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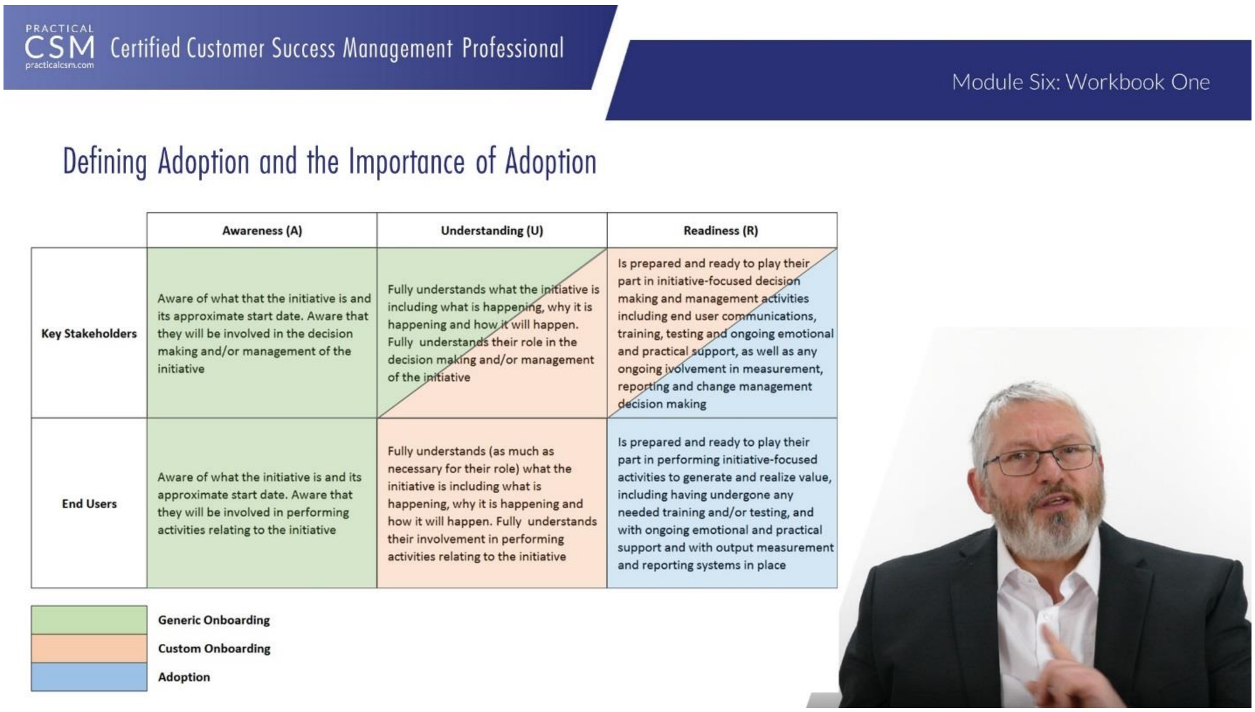
Module Six:
Practical CSM Framework Phase 4: Adoption Planning
Workbook One

Welcome to Module Six of the PracticalCSM.com Certified Customer Success Management Professional training course

In this module we will be turning our attention away from the topic of onboarding that we examined in Module Five and instead we will be examining the subject of adoption, and in particular we will be reviewing the adoption planning process, which is the focus of Practical CSM Framework Phase 4.

Before watching the Module Six videos, make sure you have read Chapters Seven and Eight from the Book *Practical Customer Success Management*. These chapters are: Practical CSM Framework Phase 4 Adoption Planning, Part 1 – Concepts and Part 2 – Practice. As we discussed at the beginning of the previous module, it is important that you read the chapters of the book that you are directed to, because those chapters contain important information that doesn't get repeated in the videos, so if you don't read the relevant chapter or chapters of the book then you miss a lot of important learning on the topic. Please take your time with the two chapters of the book and wait until you have read and fully absorbed their contents before watching the videos in this module.

In Workbook One we will cover the contents of Chapter Seven: Practical CSM Framework Phase 4 Adoption Planning, Part 1 – Concepts, including defining adoption, the importance of adoption, pilots and phases, and adoption and change management. We will spend some time thinking about the differences between directly and indirectly impacted users and their adoption or change management requirements. Finally, we will focus in on a particularly useful and important research and planning technique, which is to run a Workshop.

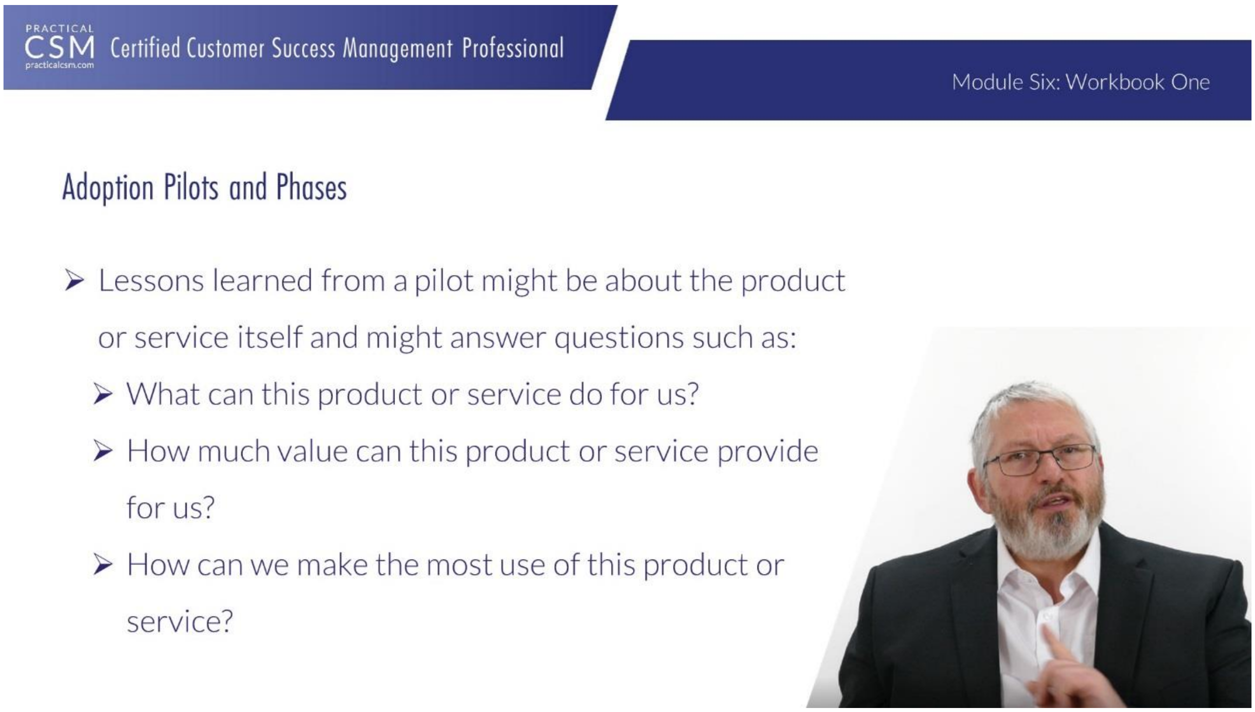


It's important to touch on what we mean by adoption and why it is important, but I want to keep this discussion brief because we have already discussed this in some depth in previous modules. Let's take a quick look back at the table we reviewed in Video 1 of Module 5.

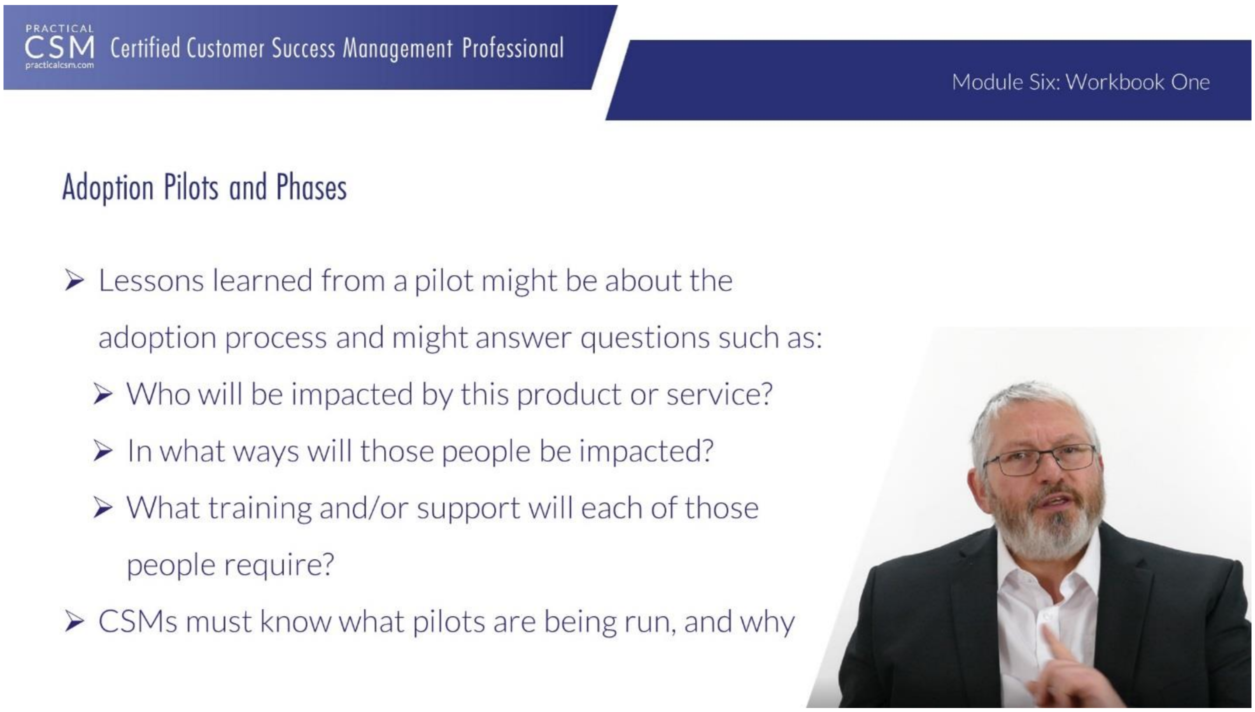
Let's not worry about Onboarding, since we have already covered that topic in the last module. What this table shows us is that the role of Adoption is to ensure that both key stakeholders and end users alike are fully enabled, readied and prepared to ensure that value generation (and ultimately realization) from the initiative can commence. In short, by the end of the adoption process, the customer is able to fully utilize the products and services within their business processes, and can measure the performance of these products and services to compare against their predetermined targets at each milestone en route to ultimate realization of all outcomes from whatever initiative the products and services are supporting.

Adoption is always critical. It's the bit that comes between merely *having* something and actual *using* that thing to do whatever it is intended to do. In some circumstances this may be very simple and straightforward – read the instructions on the pack, plug it in and switch it on, leave it to warm up and then flatten out the creases in your clothes with it for example. In other situations adoption is far, far harder, as might be the case where the products and services being supplied to a company will impact and change the processes of multiple business capabilities across multiple departments or functional areas, causing changes to the working day of many thousands of employees, all of which will need at least communication about what is happening if not training, testing and ongoing support for the new tasks they will be expected to perform.

So whereas onboarding was about raising awareness and increasing understanding, adoption is about actual readiness to *do what needs to be done* and as such it tends to be more involved and more expensive than the more straightforward process of customer onboarding.



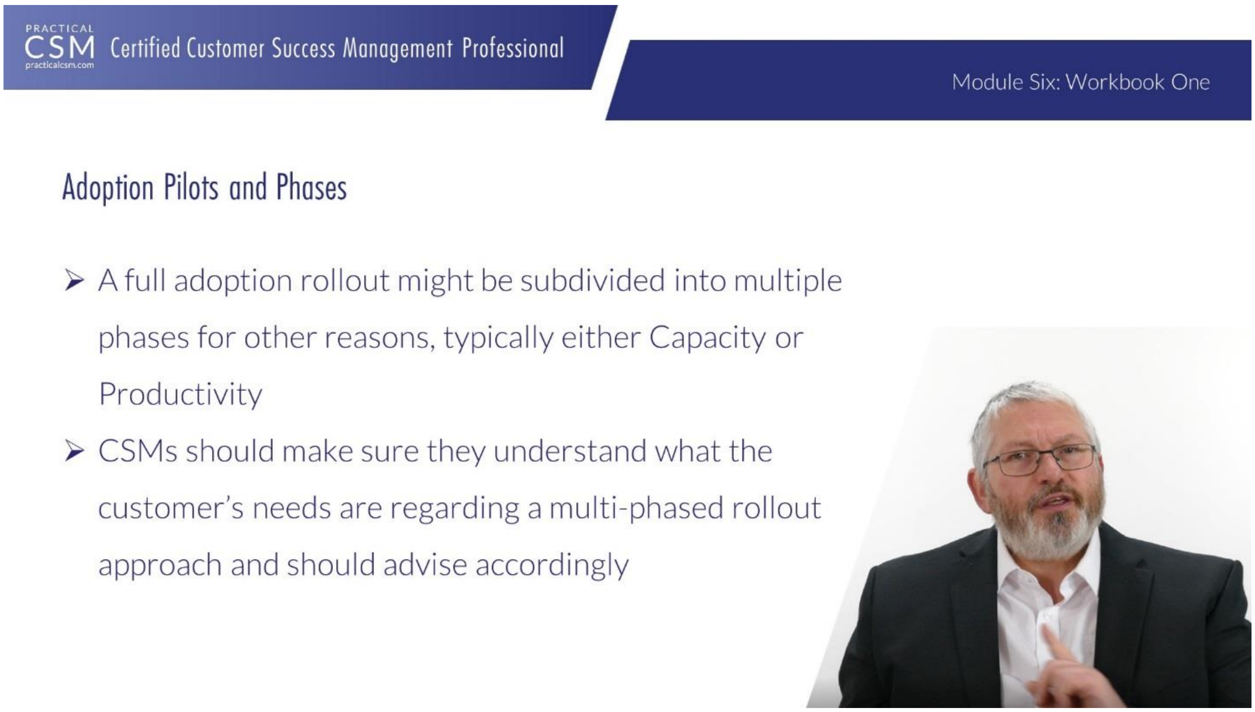
There are a variety of reasons why a customer might decide to take a multi-phased approach to product or service adoption. One of these reasons might be due to them running one or more smaller pilots from which valuable information can be learned prior to a major rollout. The lessons learned from a pilot might be about the product or service itself and might answer questions such as “what can this product or service do for us?”, “how much value can this product or service provide for us?” and “how can we make the most use of this product or service?”.



Other questions might be regarding the implementation and adoption of the product or service, such as "who will be impacted by this product or service?", "in what ways will those people be impacted?" and "what training and/or support will each of those people require?"

Whilst the answers to both types of questions can be surmised using previous example of similar situations or by various techniques such as modelling tools, at the end of the day there's no substitute for direct, first-hand experience ie decision making based not on guesses but on real data collected in the field, and this is why customers like pilots. Whilst the supplier would of course prefer (all other factors being equal) to sell the whole thing in one go, suppliers tend to like pilots also, since conducting a pilot (even one where the product or service is supplied free of charge or at reduced cost) demonstrates a sizeable commitment on the part of the customer to go ahead and make a full purchase if the pilot proves successful.

CSMs should always make sure they know whether one or more pilots are being run, who proposed the pilot/s, what its purpose is, and what the success criteria (ie desired outcomes) are for each pilot, so that the CSM can prepare accordingly.

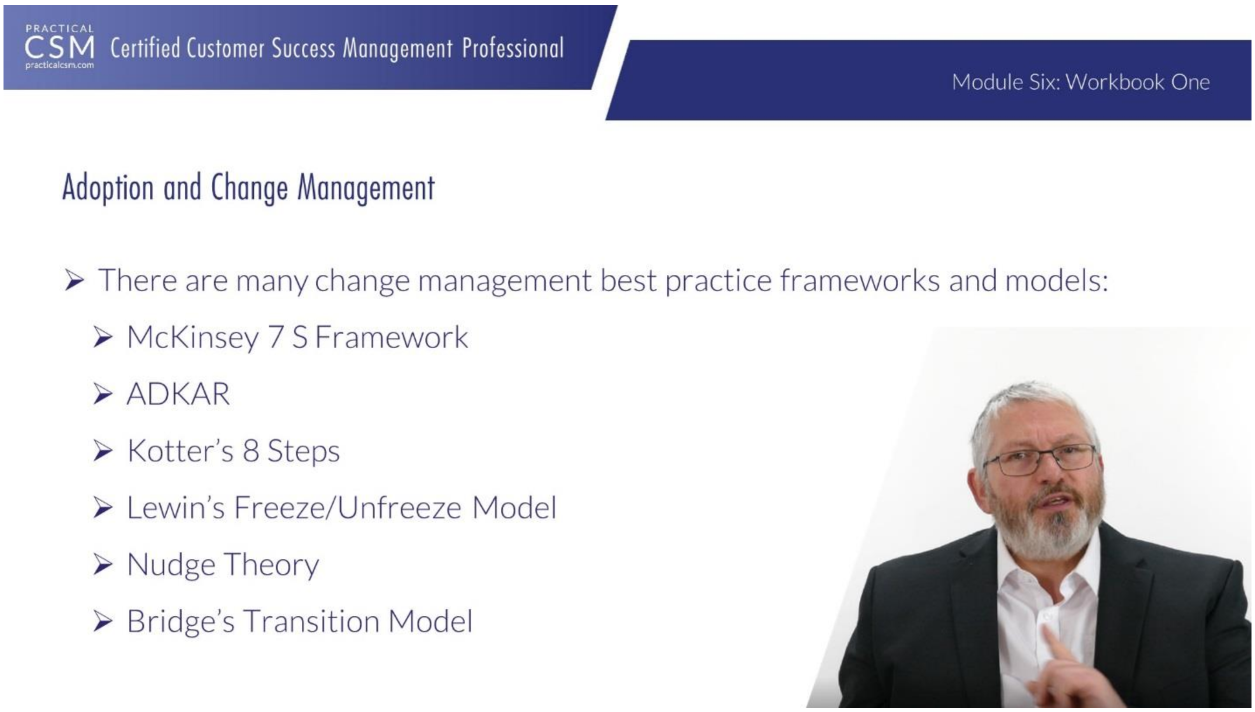


On the other hand, the purpose of dividing a full adoption rollout into multiple, smaller phases is not so much to learn lessons (although valuable lessons about how to perform the rollout can most definitely be learned from earlier phases and applied to later phases). Instead the motivation tends to be for practical reasons either of capacity – for example there might only be three instructors within the customer's training team and they cannot therefore be everywhere at once to train everybody at the same time – or productivity – for example only 20% of the customer support team can be spared at any one time to undergo training on the new telephony system, since the other 80% will need to be available to provide continuity of support services to the customer's customers – or cash flow – for example there may be sufficient funding to cover the adoption program for the first phase, but then the customer will need to wait six months to accumulate more revenues in order to be able to fund the second phase.

As with pilots, CSMs should make sure they understand what the customer's needs are regarding a multi-phased rollout approach and should be comfortable about providing best practice advice to the SPL and other customer stakeholders regarding the pros and cons of running one or more pilots and/or of a multi-phased approach to adoption, as related to that particular customer's unique situation and needs.

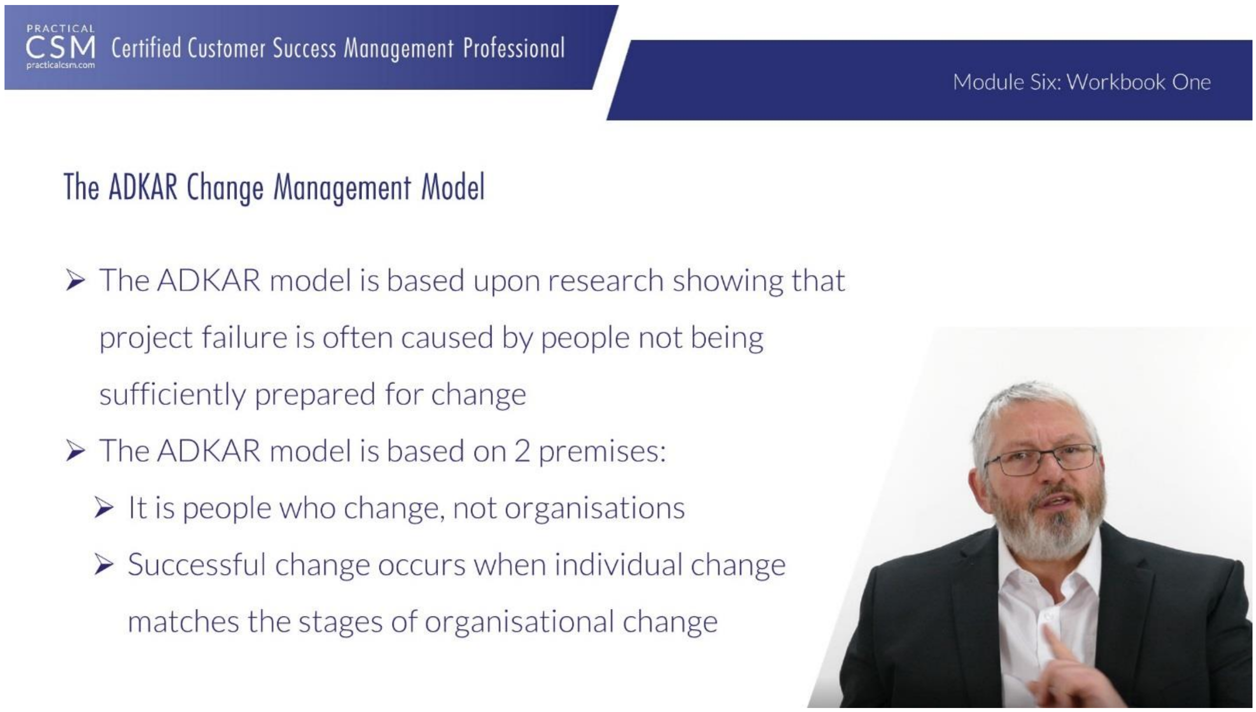
The start point for any change is the motivation for change to occur. You might recall back in Module 2 we discussed the BMM or Business Motivation Model that looked at how strategy is formulated within a business, and this is exactly what we are talking about here. The motivation for change will be the combination of internal and external drivers (or influencers) that are acting upon the company to cause it to need either to do things differently or even to do entirely different things. Having assessed these influencers and determined which ones need dealing with, the next steps is to determine the “Ends” – the goals and objectives for the initiative. The final step is then to create the strategy and tactics for what to do to enable those goals and objectives to occur.

What a change management expert brings to the table is the knowledge of what types of activities should be included within that strategy in order to make sure that the desired outcomes (the goals and objectives) will be reached, and in what order those activities should take place, and of course *how* they should take place



Just as project managers will follow a best practice framework or methodology for project management such as Prince2, and CSMs will follow a best practice framework or methodology for customer success management such as my Practical CSM Framework, change management professionals will follow a best practice framework or methodology for change management, such as the McKinsey 7-S Framework, ADKAR, or Kotter's 8 Steps.

We will only have time to very briefly review ADKAR, but my recommendation to customer success managers who will be involved in helping customers with adoption planning and implementation for more complex situations that for example involve multiple end user groups and/or changes to multiple capabilities across a number of locations and/or functional areas is to study change management best practice in more depth – for example by reading books on the subject or attending a training course that is dedicated just to the topic of change management.



The ADKAR change management model was created by a change management research and consultancy organization called Prosci and was based around their own research which indicated to them that the biggest cause of project failure was that people were not sufficiently prepared for and helped through the changes experienced by those who were impacted by the project.

The ADKAR model is based on 2 premises:

It is people who change, not organisations

Successful change occurs when individual change matches the stages of organisational change

For successful change to occur at the individual level, people need to move through each of these stages, in synchronous step with the change occurring in the business:

Awareness of the need for change.

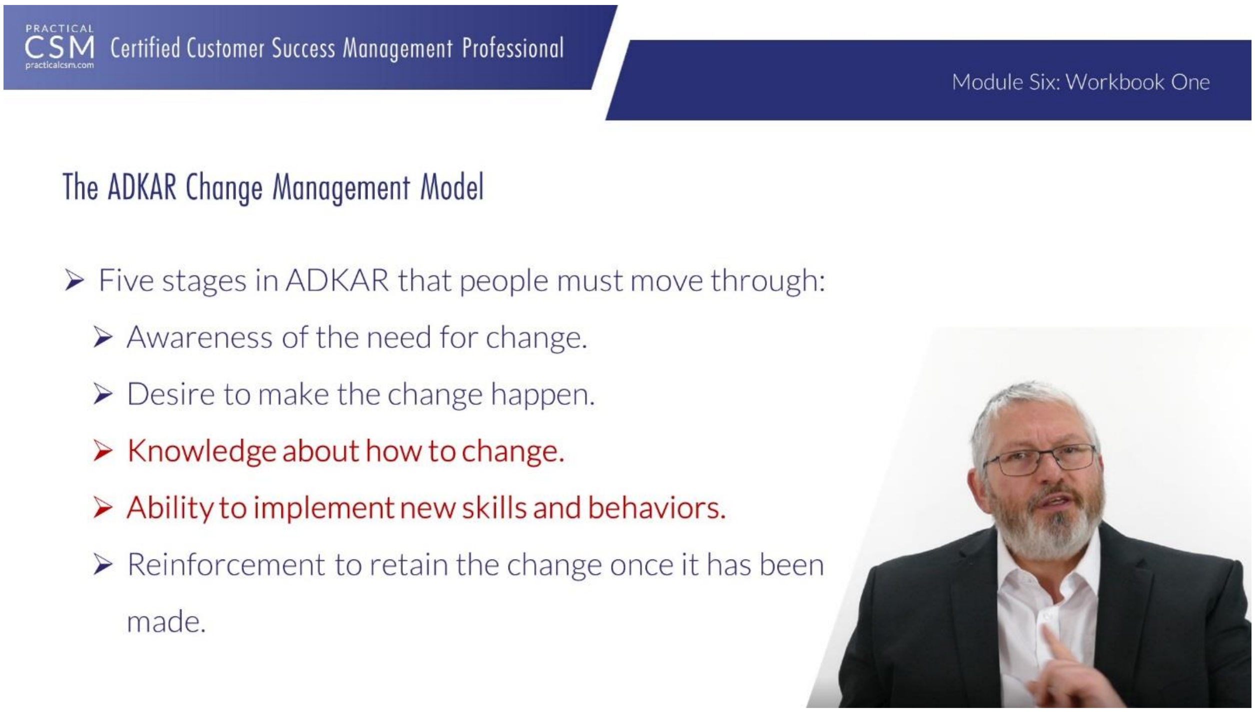
Desire to make the change happen.

Knowledge about how to change.

Ability to implement new skills and behaviors.

Reinforcement to retain the change once it has been made.

Notice how the first two stages of ADKAR focus on communication of information and on winning hearts and minds. This should be the approach used when reaching out to impacted users in the initial stages of an adoption initiative.



Notice how stages three and four of ADKAR focus on knowledge, skills and behaviors – just in the same way as Chapter 7 of the book discussed the concept of KSA – Knowledge, Skills and Attitude – as being the three critical elements to ensure are in place within impacted user groups that will enable those users to perform well in their role post change.

Notice finally how the fifth and last stage of ADKAR focuses on reinforcement of key messages in order to ensure the ongoing retention of change.

The first four stages of ADKAR define change management activities that take place within Practical CSM Framework Phases Four: Adoption Planning and Five: Adoption Implementation, but whilst this fifth stage will be planned for in Practical CSM Framework Phase 4: Adoption Planning, it will be implemented in Practical CSM Framework Phase 6: Value Realization.

If further study on the topic of change management interests you, the definitive book on ADKAR is *ADKAR A Model for Change in Business, Government and Our Community* written by Jeffrey Hiatt (a change management consultant who was the founder and owner of the company Prosci) and published in 2006 by Prosci Learning Center Publications. This book is well written in a way which makes its subject accessible to non-change management experts. The book is widely available on Amazon and from other larger book stores and is recommended as a useful addition to any CSM's professional library.

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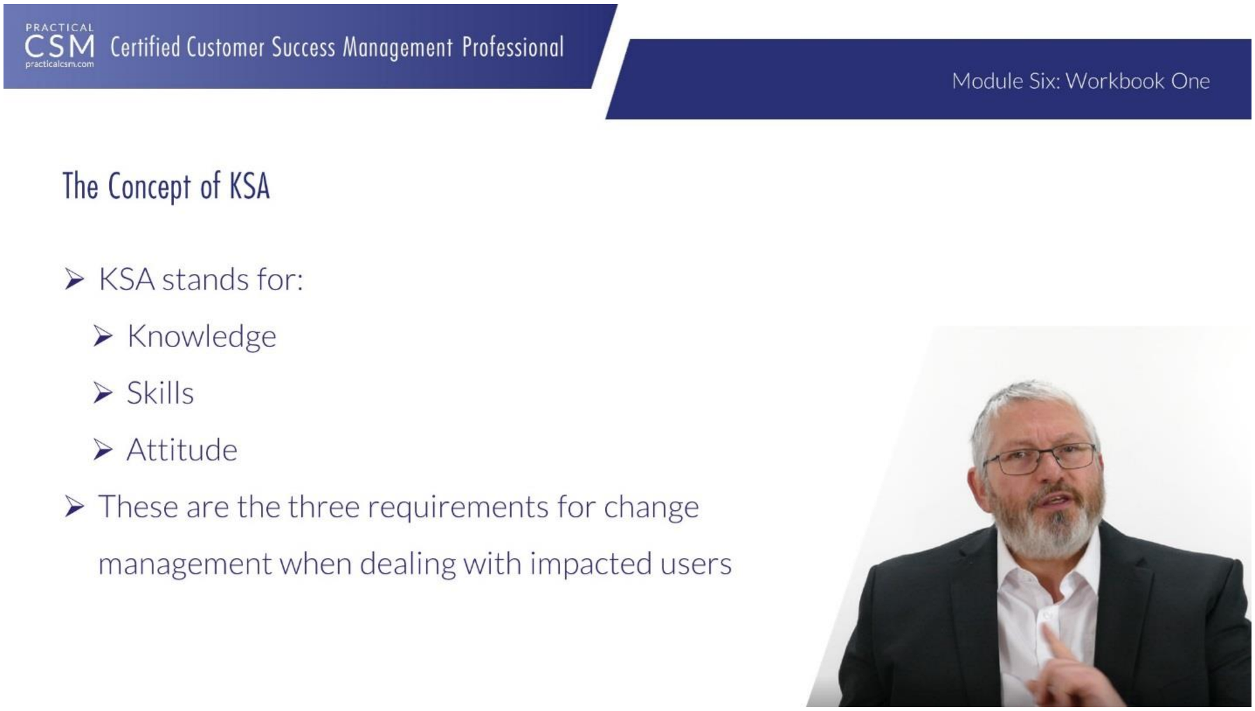


You will recall from Chapter 7 of the book (and our brief mention of it a few minutes ago) that KSA stands for knowledge, skills and attitude, and these are the three requirements for change management when dealing with the people who will undergo the change – ie the impacted users. Let's briefly review each aspect:

<u>Knowledge</u>

Knowledge is often described as “book learning”, and refers to cognitive understanding of what the stakeholder is required to do and how they are required to do it. The reason that it is sometimes referred to as “book learning” is because increasing knowledge is the traditional role of academic organizations such as schools and colleges, and because knowledge is (or at least was) generally transferred through books and lectures.

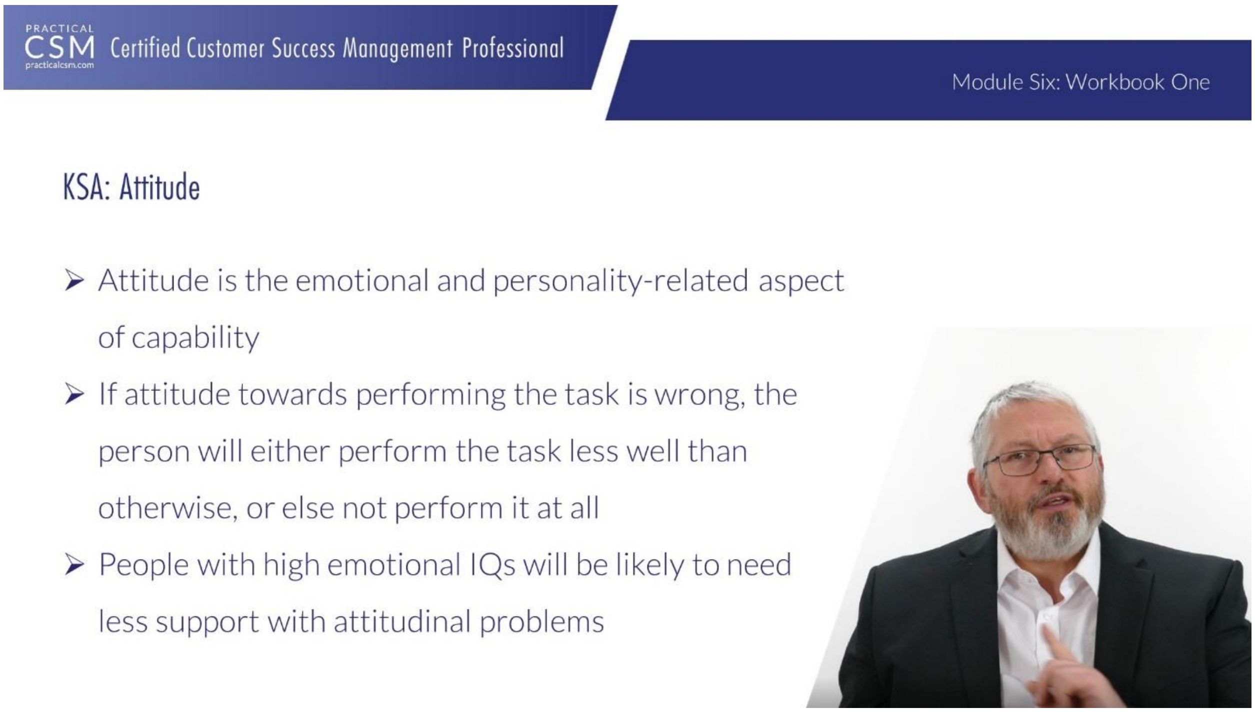
Having an understanding of what needs to be done generates the ability for the person to think and act independently rather than having to be told what to do by a supervisor at every stage of the performance of a task. Knowledge is therefore of particular importance in jobs that require autonomous decision making by the person involved, such as in sales, customer service or consultancy roles.

<u>Skills</u>

Skill is the ability to perform a task adequately, and this performance ability tends to increase in quality over time as more experience of performing the activity is gained.

Different types of tasks have more or less of a skill-related component. For example tasks requiring precise brain-to-body motor skills such as dentistry or fork lift truck driving will tend to require a high level of skill, which in turn requires at least a degree of on-the-job style training to be completed before a person gains the desired skill.

Because skill cannot be taught through books but through experience, it tends to be taught in situ by coaching and/or mentoring rather than just by instructing (for example think about how you might teach someone how to swim or ride a bicycle).



<u>Attitude</u>

Attitude is the emotional and personality-related aspect of capability. Regardless of how knowledgeable and/or skilful a person might be, if their attitude towards performing the task is wrong, they will either perform the task less well than otherwise, or even not perform the task at all.

Emotions that might negatively affect a person's attitude towards performing a task might include ignorance (not understanding why it is important for example), anger (caused for example by feelings of being unjustly imposed upon by being ordered to perform the task) and fear (perhaps due to feelings of insecurity around the ability to perform the task sufficiently well, and concerns about being sanctioned in some way if they cannot do so).

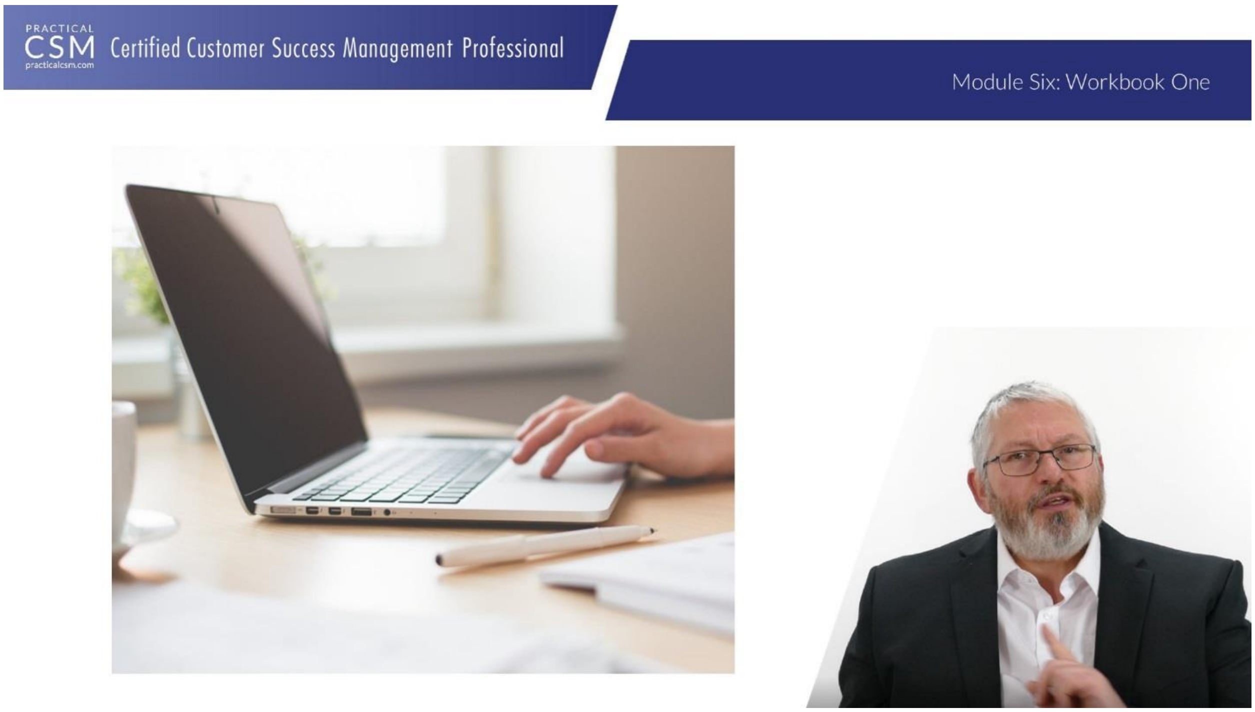
An individual's personality will at least to some extent dictate the level of impact that attitude may have to the performance of the tasks they are asked to perform. People with high emotional IQs and mature personalities will be more likely to need less support with attitudinal problems than their counterparts with lower levels of emotional IQ and less maturity.

Customer success managers need to ensure that all three aspects of KSA are given careful consideration for every user who will be impacted by the upcoming change, and that the adoption plans that are created contain the right mix of communication, training, testing, measurement and ongoing support (both practical and emotional) for each user group that will enable them to succeed in the performance of their new tasks.

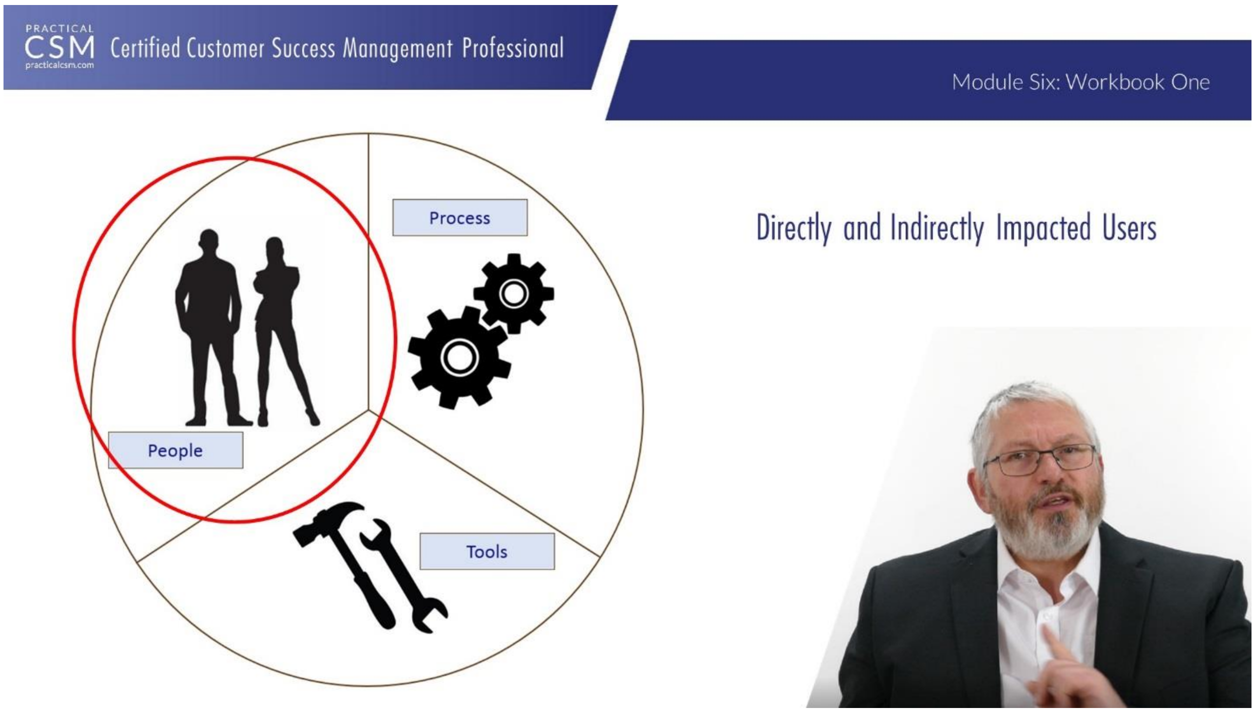
In the ADKAR change management model, the people who will be undergoing change and who therefore need change management activity to be applied to them are simply referred to as “people”. This makes sense since of course the ADKAR model is generic in the sense that it can be applied to any type of change situation. For CSMs dealing with customer adoption requirements we can be a little more specific about these “people” whom we will be helping to undergo change, since that change is more specific in nature. The change that relates to an adoption initiative is of course the change that occurs due to the implementation of the CSM’s company’s products and services (and potentially other products and services from third parties as well, that combine with the CSM’s company’s products and services to create an overall solution), in order to make improvements to the customer’s existing capabilities or to enable the customer to possess new capabilities that it does not already have. These improved or added capabilities will then in turn (when used over time) generate the business outcomes that the customer requires.

You will recall from Module 2 that business capabilities have three components, namely people, process and tools. What we are discussing then is changes made to the *tools* aspect of one or more capabilities. Of course in changing the tools, adjustments will usually need to be made to the *process*, even if only to recognize that you use the new tool (ie the new product or service) to perform an action instead of the old tool (ie the previous product or service which the new one replaces). However in many cases the new tool will not resemble the old tool in every detail and there will be important differences that will require the previous process to be updated to reflect those differences.

For example, let's think about a physical product such as a forklift truck. Whilst a brand new fleet of forklift trucks that will be replacing the existing, ageing fleet in the customer's distribution center will be performing the same role within the distribution center's capabilities (such as placing inventory items on shelves within the distribution center for storage, loading vehicles with packaged products that are ready for shipping to customers, and so on) and whilst they may operate in *generally* the same way as the old forklifts, there will be important differences. In the case of forklifts these differences may be subtle to the uninitiated, yet it will also be critical to ensure they are dealt with appropriately, since not doing so may put employees at risk of injury or even death, if the driver has not been sufficiently trained and tested in the use of the new forklift's operating abilities and controls.



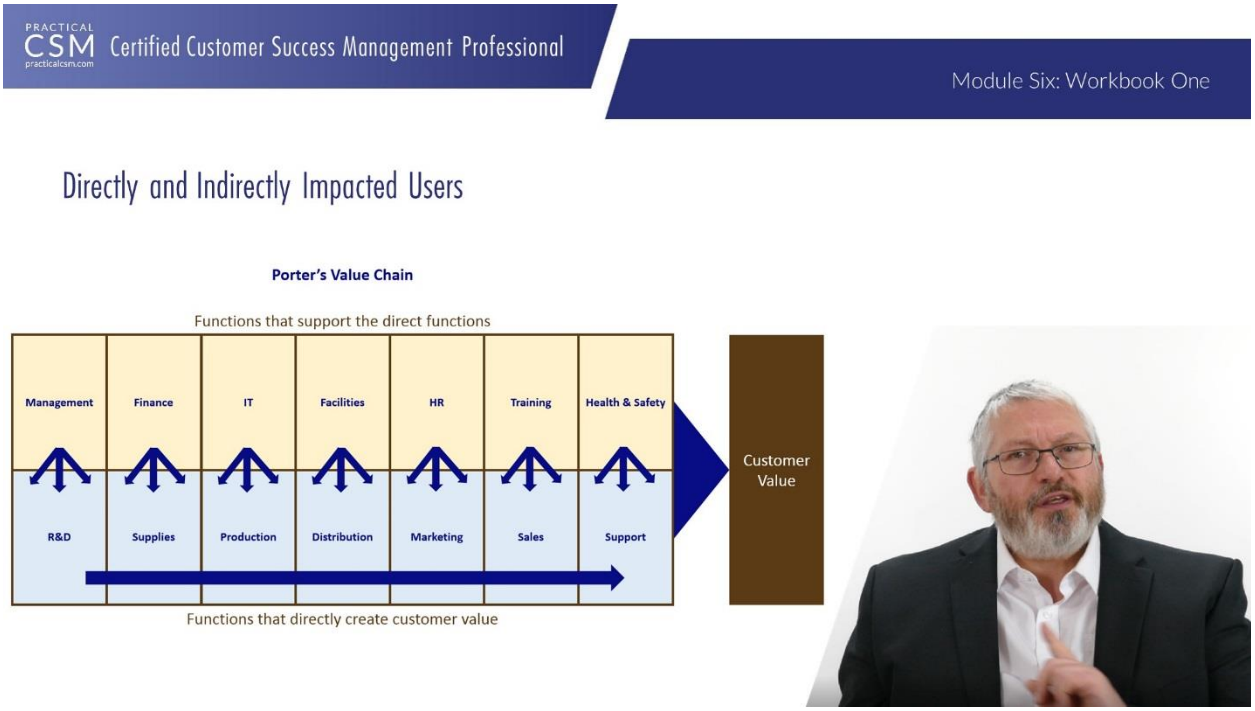
Now let’s consider something like a new software service such as an employee’s expenses claim system that enables employees to submit their monthly expense claims online. Perhaps the previous system was paper based, with employees filling out a form and physically submitting the claim to their line manager together with receipts, which the line manager would need to review and approve before passing through to the Finance department for a second review and final approval and for payment. Obviously the new, online software system that replaces the old paper form is going to involve changes to the old expenses claim process.



So if there are changes made to an existing capability's tools and/or processes then this naturally means that there will need to be changes made to the third aspect of business capabilities – the people. Those changes might be quite far reaching – for example the employment of new people or the reduction in numbers of existing people – or might be quite subtle – for example a brief familiarization session on how to log in to and use the new online expenses system – but whatever the case, the KSA needs of each person (ie each user) who will be impacted by change caused by the initiative that the CSM's company's products and services is supporting need to be researched, documented and planned for within the adoption program.

Several previous chapters of the book as well as Chapter 7 itself defines the concepts of directly impacted and indirectly impacted users and describes their differences. Just briefly then to refresh your memory, a directly impacted user is defined as someone who will actually be using the new products and/or services, whereas an indirectly impacted user is someone who will not actually be using the new products and/or services, but for whom change will still occur. For example let's look back at the new online expenses claim system for employees. Employees who make expenses claims (such as senior executives, sales people, service engineers and others who are involved in activities that accrue expenses such as for travel and accommodation) will be directly impacted by the initiative, since they will be using the new online expenses claim software system to submit their expenses claims each month, as will for example their line managers who will also be using the new system to approve those claims, and also the members of the Finance department who perform the final approval and submit the claims for payment. On the other hand, the wages clerks who calculate how much each employee should be paid each month and enter that onto the relevant systems to transfer the money and create the payslips will *not* be using the new expenses claim system at all, however they might find that because the new system is so much more efficient than the old one, there are half as many payment errors to need correcting than used to be the case, and payment information comes to them several days earlier than previously, giving them more time in which to complete their own tasks. They are not directly impacted because they do not use the new system itself, but they *are* indirectly impacted because they see a change to their own activities that is *indirectly caused* by the initiative.

Obviously, all directly impacted users need to be carefully identified and their KSA needs for any changes to tools and processes need to be documented and then planned for. But indirectly impacted users should also be identified, and *their* KSA needs should also be considered. In many cases (for example if the illustration of the wages clerks we used a moment ago) their needs might be no greater than a basic communication to make them aware that the change is going to occur. Others however might experience changes to their own tools and processes need to be made in order to accommodate the changes occurring via the initiative, and for these indirectly impacted users there might be a need for just as much KSA requirements to be considered as for those who are directly impacted.



If you think back to Porter's Value Chain in Module 2, you may recall how different business departments or functions combine in different ways to generate customer value as the end result. Knowing how these different functions combine will give the CSM an excellent starting point for considering who more widely within the customer organization might be indirectly impacted by an initiative that will for the sake of argument directly impact all sales people. For example, will making sales people 15% more productive on average lead to a variety of indirect impacts in the Production department, or in the Distribution department? If so, what might the KSA needs of some or all of the employees who work in those departments be, and should those needs be catered for within the adoption plan alongside the KSA needs of the directly impacted users within the Sales team itself?

The workshop is a mainstay of the consultant's toolkit. Holding a workshop is often the best way for the CSM to quickly learn all or at least the majority of information needed about a subject area, of enabling creative innovation and problem solving to occur within a management team or other stakeholder group, and of facilitating consensus forming between stakeholders who may hold a wide range of disparate views or opinions.

The CSM might propose a workshop with the customer for one those three reasons, or for any two or even for all three.

Workshops will vary in length and sophistication based upon two core factors – the complexity of the task set for the workshop to complete and the numbers and personalities of the people who will be attending the workshop.

When faced with an adoption initiative, the work that needs doing is to research the necessary information about which users will be impacted and in what ways, place the users into IGs (or impacted groups), determine each IG's KSA requirements, decide how best to meet those requirements, calculate costs and determine roles and responsibilities, determine risks and challenges and how they can be prevented or circumvented, and then put it all together into an adoption plan together with milestones and measurements, and divided into multiple phases as necessary.

For a simple initiative that only impacts a very small number of IGs in one location and where decision making will be performed by only a small number of key stakeholders who have all the information needed at their fingertips, who all know each other and work well together and who share similar views and opinions as to what should happen and how it should occur, it may be easy to get through this above task list and end up with at least a high level adoption plan in the course of a day or even a morning or an afternoon.

On the other hand, for a complex initiative that directly and indirectly impacts a large number of different IGs in a variety of locations that cross multiple geographical regions, time zones and languages, and where there is a large number of key stakeholders who do not have all the necessary information to hand, who either don't know each other or do not trust each other and who have very different or even opposing views and opinions about what should be done and how it should happen, it might take multiple meetings over a significant period of time to complete those same tasks.

Whilst these two scenarios illustrate the two extreme ends of the scale, the reality will usually fall somewhere in between these two ends, and as such CSMs should always consider carefully what the relative levels of initiative complexity and key stakeholder involvement are before determining what type and duration of workshop might be required for the specific customer engagement they are currently working on.

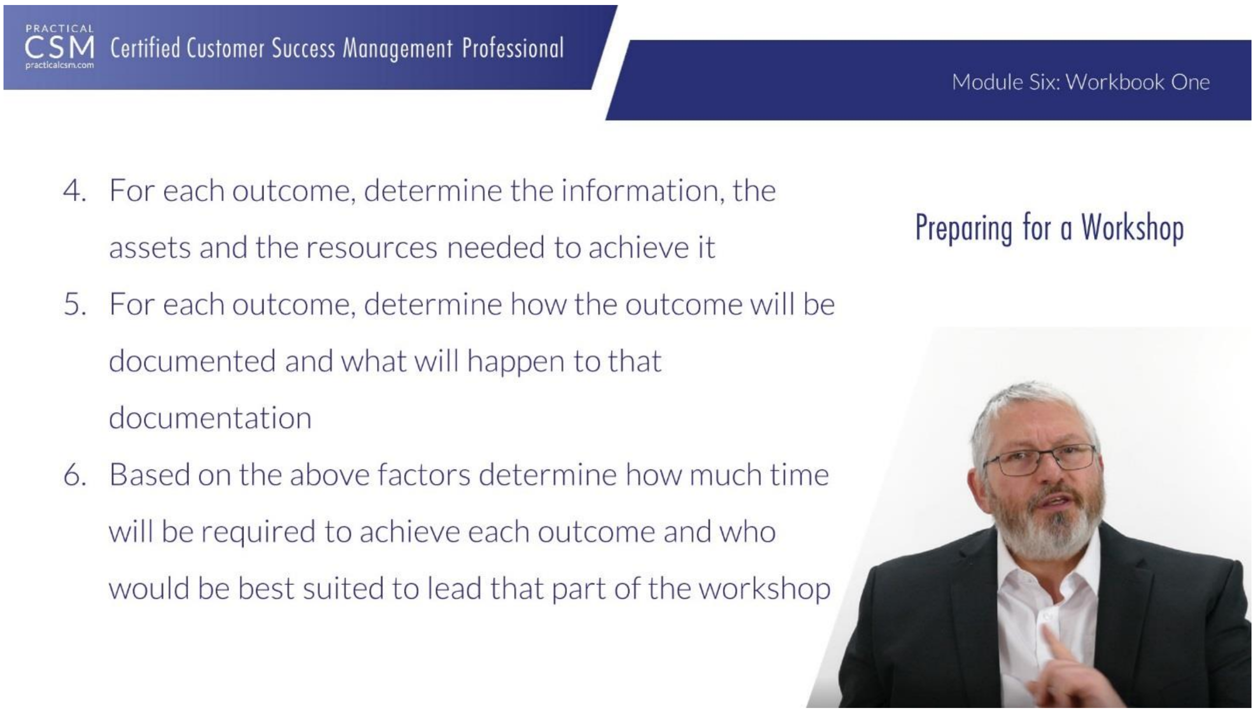
To do this, the eleven steps shown below can be followed:

Determine the outcome requirements from the workshopping process

For each outcome, determine which stakeholders will need to be present for the outcome to be achieved (remember that not all stakeholders may need to be present throughout the entire workshopping process)

For each outcome, determine the process needed to achieve it

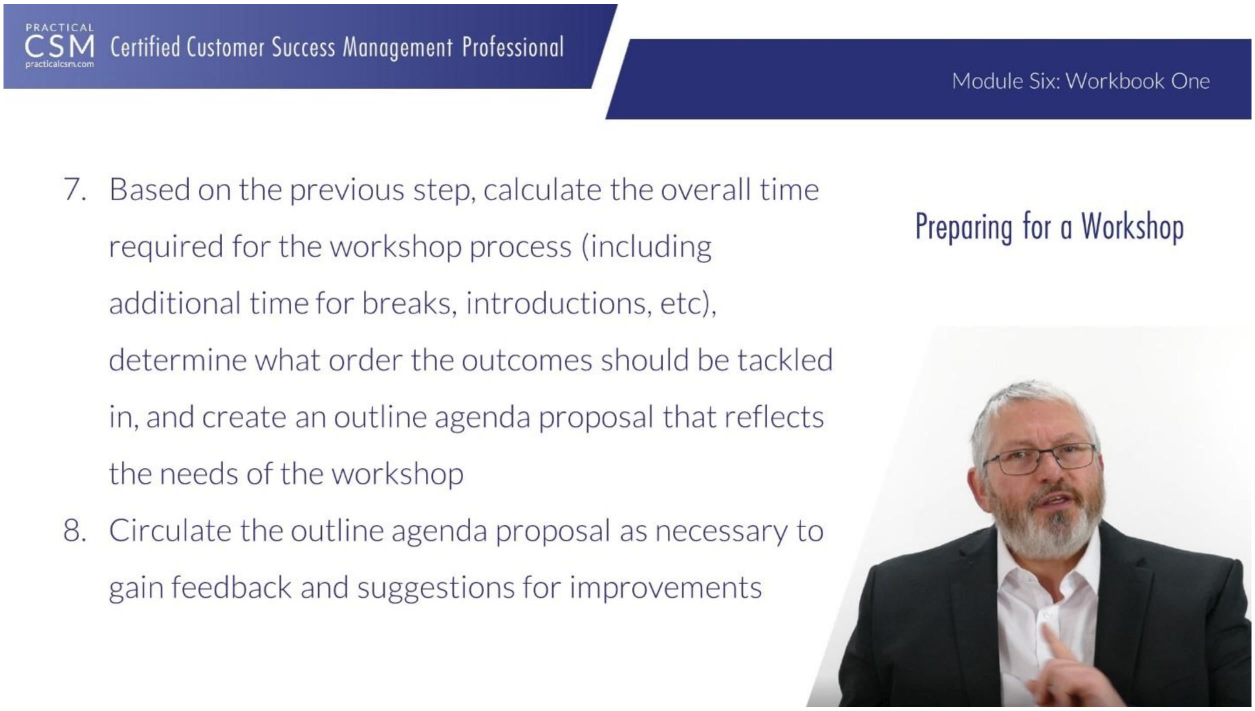
For each outcome, determine the information, the assets and the resources needed to achieve it



For each outcome, determine the information, the assets and the resources needed to achieve it

For each outcome, determine how the outcome will be documented and what will happen to that documentation

Based on the above factors determine how much time will be required to achieve each outcome and who would be best suited to lead that part of the workshop



Based on the previous step, calculate the overall time required for the workshop process (including additional time for breaks, introductions, etc), determine what order the outcomes should be tackled in, and create an outline agenda proposal that reflects the needs of the workshop

Circulate the outline agenda proposal as necessary to gain feedback and suggestions for improvements

Amend the outline agenda proposal as required and circulate the amended outline agenda proposal for approval

Create a detailed agenda based upon the approved agenda proposal and depending upon workshop complexity gather the workshop team together to create a plan to manage the workshop

Start preparation work as necessary on gathering the required information, assets and resources, and on administrative tasks such as booking meeting and breakout rooms, securing equipment such as projectors, arranging for refreshments, sending out invitations, and so on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