and quicker to accomplish. Start planning how you will consult, inform and train users as soon as you decide on the new software.

Get people excited: Create a buzz around the new system. Let people know about its functionality and features and explain how it will help them. Build the excitement of how their work life just got better. Start with your key stakeholders to initiate the conversation because they are big motivators in this journey.

Identify the advocates: Change needs champions. Look for the people who are excited about the new system and encourage them to share their excitement with others.

Create an incentive or reward plan: Motivate users to become advocates for using the new software. You may already have a champion award plan within your organization. Get creative and expand it by rewarding users who adopt the new software early and with enthusiasm. The rewards do not need to be monetary. Positive feedback and encouragement are often just as effective.

Tailor your training: IM applications are sophisticated and feature-rich packages and not every user needs to be trained on every feature and module. Take time to understand what each person or group needs to know and provide the appropriate training.

Communicate, communicate, communicate: As with any change program, communication is essential. When people do not know what is going on, they can become fearful and anxious. Work out the best strategy for letting everyone know what is coming, when and how it will affect them. Be creative and inventive in choosing communication methods, which may include information sessions, webinars, posters or video clips, as well as more traditional documentation.

Transfer ownership: Your people need to take ownership of the software. They must feel comfortable using the software and they must want to use it. Managers, supervisors and team leaders must lead by example and both use and promote the system.

Have a user support plan ready: User adoption does not end with post-rollout training. Continue to support your users throughout the software's lifecycle. Put a program in place for getting help and designate go-to people and go-to sites. You might even organize department-specific Q&A sessions.

Define metrics and measures: Any new implementation needs to be measured to determine whether it is successful. Look at the hard data. Run a report on usage. Create surveys before and after system rollout. Measure by training outcome or by IT tickets opened for problems involving the new software. Remember to build a feedback loop and ensure that people know you are keen to get their feedback and that you will act on it.

There is no one size fits all.

OpenText User Adoption Services

OpenText can help accelerate and sustain effective user adoption, resulting in engaged and efficient user communities. Its dedicated team of professionals focuses on simplifying user adoption of Information Management software to reach high levels of user satisfaction and accelerate user rollout.

Services include:

- User Adoption FasTrak Service
- Strategies and assessments for increasing adoption
- Instructor-led and self-paced learning solutions curriculum tailored and developed to an organization's needs
- User performance support
- Intuitive, quick reference guides
- User coaching and floorwalking

For more information on IM, OpenText Professional Services and OpenText User Adoption Services, visit www.opentext.com/services.
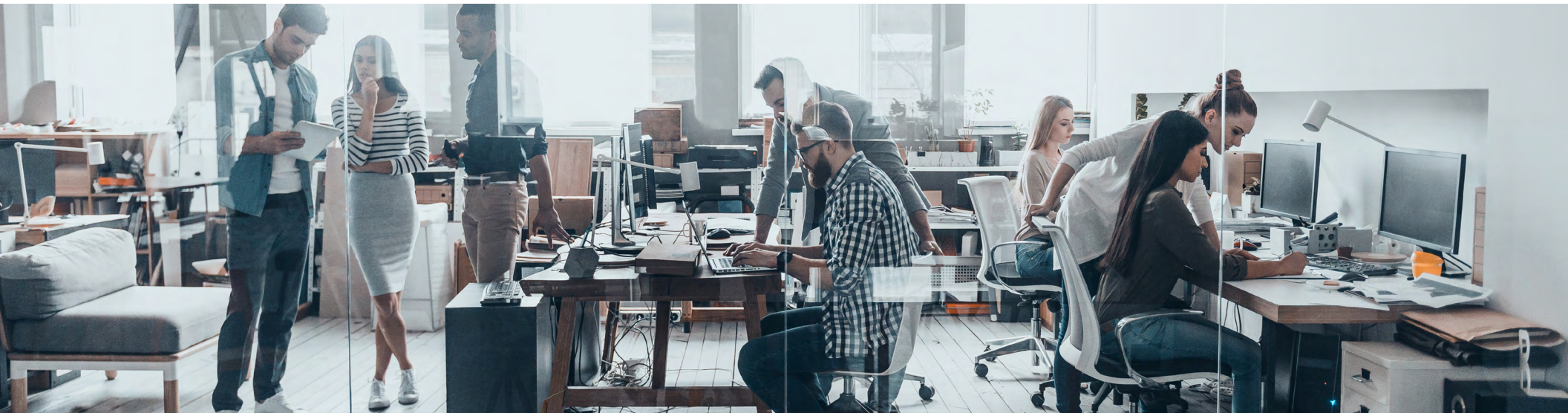
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Successful technology implementation is not measured by whether the system is up and running, but by how many users are working in it each day. In digital transformation projects, the majority of the investment goes into technology, but often companies struggle to get their users to adapt to the new system. This IM User Adoption guide delivers insight into the importance of user adoption and provides key strategies to maximize your investment.

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Inside:
- Understand why user adoption matters
- Acknowledge the impact on users
- Watch out for the adoption gap
- Recognize the reasons for resistance
- Learn key strategies for adoption success
- Understand people centric user adoption
- Learn the importance of change management

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Melanie is a lead consultant for OpenText. Melanie has a passion for incorporating user adoption and change management. She assists with successful implementations and rollouts to ensure a high return on investment.