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Module Six:  
**Practical CSM Framework Phase 4: Adoption Planning**  
Workbook Two

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

In Workbook One we discussed some of the content from Chapter 7 in the book, namely: Practical CSM Framework Phase 4 Adoption Planning, Part 1 – Concepts, including defining adoption, the importance of adoption, pilots and phases, adoption and change management, the differences between directly and indirectly impacted users and their adoption or change management requirements and the steps needed to plan a Workshop.

In Workbook Two for Module Six we are going to look at some of the practical tools and techniques CSMS can use when creating an adoption plan, as laid out in Chapter 8 of the book: Practical CSM Framework Phase 4 Adoption Planning, Part 2 – Practice.

## Practical CSM Framework Phase 4: Adoption Planning – Agenda

- Getting the adoption requirements agreed
- The role of the CSM in adoption planning
- Adoption planning information requirements for:
  - general adoption requirements
  - capabilities and processes
  - impacted groups
  - adoption activities
  - practical considerations
  - adoption barriers
  - adoption risks



As discussed then, in this video we will be reviewing techniques for creating an adoption plan including: Getting the adoption requirements agreed, and the role of the CSM in the adoption planning process. We will then review adoption planning information requirements for: general adoption requirements, capabilities and processes, impacted groups, adoption activities, practical considerations, adoption barriers and adoption risks.

To do this we will show the use of adoption planning tools that you can find in the downloads section at PracticalCSM.com, however the information and advice about what information to research and document and how to go about doing so applies equally if you are using other tools, templates or software systems that are provided for you by your own company, or that you have developed yourself.

## Getting the Adoption Requirements Agreed

- “Adoption requirements” = the documented list of outcomes that the customer wishes to attain specifically from adopting the CSM’s company’s products and services, and more widely from the overall initiative
- The customer’s adoption requirements must first be clearly established
- After this, adoption planning can commence



What do we mean by the phrase “adoption requirements”? We simply mean the documented list of outcomes that the customer wishes to attain specifically from adopting the CSM’s company’s products and services and more widely from the overall initiative that those products and services have been purchased to support. As with everything in life, the start point is to know what the objectives are. Once we have established in clear, simple terms what it is we are trying to achieve it becomes easier (though not necessarily *easy*) to start to make plans for how to achieve those ends.

## Getting the Adoption Requirements Agreed

- The customer must determine their adoption requirements, not the CSM
- Customer's may need help to understand who within their organization may be directly or indirectly impacted, and in what ways
- The CSM's can act as a facilitator, helping customers to understand what to do and to make sound decisions



The first thing to point out here of course is that it is not up to the CSM or indeed to anyone in the CSM's company to determine what the customer's adoption requirements are, that's a decision for the customer to make. Customer's may need help to fully understand the implications of their initiative and therefore to realize who within their organization may be directly or indirectly impacted, and in what ways, and may benefit greatly from taking advice from someone such as the CSM with knowledge and experience about adoption needs and best practices.

Much of the information to be researched and documented and much of the decision making to be agreed upon about an initiative's adoption requirements must be gathered from internal sources within the customer's own organization and decided by process owners, department heads and other key decision makers, and as such the customer's own stakeholders will almost certainly be better placed to obtain this information and make these decisions than would the CSM. However, there is still a very important role that CSMs may need to play in this fact finding and decision making process, which is that of the facilitator.

## Getting the Adoption Requirements Agreed

- Multiple customer stakeholders may need to be involved within the decision making process
- These may be cross-functional leaders and decision makers who represent a wide range of different functions and departments, and hold a wide range of different opinions about what the initiative is, what it should do, and how it should be achieved



With a more complex customer initiative there may be multiple customer stakeholders who will need to be involved within the decision making process. These stakeholders might represent a wide range of different functions and departments from across the customer organization, including vertical functions such as Production or Sales as well as horizontal functions such as IT or Finance, all of which will be impacted by the initiative. These cross-functional leaders and decision makers may therefore hold a wide range of quite different beliefs and opinions about what the initiative is, what it should do, and how it should go about achieving it (including who should be involved in the running of it and who should pay for any costs incurred).

## Getting the Adoption Requirements Agreed

- Customers with a high level of adoption maturity and/or a less complex initiative are likely to require less input from the CSM
- Customers with both a complex initiative and a relatively low level of adoption maturity are likely to require more input from the CSM



In customers with a high level of maturity in terms of their experience of and readiness for implementing, adopting and realizing value from whatever type of initiative is occurring this may not be a problem, since the customer may have developed systems and protocols for dealing with these differences and are therefore able to formulate an overall consensus opinion on the adoption requirements for the initiative. This type of customer may well have either already been through this decision making process and can simply provide the CSM with their documented list of adoption requirements, or can be left to their own devices to come up with that list.

On the other hand, where the CSM comes across the customer who has a highly complex initiative and a relatively low level of maturity in terms of their experience and knowledge of this sort of initiative, and in particular if the customer's corporate culture and policies do not lend themselves well to cross-functional decision making, the problem of determining the initiative's adoption requirements may be greater. With these situations, some customers may wish to involve the CSM in their adoption requirements deliberations, both as SME (subject matter expert) and as facilitator.

## The Role of the CSM in Adoption Planning: Subject Matter Expertise

- CSMs can provide their knowledge and experience acquired through their training on and time spent familiarizing themselves with their own company's products and services, and through their previous engagements with other customers in similar situations who faced similar adoption requirements



In terms of subject matter expertise, the concept here is that the customer success manager can provide their knowledge and experience acquired through their training on and time spent familiarizing themselves with their own company's products and services, and through their previous engagements with other customers in similar situations who faced similar adoption requirements. Although the CSM is of course not going to know as much about the specific initiative and the wider vision and strategies of the customer organization, they do still have a perspective that may help the customer to think about the types of outcomes that they may need to decide upon.



### The Role of the CSM in Adoption Planning: Facilitation

- CSMs may be perceived as a neutral and trusted third party with no internal political axe to grind
- The CSM can facilitate the customer's team of cross-functional stakeholders to discuss their company's adoption requirements and reach a consensus opinion
- They can also use their subject matter expertise to guide the process in the right direction



In terms of facilitation, it is sometimes the case that a neutral and trusted third party with no internal political axe to grind such as the CSM could make the ideal facilitator to help a customer's team of cross-functional stakeholders to discuss their company's adoption requirements together and reach a consensus opinion as to what those adoption needs are. Of course as well as being a neutral and trusted third party, it definitely helps if the facilitator happens to have a good understanding of and level of expertise in the topic of adopting and generating value from the products and services that the initiative is deploying, so that they can help to lead conversations in the right direction and ensure those conversations both include all aspects that need to be considered and stay on track without diverting off into areas that are not necessary for the purposes of determining the initiative's adoption needs. Again, the CSM fits the bill very well indeed.

## The Role of the CSM in Adoption Planning: End to End

- CSMs may be called upon to facilitate the end-to-end adoption planning process including:
  1. determining adoption requirements
  2. identifying changes to processes
  3. defining who is impacted
  4. documenting practical considerations
  5. determining users' adoption needs



So far we have discussed the above in terms of Step 1: Determine Adoption Requirements. However in reality, what works as the process for determining adoption requirements can also be applied as the mechanism for all of the other steps from 2 to 9 as well, including identifying changes to processes, defining who is impacted, documenting the practical considerations, determining all of the adoption needs of the users...

## The Role of the CSM in Adoption Planning: End to End

- CSMs may be called upon to facilitate the end-to-end adoption planning process including:
  6. capturing and managing challenges and risks
  7. creating the adoption plan
  8. Approving the adoption plan
  9. publishing a high level roadmap to summarise the plan for key stakeholders



...capturing and managing challenges and risks, creating the adoption plan, approving the adoption plan and publishing a high level roadmap that summarises this plan in a way that makes sense to all key stakeholders. What is this process? The process is one of multiple communication, research, analysis and planning activities that center on the “workshop” process that was described in Chapters 7 and 8 of the book and which we discussed at the end of Video 1 of this module.

## The Role of the CSM in Adoption Planning: Defining the Planning Process

- The adoption planning process itself needs to be defined and agreed with the customer
- Precise details of the process and the length of time taken on each step will of course vary, based upon the needs and requirements of each customer
- Customers should take the lead in decision making, and should be considered as the project's owners



Assuming that the customer success manager has been invited by the customer to assist them in their adoption planning process, this process itself needs to be defined and agreed. The precise details of the process and the length of time taken on each step will of course vary from engagement to engagement, based upon the needs and requirements of each customer. Also of course it is important to remember that it is the *customer's* process which the CSM is being invited to become a part of, rather than being the CSM's process that the customer is being invited to attend. It is therefore the customer's decision as to what the planning process should look like and who will be involved in it.

## The Role of the CSM in Adoption Planning: Defining the Planning Process

- The CSM's role is to:
  - provide subject matter expert-related advice and support
  - facilitate the flow of information and helps to co-ordinates activities
  - aid the negotiation of decisions between stakeholders with conflicting needs and opinions



With that said, as a subject matter expert in how to adopt and realize value from their company's products and services, it may well be the case that the customer's SPL may invite the CSM to recommend a process or even to take the initiative alongside them to help organize and arrange it all. If this is the case then it should be seen as good news, since it inevitably must mean that the CSM has done a great job in developing the trust relationship between themselves and the SPL and other customer stakeholders and that the customer perceives them as being a valuable asset whose input is central to the overall process of realizing the outcomes from their initiative.

## The Adoption Planning Process

- The “kick off” meeting: the CSM should hold an initial meeting with the SPL and any other customer stakeholders that the SPL wishes to invite to that meeting (though the fewer the better at this stage is probably a good thing) where the two (or more) of them can discuss and agree that process in person
- This meeting is best conducted in person if possible



If the CSM is invited by the customer to help them determine an adoption planning process, then the best way would be to hold a meeting with the SPL and any other customer stakeholders that the SPL wishes to invite to that meeting (though the fewer the better at this stage is probably a good thing) where the two (or more) of them can discuss and agree that process in person. Ideally this meeting would be face-to-face in person, but if for logistical or cost reasons this is not possible then an online virtual meeting might serve as a less effective but pragmatic second best approach.

In this meeting, the CSM is really looking for the SPL to take the lead, but depending upon personalities and existing knowledge and experience levels, may wish to be more or less forthright in proposing topics for discussion and then facilitating that discussion through to a satisfactory conclusion, always being careful to try to make the SPL feel comfortable with the process and remain in charge of ultimate decision making. As with much of the CSM’s role, the CSM should not be out to make themselves the star of the show, but rather to facilitate success in others.

## The Adoption Planning Process

- The adoption process for complex adoptions is likely to need input from multiple stakeholders
- Not all of the information required will be known up front, and some of it is likely to need researching
- Multiple stakeholders will be involved and new information will be needed in order to understand the adoption requirements of all impacted users



The adoption process for anything more than a simple adoption requirement is likely to need input from multiple stakeholders and not all of the information required to make adoption planning decisions is likely to be known up front, and instead some of it is likely to need researching. The reason for needing the involvement of multiple stakeholders and for uncovering new information is due to the need to understand the adoption requirements of each impacted user. This means first of all finding out who is impacted and then learning in what ways they are impacted. Department and/or function heads and/or team leaders are therefore likely to be important stakeholders, and even though they are in charge of their teams of users, even they may not know all the details about exactly how each IG (impacted group) goes about performing their tasks in sufficient details to be able to document exactly what the changes to those tasks will be.

### The Adoption Planning Process: Multi-Workshop Approach

- In the first workshop senior decision makers are invited
- The overall vision, scope and outcome requirements are agreed, together with management and funding options
- Part of the scoping exercise will be to determine which departments and/or functional areas of the business are going to be impacted by the initiative and who needs to help determine end user adoption requirements



As a result of this, one approach might be to hold a series of separate workshops. In the first workshop senior decision makers are invited, and in this workshop the overall vision and scope for the adoption plan and the outcome requirements from it are discussed and agreed, along with management of and funding for the project. Part of that scoping exercise will be to determine which departments and/or functional areas of the business are going to be impacted by the initiative and therefore who else needs to be brought in to help determine the details concerning end user impact and adoption needs.



### The Adoption Planning Process: Multi-Workshop Approach

- Department and function heads, team leaders and subject matter experts can be invited to attend further “discovery” workshops (or other facilitated meetings) in order to:
  - gain clarity on the adoption or change management requirements of all impacted users,
  - agree assets and resourcing requirements



From the output from this initial workshop, one or more further “discovery” workshops (or other facilitated meetings) can be arranged where department and function heads, team leaders and subject matter experts can be invited to attend. The purpose of these workshops or meetings is firstly to gain clarity on the adoption or change management requirements of all impacted users, and secondly to agree what assets and resources need to be provided by the adoption plan to meet and fully satisfy these requirements.

### The Adoption Planning Process: Multi-Workshop Approach

- There is often the need for a follow up process to enable additional information that needs to be researched and/or validated to be provided and discussed
- The high level plan can then be determined by the original, senior decision making team
- Once this is approved, work can commence on detailed planning for all of the adoption initiative's activities



Experience shows that workshops are just as likely to expose unknown information that needs to be further researched or at least assumed information that needs validation as it is to find definitive answers to all the questions. There may therefore need to be some agreed follow up process to these discovery workshops that enable additional information that needs to be researched and/or validated to be provided and discussed as necessary.

Following this, the original, senior decision making team should be able to meet once again to assemble all of the pieces together into an overall high level plan which they can either approve themselves or if necessary submit for further discussion of and approval by others. Once the high level plan is approved, work can commence on detailed planning for all of the adoption initiative's activities, including communications, training, testing, supporting, measuring and reporting activities, which can then be divided into phases as necessary and with roles and responsibilities assigned for all tasks as well as agreement on overall project management, on funding and on reporting.

## Adoption Planning Tools: Existing Tools

- The customer's Org Chart or a Porter's Value Chain model of the business
- The Customer Research Checklist from Practical CSM Framework Phase 1: Preparation
- The Customer Engagement Proposal from Practical CSM Framework Phase 2: Commitment
- The Onboarding Work Plan from Practical CSM Framework Phase 3: Onboarding



There are several tools that customer success managers have already been introduced to, which the CSM may find useful to employ and/or to refer back to during adoption planning. These include:

The customer's Org Chart or a Porter's Value Chain model of the business to help determine which departments and functions of the business will be directly or indirectly impacted by change engendered by the initiative. The Customer Research Checklist document that was created in Practical CSM Framework Phase 1: Preparation and has subsequently been referenced and updated in Phases 2, 3 and now 4, which will contain some at least of the information needed for adoption planning. The Customer Engagement Proposal that was created in Practical CSM Framework Phase 2: Commitment, which determines the scope of the CSM's involvement with the customer and helps to determine what CSM activities are included and what activities lie outside of the commitment and which might therefore attract additional professional services fees. The Onboarding Work Plan that was created in Practical CSM Framework Phase 3: Onboarding, which should contain valuable information about impacted users and groups. In addition to these pre-existing tools, the CSM might find the tools inside the *Chapter\_8\_Adoption\_Tools* Microsoft Excel workbook to be useful. If you have not already seen these tools then students are advised to pause this video, download and open the workbook and take a brief look through the worksheets to familiarize themselves with them.

## Adoption Planning Tools: The Adoption Planning Tools

Requirement	Details
Key Objectives	
Who will be involved in research and planning	
Directly Impacted User Groups	
Indirectly Impacted User Groups	
Funding Sources	
Who will be involved in implementation	
Measurement	
Reporting	
Sign Off	



In addition to these pre-existing tools, the CSM might find the tools inside the *Chapter\_8\_Adoption\_Tools* Microsoft Excel workbook to be useful. The first worksheet within the workbook is the “General Adoption Requirements” sheet, which is the sheet that is shown here.

## The Adoption Planning Tools: 1. General Adoption Requirements

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- Key objectives
- Who will be involved in research and planning
- Which users are impacted by the initiative
- Funding and implementing the plan
- How progress will be measured
- Progress reports and sign off



This tool is very straightforward. It lists the basic requirements and provides a space to document the relevant information for each. You may recall from Chapter 8 of the book that what needs to be decided and documented includes:

Key objectives (outcome requirements) in Row 2

Who will be involved in the research and planning processes in Row 3

Which users are impacted by the initiative and whose adoption needs therefore need to be included (these are divided into Directly Impacted Groups in Row 4 and Indirectly Impacted Groups in Row 5)

Who will be involved in funding and implementing the plan in Rows 6 and 7

How progress will be measured in Row 8

Who will take those measurements and provide progress reports in Row 9

Who will provide the ultimate sign off and confirm the level of value returned by the initiative? In Row 10

In terms of using the tool, the easiest way is simply to share it with the SPL – perhaps on a large screen or projector if face-to-face or by sharing the workbook on screen if using a virtual collaboration tool for an online meeting – and then work through the requirements, row by row, referring as necessary to information already researched and documented in the Customer Research Checklist.

## The Adoption Planning Tools: 2. Capabilities and Processes

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- Enables the CSM to document the capabilities and/or processes that will be impacted by the initiative
- One row for each capability or process
- Includes columns for Name, Description, Owner, Department (or Function), Explanation of Impact and the List of Users Impacted



The second worksheet in the workbook enables the CSM to document the capabilities and/or processes that will be impacted by the initiative. This is the first of the more detailed worksheets that effectively expands upon the first worksheet to list out all capabilities and processes that will undergo change, and document exactly what those changes are.

	A	B	C	D	E	F	G
	No.	Name	Description	Owner	Department/Function	Explanation of Impact	Impacted Users
1	Capability / Process 1	Taking New Orders from Customers for Product X	The capability to document the custom requirements for Product X from a new customer, confirm production and shipping times with them, offer and (if required) provide finance options, gain financing approval (if required), get contract signed and place ne worder in production queue to be produced	VP Global Sales, Chris Hutchinson	Sales	New joined up sales, finance, manufacturing and distribution software system that enables orders placed by sales people to be automatically referred for finance and when approved to be added to the manufacturing queue and ultimately to the distribution worklist. The new software simplifies the custom ordering process for Product X and reduces time to delivery for the customer by up to three weeks	All Sales Staff
2	Capability / Process 2						
3	Capability / Process 3						
4	Capability / Process 4						
5	Capability / Process 5						
6	Capability / Process 6						
7	Capability / Process 7						
8	Capability / Process 8						
9							

This illustration shows the Impacted Capabilities and Processes worksheet within the tool and the first row has been completed as an example of how this worksheet might be used. For smaller or less complex initiatives it may be possible for just the CSM and SPL to sit together at the screen and work through this sheet to complete it between them. For larger, more complex initiatives it is likely that input from a variety of process and function owners across multiple departments and/or regions will be needed. If this is the case then the sheet can be displayed or projected onto a larger screen that everyone can see during the workshoping process. The CSM can then facilitate contributions from all stakeholders and document the group’s findings directly into the worksheet as the workshop participants agree them. It might also be useful to color code where assumptions are made and perhaps create an additional “Notes” column where additional information about work that still needs to be done (such as follow up research to uncover additional information or validate assumptions) can be documented.

## The Adoption Planning Tools: 3. Impacted Groups

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- It is essential identify all IGs (impacted Groups)
- This task may already have been performed within the Customer Research Checklist and/or in the first sheet of this Adoption Planning Tools workbook
- This is an opportunity to ensure the list is definitive, using the list of capabilities as a sum check



As was discussed in Chapters 7 and 8 of the book, identifying all of the IGs (impacted groups) is an important task to perform well. Whilst this information may already be present in the Customer Research Checklist and/or in the first sheet of this Adoption Planning Tools workbook, these lists may be incomplete and/or contain assumptions that now need to be validated before moving forwards, since it is at this adoption stage that a thorough and accurate understanding of all impacted groups becomes essential.



## The Adoption Planning Tools: 3. Impacted Groups

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- Each IG should have a meaningful name and a description
- The Changes column is for explaining in what ways each group will be impacted by changes
- The next three columns are for capturing the KSA (ie knowledge, skills and attitude) requirements



Once the IGs have been correctly identified, the other essential task to get right is to determine in what ways each IG is impacted. The third worksheet in the Chapter 8 Adoption Tools workbook is called Impacted Groups. In this sheet the CSM can provide each IG with a meaningful name and a description to ensure everyone understands what the group is for and who is included within it. If desired, another column could be added that specifically contains numbers and locations of users within the group, however in the standard tool these are added into the Description column. The next column is called Changes and in this column you can notate in what ways this group will be impacted by changes caused either directly or indirectly by the initiative. In the next three columns the CSM can document the KSA (ie knowledge, skills and attitude) requirements of each group respectively.

## The Adoption Planning Tools: 3. Impacted Groups

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- It is not always easy to get the IGs right
- It is necessary to involve relevant customer stakeholders in this process
- “Unknown unknowns” may be uncovered and further research may need to be conducted
- The CSM should assume a project management role



It should be emphasized that the easy part is filling out the worksheet, whereas the difficult part is correctly identifying each IG and correctly identifying each IG’s KSA requirements. In most cases the CSM cannot do this as well on their own as if it was done with those who know the users, since even if you know the knowledge and skill requirements for the new role or process, without knowing the users it is difficult to estimate their current levels of knowledge and skills, and even harder to know what their attitude may be towards the changes they will be asked to undergo. Far better then to work with a small team of customer stakeholders who *do* know the users and can advise accordingly, and this of course will form a large part of the work conducted within an adoption discovery workshop.

As has been mentioned before it is not uncommon to find that the workshopping process uncovers “unknown unknowns” ie information that no-one realized would be needed, and which no-one (or no-one at the workshop at least) is currently in possession of. When this occurs the CSM needs to ensure that a note is made and that someone is assigned to conduct the research and report back with the missing information. As well as planning and facilitating the workshop, managing the post-workshop activities and ensuring that all necessary information is researched and documented is an important task. It may be the case that a customer stakeholder such as the SPL will take on this task (since they may be better positioned to oversee internal work that needs to be conducted within the customer’s organization than the CSM would be). If that’s the case then the CSM needs to “project manage the project manager” as it were – making sure that the SPL or other stakeholder is indeed overseeing the necessary work to uncover missing information. The Impacted Groups worksheet is shown here, with information related to one IG completed as an example.

	A	B	C	D	E	F	G
	IG	Name	Description	Changes	Knowledge	Skills	Attitude
1	Group 1	Customer Support Team	250 in Orlando FL and 375 in San Jose CA call centers. Responsible for first line customer support.	New call center software in both call centers to go live in six months' time. Changes to job role description and to shift patterns to occur at the same time	<ul style="list-style-type: none"> <li>• Overview of what is happening, why and timelines</li> <li>• Changes to job role</li> <li>• Changes to shift patterns</li> <li>• New software familiarization</li> <li>• New processes familiarization</li> </ul>	<ul style="list-style-type: none"> <li>• ability to perform new role requirements</li> <li>• live simulation training exercises</li> <li>• testing on new software and processes</li> <li>• use of support tools</li> </ul>	<ul style="list-style-type: none"> <li>• group members will need reassurance that new shift patterns and changes to job role will not impact work/life balance or cause loss of income</li> <li>• some group members may be concerned about potential job losses</li> <li>• some group members may need emotional support around being able to cope with operating the new software and associated processes</li> </ul>
2	Group 2						
3	Group 3						
4	Group 4						
5	Group 5						
6	Group 6						
7							

The Impacted Groups worksheet is shown here, with information related to one IG completed as an example. As before, pause the video to give yourself more time to review the example

## The Adoption Planning Tools: 4. Adoption Activities

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
-------------------------------	--------------------------	-----------------	---------------------	--------------------------	-------------------	----------------

- Enables documenting of adoption requirements for all IGs
- Simplifies the process of keeping track of all requirements
- Can be referred to whilst developing the adoption plan
- Helps ensure nothing is missed



The *Adoption Activities* worksheet is next. The purpose of the Adoption Activities worksheet is as its name might suggest, to provide a simple means of documenting all adoption requirements for all IGs in one place, in order to simplify the process of keeping track of all these requirements, and ultimately to refer to whilst developing the adoption plan, so that no important communication, training or support requirement is omitted by accident.

## The Adoption Planning Tools: 4. Adoption Activities

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
-------------------------------	--------------------------	-----------------	---------------------	--------------------------	-------------------	----------------

- The first four columns contain the IG number, name, general description and requirements
- Columns E, F and G are used to describe the communication, training and support activities respectively for each group
- There is an additional column for any other activities



The first four columns contain the IG number, name, general description and requirements, which should match those used in the previous sheet – Adoption Requirements. Columns E, F and G are used to describe the communication, training and support activities respectively for each group, and there is an additional column for any other activities.

	A	B	C	D	E	F	G
		Name	Description	Changes	Communication	Training	Support
1		Group 1 Customer Support Team	250 in Orlando FL and 375 in San Jose CA call centers. Responsible for first line customer support.	New call center software in both call centers to go live in six months' time. Changes to job role description and to shift patterns to occur at the same time	Immediate: Inform team leaders of the upcoming change, for them to propagate to their team members. 3 months prior: Formal communication via email and letter to every team member, detailing the change and explaining why it is happening, what their role will be and what they can expect in terms of changes to job role, shift patterns etc, when the change will occur, and what training, support and incentives they will receive. Immediately after the letter: Series of voluntary meetings with management team and HR in attendance to review the upcoming changes and answer any questions. 2 months prior: Email setting out training and go live dates and times for each cohort. 1 month prior: reminder emails. 1 week prior: reminder emails	Overview of changes, overview of new processes, overview of new software, detailed training on software features and functions, detailed training on new processes, live simulation training exercises, testing on new software and processes, awareness of support availability, sign off by team manager	Initial support from line manager/team leader and from designated power users. First line support from the IT Tech Support Team, to go live contemporaneously with the new software. Second and third line support backed off to vendor as a managed service
2		Group 2					
3		Group 3					
4		Group 4					
5		Group 5					
6		Group 6					
7							

The image here shows the Adoption Activities Checklist with the first row completed as an example. The standard tool has deliberately been kept as simple as possible to make it quick and easy to use, but CSMs who find this type of tool useful might want to add additional columns to store more information for each IG.

The main difference between the Adoption Requirements sheet and the Adoption Activities sheet, is that the first sheet – Adoption Requirements – simply documents the *needs* of each group that have been identified by research or simply by asking relevant stakeholders (such as subject matter experts, team leaders, and so on), whereas the Adoption Activities worksheet actually documents what will be done within the adoption plan to *meet* those needs.

## The Adoption Planning Tools: 5. Practical Considerations

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
-------------------------------	--------------------------	-----------------	---------------------	--------------------------	-------------------	----------------

- CSMs must ensure that practical concerns are raised and any considerations that need to be thought through and included within the adoption planning process
- There is a row for each consideration, with a space next to it for documentation of notes
- Eight considerations have been included, but the CSM can add further ones as necessary



It's important for CSMs to make sure that practical concerns are raised and any considerations that need to be thought through and included within the adoption planning process are documented. This is the purpose of the *Practical Considerations* tool in the fifth worksheet. Like the other tools in this series for adoption planning, the tool is very simple and serves purely as a checklist or aide memoir for the CSM to ensure that all practical concerns are discussed and as a space to document the outputs from these discussions. A row for each consideration has been created in the worksheet, with a space next to it for documentation of notes relating to that consideration. Eight considerations have been included, but of course the CSM can add further considerations below if they desire, and can also remove rows containing unimportant or unrelated considerations in order to customize the list to better meet their specific requirements.

Consideration	Description
Implementation Phases	Will the solution be rolled out all together or will it be rolled out in a series of phases? If the former, when will the implementation be completed? If the latter, when will each phase occur, what happens in each phase, and how will this impact the adoption plan?
User Availability	When are the users available, especially if they need to undergo any lengthy training? Are all users within an IG available together or will they need to be separated into multiple groups that undergo separate training in order to maintain productivity levels?
External Dependencies	Are there any activities that are outside of this initiative but which this initiative relies upon being completed prior to commencing the adoption? (For example do a group of new recruits need general induction training first before being exposed to the specific task-oriented training contained within the adoption plan?)
Internal Dependencies	Are there any activities from within this initiative which must be completed prior to commencing the adoption? (For example is there some customization or integration work that must be completed before the adoption commences?)
Financing	Are there sufficient funds available for the completion of the adoption program and where will this funding come from? If cash is tight would it be better for cash flow reasons to divide the adoption roadmap into a series of phases where essential training is completed straight away and other training is left to be completed at a later stage when it becomes affordable?
Deadlines and Timeframes	Are there any hard deadlines by which, or timeframes in which all or certain aspects of the adoption must be completed? For example a new piece of legislation, or the launch of a new product may each engender specific deadlines that must be met.
Milestones and KPIs	What does the customer require in terms of milestones <u>en</u> route to overall completion of the adoption program, and how will those milestones be measured?
Internal and External Standards	Must all or parts of the adoption program ensure conformity to internal and/or external standards, such as best practice guidelines and government or industry regulations?

The eight default considerations in the template are:

**Implementation Phases:** Will the solution be rolled out all together or will it be rolled out in a series of phases? If the former, when will the implementation be completed? If the latter, when will each phase occur, what happens in each phase, and how will this impact the adoption plan?

**User Availability:** When are the users available, especially if they need to undergo any lengthy training? Are all users within an IG available together or will they need to be separated into multiple groups that undergo separate training in order to maintain productivity levels?

**External Dependencies:** Are there any activities that are outside of this initiative but which this initiative relies upon being completed prior to commencing the adoption? (For example do a group of new recruits need general induction training first before being exposed to the specific task-oriented training contained within the adoption plan?)

**Internal Dependencies:** Are there any activities from within this initiative which must be completed prior to commencing the adoption? (For example is there some customization or integration work that must be completed before the adoption commences?)

**Financing:** Are there sufficient funds available for the completion of the adoption program and where will this funding come from? If cash is tight would it be better for cash flow reasons to divide the adoption roadmap into a series of phases where essential training is completed straight away and other training is left to be completed at a later stage when it becomes affordable?



**Deadlines and Timeframes:** Are there any hard deadlines by which, or timeframes in which all or certain aspects of the adoption must be completed? For example a new piece of legislation, or the launch of a new product may each engender specific deadlines that must be met.

**Milestones and KPIs:** What does the customer require in terms of milestones en route to overall completion of the adoption program, and how will those milestones be measured?

**Internal and External Standards:** Must all or parts of the adoption program ensure conformity to internal and/or external standards, such as best practice guidelines and government or industry regulations?

## The Adoption Planning Tools: 6. Adoption Barriers

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- The first columns contain the name of the barrier and its description
- In the third column the CSM should rate the severity of the barrier from 1 to 10 where 1 would be a very small or inconsequential barrier and 10 would be a very large and important barrier



The *Adoption Barriers* tool and *Adoption Risks* tool are very similar in format, with both containing columns for the barrier or risk name and description. In the case of Barriers this is followed by a single column for noting the severity of the barrier. My recommendation is to rate the severity from 1 to 10 where 1 would be a very small or inconsequential barrier and 10 would be a very large and important barrier.

## The Adoption Planning Tools: 6. Adoption Barriers

General Adoption Requirements | Capabilities & Processes | Impacted Groups | Adoption Activities | Practical Considerations | **Adoption Barriers** | Adoption Risks

- Adoption barriers are unique to that customer and specific to their situation
- They should be identified by the customer's stakeholders
- The CSM's role is to use consultative questioning to help stakeholders identify all barriers



Adoption barriers should ideally be identified by the customer's stakeholders, since in theory at least they should be unique to that customer and specific to their situation, however it is not always easy for customer stakeholders to think of everything without some prompting. As we have said before, the secret of good consultancy is asking the right questions. In this case, it's about asking questions that prompt the customer's stakeholders to think of all the adoption barriers relating to their initiative. The CSM might decide to try to uncover *all* adoption barriers first and then revert back through the list to discuss strategies for dealing with them afterwards. Alternatively the CSM might decide its best to discuss and agree steps to deal with each barrier as it is raised. Either way can work, with the former having the advantage of being able to get the stakeholders into "creative brainstorming" mode where one idea might perhaps trigger another. On the other hand the latter works well where you have multiple workshops or other meetings with smaller numbers of people and are focusing in on just one specific area of the overall initiative with those stakeholders.

Barrier	Problems	Actions
Lack of senior management support for the initiative	Difficulties gaining funding either now or in future phases. Difficulties motivating staff to participate. Results not reported or not taken seriously	Write a business case (or amend the existing one) to show business benefits of the initiative and how it impacts broader corporate vision and strategy. Provide case study-based evidence of results of similar initiatives. Try to find a senior leader who will act as sponsor.
Lack of end user support for the initiative	One or more groups of end users and/or their team leaders may be unsupportive and even critical of and/or opposed to the initiative taking place. Unsupportive end users may deliberately or unwittingly “sabotage” the initiative and prevent it from succeeding	Conduct research to understand their reasons for not supporting the initiative and find ways to deal with these reasons. For example, negotiate pay increases for additional skills learned, or provide written assurances regarding no job losses, or explain in detail what training and support will be provided.
Lack of assets and/or resources	Insufficient access to assets such as the people who will be impacted by the initiative and equipment they will be using, and/or lack of resources such as trainers and training materials, support systems, cash, etc	The only ways to unlock necessary assets and resources are either to gain the support and commitment of the asset/resource owner (such as a team leader, process owner or budget holder) or to get a senior manager to request their support. If these are not possible then the other alternative is to try to find a way to implement the adoption without the specific asset or resource that you do not have access to.
Culture and/or Politics	Difficulties caused by organizational or regional culture causing opposition to all or often specific aspects of the initiative, and/or the initiative getting caught up in “office politics”	Where cultural problems occur, the CSM should try to investigate which aspects of the initiative are causing the issues. It is generally easier to adapt the initiative than attempt to change the culture, so once the specific problem is identified try to find a workaround that is more culturally aligned to the users’ needs and expectations. Where office politics is involved, try to get the acknowledged support of a senior authority who can deal with those sorts of issues by virtue of their position of seniority.

The following are generic examples of the types of adoption barriers you might find stakeholders raise during this process, with ideas for the types of action that it might be possible to take to overcome them:

**Barrier:** Lack of senior management support for the initiative

**Problems:** Difficulties gaining funding either now or in future phases. Difficulties motivating staff to participate. Results not reported or not taken seriously

**Actions:** Write a business case (or amend the existing one) to show business benefits of the initiative and how it impacts broader corporate vision and strategy. Provide case study-based evidence of results of similar initiatives. Try to find a senior leader who will act as sponsor.

**Barrier:** Lack of end user support for the initiative

**Problems:** One or more groups of end users and/or their team leaders may be unsupportive and even critical of and/or opposed to the initiative taking place. Unsupportive end users may deliberately or unwittingly “sabotage” the initiative and prevent it from succeeding

**Actions:** Conduct research to understand their reasons for not supporting the initiative and find ways to deal with these reasons. For example, negotiate pay increases for additional skills learned, or provide written assurances regarding no job losses, or explain in detail what training and support will be provided.

**Barrier:** Lack of assets and/or resources

**Problems:** Insufficient access to assets such as the people who will be impacted by the initiative and equipment they will be using, and/or lack of resources such as trainers and training materials, support systems, cash, etc

**Actions:** The only ways to unlock necessary assets and resources are either to gain the support and commitment of the asset/resource owner (such as a team leader, process owner or budget holder) or to get a senior manager to request their support. If these are not possible then the other alternative is to try to find a way to implement the adoption without the specific asset or resource that you do not have access to.

**Barrier:** Culture and/or Politics

**Problems:** Difficulties caused by organizational or regional culture causing opposition to all or often specific aspects of the initiative, and/or the initiative getting caught up in “office politics”

**Actions:** Where cultural problems occur, the CSM should try to investigate which aspects of the initiative are causing the issues. It is generally easier to adapt the initiative than attempt to change the culture, so once the specific problem is identified try to find a workaround that is more culturally aligned to the users’ needs and expectations. Where office politics is involved, try to get the acknowledged support of a senior authority who can deal with those sorts of issues by virtue of their position of seniority.

Barrier	Problems	Actions
Lack of Customer Maturity	Difficulties caused by the customer not understanding the issues relating to an initiative of this nature and therefore not preparing fully and in particular not listening to advice from the CSM or others	Sometimes the CSM might be brought in at a later stage, after the customer has already tried to make a success of the initiative on their own and failed to do so due to lack of skills, knowledge and/or experience with this type of initiative and/or with these types of products and services. If the customer is aware of this shortfall and open to taking advice then the CSM can assist. In circumstances where the customer lacks the necessary understanding to make the initiative a success and is not aware of it, it may be harder for the CSM to lead the customer in the right direction. In this situation a possible route forwards might be to share with the customer's stakeholders case studies of previous initiatives that experienced similar problems that the CSM is anticipating here, or better still to get a direct conversation going between the stakeholders of the new customer and those of previous customers who can share first-hand accounts of the type of problems they encountered
External Dependencies	Problems caused by the initiative being dependent upon other activities occurring. This might be all sorts of things, for example the withdrawal of funding, or changed customer requirements, or another project not completing on time, etc	External dependencies are many and varied, and there is no single action that can be recommended for dealing with them since it will depend entirely upon the nature of the dependency. The best a CSM can do is to ask in advance what dependencies exist, and then build contingency plans for any that are deemed to be a significant risk to the initiative (see the section on risks below)

**Barrier:** Lack of Customer Maturity

**Problems:** Difficulties caused by the customer not understanding the issues relating to an initiative of this nature and therefore not preparing fully and in particular not listening to advice from the CSM or others

**Actions:** Sometimes the CSM might be brought in at a later stage, after the customer has already tried to make a success of the initiative on their own and failed to do so due to lack of skills, knowledge and/or experience with this type of initiative and/or with these types of products and services. If the customer is aware of this shortfall and open to taking advice then the CSM can assist. In circumstances where the customer lacks the necessary understanding to make the initiative a success and is not aware of it, it may be harder for the CSM to lead the customer in the right direction. In this situation a possible route forwards might be to share with the customer's stakeholders case studies of previous initiatives that experienced similar problems that the CSM is anticipating here, or better still to get a direct conversation going between the stakeholders of the new customer and those of previous customers who can share first-hand accounts of the type of problems they encountered

**Barrier:** External Dependencies

**Problems:** Problems caused by the initiative being dependent upon other activities occurring. This might be all sorts of things, for example the withdrawal of funding, or changed customer requirements, or another project not completing on time, etc

**Actions:** External dependencies are many and varied, and there is no single action that can be recommended for dealing with them since it will depend entirely upon the nature of the dependency.

The best a CSM can do is to ask in advance what dependencies exist, and then build contingency plans for any that are deemed to be a significant risk to the initiative (see the section on risks below)

## The Adoption Planning Tools: 7. Adoption Risks

General Adoption Requirements | Capabilities & Processes | Impacted Groups | Adoption Activities | Practical Considerations | Adoption Barriers | **Adoption Risks**

- A risk is something that has not happened but which might occur and if it does then it will have negative consequences
- Once a risk has been identified it is then a case of deciding both how likely it is that the risk will occur and if it does occur how severe the consequences will be



The difference between adoption barriers and adoption risks is simply that a barrier is something that has happened and therefore needs to be dealt with, whereas a risk is something that has not happened but which might occur and if it does then it will have negative consequences for the initiative. In the case of risks, once a risk has been identified it is then a case of deciding both how likely it is that the risk will occur and if it *does* occur how severe the consequences will be. For example, if both the likelihood and severity of a risk are very high (ie if something is very likely to happen and when it does it will be disastrous to the initiative) then this risk will need to be treated differently than if for example both the likelihood and severity of a risk are very low (ie if something is highly unlikely to occur and if it does occur the consequences to the initiative will be very mild).



## The Adoption Planning Tools: 7. Adoption Risks

General Adoption Requirements	Capabilities & Processes	Impacted Groups	Adoption Activities	Practical Considerations	Adoption Barriers	Adoption Risks
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- Once uncovered and rated for likelihood of occurrence and severity of impact, the CSM and customer stakeholders can determine the appropriate course of action to take for each risk
- This might include actions to be taken in advance to prevent occurrence, or afterwards to reduce the severity of its impact



Once uncovered and rated for likelihood of occurrence and severity of impact, the CSM and customer stakeholders can determine the appropriate course of action to take for each risk. This might include actions to be taken in advance in order to prevent (or at least reduce the likelihood of) the risk occurring in the first place and/or to reduce its severity if it does occur. It might also include actions to be taken upon the risk occurring in order to reduce the severity of its impact.

As previously mentioned, the *Adoption Barriers* tool and *Adoption Risks* tool are very similar in format, with both containing columns for the barrier or risk name and description. In the case of Risks however, there are two columns for ratings; the first being Likelihood of occurrence and the second being Severity of results if it does occur. My recommendation is to rate both occurrence and severity from 1 to 5 where 1 would be unlikely to occur or inconsequential if it does occur and 5 would be very likely to occur or having a very large impact if it does occur.

Adoption Barriers

	A	B	C	D	E	F	G	H	I
	No.	Name	Description	Severity	Strategy	Responsible	Accountable	Consulted	Informed
1									
2	Barrier 1			0					
3	Barrier 2			0					
4	Barrier 3			0					

Adoption Risks

	A	B	C	D	E	F	G	H	I	J	K
	No.	Name	Description	Likelihood	Severity	Score	Strategy	Responsible	Accountable	Consulted	Informed
1											
2	Risk 1			0	0	0					
3	Risk 2			0	0	0					
4	Risk 3			0	0	0					

As previously mentioned, the *Adoption Barriers* tool and *Adoption Risks* tool are very similar in format, with both containing columns for the barrier or risk name and description. In the case of Risks however, there are two columns for ratings; the first being Likelihood of occurrence and the second being Severity of results if it does occur. My recommendation is to rate both occurrence and severity from 1 to 5 where 1 would be unlikely to occur or inconsequential if it does occur and 5 would be very likely to occur or having a very large impact if it does occur.



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