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Module Seven:  
**Practical CSM Framework Phase 5: Adoption Implementation**  
Workbook One

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Well here we are at Module Seven of the PracticalCSM.com Certified Customer Success Management Professional training course. This is the second framework phase that deals with the very important topic of adoption, and this phase is all about adoption implementation.

For this module you need to read Chapter Nine: Practical CSM Framework Phase 5 Adoption Implementation from the book before you review the videos.

## Practical CSM Framework Phase 5: Adoption Implementation – Agenda

- Adoption Implementation Roles
- Project Management Principles and Best Practices
- Preparing for Project Kick-Off
- Managing People



In Workbook One we will focus a lot on the role of the CSM as the assistant and guide to the customer's SPL during the adoption implementation process. In particular we will discuss the following: The utilization of project and program management principles and best practices to assist the CSM and SPL to manage the adoption implementation process, preparing for project kick-off, and managing people during the implementation process

## Adoption Implementation Roles

The Customer is the Adoption Process Owner

- Logically, the customer should be the owner since the customer is paying
- Customers who “assume ownership” are more likely to invest the necessary time and energy to make it a success



By the time that the adoption planning phase is completed and the date has been set for adoption to commence, the CSM will be well aware both of the nature and duration of the adoption implementation process itself, and of their own type and level of involvement within it. This of course is because all these details will have been (or at least should have been) discussed and agreed with the customer’s stakeholders during the adoption planning process, and documented within the adoption plan itself.

There is no hard and fast rule to state either how much involvement the CSM should have or indeed what specific tasks the CSM should undertake. Instead, it’s up to the CSM to propose and then negotiate their role with the SPL and other customer stakeholders. However, whilst there’s no actual rule, there are perhaps a few guidelines that the CSM might wish to bear in mind in their discussions. These are:

The Customer is the Adoption Process Owner. From a purely logical perspective, the customer organization is the owner of the adoption process, since the customer is paying for it (one way or another). From a psychological perspective, it is desirable for the customer organization’s key stakeholders to *feel* like they (or their company) own the adoption process, because if they feel like they own it, they are more likely to invest more of their time and energy in committing to making it a success than would otherwise be the case. If on the other hand they feel that the CSM’s company (ie the supplier) owns the adoption process, then they will also likely feel less personally associated to its success or failure. In this more passive state of mind, they are perhaps less likely to extend the same level of effort to ensure the adoption implementation’s success than would otherwise be the case.

## Adoption Implementation Roles

### The Customer Knows Its Own Organization

- Customer stakeholders will have a deeper and more profound understanding of their own company
- This knowledge will enable better decisions about how to implement the adoption process



The customer's stakeholders are generally speaking very likely to have a much deeper and more profound understanding of how their own company works than the CSM either currently has or indeed will ever have. This of course is partially because of the time they have spent with that company building up experience of what it does and how it works, sometimes for decades and generally for several years of employment there. In addition it may also partially be because they are viewing the company from an "insider's" perspective and as such they know realities about the company that are likely to remain hidden to "outsiders" such as the CSM. Wherever these insights come from, they are likely to help these stakeholders to form judgements and make decisions about how to implement the adoption process that will help to make the adoption go more smoothly and attain a better result than would otherwise be the case.

The types of judgements and decisions we are talking about here may be fairly subtle and sometimes may even appear relatively minor, but in fact they can all add up to be quite impactful.

For example, perhaps there are two or three managers who between them own a particular process, and perhaps the assistance of one of them is desirable to manage and monitor this process's end users through the communication, training and support that they will encounter during the adoption implementation and to ensure these users are well prepared and completely ready for the upcoming changes to this process that they will be expected to be able to deal with. Someone who knows each of these managers both as individuals and how they work together might know which of the three to ask and perhaps equally importantly, which of the three *not* to ask to take on this role.

As another example, perhaps a particular IG (impacted user group) is spread across three locations and the adoption plan calls for training to be provided to this group one location at a time, leaving the other locations to provide continuity of service in the meantime. Which location should the training take place in first, which second and which last? Again, someone who knows the company well might have a better idea for how to answer this question themselves or who within the company to approach to help decide this order of training with, than someone who is an “outsider”.

These examples might seem trivial or even completely unimportant to you, and indeed in some situations they might well be, so that in the first example any of the three managers would do equally well, and in the second example the training could take place across the three locations in any order with equal results. However, in other cases there may be a substantial difference in the quality of the end results that would simply be unknown to an unwary external decision maker that the “insider” will be able to spot and deal with appropriately. Again, the things is of course that because of their lack of “insider” knowledge, the “outsider” simply will not know which seemingly trivial decisions are indeed trivial and which are actually very important to get right.

## Adoption Implementation Roles

### The CSM Knows Their Company's Solutions

- The CSM is familiar with their own company's solutions, and in particular how to onboard, adopt and realize value from them
- This familiarity will help ensure a high quality adoption implementation to help realize the maximum value in the shortest possible timeframe



What the SPL and other customer stakeholders are less likely to be more expert in than the CSM is the CSM's own company's solutions (ie the products and services that the customer is purchasing) and in particular how to onboard, adopt and realize value from them. As we have said before in previous modules, this is the specialist knowledge and subject matter expertise that the CSM brings to the customer that when combined with the customer's stakeholders' knowledge and expertise around the company itself including its vision and strategy and the drivers behind this current initiative, its various stakeholders at the different levels within the company's organizational hierarchy, its capabilities and processes, its unique challenges and its special opportunities and so on, will ensure the best possible adoption of those products and services so that the customer can realize the maximum possible value in the shortest possible timeframe.

## Adoption Implementation Roles

### The CSM as Adviser and Guide

- The CSM is very well placed to be a powerful helper to the adoption implementation owner
- The CSM should keep abreast of what is happening at all times and should develop trust relationships with the adoption owners in order to provide guidance and advice as necessary



Due to this subject matter expertise and in particular to their experience of successful adoption implementations that the CSM builds up over time, the CSM is very well placed to be a powerful helper to the adoption implementation owner (who as we have said above should be the customer's own manager, typically the SPL). The SPL or other senior customer stakeholder should lead the adoption, but for the above reasons, this person would be wise to keep the CSM updated as to progress at all times and to involve the CSM in any decision making that may need to occur during the adoption implementation process. Similarly, it is in the CSM's own interests to do what they can to ensure the adoption implementation process goes as smoothly as possible, and so the CSM is advised to try to keep abreast of what is happening at all times and to develop good quality trust relationships with those stakeholders who do own the adoption implementation process, so that they can use their influence with these stakeholders as necessary to help out by making suggestions and providing advice as necessary.



## Project Management Principles and Best Practices

### The CSM as Shadow Manager

- There may be some specific situations that require the CSM to become the officially recognised manager of the adoption implementation
- In all other situations, the CSM should keep a close eye on progress so that they can step in with advice and guidance and even sometimes with practical help



So what we've said so far in this workbook is that the CSM is not the manager of the adoption implementation process, and instead the SPL or other customer stakeholder takes on that duty. Is that really the complete picture though? Well... yes, and then again in some circumstances maybe no. Firstly, there may be some specific situations that actually do call for the CSM to become the officially recognised manager of the adoption implementation. This tends to be in cases where the customer organization is either lacking the maturity or the availability in terms of people and time to do it themselves, and therefore actively requests the supplier to provide management of the implementation – perhaps as a part of a paid for, professional services contract. In this instance it may be the CSM who is the obvious candidate for the role if they are sufficiently familiar both with the customer organization and with the solution components and adoption best practices, and if they also have the right knowledge and experience when it comes to managing that sort of level of complexity of project – whatever that level might be, dependent upon how simple or complex the adoption implementation plan is. For these situations, the CSM needs to be sufficiently well versed in project management best practices to the level required to manage the implementation.

In addition to this recognised role however, there is a secondary consideration. Even if as in perhaps the majority of cases, the CSM is not the official manager of the implementation and instead this role is assigned to or taken on by the SPL or other customer stakeholder, as befitting someone who is an employee of and manager for the customer organization. Whether or not the CSM, SPL or some other person is officially appointed to manage the adoption implementation does not alter the fact that it is in the CSM's company's interests (and therefore in the interests of CSMs themselves) to ensure that the

adoption implementation runs smoothly and produces great results for the customer. As such then, and even where as stated, the SPL or other customer stakeholder is officially the adoption implementation manager, the CSM will in many cases want to keep a close eye on progress and be updated on activities so that they can step in with advice and guidance and even sometimes with practical help such as training resources or communication templates and of course with access to subject matter experts and to other companies such as professional training organizations that they have available to them or that are known to them through having undergone the same or similar experiences in previous adoption implementations for previous customers.

This role could perhaps be described as “shadow management”, where the CSM is not officially the manager but instead follows closely the progress and activities of the adoption process and is ready at all times with help and assistance as necessary. The level to which CSMs will want to monitor and get involved in any one particular adoption implementation will vary considerably depending upon factors such as the customer’s stakeholder’s own knowledge, skills and experience and the complexity of the implementation plan. Of course there may also be some very practical considerations such as the level of trust relationship that has grown up between the CSM and whoever has been appointed to manage the adoption implementation, and how much time the CSM has available versus how easy it is to keep abreast of the situation. CSMs therefore need to reach a decision as to how much time to invest and in what ways to do so, for each adoption implementation for each customer.

## Project Management Principles and Best Practices

### Adoption Implementation Management as Project Management

- The term “management” refers to the process of dealing with and/or controlling things and/or people in order to get a desired result
- Project management is the act of managing a particular situation that has a defined beginning and end and has desired results (or outcomes)



So far we have discussed the person who leads the adoption implementation as being the “manager”, but what do we mean by this? The term “management” refers to the process of dealing with and/or controlling things and/or people in order to get a desired result. In some situations this desired result is continuous, such as the position of Sales manager who will need to manage the sales team on an ongoing basis to ensure ongoing sales results are achieved. However, other situations have a defined beginning and end, and these are often called “projects”. Project management then, is the act of managing a particular situation that has a defined beginning and end and of course has desired results (or outcomes) that must be attained.

Project management is a profession in its own right, just as change management is.

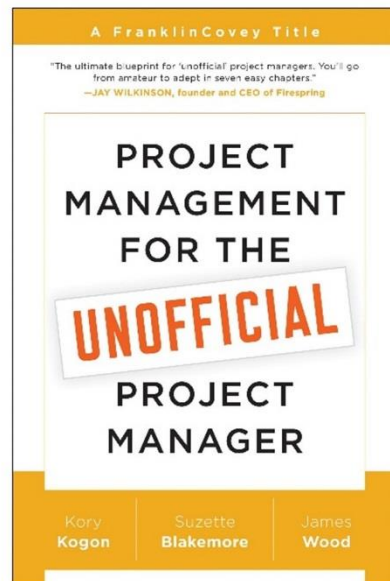
## Project Management Principles and Best Practices

### Adoption Implementation Management as Project Management

- Projects are a key aspect of customer success management and project management best practices are powerful tools for helping CSMs
- We recommend that all CSMs should consider gaining at least some introductory level training on project management skills



Many great CSMs including some of my own friends and colleagues either come from the world of project management or have been formally trained in project management best practices. Because projects are such a key aspect of customer success management and because project management best practices are so powerful as a tool for helping CSMs, my recommendation is that *all* CSMs should consider gaining at least some introductory level training on project management skills. There are plenty of training courses available that teach the basics, and indeed there may even be free resources available through your own company that you can avail yourself of. It's certainly worth checking this out to see what's available.



If project management training is not available for you, or if you simply do not have the time free to attend a training course, then you may find it useful to get a book or two on the subject instead. One book I'd recommend is *Project Management for the Unofficial Project Manager* by Kogon et al. The reason I'd recommend it is (as the title suggests) it's written for the non-professional project manager, and specifically deals with the role of "unofficial project manager", which is likely to be often be the situation that CSMs will find themselves in. However there are hundreds of other great books on project management to choose from, so CSMs will undoubtedly be able to find something that suits their specific needs and preferences.

In terms of the application of project management best practices to adoption implementation projects, the basic project management requirements for an adoption implementation project are well documented within Chapter Nine of the book, and we will therefore not review them again here. Students are encouraged however to ensure they read Section 9.2 of Chapter Nine and make notes as necessary to ensure they understand the basic tasks and skills that are defined and explained within it.

Have all project outcomes been clearly defined and agreed?

Are all of the outcome requirements uncovered, and are they documented in terms of quality, quantity and deadline?

Are all key stakeholders aware of these outcome requirements?

Are they listed in priority order and have major milestones en route to outcome attainment been identified and documented?

### Preparing for Project Kick-Off



Have all processes that will undergo change been identified?

Are all of the level 3 (ie detailed) business capabilities that will be directly or indirectly impacted by the initiative correctly identified and documented (ie including new capabilities, changes to existing capabilities and retired capabilities)?

Are all of the processes from these capabilities that will be directly or indirectly impacted by the initiative correctly identified and documented?

### Preparing for Project Kick-Off



Has the nature of each process change been accurately documented?

For each process that will be directly or indirectly impacted (ie both new processes and existing processes that will undergo change), have the steps and activities within that process been correctly and accurately documented, with changes specifically noted?

### Preparing for Project Kick-Off



Have all impacted users been identified?

For each directly or indirectly impacted process, are all the users of that process correctly identified and documented?  
Does this include numbers of users at each location?

### Preparing for Project Kick-Off



Have impacted users been correctly assigned into IGs (impacted user groups)?

Have IGs (impacted groups) been created to simplify the management of adoption requirements amongst users and have users with the same activity and adoption needs been correctly assigned into these IGs?

### Preparing for Project Kick-Off



Have the KSA needs of each IG been assessed and documented?

Have the adoption needs for each IG been accurately and completely assessed and documented, including their current and required knowledge, skills and attitude?

### Preparing for Project Kick-Off





Have appropriate requirements for communication, training and support been identified for each IG?

Have decisions been made as to what communication, training and support will be need to provided for each IG to ensure that their KSA requirements are fully met, and have these been accurately documented?

### Preparing for Project Kick-Off



Have all activities to deliver these requirements been selected, costed and approved?

Have decisions been made as to how this communication, training and support will be delivered, in terms of what activities need to happen, who will be responsible for these activities and how they will be funded?

### Preparing for Project Kick-Off



Have appropriate ways for measuring the results of these activities been identified?

Have one or measurements been selected for each activity that will enable the activities' results to be measured?

### Preparing for Project Kick-Off



Have all activities been assigned into project phases?

Have all the activities been prioritised or otherwise ordered into a logical sequence, and where necessary divided into multiple phases for delivery over time?

### Preparing for Project Kick-Off



Have all assets and/or resources needed for the performance of these activities been created and/or assigned (if team members are global, consider time zone constraints)?

What assets and/or resources will be needed for each activity? Have these been acquired and if not how and when will they be acquired? Who will be responsible for ensuring they are in place and ready for use?

### Preparing for Project Kick-Off



Have all mechanisms for delivery of activities (including third parties) been identified and made ready?

Who will actually perform the activities, and have they been notified of this?

Do those who are involved require any training or coaching and has this been provided?

Are there any other readiness considerations for those who will be involved in adoption delivery?

### Preparing for Project Kick-Off



Have all activities (or at least those in upcoming phases) been scheduled as necessary?

Is there a detailed schedule for all activities within the upcoming phase or phases of the adoption plan, and is this published in a location and format that makes it easily accessible for all those who need to view it?

### Preparing for Project Kick-Off



Have all necessary communications occurred?

Is everyone involved in the adoption delivery aware of the adoption schedule and of their own role within it?  
Have all necessary communications to impacted users taken place?

### Preparing for Project Kick-Off



Have all necessary validations and approvals occurred?

Has sign-off been provided for any budget spend or release of users for training, etc?

Has this been fully documented?

Are all managers and team leaders aware of any time away from their primary tasks that the adoption plans will impose upon their department or team members, and has their agreement to this been secured?

### Preparing for Project Kick-Off



Have all adoption barriers or challenges been addressed?

Have all adoption barriers and other challenges been accurately identified and dealt with?

For those that remain, are there plans in place for dealing with them at the appropriate time, and have people and other resources been allocated to these plans as appropriate?

### Preparing for Project Kick-Off



Have all potential risks been identified and plans for mitigation should they occurred been created?

Has a risk assessment taken place and have all risks been identified and then assessed for both likelihood of occurrence and level of impact?

Have these risks then been prioritised and those with a medium or high priority been appropriately planned for in terms of either avoidance or of dealing with them when they occur?

Is everyone who needs to know these plans aware of them?

### Preparing for Project Kick-Off



Is there anything else that has not been done that needs to be done prior to project launch?

What else needs to be done that has not yet been done?

Have you run through this list with others to ensure it is complete?

### Preparing for Project Kick-Off



Are we ready to go?

Has a final check taken place to once again ensure everything is ready and in place?

Preparing for Project Kick-Off



	A	B	C	D
		Yes / No	Date	Comments
1				
2	Have all project outcomes been clearly defined and agreed?			
3	Have all processes that will undergo change been identified?			
4	Has the nature of each process change been accurately documented?			
5	Have all impacted users been identified?			
6	Have impacted users been correctly assigned into IGs (impacted user groups)?			
7	Have the KSA needs of each IG been assessed and documented?			
8	Have appropriate requirements for communication, training and support been identified for each IG?			
9	Have all activities to deliver these requirements been selected, costed and approved?			
10	Have appropriate ways for measuring the results of these activities been identified?			
11	Have all activities been assigned into project phases?			
12	Have all assets and/or resources needed for the performance of these activities been created and/or assigned (if team members are global, consider time zone constraints)?			
13	Have all mechanisms for delivery of activities (including third parties) been identified and made ready?			
14	Have all activities (or at least those in upcoming phases) been scheduled as necessary?			
15	Have all necessary communications occurred?			
16	Have all necessary validations and approvals occurred?			
17	Have all adoption barriers or challenges been addressed?			
18	Have all potential risks been identified and plans for mitigation should they occurred been created?			
19	Is there anything else that has not been done that needs to be done prior to project launch?			
20	Are we ready to go?			

The Adoption Readiness Checklist is a template for asking and responding to the above questions, and it provides both the definitions for the checklist items that we have just reviewed and four sets of questions in four worksheets corresponding to phases 1 to 4 of an adoption project which can be used to tick off the item, add a date each item was accomplished by and make any notes that might be useful. If your adoption plan contains more than four phases then simply make as many copies of the Phase Four worksheet as you need for these additional phases.



## Managing People

### People Management Skills Are Critical

- People management is a critical skill of any project manager and indeed of any CSM
- People are what make things happen, and what stop things from happening and can prevent outcomes from being attained
- This is especially so for adoption implementations



To quote the book, “People management is a critical skill of any project manager and indeed of any CSM” and I wrote those words because after working on many projects of my own and having discussed the art and science of project management with many PMs CSMs and other professionals, I am a 100% believer in the truth of it. People are what make things happen, and it’s also people who *stop* things from happening or at least prevent outcomes from being attained as quickly and efficiently and to so high a standard of quality as would otherwise have been the case. If there’s one aspect of the adoption implementation process that CSMs need to master, it would have therefore to be the “people” aspect of it.

This is especially so for adoption, because adoption by its very nature implies people – the people who are the users who must adopt and use the new solution to generate the desired and anticipated value for their company, the people who are the managers of those people and who may be more or less enthusiastic about providing access to their team to enable them to undergo the proposed adoption process, and the people such as the instructors, communicators, support specialists and subject matter experts who are involved in the delivery of the adoption process, plus of course the adoption process researchers, analysts, planners, managers, budget holders and decisions makers such as the SPL and other key stakeholders. All-in-all then, there are a lot of people who may potentially be involved in one capacity or another in the adoption “project” – especially if the solution is a complex one, and/or there are multiple user groups from multiple departments and in multiple locations who will be impacted by that solution.

## Managing People

### Not All Decision Makers are Aligned to the Initiative

- There will be at least some degree of disagreement or even sometimes outright opposition to the initiative in the majority of cases
- Disagreement amongst any group of people is normal and to be expected, and to an extent it should even be welcomed



Unless you happen to be super-lucky in the majority of cases you will inevitably find at least some degree of disagreement or even sometimes outright opposition to the initiative itself as a whole, or to one particular aspect of it, or even just to the way in which it is being implemented, or the way in which the adoption process has been planned.

Disagreement amongst any group of people is normal and to be expected. To an extent it should even be welcomed, since arguably we do not get so far or travel there so quickly if we do not have valid debate and lateral thinking about what to do and how to do it that is a natural part of the process of arriving at the best possible adoption plan. This best possible plan may never be uncovered if people weren't prepared to disagree to the less good ideas at first, in order for these better ideas to be worked on by all and to be arrived at eventually through the processes of discussion and negotiation. In essence there is a responsibility therefore, for decision makers to disagree to plans that they think are not in the best interests of the initiative. However there is also arguably a responsibility for decision makers to seek consensus on a way forwards that works for everyone, because without this it can be very difficult if not impossible for meaningful progress to take place.

## Managing People

### Not All Decision Makers are Aligned to the Initiative

- Vested interests are the specific concerns that a particular key stakeholder may have over the initiative and the outcomes it must achieve, and spring from their role within the organization
- These different vested interests may or may not be in conflict with each other



Many times, disagreements between key decision makers occur because of what I would describe as conflicts between different vested interests. These vested interests are the specific concerns that a particular key stakeholder may have over the initiative and the outcomes it must achieve, and spring from their role within the organization. For example, the VP Sales and Marketing's vested interests might be to increase sales revenues whilst minimizing disruptions to the sales team's busy schedules and keeping sales people happy and productive both during and after the changes have occurred. On the other hand, the Chief Technology Officer's vested interests might be quite different. They may be around ensuring ongoing continuity of IT services throughout the initiative, on reducing the management of IT post-initiative and on ensuring security is maintained or even improved post-initiative. These different vested interests may or may not be in conflict with each other. For example it may be the case that the CTO's interest in ensuring ongoing continuity of IT services throughout the initiative is very much aligned with the VP Sales and Marketing's desire to minimize disruptions to the sales team. Or for example, the CTO's requirement to simplify IT management post-initiative may actually conflict with the VP Sales and Marketing's need for increases sales revenues since perhaps more IT is required to increase the sales team's productivity levels. All these things need to be ironed out in the planning phase that was discussed in Practical CSM Framework Phase 4: Adoption Planning and was of course covered in Chapters Seven and Eight of the book and Module Six of this training course.

## Managing People

### Not All End Users are Aligned to the Initiative

- Within adoption implementation the interests of end users must also be considered
- End users generally have less individual power than key stakeholders, however their willingness to fully participate is still a critical requirement for adoption success



However, when we now get to adoption implementation we suddenly have a whole new group of people to consider, those of course being the end users – the people who will actually undergo the changes, since they form the “people” aspect of the people, process and tools within each business capability that is being added or amended by virtue of the initiative going ahead.

In one sense these people may be less problematic, since they are likely not to be in positions of authority and so may be less involved in and have less control over decision making. On the other hand, as we have already seen elsewhere, the three aspects of performance are knowledge, skills and attitude, and if the attitude is one of unwillingness, or even of downright antipathy then even though the end users may not have official authority they can still exercise unofficial power by not participating in adoption activities and/or not complying with requests or instructions issued to them.

## Managing People

### Not All End Users are Aligned to the Initiative

- The basic rule is for CSMs to ensure as best they can that end users' "hearts and minds" are won first, before any attempts are made to train them, or to get them to start using the new solution to generate customer value



This is precisely why CSMs must ensure as best they can that end users' "hearts and minds" are won first, before any attempts are made to train them, or to actually get them to start using the new solution to generate customer value.

I want to emphasize that a situation of conflict between the goals of the adoption initiative and the attitude of the end users is not always present at all, and where it *is* present, it comes in different levels of severity, with only a small minority of situations where the conflict is very severe. However if you do encounter that type of situation the consequences can be far reaching – even so far as to potentially cause the overall customer initiative to fail if not addressed fully within the adoption plan.

## Managing People

### Not All End Users are Aligned to the Initiative

- Conflict between the goals of the initiative and the attitude of end users is usually anticipated by the customer's key stakeholders
- Mistrust between workers and managers can be difficult to overcome, since in this situation workers will not necessarily believe what they are told



It is also safe to say that where this level of conflict between the goals of the initiative and the attitude of the end users does arise, it is highly likely that this will be anticipated by the customer's key stakeholders, who will therefore be expecting to have to make special efforts for dealing with it. This is because these types of situations generally arise where a pattern of poor relations and/or conflict already exists between management and staff at the customer organization. For example, there may be an existing dispute over pay or working conditions, or there may be threats of redundancies or even previous rounds of actual redundancies that make end users nervous of any change and untrusting of the motivations of their managers.

These types of situations (ie where there is a pre-existing culture of mistrust and/or antipathy between management and workers within the customer's organization) need careful handling, even where the initiative does not in fact impact pay and working conditions in any way. This is because the pre-existing mistrust that employees have means that they will not necessarily believe some or even anything of what they are told within your adoption initiatives communications – perhaps because of learned behavior in the past that has shown them that they cannot take what their company tells them at face value and that sometimes there are hidden agendas that are not being revealed to them.

Needless to say, these situations can be very difficult for the CSM to handle. The CSM's desire (indeed their need) is to ensure that the adoption of their company's products and/or services goes smoothly and that by the end of the adoption process, the customer's impacted users are now using these products and/or services to generate value. This is less likely to occur at all, and highly likely to not occur to the optimum level where impacted users are highly suspicious of or even fearful of or angry about the

initiative and unwilling or at least less willing to participate in training and other necessary activities to prepare them for the change.

There is no simple solution to this issue. If you are a relatively inexperienced CSM and you encounter (or suspect you will shortly be encountering) situations of conflict or negative attitude within the cohort of your customer's impacted users, you may wish to seek advice and assistance from your line manager or a more experienced colleague. With that said, there is some general advice we can provide, which is as follows:

## Managing People: Advice for Managing End User Conflict

### 1. Make Sure the Customer's SPL is Aware of the Situation



Remember that at the end of the day, this is the customer's initiative, not your own company's, and these are your customer's employees. The first thing to do therefore is to be open about any concerns you may have with the customer's stakeholders. Most times they will be well ahead of you in terms of being aware of any negative sentiment or possibilities of conflict between the desires or concerns of impacted users and the needs of the initiative, so it's unlikely that telling them what you suspect will come as a surprise to them. If the problem is going to get fixed then you will definitely need the help of your customer's senior stakeholders to address the issue with you, so it's very important that you discuss it with them. If it feels awkward to raise as a "negative" issue, then my advice is just to be frank and honest about it. Show by your demeanour and handling of the conversation that you consider it simply as a topic for discussion like any other, that the situation is not an uncommon one to have to deal with, and that you are not being judgemental about it in any way, but instead simply dealing with the potential problem in a professional manner.



## Managing People: Advice for Managing End User Conflict

### 2. Identify the Specific Issues that Impacted Users Have



Before trying to address the problem, make sure that you and the team who are implementing the adoption initiative are clear about the nature of each dispute, problem, fear or concern that impacted users have. This is simply the application of logic – you cannot address a problem if you are not clear as to what the problem is. Make sure you get all of the impacted users' issues out on the table so to speak, and make sure they are documented clearly and accurately so that they can be addressed one by one.

## Managing People: Advice for Managing End User Conflict

### 3. Be Honest and Clear in Your Communications



A lot of impacted users' concerns spring from uncertainty and even rumor. Uncertainty and rumor can be quashed by providing users with the true facts, and by making sure that these facts are explained clearly and unambiguously. Not all the facts may be to their liking (for example maybe there will be additional tasks that they will be asked to take on that they will perceive as adding to their workload), but it is better to be open and honest as early on as possible so that everyone is clear about the reality of the situation and steps can then be taken to address any concerns (see next piece of advice for more on this). Just as a point though, it is of course important not to go ahead and communicate *anything* to your customers' impacted users or indeed to anyone else before clearing the communication with your customer's SPL or other key stakeholders.

## Managing People: Advice for Managing End User Conflict

### 4. Give an Opportunity for Discussion and Feedback



Oftentimes, negative emotions from impacted users can be dispelled simply by giving those impacted users a voice and allowing them to speak. Once the facts are known to them, provide opportunities (or recommend that your customer provides opportunities) for end users to talk to managers, and to have the opportunity of asking questions (which may be easily answerable) and voicing concerns (which may be addressable).

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### 5. Utilize Senior Authority Figures



Getting people to accept change is hard. Where there is conflict or concerns, a communication that is perceived as “coming from the top” of the organization can oftentimes dispel any difficulties and make impacted users accept that the change is going to happen. Having a senior authority lend the weight of their name and position to the initiative can therefore be a powerful help in combatting negativity amongst end user communities.

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### 6. Be Realistic



Be realistic in your ambitions. Of course it would be nice to have everyone happy or even wildly excited about using your company's products and services, and sometimes you may encounter situations where this occurs. However, whilst it is certainly good to have it, it is not necessary for every impacted user within your customer's organization to like your products or want to use your services. What *is* important is that they accept that they do need to use your products and/or services in the way in which their company wishes them to use them, and are willing to go ahead and do so. Acceptance of the change and willingness to play their part in performing the new tasks that relate to that change is therefore the bottom line in terms of a realistic ambition for your adoption initiative to achieve.



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