

# User Adoption – the next frontier in team collaboration

## Why user adoption really matters to today's IT teams

The tools of enterprise communications just 50 years ago included typewriters, carbon paper, postage machines, and chalkboards. Those all seem distant today, and the rate of change is accelerating. Today, the communications repertoire likely includes smartphones, messaging apps, and high-definition video. The changes go beyond devices or applications to the way we work.

These types of changes are why IT departments continuously evaluate and implement new technologies; however, there's natural resistance to change, and not everyone welcomes the continuous need to adapt their processes. New features, and upgraded tools can inadvertently become barriers to productivity. New technologies are often viewed as disruptive and unnecessary, especially to users that find the status quo perfectly acceptable.

It can be tempting for organizations to take a "laissez-faire" approach to technology, based on the assumption that allowing employees to choose their preferred tools will provide the best outcomes. However, this method fails to consider a number of risks. Too many solutions create too many problems. Beyond the obvious issues of support and compatibility, many factors favor implementing a standardized, organization-wide solution.

Standardized solutions don't just happen. Companies can drive their users to them, and the most popular incentives can be characterized as carrot and stick. IT organizations are mostly known



to use the stick, but directives are harder to enforce in an era of choice. The app economy and freemium software give users more freedom to solve their own problems.

Another option is to encourage users to embrace the new solutions — the carrot.

Traditionally, IT organizations have not been concerned about end user adoption. IT has been associated with deploying and supporting technology, not encouraging its use.

As arbiters of the careful evaluation required to determine the impact of new applications, IT departments are often perceived as gatekeepers at best and naysayers at worst. But driving adoption actually makes a lot of sense — socially and financially. Consider:

- **Low engagement leads to “shadow” IT.**  
Employees who are not engaged with the technology their employers provide are more likely to seek non-sanctioned applications. These choices impact their ability to interact with their coworkers and limits IT’s ability to provide support. It can also introduce compliance and security issues, placing the entire organization at risk.
- **Low adoption has a negative economic impact.**  
If employees are not using the tools provided by IT, their employers will not realize the expected ROI. Enterprise-wide licensing that goes unused is more than a lost opportunity, it’s lost budget. Even worse, users then turn to their own solutions, which brings us back to shadow IT. The costs include paying for multiple solutions and then increased hidden costs in making it all work.
- **Smaller networks equate to smaller benefits.**  
The “network effect” is a phenomenon whereby the number of participants improves the value of a service for each user. The flip side is that without critical mass adoption, the value of the service diminishes for everyone.

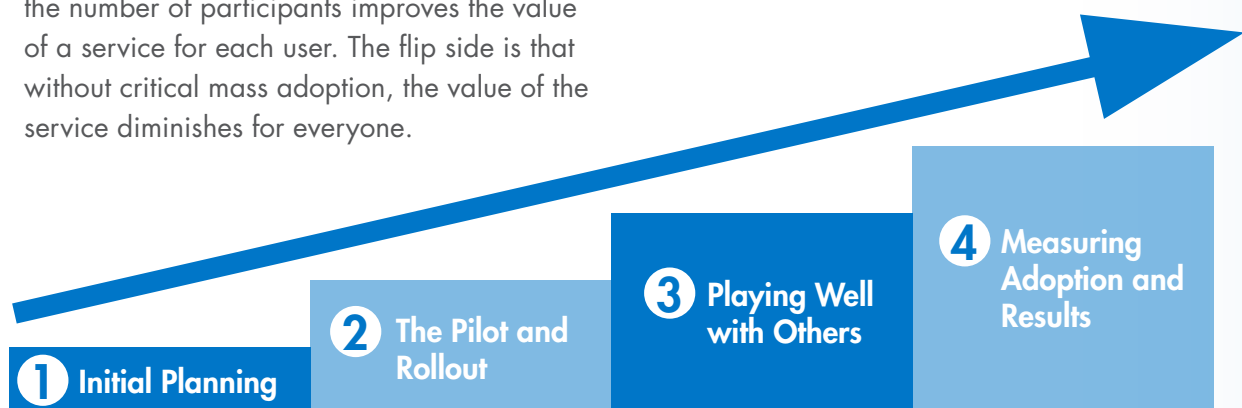
Suddenly, driving end user adoption matters. This means driving users to new tools and new ways of working. Success is rarely intuitive or easy. However, the modern reality is that IT organizations must emphasize and systematically approach adoption in the same way they have systematically approached technical implementations. Add cheerleading to the IT dossier of required skills.

## The Four Steps to Driving Adoption

### 1. Initial Planning



The first step involves understanding and addressing the needs of the users. This is key because even though everyone in the organization uses collaboration technologies, they use



The Four Steps to Driving Adoption

them in different ways. Rather than highlighting the features of the new technology, a successful adoption strategy will focus on helping users understand the benefits. The hard part is that user benefits vary.

New communications capabilities have the most value when they help a department, organization, or enterprise improve its processes and workflows. Various roles have different requirements for intra/inter-office communications, mobile communications, and room system-based communications, as well as different workflows that require integration with specialized applications.

It's good to start by identifying key constituents in different roles across the organization. Translate software capabilities into benefits that are important to them. Certain features or benefits will stand out for groups, and these form the basis for personas.

A persona is a summary of the communications patterns and technology requirements for a group of users that work in similar business processes and have similar technology needs. Personas simplify user requirements analysis for large groups.

It is best to define personas outside of organizational structures. For example, instead of accounting and sales, use corporate office workers, remote workers, and mobile workers. Personalize the benefits of the technology for each persona. This helps answer the question, "What's in it for me?" for large groups of users.

	
<p><b>IT Decision Maker</b></p>	<p><b>Agile Worker</b></p>
<p><b>Pain Points:</b> Disjointed collaboration platform creates management, complexity, upgrade, and security challenges. (IT Director, IT Manager, CIO)</p>	<p><b>Pain Points:</b> Finding the right app to use, inconsistent experiences, file sprawl, version control, scattered ideas and content. (Engineer, Product Manager, Marketer, Designer, Researcher)</p>

Don't forget to include IT needs. Surprisingly, IT is typically overlooked, even though it has requirements just like every other group. Technology considerations should address the project's business

and technical requirements; these include user enablement, service desk procedures, and the management and allocation of licenses. Change-management considerations, on the other hand, should provide business stakeholders with a detailed understanding of the new technology and overall benefits to the business.

It is also a good idea to include human resources and legal in order to better understand policy constraints. Most modern communications and collaboration solutions can make work-from-home possible, but that is not always an option. There may also be a need to address compliance issues or add legal copy to meeting invitations.

## 2. The Pilot and Rollout



Once the initial requirements are done, it is time to test out the fit. This is often best accomplished by launching the service to a small group of test users, or a pilot. These early adopters will help validate assumptions and likely add new requirements. The group should be small enough to manage feedback, but large enough to represent diverse needs from across the organization.

Pilot users will effectively form their own support group, but their experience can set the support expectations for the larger rollout. They should uncover common questions as well as common areas of confusion that need to be proactively addressed.



Some training is inevitable, but users will no longer tolerate longer-form training. Instead, approach training as supplementary education with quick effective hits that address common roadblocks to adoption. This training can be delivered in a variety of ways including self-help short videos, flyers, and short training sessions such as lunch and learns. Consider using the new technology itself as a training medium — but not for initial or getting started tips.

A strong rollout will also require promotion and fanfare. Think of posters, flyers, email campaigns, quick reference guides, and milestone celebrations. Keep in mind that the tool was selected to facilitate a broader transformation that deserves recognition and celebration.

### 3. Playing Well with Others

The days of standalone IT initiatives are over. Any new IT solution has to play well with existing and future solutions. Even when an organization aims to commit to a single vendor, additional components such as devices, applications, and databases are inevitable. Too often, we view integrations as a single yes or no question, but integrations really should be evaluated in terms of degrees of completeness.

For example, most communications and collaboration solutions integrate with Salesforce, Outlook, and SharePoint — but do not assume all integrations are equal. Carefully evaluate the complexity of the integration, the support or permissions required, the completeness of the integration, and if the integration is two-way and/or reversible.

A big factor that will impact adoption is ease of use. Meetings get rescheduled and moved, participants change, priorities change, and in-progress meetings move. The list goes on, but it only takes a few hindrances to disrupt adoption. Something as simple as an application that works differently across devices, rooms, and locations can create significant frustrations that derail adoption.

### 4. Measuring Adoption and Results

Measuring adoption requires a clear and objective definition of success as well as reliable measurement tools and processes. Easier said than done.

Metrics are critical for managing adoption and tracking ROI. Reporting licenses and installations are useful, but the key is to measure engagement. These measures can include total number of minutes in meetings, percentage of video usage, number of meetings held, number of messages shared, room equipment utilization, associated



### RECOMMENDED EVALUATION CHECKLIST

- Enabling communication workstyles: call, message, meet or a combination
- Web conferencing: personal and group systems.
- Familiar user interface and design
- Integrations: Office 365, G-Suite, and other productivity tools
- SSO support
- Centralized management of services, clients, and devices
- Deep diagnostics for rapid troubleshooting
- End-to-end encryption
- Role and group compliance monitoring and enforcement
- 508 compliance for persons with disabilities in the US
- Room utilization metrics
- Cloud transition strategies that minimize disruption and reuse equipment.
- Ad-hoc, self service license management
- Support programs including deployment services
- Vendor adoption toolkits with templates and guidance

network traffic changes, or completely separate markers such as reductions in alternative solutions or behaviors (such as travel).

It is critical to have insight into the system. This is more than visibility, but a user interface that helps administrators understand the large amounts of data available to them. Consider the following examples of useful, actionable metrics.

### Messaging

- Daily Active Users
- Usage trending over time (files posted/messages sent/active spaces)
- Top users

### Meetings

- Snapshots, with increase/decrease over period of time
- Total Meetings
- Total Participants
- Total Meeting Minutes
- Total Meeting Hosts
- Meetings with Video

### Charts illustrating trending over time

- Usage by meetings
- Usage by participants
- Participants by role
- Participants by usage

### Snapshots

- Join Method
- Usage by location
- Usage by activity

### Top 10 tables

- Top Meetings by size

- Top hosts
- Top locations

A methodical approach to end-user adoption begins by defining objectives at the start of the project and developing an analytics strategy that will help the IT organization evaluate its progress toward achieving those objectives. These objectives should clearly express expected changes in user behavior and the impact these behaviors will have on overall productivity and effectiveness. Such an approach will also help IT staff align their efforts toward achieving expected results.

Evaluating the outcome should lead to adjustments and actions that create measurable improvements. This effort, in turn, will require additional steps to understand the effectiveness of the adjustments — initiating a cycle of continuous improvement that will incrementally step toward existing and new objectives.

## Addressing the Needs of IT while delivering great user experiences

IT organizations face several challenges for deploying collaboration technologies. IT is often stuck in the middle between organizational requirements (i.e., legal, supportability, security, compliance) vs. user experience.

But modern collaboration technologies have advanced to a point where the needs of IT and the end user are no longer at odds. Today, collaboration should be considered a business-critical technology. Its criticality becomes evident when services are not available: Suddenly, sales professionals and customer service representatives

are unable to engage with clients, managers cannot meet with team members, and employees cannot interact with each other.

It is crucial that IT have the tools to quickly identify issues and their root cause, in order to provide a service in which their users have confidence. The tools must make it easy for an IT admin to quickly and easily identify when there is an issue and the cause of it. This is not just about providing the data, but in making it so intuitive that issues can be resolved quickly – even within a meeting rather than after it has finished. For IT to really understand usage and to remediate issues quickly, they should be able to get insight into:

### **Participant environment details**

- Client type and version
- OS, Browser & Version
- Client IP & Location
- Hardware make and model (ex: Lenovo Thinkpadp60, Samsung Galaxy S7)
- Microphone
- Speaker
- Camera information

### **Quality metrics over time (updated at least every 1 minute)**

- Resolution
- Bitrate
- Framerate
- Packet loss sending and receiving
- Jitter
- Latency
- CPU utilization for application over time (max and average)
- CPU utilization for System over time (max and average)
- Sharing quality of service over time

### **Meeting join information**

- Join Meeting Time
- Gateway IP
- Server Media Node region
- Connection Type (wifi, ethernet, cellular)
- Network Transport type (UDP/TCP)

### In Meeting Insight

- Host identifier
- Who's sharing in the meeting
- End meeting reason code

Employees expect that collaboration services will be available and secure, but this cannot be assumed. IT will have strong opinions about the administrative and reporting capabilities of key technologies.

## How Cisco Webex Facilitates Team Collaboration Adoption

### Customer Success

Cisco was early to realize that adoption is as important as the technical solution. It created a Customer Success Team that researches, creates, and promotes adoption best practices. This team offers templated plans that its customers can customize to specific projects. Cisco Collaboration specifically addresses what it calls the [five pillars of success](#) (leadership, technology, use cases, communications, champions).

The Customer Success Team focuses on adapting messages to contextualize and personalize the modern collaboration experience. Cisco makes its Customer Success resources available as an [online training](#) portal called the Adoption Masterclass. [Extensive guides and complementary resources](#) support the programs. Customers credit the toolkits and methods as key factors in their successful deployments. The templates have been downloaded in the tens of thousands.

These toolkits are designed to empower organizations to drive awareness and target adoption. There are separate adoption toolkits targeting different users, use cases, industries, and technologies. For example, Cisco Webex Meetings has more than 10 toolkits aimed at different types of users and adoption campaigns. They also have industry-specific guides, like [Webex for Schools](#), [Webex for Higher Education](#), and [essentials for students and faculty staff](#). The toolkits include best practices and a success playbook that contains suggested templates for posters, email, and support guides.

The results are impressive, with up to 50% of a company's users hosting a Webex meeting in the first year. Some cases have reached as high as 85% within 12 months. Targeted adoption campaigns like these increase user adoption and satisfaction, facilitate change, and reduce the likelihood of active and passive application resistance from users.

Cisco offers separate adoption toolkits for different Webex components, including [Webex Meetings](#), [Teams](#), and [Devices](#). To develop these guides, Cisco met with customers to better understand the drivers of change and adoption. Many customers, for example, shared that smaller huddle spaces are replacing traditional conference rooms as a result of an increase in distributed teams.

Adoption is largely related to awareness of benefits and encouragement to try. These guides offer suggestions and tips on how to stay productive in the modern workplace. They are adapted for



different use cases, and include [40+ regular online classes including role-specific training](#) (e.g., scheduling for the executive admin).

Cisco also works to facilitate adoption of specific features and integrations that can optimize the user experience. That is, these training initiatives go beyond how to implement the Cisco solution, to how to make it work with other applications. For example, Cisco Webex has extensive integrations to third-party applications:

- Native integrations to Slack and Microsoft Teams allow users to start or join Webex video meetings directly from these applications.
- Webex Meetings also provides calendar integrations with Outlook, Office 365, and Google Calendar, and with IBM Connections and Microsoft OneDrive for file sharing.
- Webex Teams provides integration with several applications including Asana, Box, Dropbox, Google Drive, GitHub, Jira Server, OneDrive for Business, ServiceNow, Salesforce, SAP Concur, and Trello, just to name a few. It also provides integration via APIs through the Cisco Webex for Developers program.

Cisco also addresses scenarios that don't exactly appear on application menus. For example, proximity detection addresses how room systems identify users via their smartphones. Rather than associate a room system with a scheduled meeting, a room system is associated with specific users, and those users are detected when they are present. It means meetings start quickly, even if there was a last-minute change in the location. Like all new features, Proximity Pairing can be confusing at first — but once users are introduced to it, it becomes a magical experience that drives adoption. Proximity Pairing is now being implemented by other vendors; however, because there will always be a new feature that can throw off a routine, training and awareness must be ongoing.

## CISCO WEBEX COLLABORATION SUITE

Cisco Webex is a cloud-based collaboration suite that provides core collaboration capabilities:

- **Webex Teams** is a cloud-based team collaboration application that features video meetings, messaging, calling, file co-editing, sharing, and whiteboarding. It offers a persistent virtual meeting room for in-office and remote team collaboration.
- **Webex Calling** is a cloud-based phone system that provides business calling capabilities like call pickup, hunt groups, music on hold, call transfers, and voicemail.
- **Webex Meetings** is a cloud-based web and video conferencing service that enables global and virtual teams to collaborate in real time with features such as screen sharing, meeting recording, customizable layouts, and broadcasting. Users can schedule or join Webex meetings from Teams or continue a conversation in Teams after the meeting ends.
- **Webex Devices** include a range of meeting room devices like Webex Room Series, which provides kits of devices including a camera, codec, speakers, and microphones for small and midsize meeting rooms, and the Webex Board, an all-in-one 55-inch, 70-inch, or 85-inch interactive device that offers wireless presentation, audio and video conferencing, and ideation capabilities.

## IT Success

Even the best mechanics don't want to own unreliable cars. Successful deployments of IT projects must benefit users and accommodate IT operational requirements. It's truly amazing what IT will do to maintain poorly designed "mission critical" software — but a patchwork approach is ultimately unsustainable.

On the long list of IT "wants" for a sustainable system, the two that stand out are management and security.

## Management

IT is chartered to keep software running. Doing requires operational visibility, logging, reporting, and diagnostics. In the case of Cisco Webex, management happens through the Control Hub, a web-based management portal that enables IT administrators to provision, administer, and manage the service.

The Webex Control Hub provides granular analytics and diagnostics to help IT administrators understand how Webex services are used across the organization. This data can help measure the effectiveness of adoption campaigns, the return on investment, and usage trends. Administrators can also monitor capacity and performance to optimize resource utilization and diagnose and issues.

Webex analytics provide visibility into personal and shared room meetings that allow administrators to monitor a variety of usage and quality metrics for meetings, messaging, and calling. Device-related reports provide information on which devices are popular. The information can be used to ensure the equipment is appropriately distributed.

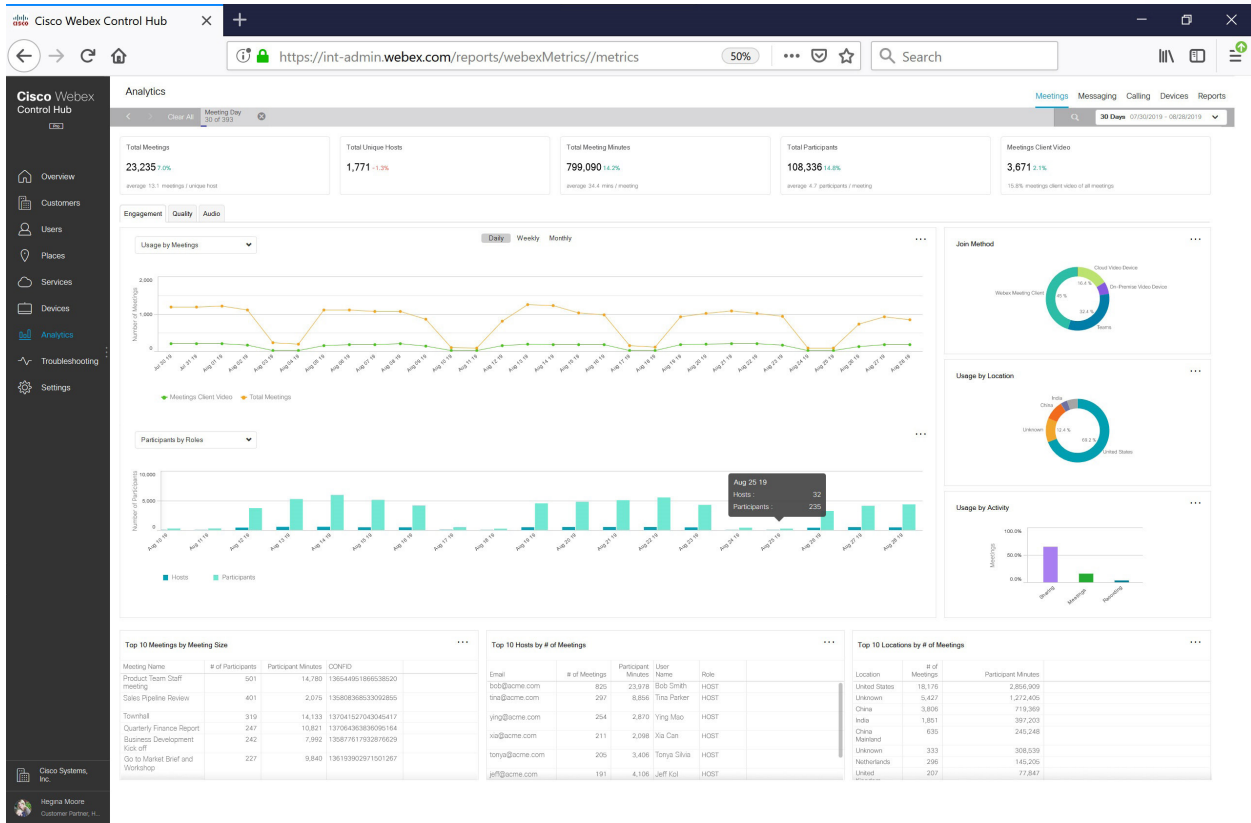
## < Diagnostics

[Meeting Details](#) [Participants](#)

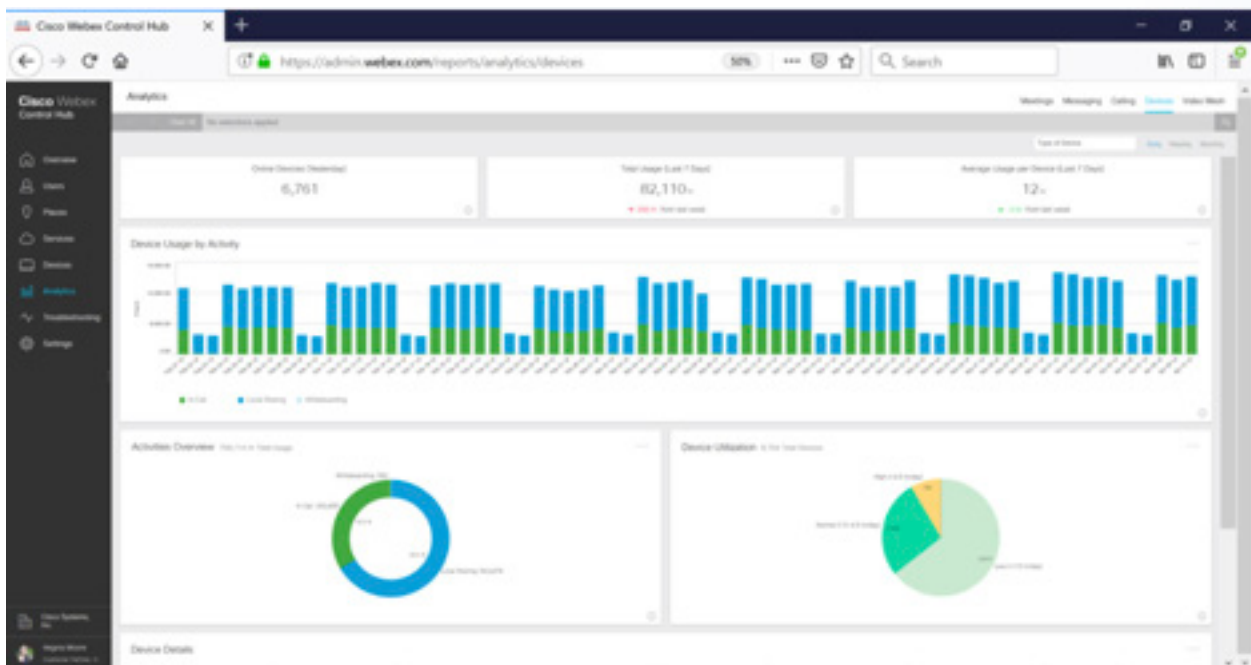
### Weekly Status Meeting

Meeting Number: 625552014    Conference ID: 91995378174561450  
 Start Date: 2017-06-05    Start: 2:01 PM    End: 2:43 PM    Duration: 42 Min    Participants: 10





Cisco Webex Control Hub Diagnostics



Cisco Webex Control Hub Analytics

## Security and Compliance

IT departments are responsible for the security and integrity of organizational data. This is one of several reasons why IT departments are so averse to employees using their own applications. Again, Cisco addresses these requirements with Webex by incorporating strong security features into the product.

Webex services give IT departments control over data in ways that most cloud-delivered services cannot. For example, encryption is not enough. Webex allows IT to ensure organizational meetings stay local and cloud-stored messaging remains fully encrypted. The customer has complete control over its data, and as the provider, Cisco does not (necessarily) even have the ability to access secured data. This is not the case with most alternative messaging systems. These capabilities

are delivered behind the scenes without additional hoops for users to jump through.

The security and compliance capabilities in Webex extend across the entire portfolio. Other relevant security features include SAML 2.0 Single Sign-On (SSO) support, broad support for Cloud Access Security Brokers (CASB), Role Based Access Control, and Admin audit logs, among others. Other relevant compliance features include a wide range of certifications including SOC-1, SOC-2 Type 2, SOC-3, ISO 27001/27017, ISO 9001, and Cloud Computing Compliance Control Catalog (C5). Webex also complies with GDPR and cross-border privacy standards such as EU-US, Swiss-US, and APEC. For healthcare, Webex will participate in HIPAA compliance through a Business Associate Agreement (BAA).

## CUSTOMER SUCCESS IN ACTION

A focus on adoption makes a difference. The results were clear at Transurban and at Oakland Schools. Transurban is an Australian company that builds and operates toll roads in Melbourne, Sydney, and Brisbane, as well as in Greater Washington (US) and Montreal (Canada). It is also a technology company that researches and develops innovative tolling and transport technologies to simplify travel.

Oakland Schools is a regional services agency in Michigan. It provides professional development services to 28 public school districts. It's 600 employees service an overall population of 1.2 million people including students, teachers, staff, and parents.

Both organizations were struggling with too many solutions for collaboration, including Google Hangouts,



Skype, Skype for Business, Slack, and Microsoft Teams. Transurban was using Skype for Business enterprise-wide, but members of its 2,500-employee workforce had brought in the app du jour in order to collaborate internally and with its 10,000 contractors. Oakland Schools realized that standardization was only possible if it could find a single solution that was

## CUSTOMER SUCCESS IN ACTION, CONTINUED.

intuitive, and also able to bring together its internal and external constituencies.

Both organizations selected Cisco Webex. Both turned to Cisco's Ambassador program for guidance to drive adoption. And, both credit the Ambassador programs for the impressive adoption results achieved.

Jen Goeldner, Head of Workspace Technology at Transurban, credits the Webex Meetings Adoption Toolkit for presenting Webex as a complementary tool to the way people work. The suggestions improved the organization's overall understanding and planning.

Following the process, Goeldner leveraged executive sponsorship from stakeholders across the organization including IT, human resources, and various lines of business within Transurban. She created a team of "early adopters" that defined requirements from across the company. This pilot group steadily expanded, and eventually became a community of super-users. This team provided critical experience and feedback. Transurban created a support channel (on Webex Teams) so that questions and answers would create a knowledge base. These Webex channels expanded into more specialized channels for Webex Meetings, Webex Teams, and Webex meeting room devices.

Goeldner also published snappy, short videos to help users with common questions. Transurban also hosted lunch and learn sessions to introduce new features. Metrics confirmed accelerated adoption within Transurban's 2,500-employee organization.

The results in just a few months included:

- 600,000 meeting minutes per month
- 147,177 meeting participants
- 51,847 video meeting minutes per month
- Average meeting time reduced from 60 minutes to 24 minutes

Goeldner stated that a key for the success of the program was focusing on the end user and understanding their requirements. Her team worked to develop persona profiles that captured most of its users, helping them on their journey to improved outcomes. To hear more about Transurban's adoption story, see their [success video](#).

Laura Hamill, Technology Integration Specialist at Oakland Schools worked with her communications department to create a video commercial promoting Webex. She also created and placed flyers in all of the conference rooms that promoted "Work smarter, not harder."

Hamill saw a rapid up take on Webex. Her active user count grew to 187 users in just a few weeks. For comparison, she had 200 unique users on the prior solution that had been in place for seven years.

Following the templates she received from Cisco, she developed informal and frequent training sessions. Keeping these sessions small and frequent allowed users the flexibility of signing up for a time that worked with their schedule. Hamill says that identifying a team lead as a Webex Champion is key, and emphasizes how useful it was to get connected with Cisco's Ambassador Program, as well as with peers in similar roles in other school districts.

*These results validate the importance of a planned and orchestrated adoption program. There will always be resistance to change, but a coordinated plan that addresses barriers and personalizes the value can overcome these barriers. Cisco is one of the few collaboration vendors to provide resources and guides on adoption. Technically, these guides could be used with other tools, but they specifically address and leverage features within Webex.*

## Final Thoughts

### Having a Great Product Is Not Enough

It takes a village to make collaboration tools effective. It also takes effort to energize a village to change its ways and adopt a new tool. There's always resistance to change, so it's becoming increasingly important for IT departments to champion adoption alongside deployment and operations.

Fortunately, some providers understand this and are creating, publishing, and promoting proven practices that drive adoption. Enterprises are advised to carefully evaluate these programs to realize the full potential of their software and services investments. The nice benefit of collaboration software is that the application itself can be part of the adoption solution.

Today, IT must view its role in a new light. Its role in the organization is evolving from being a provider of technology to becoming a partner for business leaders and end users, with a shared responsibility for helping them achieve their goals.

Webex Control Hub is the single interface for Administrators to manage and realize the value of all that Webex has to offer. In Webex Control Hub, you can

- Manage user accounts.
- Control access and authorization.
- Assign Webex services and licenses.
- Setup Webex Devices.
- View usage analytics.
- Gain insights into user adoption.
- Configure organization-wide settings.
- Troubleshoot possible issues.



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