Editorial

In recent months I have been traveling the world presenting the *User Adoption Strategies* public seminar in various cities (as well as the public seminars that align with my other books). The public seminar has been presented in Gouda (Netherlands), Brisbane, Sydney, and Melbourne (Australia), and Copenhagen (Denmark). It has been a rewarding season of presenting, facilitating, sharing, listening, and encouraging.

There have been a couple of themes on my mind throughout my travels. The first is that the demand for great ideas about improving user adoption remains high. People are hungry for a new way to approach the introduction of new collaboration tools and technologies at work, regardless of the specific products they are using. People at organizations using SharePoint 2010 or 2013 are just as interested as those at organizations using IBM Connections or Jive. The issues and challenges faced across the spectrum of products are the same, and it is always a delight as the seminar facilitator to see those similarities rise to the surface. When seminar delegates realize they are not alone, tremendous opportunities for collaboration and shared learning are opened up.

The second theme on my mind has been the need to create a better way of sharing updates more regularly on the user adoption challenge. Through my ongoing research, consulting, seminar facilitation and other activities in the user adoption space, I get to hear great ideas from other people, deepen my analysis of particular topics, and formulate new answers to the questions that people have about adoption. Hence the genesis of the idea for this expanded newsletter. I have previously written a shorter newsletter, but I don't think that is good enough anymore. What you will find in this newsletter—and the editions that follow—is a couple of articles about adoption topics, a case study of how an organization is approaching adoption, and a Q&A. I have included opportunities for you to engage with me on your work. My intent is to write one of these newsletters every three or four months.

Let's get to work. There is much to be done.

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Thinking About Internal and External Trainers

A commonly used strategy to support user adoption is classroom training. Classroom training can be designed in a variety of ways by emphasizing different design factors. One such design factors is the choice of whether to use internal trainers or external trainers. There is a short analysis of this design factor in my book, *User Adoption Strategies (2nd Edition)*, which says (page 144):

> *For organizations with their own training group, an internal trainer will front up on training day and deliver the training material. Internal trainers may already know some of the people they are training, so their ability to engage and personalize the material is much greater. External trainers can be hired when internal trainers are not available, or when the material requires a depth and breadth of expertise that calls for someone special. Remember, however, that internal trainers have a different outcome in mind than external trainers. For internal trainers—at least the good ones—the outcome is greater understanding and competence for the employees at the organization. For external trainers, the outcome is to deliver the class and get paid well.*

There are some very hard lines drawn in that paragraph, and while it works at the level of broad strokes, there are some nuances that should be explored. In recent months I have had the opportunity to talk this issue over with numerous delegates at the User Adoption Strategies public seminars I have presented around the world. Here are some of the ideas we discussed.

Defining the Ideal
The ideal person (or persons) to run a classroom training session needs at least four characteristics:

1. The skill of facilitating learning, rather than just reading out the slides.
2. The ability to build relationship and rapport with those attending the classroom training session.
3. Knowledge about how the organization works internally in order to make the classroom training session relevant to the work the attendees actually do each day.
4. Knowledge of other or similar organizations, and how they are effectively using new collaboration tools and approaches in their work.

In broad terms, internal trainers are likely to get a pass on the middle two characteristics, but struggle with the outer two. On the other hand, external trainers are likely to get a pass on the outer two characteristics, but struggle with the middle two. What can you do to mitigate this?

Strategy 1. Up-skill Internal Trainers
One strategy to mitigate the lack of capabilities by internal trainers, in addition to choosing them carefully in the first place, is to take a deliberate approach to increasing their capabilities. For example, I heard of an organization that leverages a local community college to provide training to internal trainers, to up-skill them in the processes of teaching, learning, and assessment (which the community college offers as a standard qualification or certificate). The organization paid for their internal people to take the core content required to effectively run a classroom session internally, and for those staff that wanted to take their learning further, there was a way of doing this. It was a win for the organization (who gained better skilled internal trainers), it was a win for the employee (who achieved increased competence in running a training session), and it was a win for the attendees at a classroom training session (who received better quality training).

> Choose internal trainers carefully, but more than that, take a deliberate approach to increasing their capabilities.

With respect to characteristic four, one strategy is to encourage (and fund) internal trainers to attend relevant conferences in the areas in which they are providing training. This helps with gaining a wider perspective. For example, if your organization is using Microsoft SharePoint, send your internal trainers to some of the more business-focused SharePoint conferences where various case studies

are presented about how organizations are making use of SharePoint. By listening carefully, taking notes, and asking good questions, they will be able to deepen their knowledge of the wider picture. The same principle applies for organizations using different collaboration tools and technologies.

Strategy 2. Up-skill External Trainers
For external trainers, there should not be a need to increase their competence in how to teach, train, and facilitate learning. If they can't do that as an external party, find someone else who can. The big need for external trainers is context—what's going on inside the organization, and how they can make the training relevant to that. I believe that this is ultimately about briefings, discovery, and small initial explorations. The brief for the external training providers should be clear about what's happening inside so they can make the training fit-for-purpose and relevant. The selected external trainers should be given some time to engage with people to learn more about what the words in the brief actually mean—this means providing space for their own discovery and sense-making. And finally it's about making the most of initial explorations, where external trainers need to think carefully about what is and isn't working during initial training sessions, debriefing, and revising their material or approach based on those reflections. Training sessions from external trainers should get iteratively better each time they are presented as a result of greater context, real examples, and connections inside the organization.

Strategy 3. Collaborate
I have spoken about internal trainers versus external trainers up to this point, but clearly there is a third path available too. If you have internal trainers who are passionate about what they do, strategically engage with external trainers to provide complementary capabilities. Structure a longer-term engagement where both parties can work together and where the external trainer is also operating in a skills-transfer mode to internal people. It is helpful to think about the either/or paradigm when working through what is and isn't working, but in practice it doesn't have to be that way.

Your Approach?
How do you approach the issue of internal and external trainers at your organization? How have you walked or embraced the line between the two? Please send your comments and experiences to michael@michaelsampson.net.

Two Pathways When Facing Adoption Issues

During a recent discussion about addressing the user adoption challenge among organizations using IBM Connections, the person I was speaking with made the following comment:

> *The biggest problem with user adoption is having people acknowledge they need help. Just about every client I am aware of is having user adoption problems—or they have adopted the product as far as they want to go. There is such richness within the product it is frustrating not to see it used. But then again if they are happy to use 50% of the features and love the product for that should you push them to do more?*

From this question, we can divide the world into two groups: those not achieving adoption at all, and those who have embraced only some of the capabilities and don't want to go any further. Let's address each group in turn. Please note that while the question was asked specifically within the context of IBM Connections, my answer applies more broadly across collaboration tools, including Microsoft SharePoint, Jive, and others.

Group 1. No Adoption Is Happening

For organizations that are having fundamental user adoption problems—the technology is available but no one is using it—I recommend that the next step is to step back from the immediate adoption problems and re-define or re-establish how and why the technology was introduced into the organization in the first place. In the language of my book, *Collaboration Roadmap (2011)*, what was the vision? Was it improved organizational efficiency? Better organizational or process effectiveness? Improved communication? Something else? While technology creates an opportunity for change, it is the vision of how that technology will be used within the organization that should drive the initiative.

With the vision firmly re-established, by what means was the technology and its possibilities introduced to the organization? Was it a "build it and throw it out there" approach by the IT department (which rarely ends well), or was there deep business involvement and engagement in the selection, analysis, and introduction process? If there wasn't deep engagement from the business, you need to re-start there. What's going on in the various business groups, teams, and departments now, and where could the technology make a difference? If there was deep engagement by the business, what has misfired between the initial "yes" and the reality? In other words, you need to start by re-contextualizing the what, why, where, and how of the new collaboration technology.

Group 2. Partial Adoption Is Happening

For the second group, my recommendation is different. These organizations have adopted the product as far as they want to go, despite the fact that it has many additional capabilities that could confer various complementary benefits. I take the view that the product and its features are subservient to the needs of the organization, and if the organization only needs three of the overall capabilities offered by the collaboration technology being used, then that's fine. In the approach I lay out in *Collaboration Roadmap (2011)*, this means the organization has been through the complete ROADMAP process up to the second A. They still have the last stage available to them—the P being *Pursue Increasing Value*. I'd recommend that an organization in such a situation go back and review why they embraced new collaboration technology, analyze the benefits they have gained in reality, and have a celebration if that's called for. Good job. But having done that and recognized the benefits gained, before calling quits on its further use, someone needs to take another good look at the organization and see if there are other areas that would benefit from new or expanded use of the technology. For some ideas on possibilities, see my book *Doing Business with IBM Connections (2013)*. There may not be (and that's fine), or there may be (and that's fine too). But at least the organization then knows which way to go—to keep on with the current things that are working, or to build on the current foundation and reach to the next level.

The product is subservient to the needs of the organization, so if only three capabilities are required, then that's fine.

A Bulk Loading Party Case Study

The Bulk Loading Party strategy involves bringing together a group of people who will be using a new collaboration system and transferring their data from their current system into the new one. This migration or transfer is done by people—ideally the group members themselves—and may take several hours or a couple of days. It is a strategy for use in Stage 4 (Making It Real), and confers a number of significant benefits. See pages 215-220 in User Adoption Strategies (2012) for more details. Here is a new case study of an organization using the Bulk Loading Party strategy when introducing a new system.

An organization subject to high security requirements was introducing a new system. There was a very clear overlap with a current system, and the project team were concerned about how to encourage staff to use the new system instead of the old one. To achieve this end, a bulk loading party was held over one weekend.

Starting one Friday night after regular work hours had finished, a team of staff worked around the clock to transfer the data from the current system into the new one. Security restrictions were such that the two systems could not be joined together electronically, so while one person printed out the data from the old system, someone else re-typed it into the new system in the correct place. The data was checked, cleaned, and re-formatted for the new system.

Staff took turns in getting the data into the new system, and while they were not printing or typing, they watched TV, sat around and told stories, or slept (each staff member had brought in a sleeping bag for the weekend). On Saturday night the team ordered pizza for dinner.

By Sunday most of the data had been transferred, and a couple of the team members stayed up for most of Sunday night to run some automated tests on the data to ensure it had been entered correctly. They watched a movie while the automated procedures ran and intervened in the process whenever required. By Monday morning, the team had migrated seven years of data from the old system into the new one, and thus when the rest of the staff arrived to start work on Monday morning, they were presented with a new system with all of the current and historical data ready to go. Staff did not have to straddle two systems. Staff did not have to wonder which system to look up information in, nor which system to enter new information into. There was just one system, albeit a new one.

For the staff that worked the weekend, there was a bit of a twist. Everyone was given two days of leave to make up for the weekend they had worked, with two exceptions. To sweeten the pot and introduce some friendly competition, the person who transferred the most data received an extra day of leave, as did the person with the lowest percentage of errors in their data transfer. But the person who migrated the least amount of information didn't receive any leave at all—not even the two days!

Your Bulk Loading Party?
Have you utilized the Bulk Loading Party for a new collaboration system at your organization? How did you design the party, and how do it go? Please send your comments and experiences to michael@michaelsampson.net.

Q&A with Michael

We introduced a new collaboration tool to our organization over 12 months ago and have had successes with some teams obtaining benefits from improved collaboration using the applications. However, at present we are yet to achieve that critical mass of participants which would improve the overall benefit for all through the richer views, knowledge and skills that are currently absent from the conversations. How do we to attract those staff that currently don't see a benefit in being part of the conversation?

You are in a good place. One of the big challenges when introducing new ways of working with new collaboration tools is proving they work and provide actual value in your organization. With the learnings you have gained over the previous 12 months, you can now point to real stories of value.

The ethos of Stage 1 of the User Adoption framework is "Winning Attention," and I think you have a couple of strategies you can use to start engaging with the non-participating staff members. The first strategy is *Exemplar Stories* (see pages 124-127 in the book), where you invite participating staff from your organization to talk about where, how, and why they have been using the new collaboration tools and the benefits they have gained. When non-participating staff hear these stories, it often has the impact of prompting greater interest and a desire to learn more. Clearly the Exemplar Stories need to be relevant to the non-participating staff you are engaging with, but if you have a number of stories, you can select the ones that will resonate the most.

A second strategy you could use is *Executive Support* (see pages 112-116 in the book). This is where your executives themselves are actively involved in using the new collaboration tools and approaches in their work in a way that is visible to staff. For example, when your executives run their meetings out of SharePoint, engage in discussions in Connections, or post updates on Yammer, it demonstrates the reality and validity of the tool in your organization.

Your Question?
Do you have a question on user adoption that you would like Michael's perspective on? Please ask away, at michael@michaelsampson.net.

Resources on User Adoption

To help you successfully address the user adoption challenge at your organization, we offer three core resources.

User Adoption Strategies: The Book
Now in its second edition, *User Adoption Strategies: Shifting Second Wave People to New Collaboration Technology (2012)* reviews the causes of poor user adoption, outlines a four stage model for addressing these causes, and details over 20 pragmatic strategies to use in the process. The book is replete with examples of how other organizations are using the various strategies, and the second edition includes a new chapter on measuring user adoption.

Order your copy now, available exclusively from michaelsampson.net/useradoption.html.

In-House Workshop
Bring together 15-25 of your people for an intensive two-day in-house working session to provide a rapid boost into the user adoption phase of your work. The two-day workshop is presented and facilitated by Michael Sampson.

View the standard workshop agenda at michaelsampson.net/useradoption-workshop.html.

Professional Services
Many collaboration projects fail due to poor user adoption. Engage with Michael Sampson to de-risk your work by developing a targeted user adoption approach for your organization.

Please contact Michael via the web site at michaelsampson.net/contact.html.

About Insights on Adoption
Insights on Adoption is a publication of The Michael Sampson Company Limited for people interested in learning how to approach the user adoption challenge with increased capability and competence. It builds on the theory, framework, strategies, and advice presented in *User Adoption Strategies 2nd Ed.* (2012), authored by Michael Sampson. For more on the book, see michaelsampson.net/useradoption.html.

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