

Take a **Personalized Approach** to The Human Side of Technology Change

Benefits of having a disciplined programmatic approach to change management ...

- ✓ **6X** more likely to meet or exceed project objectives
- ✓ **29%** more likely to be on or below budget
- ✓ **55%** more likely to be on or ahead of schedule


EXPLORE



Bridge the Gap

There are new ways of working, new and changing types of workers and greater expectations around experiences in the workplace. The world has gone digital and workers expect organizations to keep pace. Most workers are accustomed to powerful tools, data and applications on their personal devices and expect the same or better in their work experiences.

Today organizations have more generations in the workforce than ever before – Baby Boomers, Gen X, Millennials and Gen Z. The newest generation, Gen Z (read [Gen Z – The Future Has Arrived](#) to learn more about these new workers), grew up in the digital age. 80% of Gen Z workers indicate cutting-edge technology is a factor in where they work. With so many generations in the workforce, technology adoption is bound to differ among workers. In a study [Realizing 2030 – A Divided Vision for the Future](#),

61% of the leaders surveyed indicated they're struggling with a skills gap, lack of worker buy-in and a workforce culture that's resistant to change.

Gartner has identified a [digital dexterity](#) gap with the pace of technology change and the potential lack of ambition and/or ability of workers to take advantage of these new capabilities. We recommend IT take the lead to close this digital dexterity gap in coordination with human resources, facilities, internal communications and other teams. Success starts with understanding the workforce and managing the human side of change. The goal is to provide technology solutions that enhance the way people want to work and help them be more productive. Getting workers to embrace change and adopt a new way of working is best accomplished with a structured approach to managing change and driving adoption.



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Understand your Workforce



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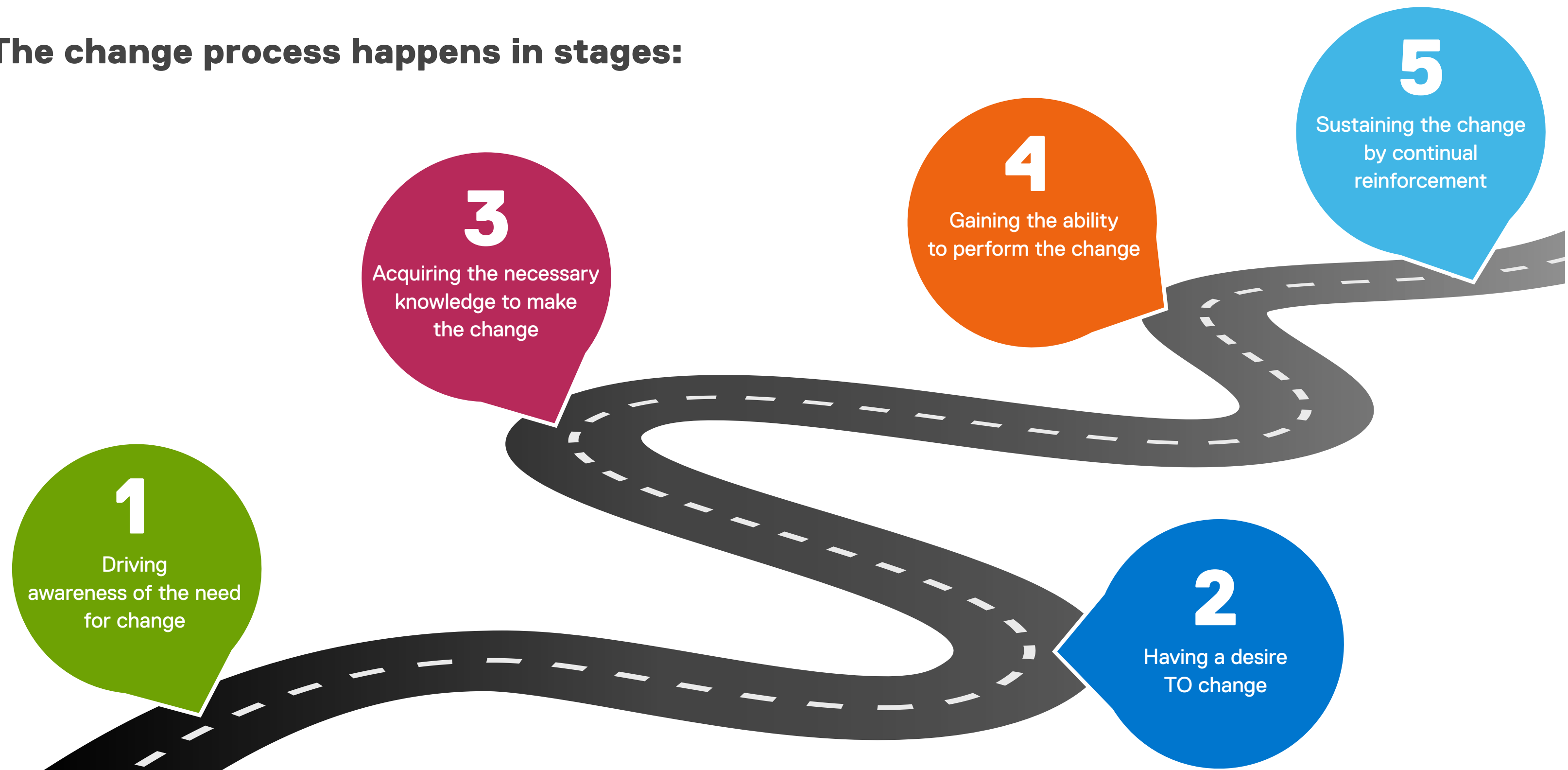
In the digital workplace, personas and worker profile data are the foundation for understanding your workforce. Once you do, you can create personalized experiences with the right content, apps, data and devices for anywhere, anytime access. More broadly it's about IT adopting a worker-centric mindset and aligning IT services, support and solutions with the needs of the business. With this understanding, your organization is better armed to address the human side of change and more easily gain "buy-in" of IT services. This particularly impacts the speed of adoption of new technology with a clear understanding of 'what's in it for them'. Learn more about our perspective on personas [here](#).

Focus on Adoption and Change Management for Long-Term Rewards

Moving to a new way of doing business is a cultural change for the organization. Change is adopted by individuals and adoption of change is a personal experience. Take a disciplined, persona-centric approach to organizational change to close the digital dexterity gap and enhance the speed, adoption and sustainability of workforce transformation. Focus on human motivational, capacity, context and performance factors at both the individual, team and organizational level.

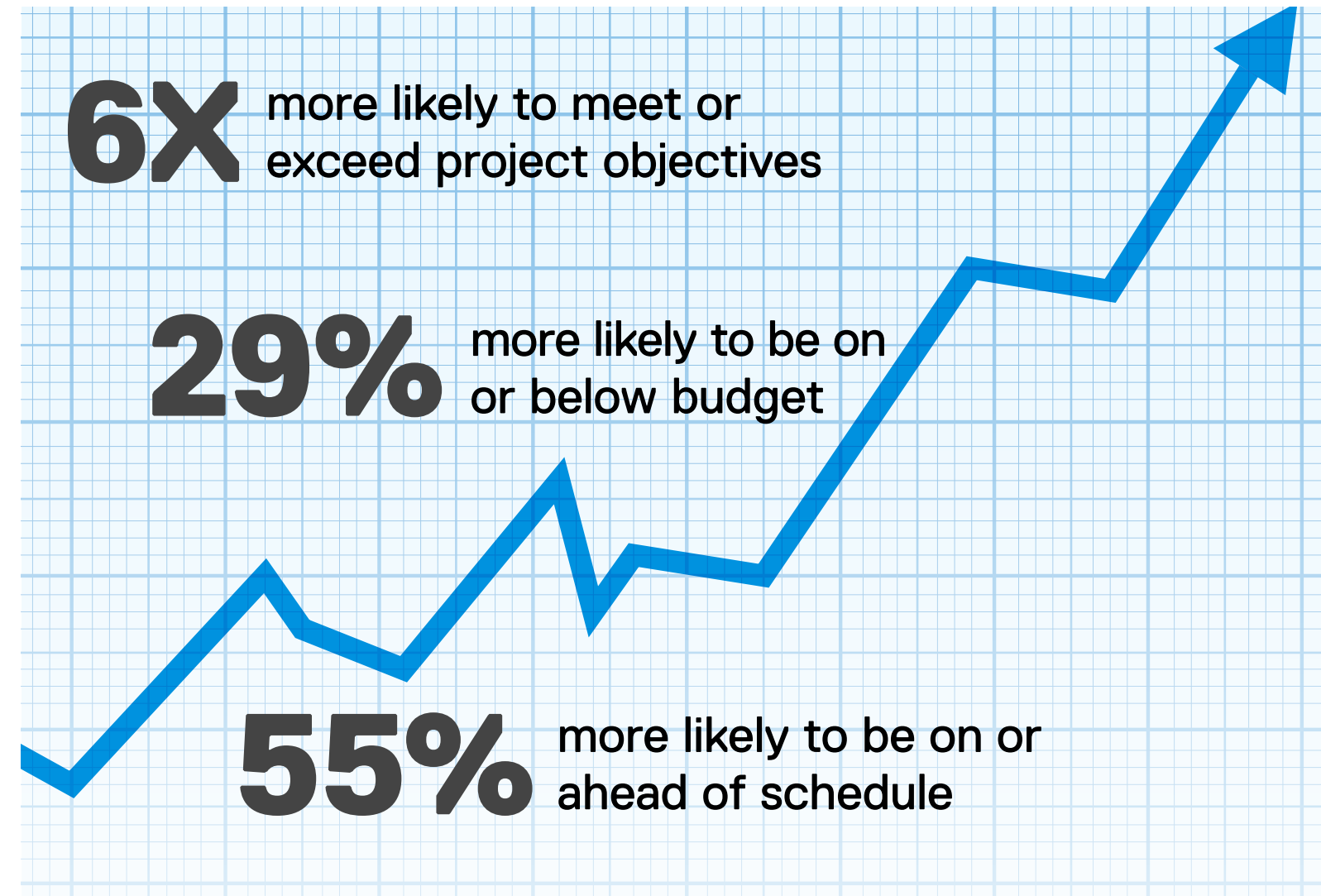
Too often organizations invest in technology platforms only to discover low usage by their workforce. Traditional methods – performing training and email-centric announcements - are not enough to enhance the likelihood of success and “business value realization”. Successful adoption strategies focus on a proactive approach to help the workforce transition from the old way of getting work done, to the new way, with lots of examples and champions to lean on.

The change process happens in stages:



Take a Proactive Approach to Drive Adoption and Manage Change

The benefits of having a disciplined programmatic approach to change management is clear and tangible. [Based on Prosci 2018 Benchmarking Data](#), initiatives with excellent change management programs were:

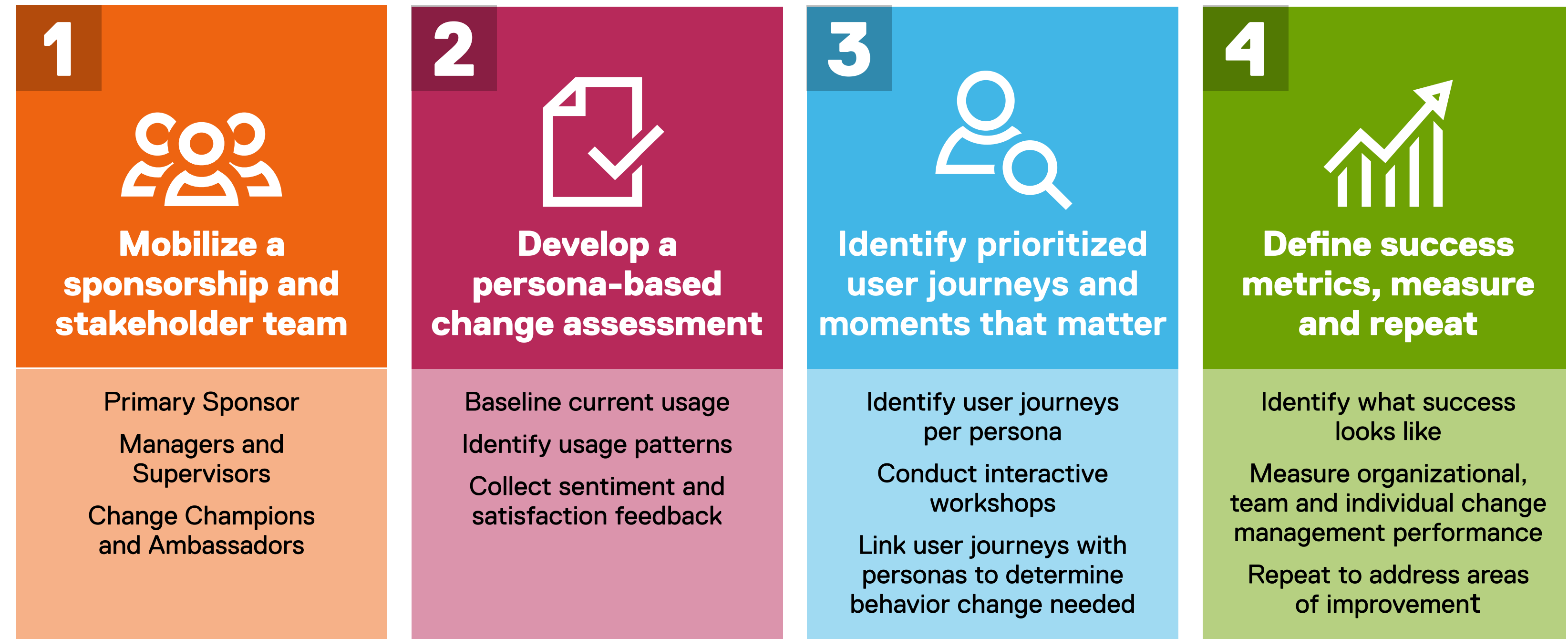


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The steps to taking a persona-centric approach to change management should be:

- 1. Mobilize** a sponsorship and stakeholder team
- 2. Develop** a persona-based change assessment
- 3. Identify** prioritized user journeys and moments that matter
- 4. Define** success metrics, measure and repeat

Framework for a persona-centric approach to change management



Take a Proactive Approach to Drive Adoption and Manage Change



Mobilize a sponsorship and stakeholder team

Executive sponsorship (more impactful the higher in the management chain) and key stakeholders are essential to actively participate in your formal Adoption and Change Management (ACM) Program. Clearly communicate expected time commitments and responsibilities for each group and ensure you have their buy-in. Typically, we recommend organizations have at least three groups in the sponsorship coalition team:

ENDORSE

Primary Sponsor is an executive sponsor who communicates the vision for the future way of working to the workforce. They set the tone and are the driving influence over the rest of stakeholder team.

DRIVE CHANGE

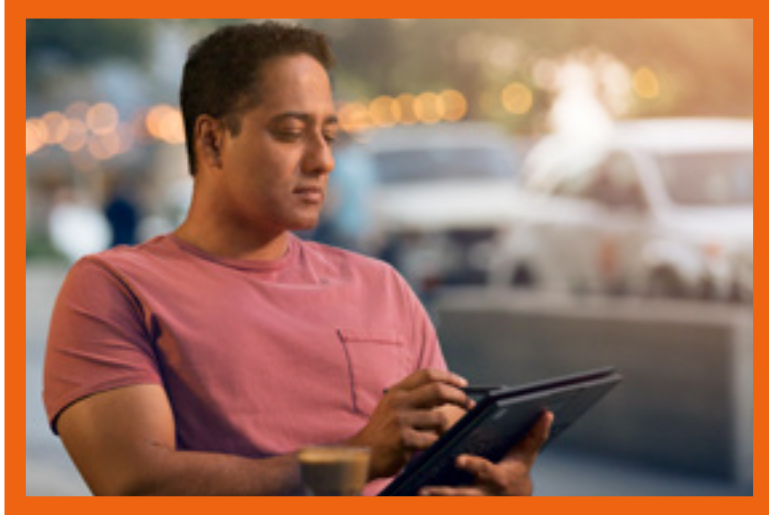
Managers and Supervisors are the first level management team who will drive change within the workforce and actively participate in all ACM program activities. It's best when these are representatives from the business units impacted.

EVANGELIZE

Change Champions and Ambassadors are the key worker peers that function as evangelists and “go to” resources during the change.



Take a Proactive Approach to Drive Adoption and Manage Change



Develop a persona-based change assessment

Knowing how workers are currently doing their jobs provides a baseline for measurement and can also be used to assess adoption of new services.

In order to properly research and define the right personas for your organization, we recommend using a variety of tools and techniques that can provide data driven evidence for workers' usage patterns and behaviors. For example, tools that collect data on each workers' computing device will illuminate work styles and allow you to conduct quick polls/surveys with workers directly to collect sentiment and satisfaction feedback. In the IT service management space, we recommend leveraging modules/features within platforms like ServiceNow to mine ticket, catalog and CMDB data to find opportunities for reducing frequency of common worker issues. In the collaboration and productivity space, many of the legacy tools and platforms do not provide adequate usage data and therefore more manual approaches may be necessary. However, once your workforce has started to move to Office 365 we recommend leveraging workforce and worker analytics data to understand how individuals and teams are working and measure adoption of specific of technology – for example how often do workers send attachments in email vs. using modern filesharing solutions such as OneDrive or Teams.

In addition to data collection, we suggest performing deskside observations and conducting worker interviews to help you gain an understanding of how to segment workers into persona groups. Ultimately the goal here is to understand current worker pain points and usage patterns so that you can group them into personas and begin to identify specific user journeys that you want to target for improvement with your ACM program.

This initial persona data is important to have as a baseline to measure and track against. It will be used to determine whether workers are adopting the new solutions and will help define some of the success criteria for the change initiative. Tracking this data by persona, provides you with the insights to address resistance, perform reinforcement and drive corrective actions by persona grouping.



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Identify prioritized user journeys

Every worker has key moments that matter to them which are the emotional difference between feeling positive and productive vs. feeling there are too many barriers hampering their productivity. Ideally the objective is to map a prioritized set of user journeys to these moments that matter and identify how your technology initiative will improve the workers' experience. This reveals where and how you should target your ACM program to maximize adoption.

How do you go about identifying the right moments that matter? We recommend a combination of observational interviews to discover candidate moments and then use the workshop format with multiple representatives from a specific persona to prioritize where to focus. Questions to pose will depend on the type of change. For Office 365 projects, for example, here are some key topics to consider:

- What are some key challenges in communication and collaboration with virtual teams?
- What is the current process to conduct meetings? How will this be improved with a more modern platform?
- What are some of the challenges when running projects today?
- How is document collaboration done today? What are the challenges?

Based on the answers derived from these workshops, the moments that matter and corresponding user journeys will be linked with each persona to determine the behavior changes needed along with the necessary skills and knowledge, enabling processes and technologies, and measurements for determining if the change was successful. These become the underlying components for crafting effective ACM program plans.

There will likely be user journeys that overlap persona groups, however the approach you take to drive the desired behaviors may be different for each. For example, in the case of trying to reduce email attachments and increase the use of modern file sharing tools, you would use a different approach with a road warrior (i.e. target the use of the OneDrive mobile app) vs. a desk-centric persona (i.e. target the use of the desktop version of OneDrive).



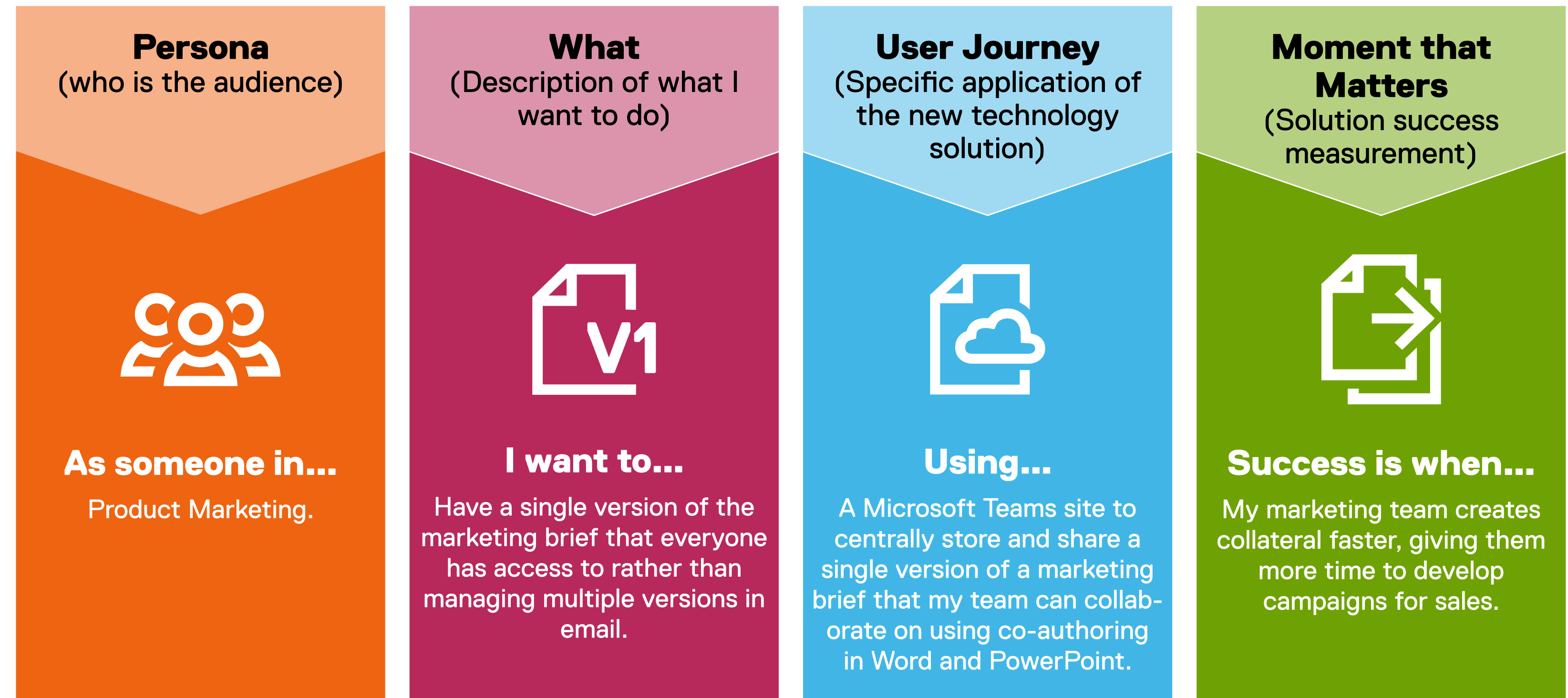
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Not sure where to begin?

To help identify moments that matter and user journeys, consider using this example framework for mapping a persona and user journey to a moment that matters:



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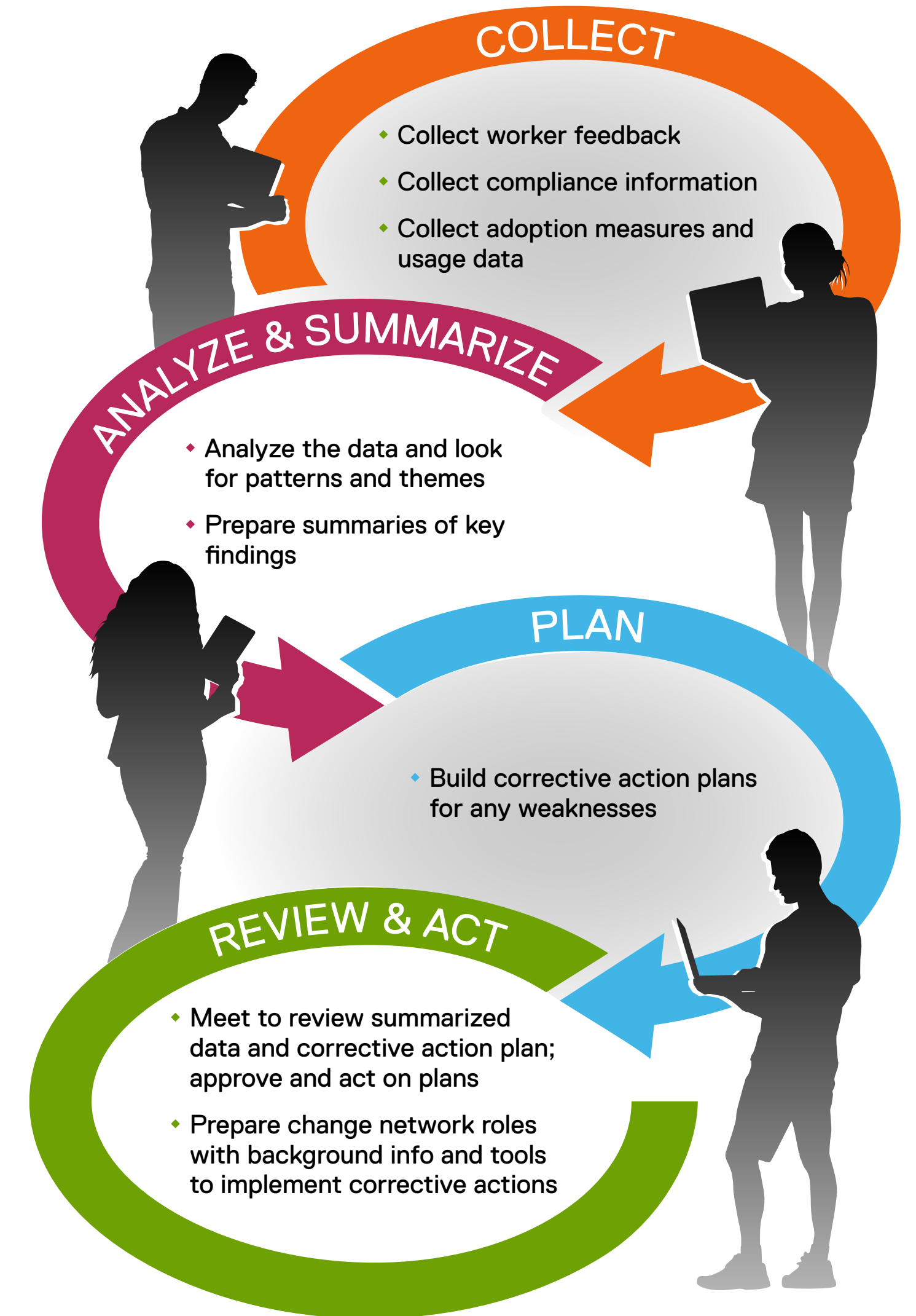
Define Success Metrics, Measure and Repeat

During initial stakeholder meetings, gain their agreement on clear objectives and criteria for achieving success. It should be tangible, measurable criteria that can be used during the execution to both chart progress and ascertain the degree of success of your ACM program. Measuring this people side of change is critical to any change initiative. [Forty percent of Prosci research participants](#) say they must report on change management effectiveness for their projects.

Measurement should include four categories:

1. Organizational performance
2. Team performance
3. Individual performance
4. Change management performance

Create a dashboard that tracks adoption and measures usage over time to ensure the trajectory of change is achieving the desired results. Ensure you have an ongoing process for collecting feedback and analyzing results. It is important to iterate quickly so that the collection, analysis, and corrective action happen while the execution of the change is underway. Monitoring and reporting on usage helps demonstrate overall adoption levels and areas where improvement is required.



The change feedback cycle

Execute the ACM Program



Once a strategy and roadmap has been developed, workforce personas have been defined, moments that matter and the user journeys captured, an ACM program can be crafted utilizing a formal adoption and change management framework.

Workers typically navigate five key milestones in the journey to realize successful change – awareness, desire, knowledge, ability, and reinforcement. The outcomes are sequential but build upon each other.



Execute the ACM Program

Persona-Centric

Based on your defined personas and the worker change journey, a plan centered around each one of the focus areas listed to the right should be developed.

When crafting a formal ACM program, plans should convey the value of adopting the new way of working. Gone are the days when a series of emails and webinars will suffice for communicating and engaging the workforce. It's essential to create buzz and excitement. Workers are bombarded with communications all the time which is why it's important to explore creative ways to communicate, amp up the buzz and generate excitement for what's to come (videos, posters, genius bars, etc.). Engage workers with a continuous trickle of promotional campaigns to generate interest and excitement. The sooner workers adopt the new way of working, the faster the organization will realize the value of the technology investment.



Communication Plan includes clear communications time sequenced for specific groups targeted at the behavior changes required to move the audience forward.

Sponsorship Plan defines key activities and responsibilities for the sponsor coalition championing change.

Coaching Plan describes how the management team will be supported and how they will engage workers.

Training Plan includes the training of specific skills and behaviors necessary for success.

Resistance Management Plan provides the processes and tools to manage worker resistance.

Adoption Measurement Plan serves two purposes – to create a scorecard that tracks adoption and usage, and to design and run a process for collecting feedback, auditing compliance and analyzing results.

Change Network Plan defines what is needed broadly from a network of change agents.

Rewards and Recognition Plan provides a formal approach to celebrate success and reinforce change.

The objective of these plans is to move workers successfully through the change journey as depicted in the graphic below.

AWARENESS	DESIRE	KNOWLEDGE	ABILITY	REINFORCEMENT
Communication Plan				Communication Plan
Sponsorship and Change Network Plans				Sponsorship and Change Network Plans
Coaching Plan				
		Training Plan		
	Resistance Mgmt Plan			
		Adoption Measurement Plan		
				Rewards and Recognition Plan

Mapping ACM plans to the worker change journey

Drive Adoption and Change From the Workers' Point of View

Changes to workforce technology is ultimately a personal experience for workers. From their point of view, they want to understand what's in it for them, why they should care and how easy is it to change. A comprehensive, persona-driven approach to driving adoption allows awareness, communications, education, governance and job aids to be more targeted, tailored and effective. Develop an in-depth understanding of workforce personas current state of working and how they will get work done in the desired future state. With this awareness, organizations can design a targeted ACM program to move workers through the cycle of change and gain their buy-in to embrace new services with enthusiasm. Overall this persona-driven model for adoption and change management will better position organizations to maximize their technology investments and reap the rewards and benefits of a more productive workforce.

