

Tyler Carmody:

Hello, and welcome back to another episode of UCX USA Talks. As always, I'm your host, Tyler Carmody, and today I'm joined by Melissa Swartz, founder of Swartz Consulting. For over 35 years, she has been training enterprise clients to help find the perfect communication solutions for their businesses. And today, she's going to talk to us about real world lessons in user adoption. With that, let's get started with a perfect kickoff question, why is it important to focus on user adoption?

Melissa Swartz:

Great question. It's important, because in the end, people deploy technology in order to make their users more something, more productive, typically. And if the technology isn't adopted by the users, then the money that's spent on the technology isn't fully ... it's not the best use of the money. So looking at the people side of things is important because it goes beyond the technology. The users have to use the technology to make the investment pay off.

McKinsey did a study, and they found that organizations with effective change management actually realized 143% of the expected ROI that they have for the projects, whereas organizations that had little to no change management only realized about 35% of their expected ROI. So that, I think, really frames it as to why you want to do this. If you're going to spend money on the technology, then people need to use it for you to really realize your investment. So it ties the technology to the people, I think is the best way to say that.

Tyler Carmody:

Something you were saying before we got started is that user adoption is so important because it really does focus on the people. It's about the technology, but it is really about the people. So our next question is, how is this process different from training users on the new technology?

Melissa Swartz:

So it goes beyond training. Training's a subset of the adoption and change management process. So from a user perspective, the saying is that people hate change. And I don't know that people hate some. We're changing all the time. But people definitely hate change that is forced on them and that they don't understand. And so part of what an end user adoption and change management process does is it takes time to understand the user and how they use technology today before you deploy the new tool, and then looks at how their lives are going to change. And so what does this new tool actually do? How does it impact the users on a daily basis? And what incentive is there for them to actually change over and use the new technology?

So it goes way beyond training. It goes more into the why, and communicating that why to the users in a way that makes them go, "Oh, okay, I'm willing to invest the time, the mental effort to make the change, because I see there's benefit for me." So it is about training. I mean, certainly training is a component of it. But it's also about understanding the users, communicating with the users, and making them understand what's in it for them. And then follow up and making sure that you're listening to your users as they tell you things, that you incorporate that information in and basically make a loop where you're continually improving the process.

Tyler Carmody:

Well, it doesn't take 35 years of experience to know that the why is just as important as the how.

Melissa Swartz:

Absolutely.

Tyler Carmody:

Someone with no experience with user adoption, it definitely rings true. So with that, can you give us an overview of the process? What does it look like?

Melissa Swartz:

Sure. So there are different models. I like one that's a four-phase model. And it really should start when you're in the beginning of your discovery for the new technology tool itself. So hand-in-hand with the technology side of it, like, what do we need, what are the options, part of the process should also be ... So the end user adoption process starts with that discovery phase. And so part of that discovery is how are people using the current tool, and then understanding how their job will change with the new tool. What does it do? How does it impact their daily work?

And typically, you'll find that within any organization, there are different types of users. I mean, I don't know, you may have people who are out of the office all the time. You may have people who are strictly in the field. If you're in retail, you have people who are on the floor of the store. Then you'll have office workers, and you may have road warriors. I mean, you've got all these different types of workers. And so it's not a matter of just looking at it and saying, "Okay, how does this tool we're bringing in ... Today, we don't have it, and we're going to bring in," I don't know, "instant messaging and chat." Just a really basic example. How does that change? It changes every one of those different types of users.

So the impact for somebody who is, I don't know, on the sales floor and whose job is to really maybe stock merchandise and help customers is going to be very different from someone who is communicating all the time with internal users. So there may be a big change for the internal users who can now communicate with chat, versus the sales floor people who are not communicating internally nearly as much. So part of the discovery is just finding those user profiles. And so discovering that, discovering how they work, and then what do they need, what gaps do they have ... Is there something that if they had this one thing, their work life would be so much easier, there's just this really quick way to make them so much more productive? So all of that is really ... it's technology, but it's technology from the people perspective as opposed to technology from the features, how do you implement or administer this new solution?

Tyler Carmody:

Absolutely.

Melissa Swartz:

So that's discovery. And then the next phase is the planning phase. And so the planning phase is where you take that information that you've got in discovery and you look at it and you say, "Okay, we're going to divide our users into these profiles," or personas or whatever you want to call them, user types. There's a bunch of different words. But you've got these different types of users. So for each type of user, the "What's in it for me," WIIFM is an acronym, WIIFM. But you have to look at each type of user and say, "Okay, what is their incentive? What do they get out of this change? How do you make that something that's valuable to them?" So you want to identify that.

And then as part of that planning, you want to plan your communication strategy. And it may be, and it often is a little bit different. You may be able to combine some user profiles and say, "Okay, for these

three profiles, we're going to communicate with them the same way, because essentially they get the same benefit out of it." But you need to look at your communications and say, "Do I need different communications for different user groups?" And then plan, because you need to think about that communication sequence, and what does that look like? You've got the whole, the new thing is coming, and then the new thing is coming soon, and then here's what you need to do, and then it's tomorrow. And then day one, what do you need to do? And then you've got your follow-up. So you've got to a communication sequence that needs to be created. You need to figure out who's going to send it out, all of that.

And then you've got your training. And training typically anymore is way beyond just the training class itself. There needs to be resources that people can go to later, and that newly onboarded team members have access to as well. So is it video? Are there little short videos on how to do this one thing, that people can absorb in bite-sized chunks? Do they need user guides? I mean, you've got some people that will dive into that technology and want to know all the details. Most of the people are like, "Give me one page. I don't want to know all that." But there's going to be people that'll dive deep. So you've got to meet the needs of all of those different people. So creating training resources is a big step.

And then in the planning stage, I think is where you create your surveys that you want to give to your users at the end to say, "Did we do what we wanted to do?" And those surveys need to let you measure your success. So you're figuring out what your success criteria is and framing the question so that when you're in the midst of the battle, you have it ready to go. So following planning, of course, is execution. And that's when all that stuff gets actually done. So now you've planned this communication sequence. Somebody's got to write the emails, if you're communicating via email, or whatever you're doing. So it's getting those training classes created, the communication sequence created, actually creating the surveys. And again, with all of that messaging that's targeted to specific groups of users and what's important to them.

So in our industry, there's a lot of phased rollouts. So you may rinse and repeat and learn as you go. So as you do a phase, survey the users, find out what went well, find out what could have been better, tweak your process. And then just keep going and keep improving. And stay in touch with those users and actually listening to them and making them feel like their feedback has value. You're not just tossing it, and, "Thank you very much. We're done." So that's an overview of the process.

Tyler Carmody:

Well, honestly, if you ask me, the real unsung here of the workplace are the ones that really do this, that really make sure that everyone who works with them knows exactly how the technology works and can always be there for questions, anything like that.

Melissa Swartz:

Yeah, absolutely.

Tyler Carmody:

So we have two questions left. Our next question is, how does this approach that you just spoke about benefit a project? And can you provide any examples?

Melissa Swartz:

I can. The first example I will give you is from a project that I worked on. It was a few years ago. And it was actually a contact center project. And the organization had multiple different smaller contact

centers. So all of these groups were changing over from the same technology to the same technology. And so the difference really was in how the management of those groups approached it. So we had created this whole process that included training, communication, all of that. And most of the groups took full advantage of that. And they were very, very involved and communicated with their users, let them know what to expect.

There was a group that did not. I don't know what the resistance was, but they just didn't fully buy in. So they didn't invest in the time that it took to train their users. The communication with them was poor. And so statistically what happened is those users were ... I don't know, maybe they were a small percentage of the entire user group. But they accounted for 50% of the help desk tickets. And they were mad. They were angry. They were vocal. They were just like, "Why are you doing this to me?"

Tyler Carmody:

You're the grim reaper, yeah.

Melissa Swartz:

Yeah. Yeah, exactly. And most of their questions were things that were covered in training. If they had gone to training, they would've known this. But their management didn't tell them they needed to go, and so they didn't. And they were just in an uproar. And it made everybody's lives difficult. It made the help desk's lives ... Certainly, their lives were difficult, but even the support team wasn't able to concentrate on maybe higher level support tickets because they were dealing with these basic questions, like, "How do I log on?" So that was a real eye-opening environment, just because it was so apples to apples with everything. You could really see the big difference was the investment in the adoption process.

I worked on another project. It was a state government that was moving 10,000 users to Microsoft Teams. And the vendor that was supporting that had an amazing adoption and change management team. And there ended up ... I think they were up to about five people who were part of that team. And they handled almost everything for the end users. They created all of the training materials, they created all the communication materials. They did the surveys, they followed up. I mean, it was just amazing to see it done at that level, and the investment that both the client and the vendor made in the adoption and change management. It was significant.

And of course, there were issues with the project. I mean, there always are. But having that team in place when there were issues ... Well, one of the things that happened was there was a major user interface change at one point. And so there were people who had been trained, and now things had changed. And then there were people who needed to be trained, and things had changed. And so this team, from the technical team's perspective, there wasn't a big deal. They're still deploying users. The actual get somebody up and working on Teams part of it didn't really change. But the adoption and change management team had a big event there. They had to go back and communicate with all the users who had been trained the old way and say, "Okay, this has changed. This is what it is." They had to create new training materials. They had to change their training to accommodate the new stuff. So I mean, there was a lot going on with that that had nothing to do with the technical side of the deployment. So had that team not been in place, it would've been much rougher.

Tyler Carmody:

For sure. So if me, the illustrious conference operations manager for UCX USA, which is coming to Austin this September, if I wanted to include this process in a project, where would I start?

Melissa Swartz:

I think it's kind of like AA. You recognize you have a problem. So starting with, "Yes, we need this process," is first step. But I think that the next thing is, how do you go about it, if you decided you want to commit to this and this is what you want to do, is make that part of your project? I think the first question you've got to ask yourself is, "Where are the resources? Can I do it with internal resources or do I need to bring in external resources?" So maybe you have people on your team that have the time and have the skills and they can do it. And if not, then you need to look outside. And so including it in the scope of work with your technology provider is really important to figuring out what they can do. What do you want to do internally, what do you want to push to them? And then making sure that that's something that they're not pushing to do, that they're comfortable with handling that part of it.

I know a lot of the vendors do have programs for this. And so depending on who you're working with, it might be something that's really easy for them to do and offload from you. So just evaluating that and figuring out who's going to do it is, I think, the big thing. I was working on a project not too long ago. And I was working with the IT guys. And it was about four phases. It wasn't huge, but the IT guys were like, "Eh, we don't need ... We'll just put them on the new stuff."

Tyler Carmody:

That sounds like an IT guy.

Melissa Swartz:

And one of the higher level VPs came in ... Yeah. A higher level guy came in was like, "No. We do need to actually tell them and frame them," and all of that. And interestingly, in that organization, I said, "Okay, that's great. We can do this. Who do we get?" And they were like, "Well, we don't have anybody." And they ended up bringing in somebody from HR, who actually did the communication and was sort of the voice of the project. But I ended up having to write a lot of the stuff, because nobody on that team was really able to do that. So the vendor did the training. I did a lot of the communication sequence. So I mean, you just need to find those people and put that team together and figure out who's going to do what. So that's how you do it.

Tyler Carmody:

Yeah, yeah. Well, I'm sure that me, everyone watching, and my cat, who's now screaming outside my door, are ready to deploy Microsoft Teams to a business of 50,000 people. And it's all because of you.

Melissa Swartz:

Right, no problem.

Tyler Carmody:

So thank you so much for your time. I wanted to take some opportunity to see if you have any final takeaways for our audience.

Melissa Swartz:

I think the final takeaway is just that this is important, that it's two sides of the coin. The technology's one side and the people are the other side. And if you ignore one or the other, then your project just is not as likely to succeed.

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Tyler Carmody:

Absolutely. Well, Melissa, thank you again for your time today. And thank you all for watching. I hope everyone enjoyed this session as much as I have. And if you're interested in keeping up with all the happenings in the unified communications space, please visit [ucxusa.com](http://ucxusa.com), and be sure to follow us on social media [@UCXUSA](#) and at [@ucxusaexpo](#), and we'll see you next time.