



THE PROVEN STRATEGY TO SUCCESSFUL DIGITAL ADOPTION



VisualSP®

Asif Rehmani, MVP

© Copyright 2020 VisualSP®. All Rights Reserved.





CONTENTS

1. CLARIFY YOUR BUSINESS OBJECTIVES.....	6
2. CREATE A LONG-TERM CHANGE MANAGEMENT PLAN	9
3. BUILD A TEAM OF INFLUENCERS.....	16
4. DEPLOY AN AWARENESS AND ANTICIPATION CAMPAIGN	20
5. DESIGN AN INCENTIVE PROGRAM	24
6. DEVELOP FRICTION-FREE GOVERNANCE POLICIES.....	27
7. SIMPLIFY TOOLS, PROCESSES, AND WORKFLOWS.....	30
8. GROW A MODERN HELP AND TRAINING SITE.....	33
9. RUN LIVE CLASSES	36
10. ROLLOUT DAILY TIPS CAMPAIGNS	40
11. HOLD Q&A SESSIONS.....	43
12. PROVIDE IN-CONTEXT ONE-CLICK HELP.....	46
13. LAUNCH THE DIGITAL ADOPTION PROGRAM.....	51
14. GATHER THE MOST IMPORTANT METRICS	55

HOW TO USE THIS BOOK

The idea of “If you build it, they will come” worked for Kevin Costner’s character in the movie *Field of Dreams*, but this is not the reality for applications in the real world.

Many companies have deployed digital tools, including many of the following: SharePoint, Office 365, G Suite, Salesforce, Workday, SuccessFactors, Oracle Cloud HCM, Talentsoft, ServiceNow, Oracle CX Cloud, Microsoft Dynamics 365, NetSuite, SAP Concur, Oracle Cloud ERP, SAP Ariba, Jira, cPanel, LivePerson, and other software applications. But many don’t succeed in helping their employees use these software applications to the fullest.

They fail to achieve the ***intended business objectives*** and the ***return on their technological investment***.

These objectives may include customer support, document management, data security, regulatory compliance, automation, productivity, team collaboration, etc.

Another negative outcome, as a digital workplace, they struggle to stay agile and ahead of the ***digital innovation curve***.

What these companies lack is successful change management for sustainable digital adoption.

If this problem applies to your company, this book is for You!

What these companies lack is successful change management for sustainable digital adoption.

In this essential guide to digital adoption success, learn **simple steps you can take to help your employees discover, master, and actually use your applications or any platform**. Also included are helpful resources to help you get started and be successful.

At [VisualSP](#), in our many years of experience helping companies achieve success with digital tools, we have found that the steps recommended in this book are ***proven to produce the best results***.

The numbered headings represent the steps that you need to schedule and implement. Some steps are one-time and others are on-going.

The sample plan looks as follow.

- **Week 1: Clarify your business objectives.** Specify the business objectives that you aim to achieve in your company. This allows you to be able to measure success after implementation.
- **Week 2: Create a long-term change management plan.** Give each step the time, space, and personnel needed for successful completion. Included is a sample plan you can customize to create your own sequence of action steps.
- **Week 3: Build a team of influencers.** Appoint a group of people who will be responsible for making sure that the planned activities are completed by everyone involved.

- **Week 4: Deploy an awareness and anticipation campaign.** Let everyone know which applications are coming and how digital work is about to get easier and faster.
- **Week 5: Design an incentive program.** Find ways to recognize everyone's efforts toward success. Take action to motivate your workforce.
- **Week 6: Develop friction-free governance policies.** Create and improve rules that bring order to chaos without creating barriers to platform usage.
- **Week 7: Simplify tools, processes, and workflows.** Deploy default and customized solutions that make your colleagues' life easier, not harder.
- **Week 8: Grow a modern help and training site.** Build and maintain a training and help center that hosts everything there is to know about using your deployed software applications.
- **Week 9: Run live classes.** Bring everyone into a classroom and explain how the platform solves common individual and team problems.
- **Week 10: Rollout daily tips campaigns.** Send daily bite-sized digestible training content to your coworkers, directly to their inboxes.
- **Week 11: Hold Q&A sessions.** Give everyone a chance to ask questions and get detailed answers in-person, in real-time.
- **Week 12: Provide one-click help.** Automate help and support. Provide all users with in-context one-click help and pop-up guidance walkthroughs. Give them the ability to use an application even if they don't know how.

- **Week 13: Launch the digital adoption process.** Formally and extravagantly, make the application or platform available and invite everyone to use them.
- **Week 14: Gather the most important metrics.** Track all applicable activities, quantify outcomes, and measure success. Then, make improvements as you go along.

This guide may be used by any company that is ***already using*** or ***planning to use*** a digital tool. This step-by-step action plan walks you through activities that have proven to lead to ***successful rollouts*** and ***improved usage***. The numbered headings are action steps you may take.

Inside, you will also find resources to help you take well-informed decisions and optimize outcomes. The goal is to get the most business value out of your deployed digital tools.

This book is a simple read ***optimized to be used as an action plan and a checklist***. We are always available if you have questions or need help, especially regarding VisualSP. Please send us any feedback on [our contact page here](#); we appreciate your participation in making this guide a more helpful tool for all software applications users.

Let's get started with the first step: *clarify your business objectives*.



1. CLARIFY YOUR BUSINESS OBJECTIVES

Today, in order to stay competitive, digital workplaces need to stay ahead of the digital innovation curve. Apps and platforms give your workforce the ability to do more with less and provide optimal customer service.

However, for your company to be able to use the digital tools to the fullest, maximize productive output, and attain return on investment, you need to continually drive user adoption. Employees **will not start and continue** to use the applications on their own, a strategic push is needed.

It is all about helping employees break old working habits and develop new better ones.

To initiate the change, start with ***knowing what you want to achieve.***

How will you use the technology in the short-term, middle-term, and long-term?
Which scenarios, processes and workflows that need to be prioritized?

Clarify your business objectives and use this guide to attain them.

Your deployed applications most likely offer a great range of functionality that serve an exhaustive set of working scenarios.



Make a list of scenarios, processes and workflows that need to be prioritized.

1.1 LOOK INTO HOW THINGS GET DONE BY DIFFERENT DEPARTMENTS AND TEAMS IN YOUR COMPANY AND SELECT WAYS TO IMPROVE THE WORKFLOWS.

Talk directly to the users and have them walk you through the processes and third-party tools that they use regularly.

1.2 EXPLORE CASE STUDIES TO FIND WAYS OTHER COMPANIES ARE USING SIMILAR APPLICATIONS TO COMPLETE COMMON TASKS.

For example, for Microsoft 365, get ideas from their [productivity library](#).

1.3 WITH THE HELP FROM YOUR IT TEAM, AIM TO CONTINUALLY DISCOVER AND CREATE BETTER WAYS OF GETTING WORK DONE.

[This article](#) outlines ways you can motivate your IT team toward that end.

1.4 MAKE A LIST OF PROCESSES AND WORKFLOWS THAT NEED TO BE PRIORITIZED.

Start with the already established processes and workflows.



1.5 USE THE LIST TO PLAN THE REMAINING STEPS AND TO IMPLEMENT THE DIGITAL ADOPTION ACTIVITIES THAT SERVE THEM FIRST.

With a clear idea on how you want your workforce to use a software application, an app, or a website, plan campaigns that will prioritize the mastery and adoption of the applicable features.

Share the list of objectives with everyone in the company so that a shared vision can emerge.

Next, create a long-term change management plan.

RESOURCES

[Productivity Library - Explore simple ways to get going fast](#)

[VisualSP user training and support Blog](#)



2. CREATE A LONG-TERM CHANGE MANAGEMENT PLAN

In the previous step, you have clarified the business objectives, in this step, you need to layout action steps that will lead you to achieving the goals.

Widening and deepening usage for a digital tool is not a one-time task but an ongoing one.

The second step is to create a formal change management plan that accounts for continual efforts.

Depending on the size of your company and the resources available, this task may take a week or less.

Plan to start installation tasks and user adoption activities at the same time.

Since many change management decisions inform technical choices, the digital deployment project and the digital adoption programs should be implemented concurrently.

2.1 CREATE A SEPARATE PLAN FOR EACH STEP

Plan each of the 12 steps individually and then combine them to make the masterplan.



1. Build a team of influencers
2. Deploy an awareness and anticipation campaign
3. Design an incentive program
4. Develop friction-free governance policies
5. Simplify tools, processes, and workflows
6. Grow a modern training site
7. Run live classes
8. Rollout daily tips campaigns
9. Hold Q&A sessions
10. Provide in-context one-click help
11. Launch the digital adoption process
12. Gather the most important metrics

At this stage, add duration only; you will be able to determine start and finish dates when it is time to compile the masterplan.

2.2 COMBINE THE 12 SEPARATE PLANS INTO ONE COMPLETE PLAN.

More or less, plan to initiate one step at a time, one per week.

During week 1, rollout step 1; week 2, step 2, etc.

Planning is a way to improve the likelihood for success.

With a detailed well thought out plan, you minimize time-wasting activities and maximize the probability for success.

To ensure that more people participate and take action on time, **add a precise deadline to every activity** that the plan requires from the users. Determine a month, a day, as well as an hour.

For live events like Q&A sessions, prepare locations and infrastructure. And, always be prepared to modify, and adapt the plan as variables change along the way.

Depending on the kind of feedback you receive from early-adopters, prepare to improve the plan accordingly.

Use the simple template below to create your digital adoption and change management plan.

SAMPLE PLAN															
Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Cont'd
Clarify your business objectives															
Create a long-term change management plan															
Build a team of influencers															
Deploy an awareness and anticipation campaign															
Design an incentive program															
Develop friction-free governance policies															
Simplify tools, processes, and workflows															
Grow a modern help and training site															
Run live classes															
Rollout daily tips campaigns															
Hold Q&A sessions															
Provide one-click help															
Launch the digital adoption process															
Gather the most important metrics															

You need a team of committed individuals that would ensure the timely implementation of the 12 steps



Third-party change managers are often preferable since they can put all their focus on change management.

2.3 APPOINT CHANGE MANAGERS

To achieve the needed gradual and sustainable organizational change, you need a team of committed individuals that would ensure the timely implementation of the 12 steps toward digital adoption.

The in-house candidate may come from any department: human resources, IT, marketing, or finance. The external candidates may come from a consulting firm or a new hire.

Depending on the size of your organization, you may need one or several people for the task.

2.3.1 BUILD AN IN-HOUSE TEAM OF CHANGE MANAGERS

Make a list of people to consider as candidates, people who are influential, people who can find **at least 60 minutes per week**, and have some level of inclination toward technology and innovation. Clearly define their roles and responsibilities.

2.3.2 HIRE THIRD-PARTY EXPERT CHANGE MANAGERS IF HELP IS NEEDED

If there are no good candidates within your organization, [bring in outside help](#). Third-party change managers are often preferable since they can put all their focus on change management.

VisualSP is a plug-and-play add-on application that provides pop-up walkthroughs and automates ongoing micro-training

2.3.3 ALLOCATE TIME

Make an estimate of how much time everyone in the company, including the executives, will need to dedicate to the digital adoption efforts.

More time is needed in the beginning. Typically, the range can go from 15 to 60 minutes per day or per week, on an ongoing basis. In the beginning, for some users, 60 minutes per day maybe needed, but overtime, 15 minutes per week may be enough.

The business necessity for digital adoption in your company is the determining factor.

2.3.4 DRAW A PRELIMINARY BUDGET

Digital adoption efforts cost money. Each personnel, activity, or tool involved needs some funds.

A small ongoing budget is needed, especially for essential tools like [VisualSP](#), a plug-in that provides **pop-up walkthroughs** and automates ongoing micro-training.

Once done, share the plan with everyone in the company so that expectations can be raised and aligned in one direction.

Next step is building a team of influencers.

RESOURCES

[Create a change management plan to achieve sustainable user adoption](#)

[Change management is key to successful user adoption](#)

[User adoption success starts with understanding your users](#)

[Why you should launch your deployment & adoption plan concurrently](#)

[Change mentoring - One-on-One expert consulting](#)



There needs to be a group of people who will champion the digital tools, show the way, and inspire action from others.

3. BUILD A TEAM OF INFLUENCERS

3.1 UNDERSTAND WHY AN ACTIVE TEAM OF INFLUENCERS IS ESSENTIAL

It is easier to imitate than to initiate.

Having the leadership set expectations is not enough; there needs to be a group of people who will champion the digital tools, show the way, and inspire action from others.

In addition to change managers, you need to find some influential colleagues that everyone can imitate.

Ultimately, visible efforts from both formal and informal leaders help everyone to see digital adoption activities as a priority to the company.

Change managers ensure successful implementation of digital adoption campaigns but **influencers lead the way as exemplary users.**

These people should be influential to the extent that their participation raises the significance of every campaign, drives conversations, and encourage the participation of others.

From each department, recruit at least one influencer among managers and one among their staff.

3.2 REVIEW BEST PRACTICES

- Appoint at least one influencer from the management and one from the staff of **every department**.
- Look for people who are motivated enough to stay **active long-term**.
- Finally, be prepared to replace some people from the team of influencers along the way.
- Look for the following key traits:
 1. Affinity to technology, **innovation**, and new ideas.
 2. Clear grasp of the application's key **capabilities** and benefits. Run 2 or 3 live offline or online classes to introduce them to the platform.
 3. Do they engage in collaborative tasks at least weekly? If they regularly work together with others, they are more likely to discover **how the platform solves common problems**.

From each department, recruit at least one influencer among managers and one among their staff.

The team should include at least one executive of the organization.

The point is to assemble a team of influencers that will champion the digital adoption campaigns and inspire the entire workforce to join the efforts. The team should include at least one executive from the organization.



Make sure that there are always influencers whose job is to champion continual digital transformation.

3.3 DESCRIBE THEIR ROLES AND RESPONSIBILITIES FOR THE DURATION OF THE CHANGE MANAGEMENT PROCESS.

Key roles should include the following.

- Enthusiastically participating in every step of every digital adoption campaign. Every influencer should be able to dedicate **at least 60 minutes per week** to the effort.
- Being **the first to use** the application's features for the different scenarios, processes, and workflows prioritized in the company.
- Making heavy use of the platform for all the applicable tasks.
- Recording their experiences with the platform and turning the documentations into **case studies** that they should share with everyone to demonstrate how the platform solves problems. They can do this weekly in a live offline or online event format.
- Finding ways to **persuade everyone** to use and adopt the platform for all the applicable tasks.

Make sure that there are always influencers whose job is to champion continual digital transformation. With the involvement of the top leadership and the employee evangelists, the entire workforce prioritizes the digital adoption initiative and invest efforts to achieve success.

Next, deploy an awareness and anticipation campaign.

RESOURCES

[How executives can lead the way in adoption efforts](#)

[Productivity grows when employees become evangelists](#)

4. DEPLOY AN AWARENESS AND ANTICIPATION CAMPAIGN



At this point, you know what you want to achieve, you have developed a long-term change management plan, and you have built a team of influencers.

Now, before you implement the remaining steps in the digital adoption process, ***deploy a publicity campaign for the launch day***, the day the platform will become available for use.

Use your existing corporate communication channels to make everyone aware of the upcoming digital adoption campaigns. The goal is to create excitement and anticipation.

Not only that, your messaging should be designed to make your workforce interested in using the platform ***well beyond the launch date***.

Here are some best practices.

- Focus the messaging on the fact that the upcoming launch day will be the start of a process during which ***every team and every individual will find solutions for their productivity and collaboration problems***.

Show how the software application or website removes barriers to getting things done quickly, easily, and safely.

- Combine emails, events, and posters to get the word out. To be effective, have the promotion campaigns be inspired by your established corporate culture.
- During the promotional events, run through key live demos and case studies to show **how the application or platform removes barriers to getting things done** quickly, easily, and safely.
- Allow time for attendants to ask some questions. If a question is big enough, refer everyone to the upcoming live Q&A sessions.
- Always have at least one top executive make the announcements and appear on all promotional materials, including emails, posters, flyers, and events. The point is to show that expectations come from the top.

4.1 BROADCAST THE ANNOUNCEMENTS

Use emails and posters to invite everyone to **expect promotional flyers** and to **attend the upcoming promotional events**.

Give all the details one may need to be able to use the platform for the first time the day of the launch.

In the emails, prominently list links to any **additional resources related to the day** the platform will become available to users. Also, add a link to a video teaser featuring **top executives talking about the importance of using the platform** and why it is important that everyone starts on the launch day.

Request everyone to reply with a confirmation that they have read every email received and plan to participate.

Request everyone to reply with a confirmation that they have read every email received and plan to participate.

4.2 DISTRIBUTE FLYERS AND LEAFLETS

Use the extra space that flyers and leaflets offer to include more information that couldn't fit on the posters. Include **the list of all the common problems that are about to be solved** for everyone and for the organization.

Have enough flyers also displayed around the cafeteria, foyer, elevators, and offices.

4.3 HOLD PROMOTIONAL EVENTS

Hold at least one promotional event before the launch kicks off.

If you want to show more of the platform's capabilities and persuade more employees, split the content and schedule 1 or 2 more events, preferably the same week.

Create presentations that sell the platform to employees.

Create presentations that **sell the platform to employees**. Present the most common scenarios, live demos, case studies, and success stories.

In priority, focus on individual benefits rather than business ones. People would always want to know "**what's in it for me?**". Talk extensively on how the platform will make everyone's life easier.

Moreover, encourage everyone to find better ways to use the digital tool and plan to recognize their efforts in the incentive program.

To maximize attendance, consider incorporating the awareness event into other existing established corporate events.

When you get the word out about the upcoming launch, you are able to create anticipation, arouse excitement, and make everyone aware of the countdown to the launch. This step also gives you the opportunity to highlight to everyone the expectations from the top leadership.

As the entire workforce awaits the big day, continue with the completion of the remaining steps to be implemented before the official launch day.

Next, design an incentive program.

RESOURCES

[Explore simple ways to get going fast](#)

[Unlocking the secrets of user adoption](#)



5. DESIGN AN INCENTIVE PROGRAM

A rewarded behavior is always much more likely to repeat. Motivation is essential to digital adoption success. An incentive program can help in this area.

Employees prioritize campaigns activities ***when they stand to gain something of value.*** Create an incentive program for all the planned adoption campaigns. It is about making sure that those who take action on time experience some form of instant gratification.

Reward both the learning and practicing activities.

You can't give everyone the same reward; you need to prioritize. Give greater rewards to ***early-action-takers*** and ***early-adopters***.

Consider some of the following best practices.

- Preferably, [consult an expert](#) if you have never run an incentive program before.
- The task of budgeting and tailor-making awards to match recipients' personalities usually needs an experienced perspective.
- If your organization is medium to large, consider ***hiring a third-party team*** specialized in workforce motivation programs.
- It is usually easy for companies to go unnecessarily overboard with incentive programs. ***Determine the budget in advance*** and have all



Don't just reward the top 3 early-action-takers, also reward the top 10, the top 50, and the top 100.

expenses remain within the constraints. You can use their service in the first 4 or 12 weeks of the digital adoption program and then slowly build an internal team that can take over the incentive program management, for long-term.

5.1 SELECT A RANGE OF TYPES OF AWARDS

Some prizes work better than others. Shopping vouchers, gift cards, and event tickets happen to work very well.

To maximize the number of positive responses, ***make an effort to personalize every award*** to match the recipient's personality. You won't have time to do this for everyone but you can do it for the top winners.

Create awards to match your particular corporate culture. For this task, creativity is needed. Take the time to search for gifts that will please different members of your workforce. You may just come up with something that works. It can be something as simple as winning a chance to be taken to lunch by the boss.

5.2 CREATE SEVERAL PRIZES FOR WINNERS AT DIFFERENT LEVELS

Don't just reward the top 3 early-action-takers, also reward the top 10, the top 50, and the top 100.

For many people, a simple public recognition in the form of points or badges is enough to motivate more effort from them.

Have the prizes be given to a good number of people, enough to ***generate a buzz around the program.***

5.3 LET EVERYONE KNOW THAT THERE ARE PERKS FOR COMPLETING ADOPTION TASKS

Use the internal corporate communication channels to promote the incentive program.

And, make sure that you always ***declare the winner publicly*** with all the lights and sounds that you think appropriate. Hold a quick ceremony and invite everyone. This approach may sound over the top but it has proven to inspire more people to participate in the digital adoption efforts.

Instant gratification does drive action. Make sure you have an incentive program in place.

Next, develop friction-free governance policies.

RESOURCES

[Unlocking the secrets of user adoption](#)

[User Adoption as a Service \(UAaaS\)](#)

[One-on-One Consulting - Instead of just 'consulting'... how about some actual help?](#)



Avoid rules that proliferate to the point where using the platform becomes an inconvenience.

6. DEVELOP FRICTION-FREE GOVERNANCE POLICIES

Without a structure and some boundaries, chaos will follow, making the deployed platform unusable. You need some governing rules.

But, make sure that the governance policies that you create don't impede user adoption of the platform. Avoid rules that proliferate to the point where using the platform become an inconvenience.

Good rules don't prevent end-users from using the platform, but rather **steer them in a desired direction**.

Follow these best practices.

- Involve users in the policies creation process and **consider their input** on every rule. They may just know whether a rule will create unnecessary friction or not.
- Avoid complex rules, cumbersome forms, lengthy processes, and slow response time from your IT team.
- Allow the use of native **default solutions** wherever possible. Don't remove or turn off an out-of-the-box functionality unless you have a good reason.
- To avoid disruptions and frustration, every time you remove a solution, **always provide an alternative**. Without an alternative, users tend to abandon the platform and adopt third-party solutions.

Don't remove or turn off an out-of-the-box functionality unless you have a good reason.

Start with rules applying to data security and regulatory compliance.

Oftentimes, it's much better to suggest than to impose.



6.1 TAKE TIME TO UNDERSTAND EVERY PROBLEM THAT USERS ARE TRYING TO SOLVE

With the obtained insights, you are more likely to create rules that facilitate the pursuit of solutions to problems.

6.2 CREATE A FOUNDATIONAL SET OF GOVERNANCE POLICIES

Start with rules applying to data security and regulatory compliance. Policies should not be written in stone. Be open to updating and improving them as experience gives you new insights.

6.3 REVISE EACH POLICY AND SEE IF IT CAN BE REPLACED BY CLEAR GUIDANCE

Oftentimes, it's much better to suggest than to impose. Focus first on convincing your end users to abide by the best practices. Create a rule only if necessary.

6.4 MAKE EVERYONE AWARE OF THE GOVERNANCE POLICIES

Using [VisualSP](#), create guidance walkthroughs that communicate all the warnings, reminders, and best practice recommendations on their respective pages, windows, and features of the platform.

6.5 PUBLISH EACH POLICY ON ITS OWN SEPARATE PAGE ON YOUR CUSTOM HELP AND TRAINING SITE

If you compile all the governance policies in one voluminous PDF document, users will avoid reading them. On your custom help and training site, ***stick to one-policy-per-page***. This facilitates subsequent improvements on a policy, including edits, updates, and discussions.

Communicate all your governance policies with upmost clarity. Any policy that cannot be described in a sentence or two using plain English is probably not simple enough.

With friction-free governance policies in place, order is established without creating roadblocks to digital adoption.

Next step, simplify tools, processes, and workflows.

RESOURCES

[Create Governance policies that don't block adoption](#)

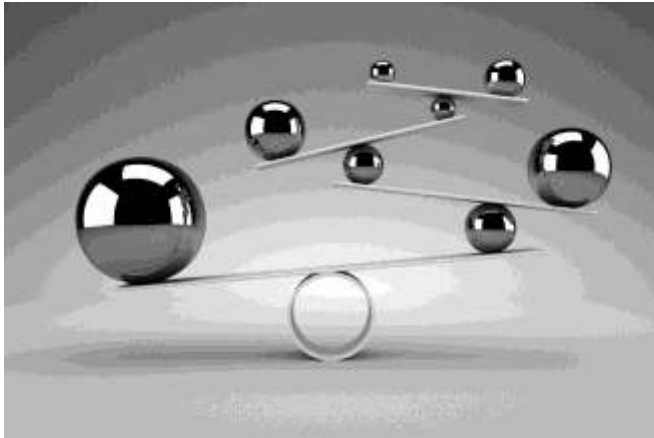
[Build a training site that actually drives user adoption](#)

[Caveman Adoption Tenet #1: Simple governance policies to promote user adoption](#)

[Show Governance policies to users in-context to their environment](#)

[Use Case - Communicate Governance information at moment-of-need](#)

[Provide context-sensitive Help to ensure sustainable user adoption](#)



Start with what works well for majority of the users.

7. SIMPLIFY TOOLS, PROCESSES, AND WORKFLOWS

Successful digital adoption largely depends on simplicity. Don't create tools, processes, and workflows that users find inconvenient.

To get employees to use a platform **without friction**, you need to create workflows that are easy to follow.

Simple solutions have many other advantages. They take **less time and money to develop**, are easier to duplicate, and have shorter learning curves.

Have the following best practices guide your decisions.

- Always start with **out-of-the-box solutions**. Before you engineer a custom solution, determine whether a natively built one will do the job.
- First, aim to serve the largest audience. Start with what works well for majority of the users. If a solution is simple enough to be welcomed by most users, deploy it as a priority. Later, you can find time to accommodate everyone else.
- Reconsider any task that requires users to submit a permission request, create a helpdesk ticket, or wait in a long queue, especially when there is little to no automation to the process. **Often it is much more productive to provide guidance** and let users create freely and then focus on managing what they create.



7.1 FIRST, FIND CRITICAL PROBLEMS THAT ARE NEGATIVELY AFFECTING USERS

This is about putting yourself and your entire admin team into users' shoes. Allocate weekly time for this ***ongoing discovery task***.

Sit down with users and have them walk you through the tools, processes, and workflows that they use on the daily basis. Later, use this information to select or build better solutions within the platform.

Start with big problems that affect big teams since that will usually have the biggest payoff once solved. Then gradually move to problems that affect smaller teams and individual users.

7.2 USE OUT-OF-THE BOX SOLUTIONS

Always rethink a solution if it requires a dedicated development team, a dedicated environment, or multiple milestones.

Before you opt for a custom system, **always ask whether an already-made default one will do**. In most digital workplaces, out-of-the-box solutions can usually do the job that you are intending to do.

7.3 BUILD LOW-TO-NO-CODE SOLUTIONS

Don't build systems based on assumptions. First, ask whether you are ***solving an actual problem***.

Next, avoid including options and steps that users don't understand or don't need in the work process. Prioritize solutions that use the lowest amount of code or no code at all.

7.4 TEACH USERS AND TEAMS TO BUILD THEIR OWN SOLUTIONS

Wherever applicable, coach users to create, maintain, and improve their solutions on their own without much input from the IT team.

Simplicity helps. If building a solution requires no code, end users can do it on the fly.

*If building a solution requires no code,
end users can do it on the fly.*

This approach gradually helps employees to make use of even more functionality and be able get the most value out of the platform without much help from change managers.

Simplicity is user-friendly; complexity is not.

Striving to simplify solutions helps you to refrain from deploying custom code where low-to-no-code would work just as well.

Next, grow a modern help and training site.

RESOURCES

[Caveman Adoption Tenet #3: Simple Solutions](#)



Growing a help and training site needs continual effort.

8. GROW A MODERN HELP AND TRAINING SITE

Help items, training content, governance policies, and best practices lists need a place where users can find them.

Using default or external third-party sites simply comes with too many limitations; ***you need a site you can control.***

Your company needs to build and maintain a knowledge base that hosts all there is to know about using the deployed digital tool.

Moreover, the help center needs to have all the functionality that allow users to not only search and find help items but also to ask questions, give answers, and leave comments.

This is an ongoing program; growing a help and training site needs continual effort.

Follow the following most important best practices.

- Give every help item, every tutorial, or every governance policy ***its own separate page*** with its unique URL link. This gives users the ability to easily share, edit, update, and discuss the content. Also, using [VisualSP](#), this approach ***allows you to embed the help items into their respective features*** and workspace windows.

On every page of the knowledge center, write content for the web.

Continual improvement keeps the site usable.

- On every page, keep content short, scannable, and to-the-point. Use bulleted lists, text formatting, and short sentences wherever possible. **Write content for the web.**
- Aim to always add a video version of a text to every page. The video may duplicate or complement the text content. **Most people learn best with visual media.**
- Make the home page a hub of shortcuts, a roadmap to all the most visited pages of the site. This removes the need to always navigate and search.
- Integrate the task of updating content in your daily routines. Continual improvement keeps the site usable.
- Ensure that you always answer questions as soon as possible; the site retention rate depends on how promptly users get the help they need.

8.1 START YOUR OWN CUSTOM HELP AND TRAINING SITE

To enable an ever-improving digital adoption, in the long-term, **growing your own site is essential**. Source content from in-house production and third-party providers.

Build the site as a **discussion-driven** social portal where users come **to learn and share knowledge**. Users should be able to ask questions, give replies, leave comments, or add new posts.

On the site, users should be able to ask questions, give replies, leave comments, or add new posts.

8.2 ADD THE FREQUENTLY-ASKED-QUESTIONS SECTION AS SOON AS POSSIBLE.

Add a new post whenever a question is asked 3 times or more, by 3 or more different people. Setup this section to grow larger overtime.

8.3 APPOINT A TEAM OF CONTENT MANAGERS FOR THE SITE

To make sure that every piece of content is left in the right place and duplicate pieces of content are consolidated, **content managers are essential**.

The group may include people from the IT team, group of super-users, and other informal influencers.

Aim to grow an easy-to-scale help and training site that is intuitive, searchable, and, more importantly, helpful.

With all help items, training tutorials, and governance policies in one place, employees know exactly where they go to learn when it is time to use a new digital tool.

Next, Run live classes.

RESOURCES

[Build a training site that actually drives user adoption](#)

[Jumpstart user adoption with Microsoft's Learning Pathways training site](#)

[The optimal training strategy for sustainable user adoption](#)

[Why you need a custom Help site](#)



To show employees how to use the platform step-by-step, use VisualSP in-context one-click help and pop-up guidance walkthroughs.

9. RUN LIVE CLASSES

Many digital tools are comprehensive. Employees need to understand what they are, what problems they solve, and how they work. For this task, traditional live classes, in-person or online, are needed.

The goal is to help users **grasp the key concepts of the platform** and see how different features, processes, and workflows are used to complete familiar tasks.

To show them how to use different features and to complete different tasks step-by-step, instead, use [VisualSP](#) in-context **one-click help** and pop-up **guidance walkthroughs**.

Given that people forget most of what they learn within 24 hours after a class, do not expect the traditional classroom style training sessions to be effective enough to drive sustainable user adoption. They are effective at exposing employees to the big picture; that's it.

Also, sometimes, running live classes helps fast learners and early adopters to get up to speed and be able to use the platform much sooner.

This group of early adopters tend to inspire and **influence the rest of the workforce** into adopting the platform as well.

To run successful live classes, consider the following best practices.

Running live classes helps fast learners and early adopters to get up to speed and be able to use the platform much sooner

- Make the presentations focus **on how the platform solves problems** rather than how they help complete specific tasks step-by-step.
- Deliver the same presentation **at least 3 times** over a 2 months period.
- Always ensure that you **use demos, case studies, and success stories** to illustrate how the platform solves problems.
- Limit every session to the duration of about **one hour**. For most digital workplaces, it is impractical for employees to be away from their desks for too long.

Allocate enough resources and appoint enough people to the task of providing answers without delay.

9.1 FIRST, SET UP THE HELPDESK

After a live training, there is always a long queue of questions awaiting answers. Allocate enough resources and appoint enough people to the task of providing answers via the helpdesk without delay.

Also, schedule to address the more complicated questions at the **Q&A sessions**, which you are going to organize next.

Aim to hold the Q&A session **as soon as possible** after the live class, preferably the next day.

Look at the helpdesk history, if a question is asked more than 3 times by 3 or more different people, add it to the **frequently-asked-questions section** on the help site which you have setup in the previous step.



Find ways to make the presentations more engaging and more memorable.

9.2 CREATE A COMPREHENSIVE COURSE

The curriculum should be designed to **help users understand why, how, and when** to use the different features of the platform.

If necessary, consider using an existing course that is being used by expert trainers.

In order to be able to cover more subjects and deliver multiple classes, optimize the course to be scalable.

Introduce the training content and the list of all the tutorials and walkthroughs that everyone is expected to consume.

Let everyone know of all the training programs available and ways to learn more about the platform (for example: VisualSP-in-context learning, Microsoft Learning Pathways training, custom built help site, Q&A page, and the helpdesk).

9.3 DELIVER MULTIPLE CLASSES

First, invest time in learning the best ways possible to deliver the courses. Find ways to make the presentations more engaging and more memorable.

If needed, bring in a [third-party expert trainer](#) for the sessions.

Combine in-person sessions with online sessions in the form of webinars.

To improve information retention, **avoid delivering too many bits of information too quickly**. Spread the content delivery over multiple sessions.

Deliver the same presentation more than once.

Also, repetition improves information retention. Plan to deliver the same presentation more than once.

With a clear idea of how the platform works, employees can follow the ***right paths*** to learning and mastering the platform.

Next step, rollout daily tips campaigns.

RESOURCES

[One-on-One Consulting](#)

[The optimal training strategy for sustainable user adoption](#)



Bringing training content into employee inboxes ensures that everyone actually views it.

10. ROLLOUT DAILY TIPS CAMPAIGNS

In the previous steps, you have setup a custom Microsoft Learning Pathways site and started your own custom help and training site. Now, broadcast the containing articles and videos by email, one tutorial at a time, daily.

While VisualSP brings training content to the workspace windows of the platform, an autoresponder brings it **to their inboxes**.

By bringing training content into their inboxes, you make sure that everyone receives it where they work every day. This approach enables **continual micro-training**, which has a higher consumption rate and a higher information retention rate.

Rolling out daily tips campaigns does, over time, increase and improve usage of the platform.

Here are ways to maximize results for your campaigns.

- Always **add a deadline** to the consumption of the tutorials that you send out. Adding a sense of urgency to your campaigns increases participation rate. Preferably, instruct recipients to view the tutorial and put it into action the same day they receive the email. To help them schedule the activity higher on their priority list, make sure you **determine the date and the time of the day**.

To help them schedule the activity higher on their priority list, make sure you determine the date and the time of the day.

- Aim to run the same campaign 2 or 3 times within a year. Repetition gives those who missed the deadlines a second chance. It also helps reinforce learning.

10.1 APPOINT A TEAM OF BROADCASTERS

People tend to support what they help create.

To maximize engagement, open rate for the emails, and click-through rate for the containing links, **have the emails come from multiple executives and multiple super-users.**

In addition, every influencer that you have recruited should participate as one of the broadcasters.

Instruct every broadcaster to send out at least one of the emails. You give them a setup email; they send it out, in a way that everyone knows who sent it. Have the top executives send out the first batch of emails. This way, employees will take the campaigns seriously, right from the beginning.

10.2 ATTACH A CALL-TO-PRACTICE TO EVERY EMAIL

When people put what they learn into action, **information retention improves.**

Going through practice is a building block of the learning-by-doing strategy. In every email that you send out, below the link to a tutorial, **add a call-to-practice.** Make sure that you create enough test sites and test projects on which employees can experiment.

Going through practice is a building block of the learning-by-doing strategy.



10.3 SET UP THE AUTORESPONDER EMAILS

Create an email for each tutorial, help item, or governance policy.

Add the link that takes readers to the article, video, or walkthrough which may be hosted on Microsoft Learning Pathways site, your custom help site, a third-party training site, or VisualSP help system.

Aim to add a call-to-practice in every email that goes out.

If the training content for a web application counts 120 tutorials, create 120 emails and schedule them to be sent out over the next 120 days.

10.4 ALLOCATE EMAILS TO THEIR BROADCASTERS

Let every recruited broadcaster know which emails they are responsible for sending. For example, if the campaign is set to last 90 days, appoint 30 most influential people and have them send out 3 emails each.

With properly executed daily tips campaigns, ***continual micro-training becomes part of the corporate culture***. With time, digital adoption can only get better.

Next, Hold Q&A sessions.

RESOURCES

[Broadcast daily training emails that actually drive user adoption](#)

[What is VisualSP and how does it drive user adoption?](#)



Most employees would rather spend 30 minutes with an instructor in a live event and have questions answered than spend 3 days with back-and-forth emails.

11. HOLD Q&A SESSIONS

After exposure to a digital platform, questions always follow. A Q&A session is needed so that **answers and clarifications** can be comprehensively provided to the attention of everyone.

Moreover, the event gives employees a chance to learn not only from the instructor but **also from their peers**, giving everyone more learning opportunities.

Using the helpdesk to exchange emails back and forth with one user at a time is not a productive approach; it is too time consuming. Most employees would rather spend 30 minutes with an instructor in a live event and have questions answered than spend 3 days going back-and-forth with helpdesk emails or phone calls.

Q&A sessions reduce the volume of helpdesk tickets that support teams receive, boost learner engagement, provide opportunities to discuss misunderstood concepts, and improve user adoption of the platform.

Observe the following best practices.

- Put enough resources in place to ensure that no question goes unanswered. As an instructor, if you have no answers to a question, **consult experts** and timely bring the answer to the learner.
- Make the event regular, preferably every week, during office hours, at lunch time, the timeframe during which most people have disposable

The interval may be weekly in beginning of the change management process and grow to monthly or quarterly over time.

time. The interval may be weekly in beginning of the change management process and grow to monthly or quarterly over time.

- Choose a venue where it is more convenient to everyone to show up. If your organization is multinational or offices are spread over multiple locations, find a nearby venue for each office. ***Don't hesitate to have instructors travel around if necessary.***

11.1 APPOINT A PANEL OF EXPERTS

Include members from your IT department, heads of HR departments, some super users, and, if needed, a third-party [technical expert](#).

Make sure that the panel is knowledgeable enough to answer any question that users may have.

11.2 ASK EVERYONE TO WRITE DOWN ANY QUESTION THAT NEEDS DETAILED ANSWER

Advise everyone not to rely on their memory but to record every big question that arises when learning the platform.

Throughout the week prior to the event, learners have opportunities to compile a list of things on which they need clarification. Advise everyone not to rely on their memory but to record every big question that arises when learning and experimenting with the platform.

For all other questions whose answers are needed in order to complete a task, they should use the helpdesk or contact the support team.

Face-to-face interactions provide the optimal conditions for learner engagement.



By the time the event opens, exhaustive lists of to-do items will be ready for the sessions.

11.3 SCHEDULE AND HOLD IN-PERSON Q&A SESSIONS CLASSROOM STYLE

Prioritize meeting rooms. Face-to-face interactions provide the optimal conditions for learner engagement.

With in-person sessions, interactions are instant and communication is completely unfiltered. You need to start with classroom sessions.

11.4 FOLLOW UP WITH ONLINE CLASSROOM Q&A SESSIONS

Make use of webinars or Microsoft Teams Live Video Chat to run live online events ***where participants can easily ask questions and get clarifications.***

As for in-person events, schedule online events at regular intervals. Starting with weekly and, as users have fewer and fewer questions, move to monthly and then quarterly. With regular Q&A sessions, ***employees get to deepen understanding of how they can use the platform*** and continually engage in conversations around the subject.

Next step, provide in-context one-click help and pop-up guidance walkthroughs.

RESOURCES

[Caveman Adoption Tenet #4: Help that is actually helpful](#)

[Hold Q&A sessions that actually drive user adoption](#)



12. PROVIDE IN-CONTEXT ONE-CLICK HELP

Training programs, help sites, or help desks won't help employees use a software application to the extent that desired business outcomes and return on investment are attainable.

- **People forget** most of what they learn within 24 hours. Often, training end users can be a waste of time.
- **Using a help site is too disruptive.** In order to find help, employees have to interrupt work, navigate to the help site, search for the help item or tutorial, and then, about 5 minutes later, return back to the task at hand. Sometimes, they don't even find the help they need.
- **Helpdesks are frustrating.** After requesting help from IT teams, employees have to wait, sometimes for hours, for replies before they are able to continue with the task at hand. Many times, they don't even get the right answer first time around.

All these frustrating tasks of trying to remember steps, waiting for replies, navigating websites, executing searches, and clicking multiple times actually discourage employees to use an app.

VisualSP solves this problem.

VisualSP gives employees the ability to use a software application even if they don't know how.

With the pop-up walkthroughs, guidance is always visible on any workspace window. And, with the VisualSP tab always visible within the interface, the right help is always just a click away.

To help employees use the digital tools even if they can't remember how to or don't know how to, **install VisualSP**, a plug-and-play add-on application that **provides in-context one-click help and popup guidance** to software users.

As a digital adoption platform (DAP), VisualSP helps employees use the platform to the fullest and allows companies to actually attain **the intended business results**.

VisualSP removes all the major barriers to user adoption.

Here is how VisualSP works.

- To remove the need for employees to go through all those frustratingly disruptive steps of navigating, searching, and clicking, **VisualSP embeds help items directly into an application feature**. It makes the needed help items (training material) viewable instantly in-context to the open workspace window. With the pop-up walkthroughs and dialogs, guidance is always visible on any workspace window. And, with the VisualSP tab always visible within the interface, the right help is always just a click away. To find the right help, it only takes one click.
- When working with the platform, whenever a user needs help, all they have to do is click on the VisualSP tab, view the help item, and continue with the task at hand, without having to leave the workspace window.
- Help items come in different formats: annotated screenshots, pdf tip-sheets, screen-capture videos, and step-by-step walkthroughs. Pop-up walkthroughs are used to provide guidance as well as to display warnings,

reminders, and guidelines. You can customize the default help items and add your own to the system.

- Built-in analytics allow administrators to see which help items have been viewed and by which users, giving a way to track and measure progress.

To provide your workforce with in-context one-click help, follow the following steps.

12.1 LEARN HOW TO USE VISUALSP, IT'S QUICK AND EASY

To see VisualSP in action, [watch quick demo videos here](#).

If you need help or need a functionality explained, [contact support here](#).

12.2 INSTALL AND CONFIGURE VISUALSP

As a plug-and-play add-on application, VisualSP is easy and quick to install. Download a trial from the [VisualSP site](#).

12.3 USE VISUALSP TO SOLVE THE MOST COMMON DIGITAL ADOPTION PROBLEMS.

1. Enforcing ***governance policies***, regulatory compliance, best practices, and maintaining control over how documents are created, edited, shared, and used in an organization.
2. Leading everyone to follow ***business workflows*** and computing processes for maximum productive output.

3. Giving users the ability to learn at the moment in the flow of their work. **Learning-by-doing**, which is the most effective way of learning, helps users to master an app quickly, considerably shortening the typical learning curve.
4. Easing, simplifying, and speeding up **new hire onboarding** processes and improving new employee retention rate.
5. Reducing the workload from the number of help request tickets that IT support teams receive. This allows them to **free up time to focus on other important tasks** of fixing things and building better solutions.
6. **Shortening the typical temporary drop in productivity** that always happens during migration to a new application. This prevents frustration and the possibility that employees will fall back to their more familiar third-party tools.
7. Tracking user learning activities and **measuring progress**. You can't improve what you don't measure.
8. Delivering **micro-training**. This improves learner engagement and information retention by allowing users to learn a software application in bite-sized digestible chunks over a period of time. The approach reduces the overall training cost.
9. Turning digital tools into **super intuitive** and user-friendly applications. This keeps employees always ready for the next upgrade or migration and makes companies agile enough to ensure successful ongoing digital transformation.

10. Driving deep-and-wide usage and attaining ***return on investment***. The value that companies gain from a software application is directly proportional to the number of users and the depth of usage.

Once VisualSP is installed and configured, let everyone know that it is available and run a live class to demonstrate how to use it.

The next step is to launch the digital adoption program.

RESOURCES

[VisualSP partners with Microsoft to provide real-time Help for Office 365 through Microsoft 365 Learning Pathways content](#)

[Provide context-sensitive Help to ensure sustainable user adoption](#)

[Step by step in-context guidance for users filling out complex forms](#)

[How contextual Help systems are becoming essential to Digital Transformation](#)

[Use Case - Onboard users to new interfaces](#)

[How VisualSP drives user Adoption](#)



13. LAUNCH THE DIGITAL ADOPTION PROGRAM

If you've been implementing the project and the digital adoption campaigns concurrently, by now you should have the application ready to be used.

Consider the following best practices.

- Preferably, have everyone complete the first recommended tasks ***the same day the event is held***. Otherwise, host the event on a weekday so that more people can remember to take action the next day at work.
- Focus the event on showcasing live demos, case studies, and success stories that highlight simple ways that ***the platform solves common personal and business problems*** in the company.
- For the event space, choose a location within or near the workplace. This makes it easier for everyone to show up on time.

13.1 FIRST, DOUBLE-CHECK THAT EVERYTHING IS IN ORDER

Ensure that the IT team and the change managers team have all applications and all resources ***functional and ready***.

Confirm that all the invited people are confirmed and the organizers have completed their tasks. Also, verify that everyone has received the agenda for the event.

Have top executives deliver keynote speeches selling the benefits of using the platform and asking everyone to complete the first batch of recommended tasks.



13.2 HOLD AN EXTRAVAGANT LAUNCH EVENT

Provide all the services, activities, and entertainment that is typical of a festive business function. Memorable events include food, drinks, contests, stories, speeches, etc.

Line-up IT department leaders, change managers, super-users, and top executives to deliver keynote speeches ***selling the benefits of using the platform*** and ***asking everyone to complete the first recommended tasks***.

The entire workforce should be able to understand that, from this day forward, ***everyone is expected to use the new digital tool for all the applicable tasks***.

13.3 FOLLOW UP WITH KEY REMINDERS

- Remind them to complete the recommended first batch of tasks using the platform. If there is no real work to be done, ***use some sample and test projects***.
- Remind them to review the training, help, and support resources. Share links to the following:
 - A video showing how to get instant help using [VisualSP](#) and how to view an in-context one-click help and a pop-up guidance walkthrough ***at the moment of need***;
 - A quick guide on ***how to find training content*** on the customized Microsoft 365 Learning Pathways site as well as on your own help and training site;

After the launch day, you should be able to build up the momentum toward expanding and deepening the software application adoption.

- A quick set of tips on **how to use the helpdesk** and how to request help from the change managers, the super-users or the IT support team.
- Remind them to review the benefits of adopting the platform. This step serves to **boost motivation the day before the launch**. Highlight the necessity of changing existing working habits and adopting new better ways of getting things done for a modern digital workplace. Using success stories and case studies, highlight, once again, both **the personal and business benefits of exploiting the platform capabilities**.

After a successful launch event, users should be able to complete the recommended tasks in the days that follow, **building up momentum toward expanding and deepening user adoption**.

With ongoing training programs and other continual user engagement initiatives that you have started earlier, **usage of the platform should continue to grow and to improve**.

With diligent work on all the planned digital adoption activities, your workforce will be able to use the digital tool as intended and to the extent that continual **digital agility** and **return on investment** are attained.

After the launch, your next step is to *use the platform usage metrics* and [VisualSP analytics](#) to see areas that need improvements. Repeat the measure-and-improve process; it should be part of your daily work in the company.

RESOURCES

[Make Learning a Daily Habit](#)

[Information to get you started with VisualSP](#)

[How Contextual Help Systems Are Becoming Essential to Digital Transformation](#)



14. GATHER THE MOST IMPORTANT METRICS

Throughout the campaigns on increasing usage, decisions for improvement depend on you knowing **how much the platform is being** used and whether the usage rate is growing or not.

Digital adoption campaigns produce a lot of data. Trying to measure everything may distract you from tracking the **metrics that actually matter**.

The whole point of gathering data and measuring usage progress is to know how much the platform is being used compared to a previous period of time.

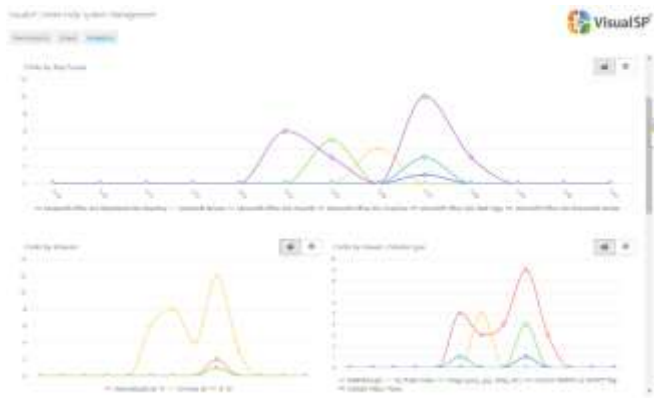
The metrics that you need the most, especially initially, are actually **basic**. Advanced third-party analytics tools are seldom necessary.

These metrics are thorough enough to give you, at the macro level, an overview of the trajectory of your digital adoption campaigns. They are mostly based on authorship activities.

Focus on **the activities that entail authorship**, not consumption.

14.1 TRACK LEARNING ACTIVITIES USING VISUALSP BUILT-IN ANALYTICS

Employees who take the time to learn how to use applications are more likely to use them. It is essential that you link learning activities to usage activities.



As a **plug-and-play** add-on application, VisualSP delivers **in-context one-click help** and **pop-up guidance walkthroughs** to end users and provides detailed **analytics for all learning activities**.

VisualSP collects all data on help items and walkthroughs consumption. You are able to quantify and measure which tutorial has been viewed and by how many users. All data is presented visually in advanced charts for easy comparison.

Use the data to find areas that need improvement for every digital adoption campaign.

RESOURCES

[Integrating Low Code Solutions with Power BI for Real Time Reporting](#)

[Caveman Adoption Tenet #2: Simple adoption metrics](#)