User Adoption

=

Value

Solving the
Software ROI Equation

ANCILE

Executive Summary

Realizing full value from your software investments can be challenging. Successfully changing to new software or new processes requires that you win the hearts and enable the minds of your team members. To do this, you need to use tactics that will engage your team and ensure team proficiency. Organizations should place a high priority on getting to this state of user adoption in order to realize the promised value of the change.

Software and the Uphill Climb to ROI

The investment by organizations on software is high:

Gartner predicts that, in 2016, "global enterprise software spending is on pace to total $321 billion, a 4.2 percent increase from 2015."[1]

Why are organizations buying? Because software is the engine powering today's organizations. Vendors tout a basket of benefits: time savings, resource savings, broad analytics, and more. Organizations want to reap all of these benefits to be nimble, responsive, competitive, and innovative. That's a tall order to fulfill.

The best technology in the world won't deliver even one of these promised benefits if it is not fully used and exploited. Use is driven by users, and therein lies the challenge.
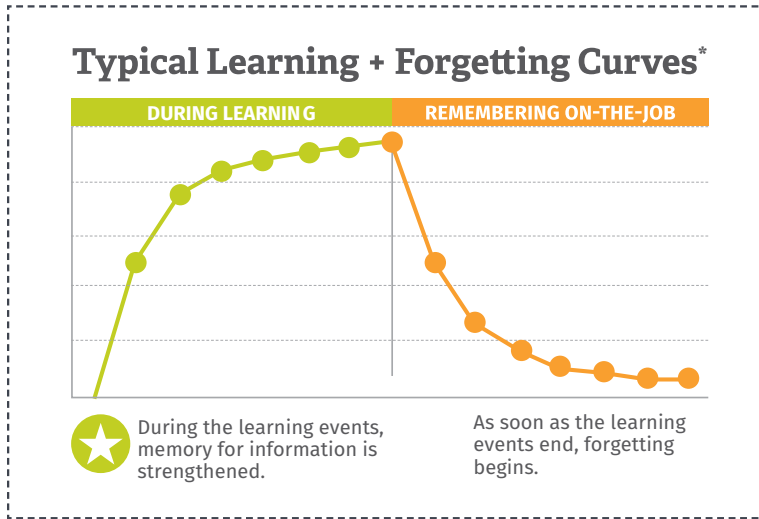

Achieving software return on investment (ROI) is challenging for several reasons, and the biggest challenges are user-related:

- To get to user adoption you have to go through humans. Change-fueled human emotions like anxiety, uncertainty, and unhappiness must be counteracted. You have to persuade to adopt. Users may find ways around your new software – such as only doing the minimum, going back to previous applications or manual processes, or relying on the help desk or coworkers instead of the facilitators you've provided. You must find a way to overcome resistance and, ultimately, encourage users to expand their use of the software by exploring additional functionality and discovering further efficiencies. Getting to user adoption means winning the hearts and minds of humans.

- You are launching your software implementation in a world of noise. Your employees unlock their smartphones up to 9 times per hour, and get interrupted as frequently as every 5 minutes.[2] Getting and maintaining attention is a challenge: your critical communications are one of many your employees receive each day.

- Relying on old-school practices – like classroom training – to enable your employees is no longer efficient, effective, nor desired.

    - It's become increasingly untenable for organizations to invest extended time in classroom events that pull employees away from the job. Classroom events mean decreased productivity and increased cost associated with instructor time, facility expenses, and travel.
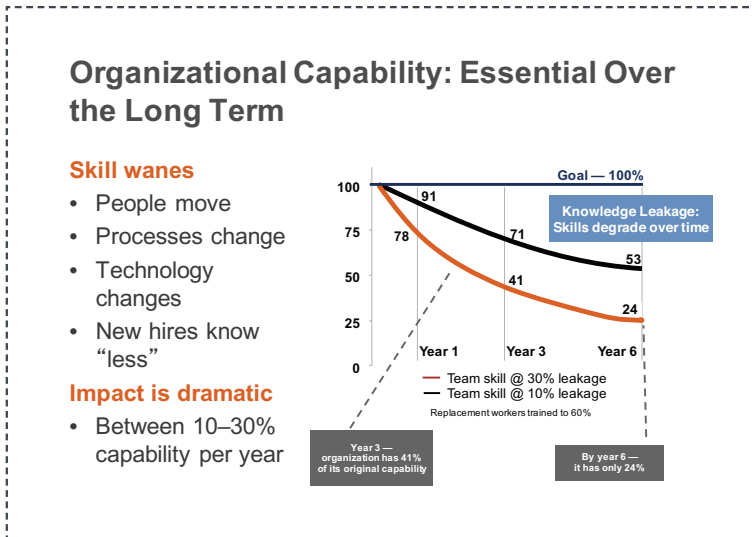
Every training event must contend with the forgetting curve.[3] When you rely on one-time learning interventions outside the task at hand, you come up against the forgetting curve – the decline of information retention. "Both learners and teachers confuse performance during training (termed "retrieval strength") with long-term retention and the ability to apply the lessons ("storage strength")."[4]

Typical Learning + Forgetting Curves*

DURING LEARNING	REMEMBERING ON-THE-JOB

During the learning events, memory for information is strengthened.

As soon as the learning events end, forgetting begins.

Today's workforce, especially those of the millennial generation and later, don't prioritize remembering information; they want on-demand information access when needed. Google and YouTube are their first destinations for many how-to questions. This reality – combined with the need to maximize performance on the job – has resulted in a need for on-demand, integrated access to learning content to support the actual work.

SOURCE: Spacing Learning Events Over Time: What the Research Says; Will Thalheimer, PhD; 2006; https://www.phase-6.com/system/galleries/download/lernsoftware/Spacing_Learning_Over_Time__March2009v1_.pdf

Software, processes, and employees are all in a state of near-constant change. Software is growing more complex and feature-rich, and the pace of releases is on the rise. Business processes, as well, are often changing, affecting how employees interact with software to successfully fulfill the new process. The makeup of your team is changing as the average tenure is reduced and baby boomers are exiting. This presents a double challenge: 1) onboarding new employees to software in a consistent, efficient, and repeatable way, and 2) ensuring institutional knowledge about the software is retained.

Organizational Capability: Essential Over the Long Term

Skill wanes
- People move
- Processes change
- Technology changes
- New hires know "less"

Impact is dramatic
- Between 10–30% capability per year

Goal — 100%

Knowledge Leakage: Skills degrade over time

100
91
78
75
71
53
50
41
25
24
0

Year 1   Year 3   Year 6

— Team skill @ 30% leakage
— Team skill @ 10% leakage
Replacement workers trained to 60%

Year 3 — organization has 41% of its original capability

By year 6 — it has only 24%

SOURCE: The Silent Killer, Knowledge Leakage and the Impact on Technical Skills, IDC, 2012

All of these challenges have made it increasingly difficult to realize full value from your software investments.

The Solution: People First. Software Second.

All requirements may be fulfilled, and the technology may work flawlessly but success rests solely on the people operating the software. People are the key to software rollout success:

- People (employees, partners, contractors) execute the processes that run the business.
- People rely on their business applications to facilitate their work.
- 'People success' drives software ROI and ensures organizational success and achievement of business outcomes.

Adoption is directly related to people's behavior. To realize software value, start by focusing on how you will help people manage the change and adopt your software investments.

"I believe that change isn't an end-user problem; it's a leadership opportunity."

– Chris Laping, *People Before Things: Change Isn't an End-User Problem*[5]
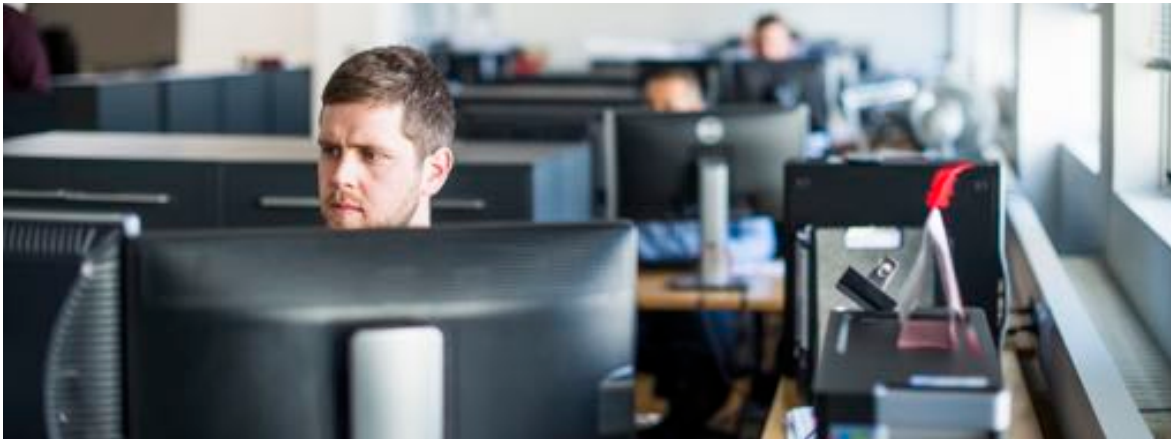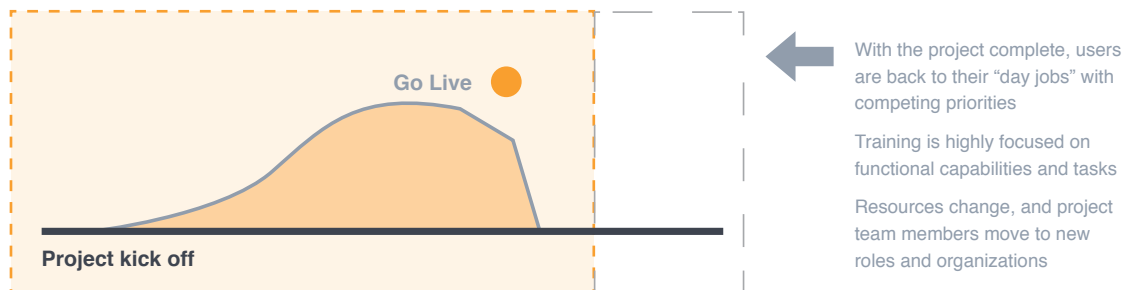
Adoption: What Is It?

In a Technology Services Industry Association (TSIA) survey[6], *Achieving Enterprise Software Success*, 72% of those surveyed said effective user adoption was the most important factor for realizing software value. The survey report goes on to state:

> ***"Many software deployments deliver 100% on the business requirements only to fail in the final phase of user adoption."***

What is user adoption? Let's start with the easy part: defining what adoption is not. Adoption is not software implementation. Adoption is not the moment you 'go live' and everyone starts logging into your new or upgraded application. When we focus on this go-live milestone as the finish line, we miss the real opportunity to successfully prepare for how to ensure employee proficiency and long-term productivity. Go-live is not the end point, but rather a milestone on the way to ongoing employee adoption of the change.

Typical ERP Training Effort
(Illustrative)

Go Live

Project kick off

With the project complete, users are back to their "day jobs" with competing priorities

Training is highly focused on functional capabilities and tasks

Resources change, and project team members move to new roles and organizations

Project methodology brings focus to the importance of user training and preparation for deployment
Training program is formalized and managed as a stream within a broader program
Team efforts are focused on a single objective / project, bringing similar focus to training

Source: Here, There, Everywhere. Learning and Working in a Mobile World, presentation, SAP

Adoption occurs when your team reaches the level of mastery that maximizes their effectiveness with the application to help them successfully complete their jobs.
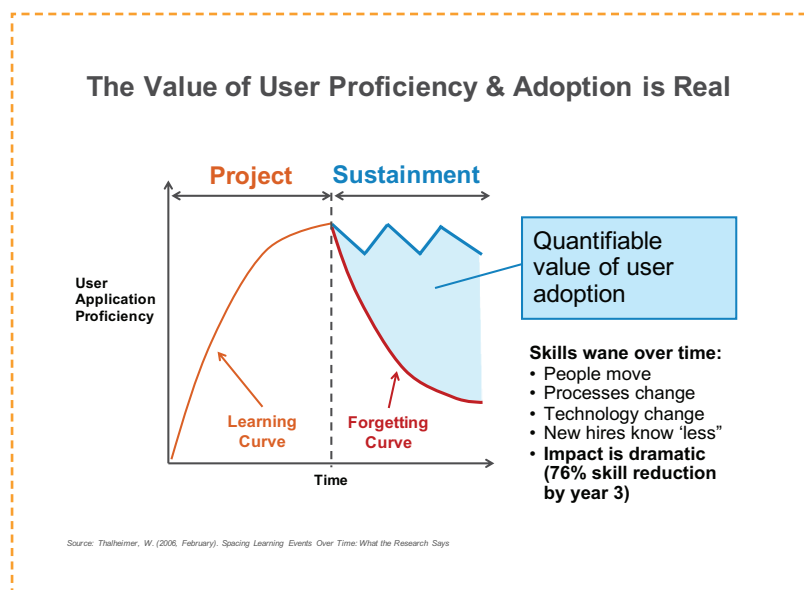
As part of a 2014 survey of 200 organizations, Neochange defined effective usage as "active users, with high levels of user feature consumption producing business results". Respondents to the survey "believed they are achieving effective usage rates of 47%."[7]

Why Adoption Matters

Your investment in your new software was not made on a whim. Rather, you had a detailed list and quantification of the expected benefits. You want to achieve these benefits as quickly as possible, getting to desired business outcomes in short order. To do this, you need to look beyond the false finish line of implementation and focus on growing and sustaining proficiency to ensure your employees have achieved adoption of your enterprise applications.

What is the 'job to be done' with the software, and what goals or metrics did you assign to this job? For example, maybe you implemented this software with an expectation of increasing some productivity or efficiency metric of your business, or reducing an element of waste. These goals likely formed the basis of your expected ROI from your software. Achievement of these goals is the measuring stick for verifying adoption.

The Value of User Proficiency & Adoption is Real

Project **Sustainment**

User Application Proficiency

Quantifiable value of user adoption

Learning Curve

Forgetting Curve

Skills wane over time:
• People move
• Processes change
• Technology change
• New hires know 'less'
• **Impact is dramatic (76% skill reduction by year 3)**

Time

Source: Thalheimer, W. (2006, February). Spacing Learning Events Over Time: What the Research Says

SOURCE: adapted from: Spacing Learning Events Over Time: What the Research Says; Will Thalheimer, PhD; 2006https://www.phase-6.com/system/galleries/download/lernsoftware/Spacing_Learning_Over_Time__March2009v1_.pdf

Based on the above, it's easy to see why getting to adoption matters. A user who has successfully achieved competency with the application has effectively "adopted" the software and is enabled to do her job. She is likely to have more confidence and reduced stress in interacting with the application.

This is a win-win for both the employee and the organization. Having been enabled for initial success, imagine how much more likely your users are to take on advanced functionality – paving the way to get more value from your software investments.

When you provide support for initial proficiency and further mastery, using mechanisms like in-application guidance, you help user behaviors become automatic. Your mandate is to get your users to this auto-pilot mode.

A focus on sustaining adoption delivers operational efficiencies, as well. Organizations who have implemented a performance support solution to enable employees as they use software have reported a 15 percent year-over-year reduction in IT help desk calls.[8]

Laying the Adoption Foundation

Are You Prepared for Adoption?

Before you begin to implement specific tactics to achieve adoption, it's helpful to build a strong foundation by understanding what influences adoption: the software, your users, and the change impact. Across these three influencers, look at the factors that might impact your road to adoption.[9]

- **Software**
  - How complex is the new or upgraded software?
  - Is training content already available or must it be created from scratch?

- **Users**
  - How many of your users will be impacted by the software?
  - Are your users geographically dispersed? Must multiple languages be supported in your rollout?
  - Are multiple teams or departments impacted by the software?

- **Change impact**
  - What is the magnitude of the change (i.e., is the software used daily, weekly, monthly, yearly)?
  - What is the risk associated with errors made in new processes or transactions?
  - What business processes are involved with this software implementation? Are these business processes changing?
  - How robust are your change management processes?
  - Do you have a communications plan and tools in place?

You might consider assigning a complexity or need rating to the above questions – 1 for low to 10 for high. Then, based on your rankings of how this effort will impact your team, focus special support to the areas of high complexity or need.

Grant Permission to Adopt

Many employees will ask for permission first, or they'll wait for permission to be granted. Users don't prioritize the time to focus on successful software adoption, nor feel they're allowed.[10] Employees who do take time out to learn or master are often seen as 'not very busy' or taking a break.

> **Why is User Adoption such hard work?**
>
> – Users don't prioritize items to get familiar with the system
> – Users are afraid of not knowing how to use the new system
> – People don't like change and are uncomfortable with the unfamiliar
> – Users don't see how it will benefit them
> – Users don't think there is anything wrong with the old way of doing things
> – There isn't enough support around the adoption process

SOURCE: 5 Ways to Encourage User Adoption of New Software, Qorus Software, http://www.slideshare.net/QorusSoftware/5-ways-to-encourage-user-adoption-of-new-software

You must add permission to your recipe for adoption. Add permission by expressly allotting hours for learning activities, conducting mandatory learning debriefs, or sponsoring similar activities that stress the importance – and requirement – for employees to take the time to adopt new software.

Tactics to Drive and Sustain Adoption

Every employee traverses the Adoption Realization Curve, moving from understanding, to proficiency, to adoption.
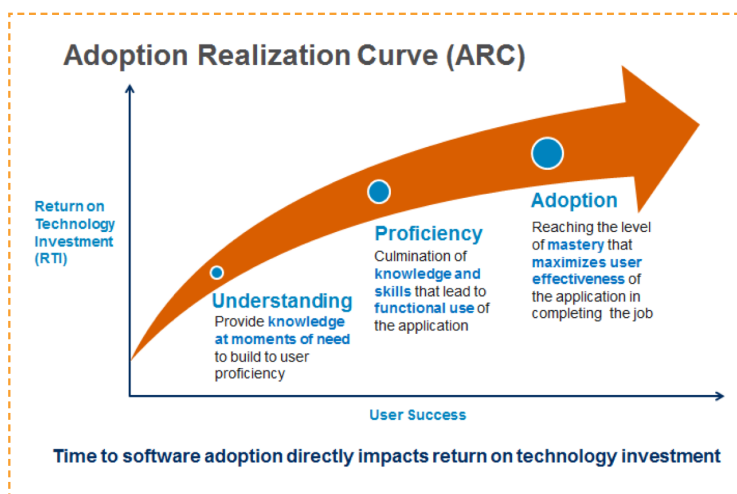
Your goal is to help your users progress along this arc using tactics that drive and sustain user adoption. The following list provides some proven methods, in roughly the order you might employ them when tackling a software implementation or upgrade.

Communicate to Manage Change and Engage

The soft side of software is the hardest part. Managing the people side of the change is more difficult than the technology side.

Your new or upgraded software is a change that impacts your users. Your users require communications to help them with the why and the what's-in-it-for-me of the change. A McKinsey study examined many project variables and, in particular, the effect of an Organizational Change Management (OCM) program on a project's ROI. The study showed the ROI was:

- 143 percent when an excellent OCM program was part of the initiative
- 35 percent when there was a poor OCM program or no program[11]

Adoption Realization Curve (ARC)

Return on Technology Investment (RTI)

Understanding
Provide knowledge at moments of need to build to user proficiency

Proficiency
Culmination of knowledge and skills that lead to functional use of the application

Adoption
Reaching the level of mastery that maximizes user effectiveness of the application in completing the job

User Success

Time to software adoption directly impacts return on technology investment

Part of the goal here is to get noticed. Michael Sampson, in his book *User Adoption Strategies*, uses the phrase 'Winning Attention' to describe this first stage on the road to adoption.[12] You are in competition with other initiatives, many distractions, and a lot of noise – you need to be the victor in gaining the attention of your users.

Begin communications early in the project, and have your middle managers do the talking. Ideally your senior team or project sponsor will set the stage with the mission and vision. But your managers should be seen 'walking the talk' as they communicate, monitor, and coach.

"Managers of teams, projects, departments, and functions are in a unique and powerful position. These are the leaders who must translate the vision of change from the C-Suite to the ground troops, help direct reports navigate the emotions of change and transition, and influence change agents to generate alignment and commitment for the change effort to be successful."[13]

Highlight why the new software is needed. Maybe there's a new process or business requirement that requires the new application, or maybe the current solution is missing key functionality. You may be preparing for a significant upgrade to the application that includes a change to the look of the user interface and how employees will interact with the software. Show examples of where change is needed, and highlight how the new software will meet these needs.

Don't think that just because you've communicated, you're aligned. One-way/one-time blasts of information are not engaging nor are they very illustrative of engagement. Build quizzes and assessments into your communications to gauge comprehension, and encourage feedback and questions. And, as with many things, once is never enough. Prosci, the leader in change management research, has found that "repeating key messages 5-7 times is essential."[14] Use both repetition and message campaigns to reinforce and to maintain ongoing dialog over the life of the change.

Classroom Train, When Appropriate

Classroom training still has a place in many software implementations, especially if you do away with the 'sage on the stage' approach to the classroom. Consider alternate models for the classroom time and consider exploring the idea of hybrid learning opportunities. For example, you might 'flip' the classroom by assigning reading or homework in advance via online elearning and using classroom time for discussion and interaction. Make the classroom experience a rewarding, interactive time that focuses on role-playing, strengthening team relationships, and reviewing interconnected processes and their impact. Focus less on using classroom events to teach the step-by-step task. In this way, you overcome the forgetting curve, maximize time on the job, and deliver help when and where it's needed by embedding guidance within the work.

Incorporate eLearning

Elearning can be a great supplement to or next step after your classroom training. With elearning you have the opportunity to create and deliver both process and how-to content that can be consumed in a variety of modalities – virtually with an instructor, self-paced, or in a lab/coaching session. In fact, in today's mobile world, elearning content that can be consumed at the user's convenience and on the user's device of choice, is a necessity.

Craft your elearning with a focus on the desired outcome, not on documenting features. For example, lead your user through How to Create and Process an Opportunity, rather than a review of all fields and options on the Opportunity screen.
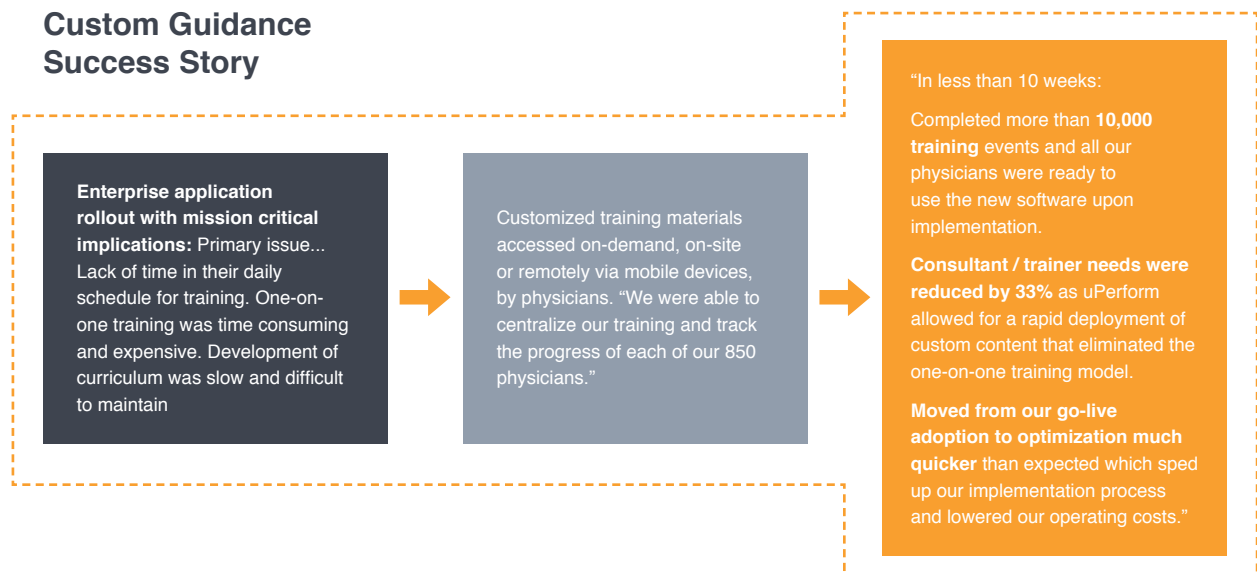
Deliver Custom Guidance

"Generic" learning content has its place – for example, when you are sharing the big picture or when you are training your project team so that they can configure your unique software implementation. But the very fact that you have customizations in your software and you are using it to complement your unique business processes makes it imperative that you provide custom guidance for your users.

Select an authoring tool that allows you to easily create and deliver custom how-to and elearning content and maintain this content as your software or business processes change.

Custom Guidance Success Story

Enterprise application rollout with mission critical implications: Primary issue... Lack of time in their daily schedule for training. One-on-one training was time consuming and expensive. Development of curriculum was slow and difficult to maintain

Customized training materials accessed on-demand, on-site or remotely via mobile devices, by physicians. "We were able to centralize our training and track the progress of each of our 850 physicians."

"In less than 10 weeks:

Completed more than **10,000 training** events and all our physicians were ready to use the new software upon implementation.

Consultant / trainer needs were reduced by 33% as uPerform allowed for a rapid deployment of custom content that eliminated the one-on-one training model.

Moved from our go-live adoption to optimization much quicker than expected which sped up our implementation process and lowered our operating costs."
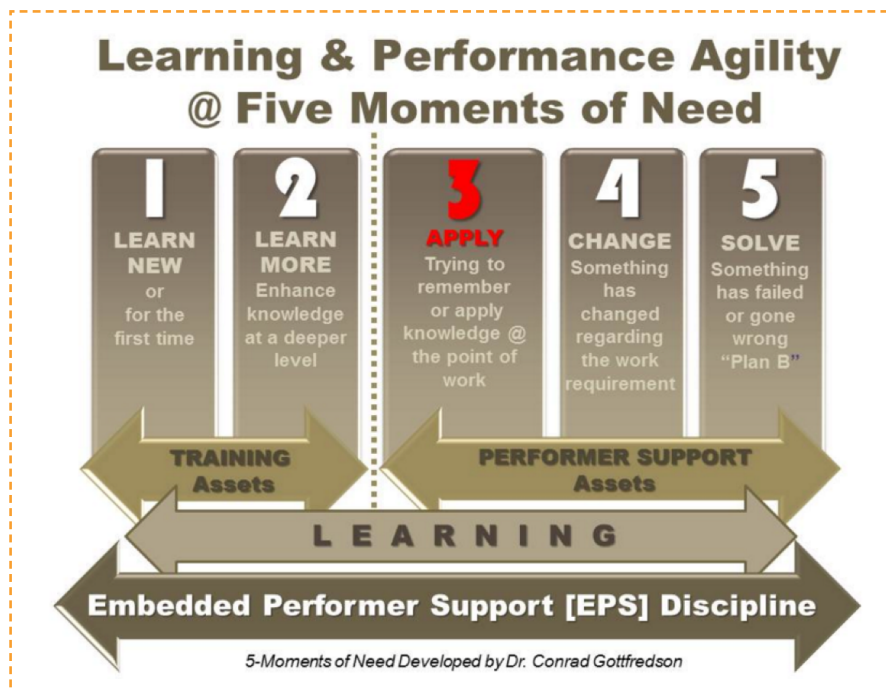
Prioritize Moment of Apply Support

If you visualize all of the user adoption tactics as a pie, you want to devote the biggest piece to performance support.

"Performance Support (PS) is any learning modality, resource or asset that is accessible and applicable at the moment of need. It is embedded in the work process such that the learning is accessed in the context of the work flow and helps solve a very specific business problem."[15]

25% Classroom

50% Performance Support

25% eLearning

Organizations with high levels of effective software usage typically deploy "online learning and support to extend the reach and quality of their impact." Integrating "contextual help into the user interface" is an example tactic.[16]

Investments that support a user, on the job and at the Moment of Apply, are far more effective than traditional training in helping to drive employee performance and long-term adoption. Performance support is most valuable when it is available from directly within the application. Minimizing the clicks to get to guidance positively impacts user comfort, consumption, and productivity.

Learning & Performance Agility @ Five Moments of Need

1	2	3	4	5
LEARN NEW or for the first time	**LEARN MORE** Enhance knowledge at a deeper level	**APPLY** Trying to remember or apply knowledge @ the point of work	**CHANGE** Something has changed regarding the work requirement	**SOLVE** Something has failed or gone wrong "Plan B"

TRAINING Assets

PERFORMER SUPPORT Assets

LEARNING

Embedded Performer Support [EPS] Discipline

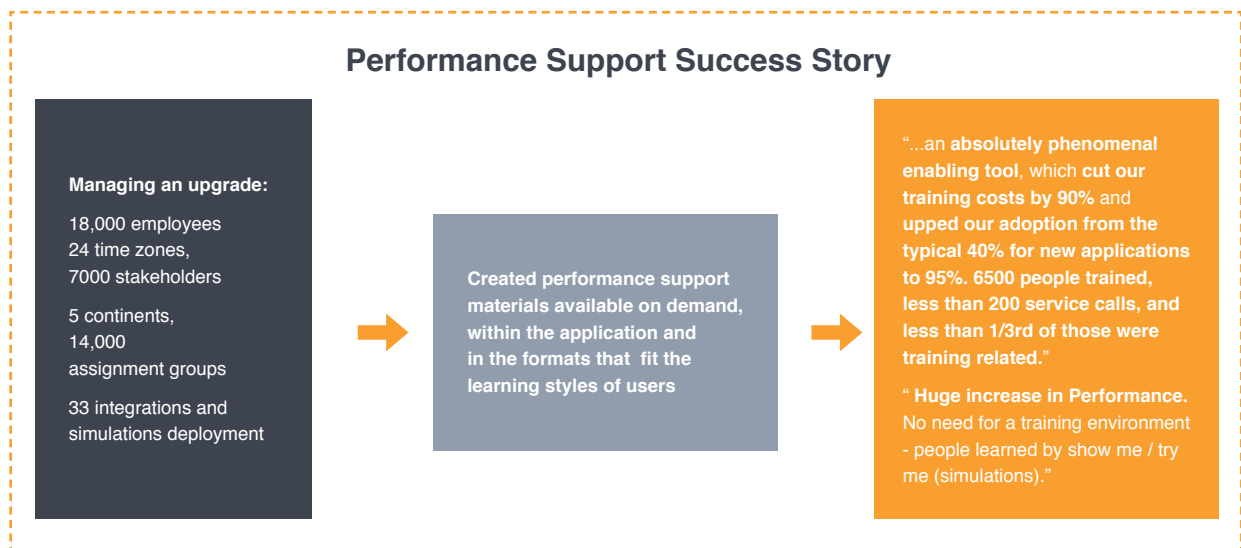*5-Moments of Need Developed by Dr. Conrad Gottfredson*

Follow Up with Users

This fact is amazing:

"U.S. firms spent about $156 billion on employee learning in 2011….But with little practical follow-up or meaningful assessments, some 90% of new skills are lost within a year, some research suggests."[17]

Employees come away from a classroom or elearning event, and there is no assessment nor discussion with their manager around the event, their understanding, or their feedback. Often, there's no way for an employee to provide feedback regarding a learning event or help content.

This is a key missed opportunity to reinforce learning and validate experience. And, given your investment in user onboarding and education, you miss an opportunity to ask your users 'How did we do?'

Studies indicate that "if managers are supportive, then employees practice their skills, which leads to greater transfer of knowledge."[18]

Performance Support Success Story

Managing an upgrade:

18,000 employees
24 time zones,
7000 stakeholders

5 continents,
14,000
assignment groups

33 integrations and
simulations deployment

→

Created performance support materials available on demand, within the application and in the formats that fit the learning styles of users

→

"...an **absolutely phenomenal enabling tool**, which **cut our training costs by 90%** and **upped our adoption from the typical 40% for new applications to 95%. 6500 people trained, less than 200 service calls, and less than 1/3rd of those were training related.**"

" **Huge increase in Performance.** No need for a training environment - people learned by show me / try me (simulations)."

Monitor Results

Ideally, your software and/or your learning technology provide ways for you to monitor consumption, errors, and calls for help. You need to be 'listening on the other end' in order to confirm readiness and optimize or adjust as needed.

What the data says	What you should do
Consumption • How many users are logging into the application? • Who is not logging in? • What transactions or processes are being completed?	Verify the numbers meet your expectations and your purchased licenses. Is a key user or a key transaction missing from the list? Follow up with the user and the process/business owner to mentor.
Errors • Where is the application reporting a user error?	Verify that performance support content is available for this transaction or process. If not, create the content. Where learning content is available, conduct coaching to reinforce the use of in-application help.
Help requests • Is your IT help desk receiving calls that can be deferred to existing in-application guidance? • Is help available to support all in-application requests?	Schedule a refresher communication on how to access in-application guidance. Create help content for those processes where it's missing.

Sustain: There is No Finish Line to Adoption

Initial success does not guarantee long-term success. You will encounter new hires, role changes, and software upgrades. All of these require that you periodically review your data to gauge your adoption maturity.

> "…the impact of changing staff and skill leakage can cause 50% of an IT organization's skills to be lost in six years."[19]

Take your consumption data – the logins, features/processes used, errors encountered – and identify metrics around low, medium, and high adoption characteristics. For example, logins that trend below X might be considered low adoption. An increase in user errors might be a warning sign. Identify one or more tactics to move the bar in these instances. For example, you might schedule a 1-on-1 coaching session. Another ongoing tactic to consider, apart from monitoring any consumption data, is to find ways to incorporate the software in meetings. This serves to show that leadership is 'walking the talk' on adopting the new software and exposes employees who aren't adopting the software.[20]

About ANCILE's Adoption Accelerators

ANCILE technology enables many of the tactics to help drive and sustain adoption. ANCILE products are used by the world's leading software companies to drive user adoption. ANCILE is the power behind SAP Productivity Pak, the HPE Adoption Readiness Tool, Dell EMC STaRT, and OpenText Personalized Help.

Communicate

ANCILE uAlign® is cloud and mobile-enabled software that helps organizations ensure user adoption through validated communications. Unlike email or other forms of communication:

- uAlign messages are targeted for specific audiences

- uAlign messages are prioritized and sorted for the user by due date of action

- uAlign messages contain assessments

- uAlign real-time analytics provides valuable insight into the breadth and depth of user understanding

ANCILE uAlign rapidly pushes mission-critical information, to the right people, in the right priority, at the right time, on the device of their choice, while validating comprehension.

Create custom learning content, including elearning

With ANCILE uPerform®, authors, subject matter experts, and business stakeholders can rapidly create and edit everything from procedural documents to simulations and eLearning courses. Content is published to a performance support website where end users access all of their content, provide feedback, collaborate with teammates, and receive personalized notifications relevant to their learning. ANCILE uPerform:

- Includes comprehensive content authoring capabilities

- Makes it easy to manage your learning content

- Integrates content into your employee's current task – for immediate assistance – and organized according to role, process, or other categorization on a website for reference

- Provides standard and custom reporting to help assess team readiness

ANCILE
uPerform®

ANCILE
uAlign®

Embed in-application guidance for support at the Moment of Apply

Using ANCILE uGuide™, authors create and deliver in-application, context-sensitive guidance for applications. End users request guided help with simple keyboard actions. This in-application guidance is:

- Integrated into the application and accessed through the cloud
- Just-enough guidance
- Minimal and action-specific
- Easily updated and distributed
- Customized to fit the unique business process and customers

ANCILE uGuide provides help that is just-enough, just-right, just-in time, and just-for-the-user.

How Much Value Can Be Realized?
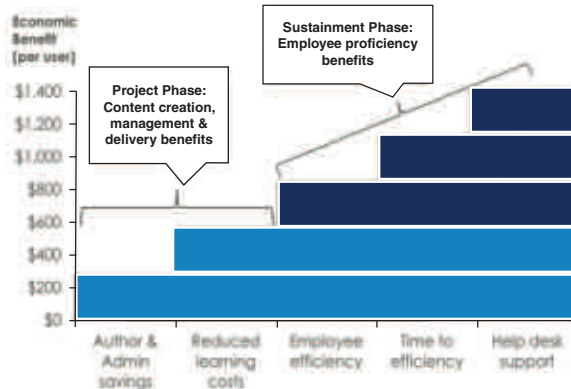
Key Benefits of ANCILE Solutions

- Reduction of authoring time by more than 50%
- Reduction of in-classroom training (from 70% to 30%) resulting in increased employee productivity and reduced travel costs
- Increased speed of finding information resulting in employee efficiency gain of 16%
- The average time to proficiency was reduced by 21%-38%
- Reduced help desk calls by roughly 25%

Summary

To end the noise and madness of software implementations and bring projects to conclusion, it's easy for organizations to be tempted by the false finish line of go-live. But getting the technology 'turned on' is only part of the software ROI equation. Look beyond the false finish line of implementation and focus on growing and sustaining proficiency to ensure your employees achieve adoption of your enterprise applications and your organization sees value from software.
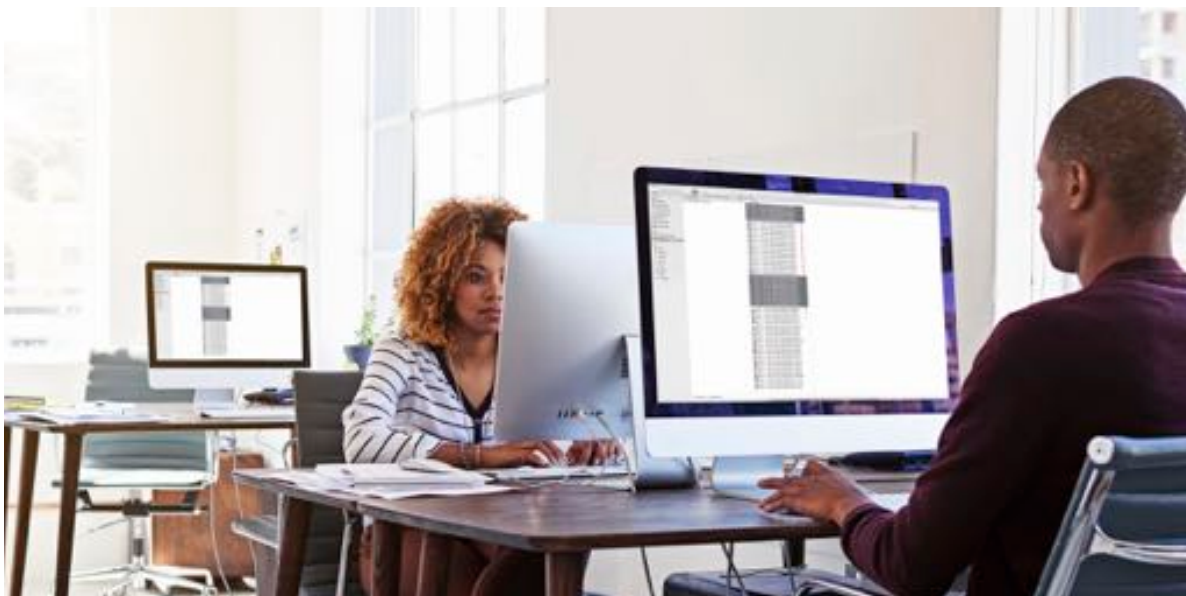
User Adoption = Value

And to get to user adoption, here is a recommended order: **People First. Software Second.**

The tactics in this ebook help you focus on people first by moving people from novice to proficiency to adoption. Start with your people – winning hearts and enabling minds – to achieve adoption and your expected business outcomes.

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