

Insights on Adoption

Opening Remarks

The challenge of achieving good adoption of new collaboration tools and approaches remains as valid today as when I wrote the first edition of the book five years ago. It is a topic that keeps coming up in market research reports, both by me and others. Much has happened in my world since I published the first edition, and it has been gratifying to work with organizations toward solving their adoption challenge.

In the 18 months that have passed since the first *Insights on Adoption* newsletter, I have continued to travel and champion for more effective approaches to user adoption in organizations. One way of doing this has been public seminars, with representatives from multiple organizations attending a day-length seminar in cities around the world. This approach allows for cross-fertilization of effective ideas and approaches, and gives practitioners the ability to hear how their counterparts in other organizations are tackling the adoption challenge. It has been excellent working with Business Partners allied with Microsoft or IBM to bring this public seminar to their local region.

While there are many strategies that can be pursued for improving adoption, I was reminded

recently of the value of simple things. During a discussion with the adoption analyst at a firm active in New Zealand and Australia, she commented that the most effective strategy she uses is to sit with a small group, observe what they are doing, and give ideas on how to improve their work processes using SharePoint (the tool of choice for this firm). She also uses a variation of the one-to-one coaching strategy, but working with a specific individual for 12 weeks to explore the possibilities of using one aspect of SharePoint. For example, recently one person wanted to explore how to use wikis. The adoption analyst scheduled 12 half-hour meetings over three months—remotely using Microsoft Lync—and helped him become effective with wikis. He has now become the internal expert for SharePoint-based wikis for the firm.

The lead article in this edition looks at going beyond an adoption-only focus, as well as recent research on organizations using IBM Connections.

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Going Beyond Adoption 101

In late 2009 I started working on the manuscript for *User Adoption Strategies*. The resulting book was published in mid-2010. My intent in writing the book was to lay out a pragmatic approach to the adoption challenge that many organizations were struggling with. One of the bedrock design principles for the book was that it shouldn't show preference for one adoption strategy above all others. The book was never designed to sell a single strategy as the perfect method. It was designed to champion the idea that something needed to change in how organizations were introducing new collaboration tools and approaches, and to highlight that there were many useful pathways that could be embraced when taking that journey.

Having now presented the User Adoption Strategies workshop in many countries around the world, worked with organizations on their adoption strategies, and published a second edition of the book, I still adhere to the original vision:

1. Organizations need to do something different.
2. There are many options.
3. A few of those options need to be pursued by each organization with great gusto.

There is something I have been pondering, though. If the current book, workshop, and consulting services were treated as "Adoption 101," what is the next level? What would Adoption 201 focus on? What would Adoption 301 be about?

My tentative conclusion is that Adoption 201 would be about creating a more conducive organizational context for introducing new collaboration tools and approaches, and Adoption 301 would be about cultivating the organizational culture and human behaviours to support collaborative action. In other words, in order to go forwards with user adoption more effectively, you have to go backwards and create the right context and culture. Actually, once I drew this out in my office, I remembered that one of the early slides in

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the User Adoption Strategies Workshop posits this very idea: that if you are struggling with the adoption stage, you may have to fix the problem by re-examining how you engaged with the business, the governance guidelines you put in place, the vision you outlined, or even the technology you chose (see slide on page 3). These refer to earlier steps in my overall ROADMAP framework for achieving success with collaboration tools and approaches at work, as written up in one of my other books—*Collaboration Roadmap* (2011).

Here's my thinking on Adoption 101, 201, and 301.

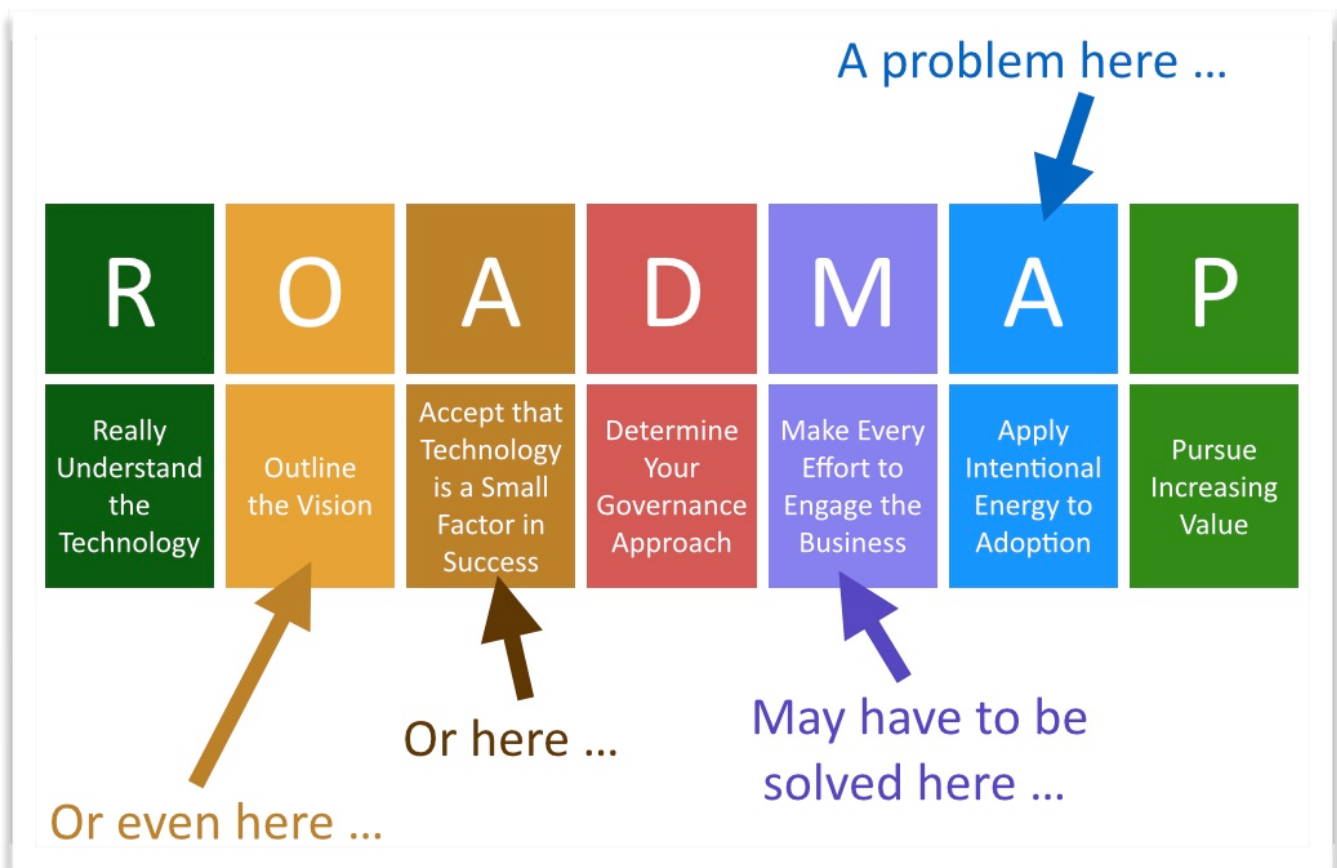
Adoption 101

The User Adoption Strategies book (Adoption 101) takes at face value the organizational context and organizational culture. What is is. It opines that a particular context and culture will make the adoption journey easier, but it doesn't seek to change either as such.

Adoption 201 (Context)

To go beyond the current state with adoption, then, Adoption 201 would be about organizational context. This would mean examining the past approach to a set of defined activities and then devising a future approach of those activities to ensure a better foundation is laid for success. Three of these activities would be engagement, governance, and business vision.

- *Engagement.* Adoption activities are much easier if employees have been consulted on their work activities and if they have helped to envision how to improve the current state with new collaboration tools and approaches.
- *Governance.* The guidelines set for effective use are a vital part of the context. These include who can create a collaborative team space, if collaborative group spaces can be used for non-business activities, and what happens to collaborative team or group spaces when they are no longer needed.
- *Business Vision.* The driving reasons for having new collaboration tools in the first place is very important. If it was just because the IT department decided to buy new tools, then the vision is weak and usually ineffective. If the



vision is to save the business from imminent bankruptcy by bringing together the collective know-how of employees across the world, as was the case for one global firm, the vision has a strong foundation that will withstand adoption challenges.

Adoption 301 (Culture)

The wider picture for adoption beyond organizational context is culture, which denotes a series of explicit and implicit agreements regarding how people work together at an organization. Aspects of organizational culture include norms (what is accepted as appropriate behaviour), values (what is viewed as good and bad), and aspirations (the goal that management and employees are working towards).

Organizations where the following are true will find adoption difficult, because the organizational culture lacks the cultural anchor points for collaborative working:

- Internal competitions are held for dividing scarce resources between groups.

- Collaboration is viewed as a sign of weakness within an individual, and is equated with being incompetent to fulfil one's duties.
- Everyone lives in fear of getting on the wrong side of the CEO and management team. Those that do are sidelined.
- Managers routinely claim ownership of great ideas that have come from other people.
- People are scared to say what they really think, because a well-placed manager hates anyone that holds a dissenting opinion. Doing so draws a rapid and very public reproof.

In summary, becoming more effective with adoption may require putting much more emphasis on the organizational context and culture. Effective adoption strategies deployed within a broken context or flawed culture will flounder and fail.

Your Approach?

How are you going in your adoption journey? Where do you need to improve the organizational context and culture so as to be more effective with user adoption? Please send your comments and experiences to michael@michaelsampson.net.

The Adoption Challenge for IBM Connections

In the fourth quarter of 2014 I surveyed organizations using IBM Connections. The intent of the survey was to gauge current status with the use and adoption of IBM Connections, and understand forward planning activities for using the tool effectively. You can find the survey report on my website; it is available for free download at michaelsampson.net/2014/11/18/connections-report-4q2014/.

Question 11 in the survey asked respondents to rate the severity of six significant issues with the use of IBM Connections at their organization. The three issues with the highest level of concern were:

1. Encouraging people to use Connections in their work was rated a significant problem by 40% of respondents, making it the top ranked issue. This is the classic post-implementation adoption challenge that organizations face when new technology is introduced. Interestingly, only 7% of respondents said this was not at all a problem, the lowest rating across all of the six issues.

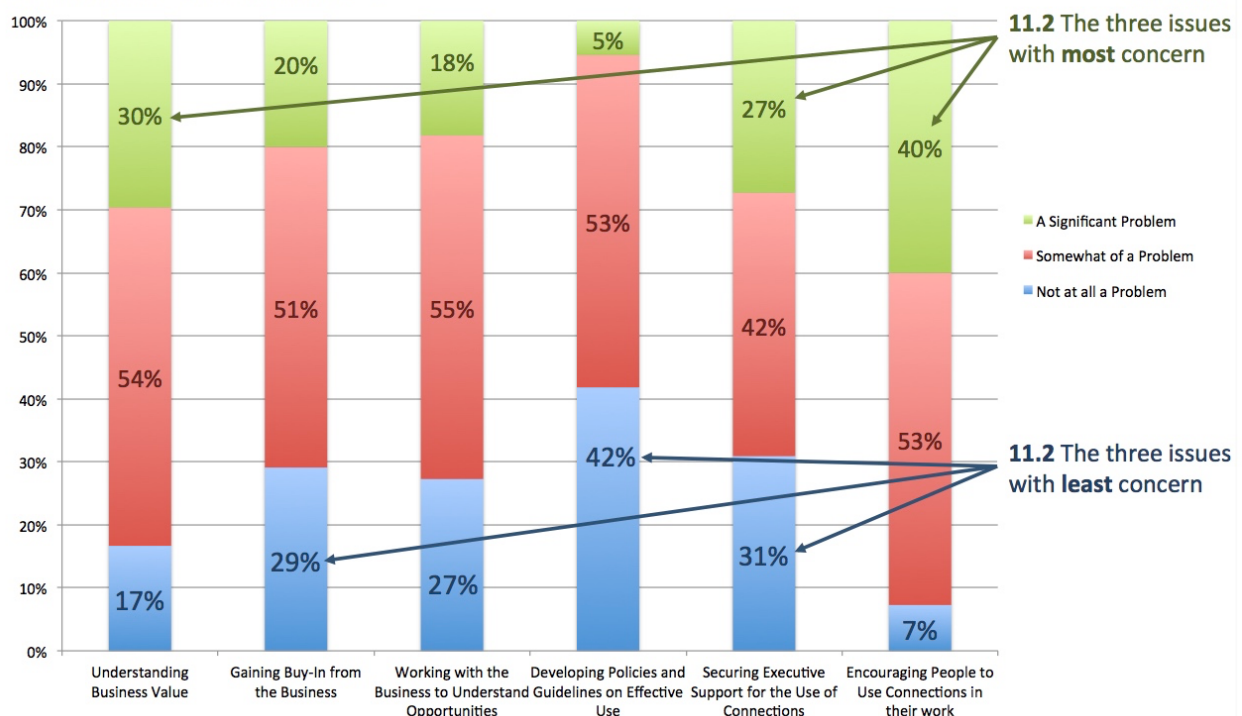
2. Understanding the business value that Connections adds to an organization was rated as a significant problem by 30% of respondents, putting it in second place. There is both an advanced planning aspect to this issue, as well as a realization one after implementation. The advanced issue is about clearly identifying where IBM Connections (or a similar tool) can add value to the organization. The post-implementation realization challenge is about driving these desired outcomes into day-to-day operational work so as to achieve the stated vision. Only 17% of respondents said this was not at all a problem in their organization.
3. The third top ranked issue was securing executive support for the use of Connections, by 27% of respondents. Interestingly, a higher number—31%—said that they did not at all have a problem with this issue.

What Is Your Rating?

The survey was focused exclusively on IBM Connections, but the diagram below is insightful whether you are using Connections or not. How would you rate your level of concern with each of the issues noted below? I'd love to hear your comments and experiences via michael@michaelsampson.net.

Use and Adoption of IBM Connections: State of the Market 4Q2014

Michael Sampson



Adoption Strategies for Unified Communications

During 2014 I expanded the scope of my adoption research to the unified communications (UC) area. This included reading the literature on adoption activities for deployments of UC, interviewing organizations on the strategies they used to introduce new tools such as Microsoft Lync and IBM Sametime, and presenting the adoption strategies workshop in Europe with a UC emphasis.

There were two major takeaways from this research. First, that the term “adoption” is generally used to refer to the purchase or acquisition decision for UC, not the use of strategies to drive the effective use of UC tools. Second, that many of the strategies in my book translate very easily from collaboration tools to UC.

Here are some examples of how the different strategies from my book have worked for organizations in a UC context:

- **Exemplar Stories** (from stage 1). An engineering firm expanded from Europe into the United States, and was able to use desktop video meetings to keep managers aligned and in touch with each other. These replaced the previous reliance on trans-Atlantic flights for in-person meetings.
- **Organizational Chaos** (from stage 1). Another engineering firm was getting ready to roll out Microsoft Lync when an earthquake destroyed one of their offices and the phone system. With Lync being the only feasible way to rapidly reconnect everyone, staff were very quick to embrace the capabilities.
- **Organizational Chaos** (from stage 1). A firm was shifting to a new building, and the current phone system was almost impossible to move from the basement. The introduction of new UC tools was linked with the new building, and the old phone system left where it was.
- **Web-Based Training** (from stage 2). A couple of firms—one in healthcare and a second in construction—offer weekly real-time discussions through their UC platform of

choice. Anyone can join and ask a question on how to do a particular task in IBM Sametime, for example. The trainer or coach will then walk them through the steps involved. The question gets answered, and a capability for doing more is encouraged.

- **Build It And They Will Come** (from stage 3). An ICT company was introducing Microsoft Lync, to staff who already knew about presence, instant messaging, and online meetings. The project leader said that adoption “was almost immediate,” which should perhaps not be surprising given the nature of the company and its average employee.
- **Zero Other Options** (from stage 4). Current communication tools are turned off and made inaccessible to users, so that the new UC tools are the only choice. Desktop phones are removed. Subscriptions to other audio and web conferencing services are cancelled.
- **Stop Doing, Start Doing Patterns** (from stage 4). After his group understands the capabilities

of Microsoft Lync and how to use them effectively, a manager states that he will no longer accept phone calls from his team (the stop doing pattern). He asks that all future requests for real-time interaction should be via Microsoft Lync (the start doing pattern).

Each of these strategies—as well as the other ones in the book I have not profiled here—can be used to inform your approach with

adoption for UC tools. As with the earlier discussion in this newsletter on moving beyond Adoption 101, however, the context of how UC is introduced has a significant impact. Ensuring that you have understood how UC will contribute value and what it will take to deliver that value is an essential starting point for any UC journey.

Your Adoption Strategies for UC?

Have you been involved in developing or running an adoption program for unified communications at your organization? What strategies did you use, and how effective did you find them to be? Please share your experiences via michael@michaelsampson.net.

After the earthquake, Lync was the only feasible way to rapidly reconnect everyone. Staff were very quick to embrace the capabilities.

Let's Work Together in 2015



In recent years I have worked with organizations around the world on collaboration strategy, user adoption, and re-imagining effective work. These engagements have been delivered in the form of private workshops, executive interviews, and planning meetings.

As 2015 gets underway, I wonder if there is an opportunity to work with you this year?

If you are looking at any of the following issues, I offer my services:

- Where new collaboration tools and approaches can deliver value to your organization.
- How to create an adoption program for your employees.
- How to cultivate collaboration as a human discipline in your people.
- How to select an enterprise collaboration or social business tool.
- In light of changing times at Microsoft, what you should do with SharePoint in 2015 and beyond.
- What is the best way to introduce a new collaboration and social business tool, such as IBM Connections.

For a one-page snapshot of how we could work together, see *How We Work with Clients*, at michaelsampson.net/services/.

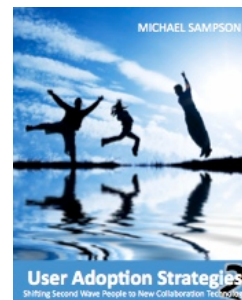
To discuss how we could work together, please get in contact, via michael@michaelsampson.net.

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/.

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/.

Consulting 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. Contact Michael via the web site at michaelsampson.net/contact/.

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/.

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