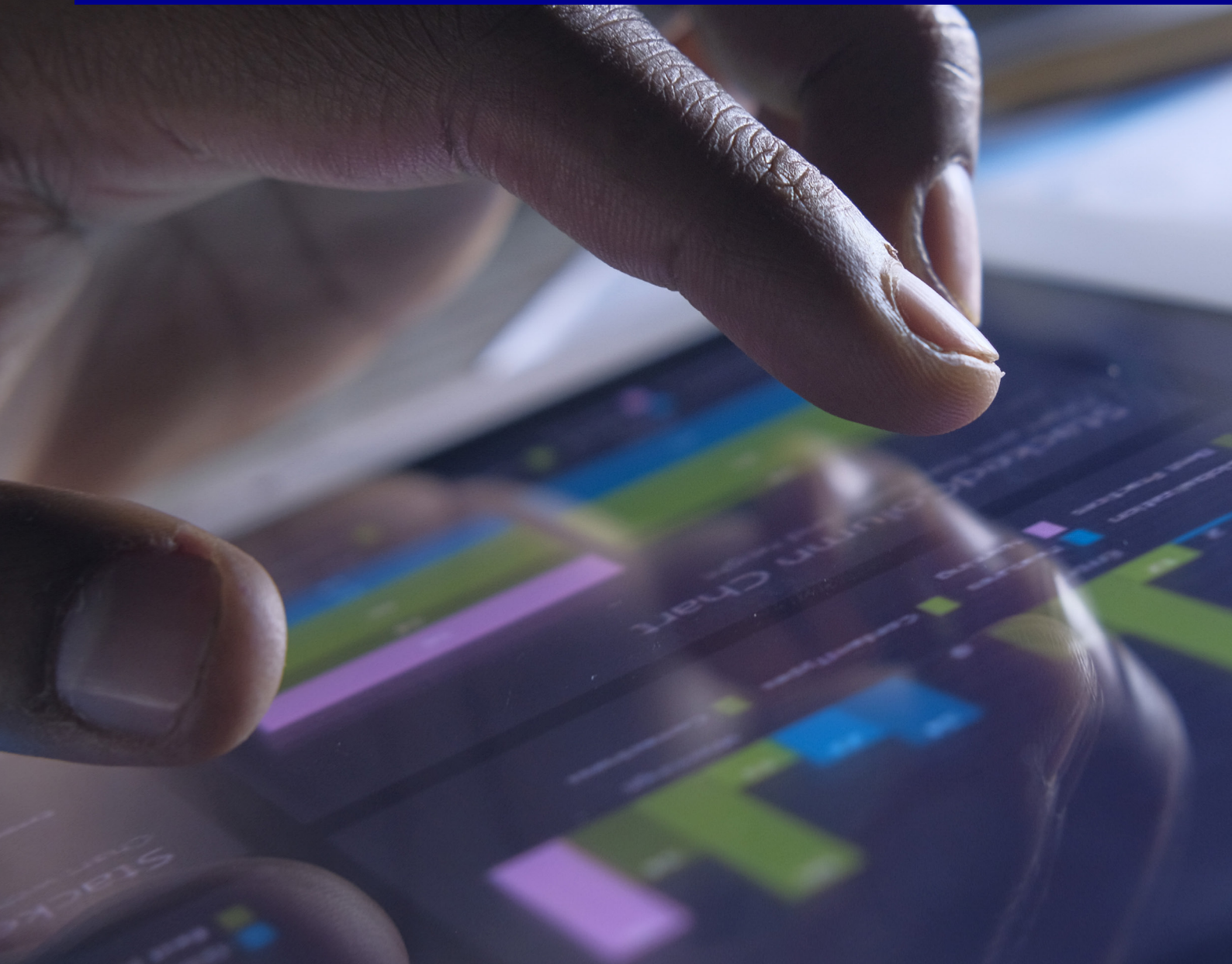


# Information management user adoption explained

Boost user adoption

Increase return on investment

Master change management



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## Introduction

New technologies and processes are intended to offer impressive return on investment and increase efficiency. However, technology rollouts can also disrupt, confuse, and demotivate employees, especially when implemented without them understanding the impact on established processes.

Employee dissatisfaction with a new technology might sound like a short-term problem, but too often, it turns into a long-term issue. It is not uncommon for users to create workarounds to avoid the new technology, rendering it a very expensive mistake. Transitioning to full digital management of enterprise information requires mindset and skillset changes to meet organizational objectives for collaboration, decision-making, and compliance.

This guide looks at what drives—or impedes—user adoption of new technology and how to make the process as successful and smooth as possible. It can make a huge difference to the success of information management projects by explaining how to:

- Understand the importance high-level user adoption has through effective people change management.
- Think about users' rational, emotional, and instinctive reactions to change from a psychological perspective.
- Construct a more people-centric software implementation that is more likely to be adopted.
- Learn practical strategies to keep user needs at the forefront of any software implementation.





## 1: Understanding user adoption

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### In this chapter

- Why adoption matters
  - Acknowledging disruption
  - Bridging the adoption gap to create value
- 

New technology can improve performance, innovation, collaboration, and decision-making. However, these benefits are only possible if users incorporate the new system into their daily work life. This is referred to as “user adoption.”

Many organizations make the mistake of assuming they do not have to worry about user adoption unless a change affects a lot of people. That is a recipe for confusion, frustration, and mistakes—not to mention loss of productivity and staff turnover. Enthusiastic user adoption is a critical factor in achieving the highest return on investment (ROI), no matter what software is being implemented and how many users it affects.

### Why user adoption matters

An organization can buy the best software on the market and configure, customize, and automate it to reflect business processes, but if employees refuse to use it, the investment is wasted.

While a new application’s technical benefits may be clear to the management team, they often are not obvious to employees. It may force them to change their processes in a way they resent. If employees do not understand the reason behind the change and the upside, they won’t invest in its success.

Consequently, the organization may experience:

- Decreased user productivity
- Increased time needed for training
- Slowed processes
- More staff turnover
- Increased time to correct errors

And, as a result, a diminished ROI.

So, why not just implement mandatory training? Training without awareness of the need and buy-in for change will not solve the problem. Only employees excited about the “why” will be interested in learning.

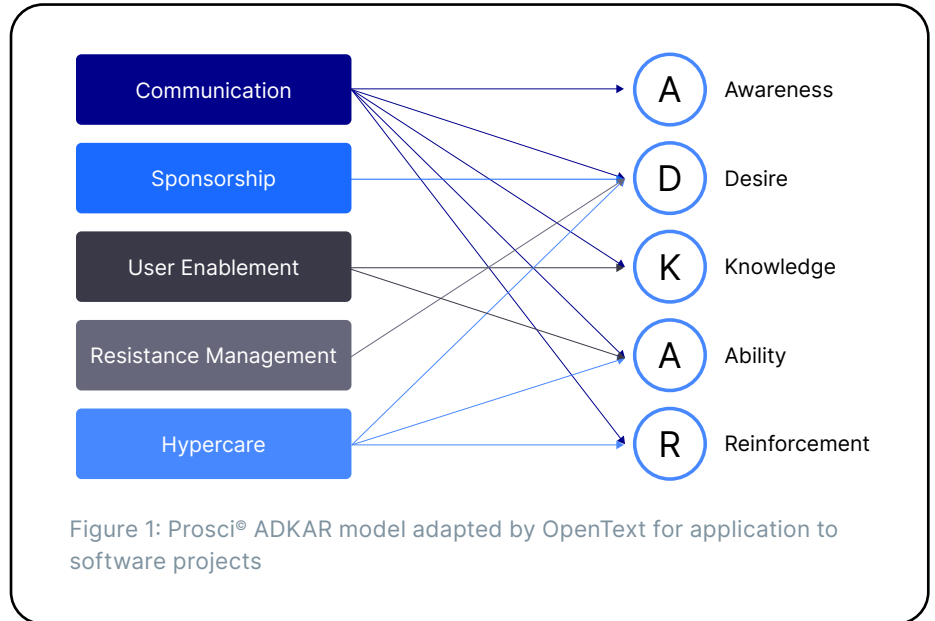
### Acknowledging the disruption

Remember that every person who uses the new software will experience a change to their daily work routine. Productivity will likely decrease temporarily while everyone learns. Smart managers expect this and plan for it, resulting in a much quicker, higher return on investment.

Organizations cannot avoid costs associated with the disruption of changing processes. They can either invest at the beginning of a project and plan a transition period or pay later with lost productivity and a long, slow process to catch up. This catch-up process is often more expensive and stressful for everyone.

**Bridging the adoption gap**

Resistance to change is natural, yet seldom planned for. A few simple steps following the ADKAR model developed by Prosci® and applied according to software projects will ensure proper planning and execution to overcome resistance:



**Communication** is key in building trust between the decision makers and the user community. The right information, at the right time, from the right sender to the right audience prevents rumors and provides a sense of inclusion.

**Sponsorship** supports not only the technology, but also business and communities that are exposed to the change.

New technology can be so different from users' previous experiences that proper training and **User Enablement** needs to be identified and delivered. If users see they can get their jobs done with the new tool just as easily as with the old one, most will accept the change. **Resistance Management** involves understanding and working around the root causes, which will be further detailed in the next chapter.

Organizations must recognize that the work is not done when an implementation or upgrade project ends. **Hypercare** is a critical component in ongoing success. Planning for continued support ensures that the new way of working becomes standard.

**Adoption creates value**

Value builds when people willingly change the way they behave and discover better ways to do their work. This boosts operational performance, increases the organization's ability to innovate, simplifies collaboration, and improves decision-making.



## 2: What's in it for me?

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### In this chapter

- Why employees resist change
  - Tactics to encourage change
  - Strategies to convert resistance
- 

Why do people resist some changes and enthusiastically adopt others? People accept change when they understand and desire the benefits.

Think about what happened when smartphones became available. Billions of people flocked to them within a few years, abandoning landlines and desktop computers, because they saw the benefits and wanted them. Smartphones practically sold themselves when the public found out what they could do.

On the flip side, think about what happened when Segways™ were introduced as a revolutionary transportation mode to decongest cities. The public rejected that change because Segways had no compelling benefits.

Resistance to change is a normal, natural response. People affected by change experience emotional turmoil, even when the changes are positive and their benefits clear. Understanding where that resistance comes from is key to managing it.

### Root causes of resistance

Employees might resist change due to a feeling of insecurity, fear, or even threat. The root causes for these emotions can be:

- **Lack of awareness**  
Poor communication and inconsistent messaging limits understanding of the what, the how and most importantly, the why.
- **Missing support and commitment from leadership**  
Leadership has the responsibility to provide credibility and to secure funds and resources. They are the ones who people look to for important employee-facing activities.
- **Shortage of personal motivation and inclusion**  
Typically people don't see the need for change because they are content with the way they work. Without understanding the change and their part in it, they are likely not motivated to support it.
- **Impact on current job role**  
People are often fearful that the new system will automate their tasks, which they see as a threat to their job security.
- **Past experience with organization's change management**  
If an organization did not handle the last change well or if they change too often, people lose trust, making them nervous.

Always look for the root causes of resistance and not just the symptoms. When causes are identified, tactics can be applied to divert resistance to acceptance.

For more information read [Convert resistance into support when implementing software](https://blogs.opentext.com/convert-resistance-into-support-when-implementing-software/) at [blogs.opentext.com/convert-resistance-into-support-when-implementing-software/](https://blogs.opentext.com/convert-resistance-into-support-when-implementing-software/)

## 3: Making software implementation people-centric

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### In this chapter

- Understanding the meaning of “people-centric”
  - 10 tips to achieve user adoption goals
- 

### What does “people-centric” mean?

As stated in the previous chapter, the most important user-related question is: “What’s in it for me?” Aim high and follow these people-centric key performance indicators (KPIs):

- Keep people informed
- Keep people involved
- Keep people interested
- Keep people inspired

### 10 tips to achieve user adoption goals

1. **Prepare to answer the question “What’s in it for me?”**

Understand the different employee tasks to better demonstrate why and how the new software tool benefits them in their daily work.

2. **Start early**

Include key users from the beginning and seek opinions of those who will be using the software daily. For users to enthusiastically adopt new software, they must feel like their work is easier and quicker to accomplish. Start planning how the organization will consult, inform, and enable users as soon as the new software is selected.

3. **Get people excited**

Create buzz around the new system. Let people know about its functionality and features and explain how it will help them. Start initiating the conversation with key decision makers because they are big motivators in this journey.

4. **Identify advocates**

Change needs champions. Look for the people who are excited about the new system and encourage them to share their excitement with others.

5. **Create an incentive or reward plan**

The organization may already have a champion award plan. Get creative and expand it by rewarding users who adopt the new software early and with enthusiasm. The rewards do not need to be monetary. Positive feedback and encouragement are often just as effective.

6. **Tailor learning to individuals’ needs**

Not every user needs to learn every feature and module. Take time to understand what each person or group needs to know and provide the appropriate enablement.

7. **Communicate, communicate, communicate**

Work out the best strategy for letting everyone know what is coming, when and how it will affect them. Be creative and inventive in choosing communication methods, which may include information sessions, webinars, posters, video clips, or more traditional documentation.

8. **Transfer ownership**

Staff must feel comfortable using the software and they must want to use it. Managers, supervisors, and team leaders must lead by example, both using and promoting the system.

9. **Have a user support plan ready**

Continue to support users throughout the software's lifecycle, especially during the first days after go-live. Designate a place where people can get help and go-to people and go-to sites. Consider organizing department-specific Q&A sessions.

10. **Define metrics and measures**

Any implementation needs to be measured to determine whether it is successful. Look at the data. Run a report on usage. Create surveys before and after system rollout. Measure by training outcome or by IT tickets opened for problems. Build a feedback loop and ensure that people know the organization is keen to get their feedback and will act on it.

**There is no one size fits all.**



## 4: The approach to Information Management user adoption

### In this chapter

- Discover key factors driving Information Management success
- Learn about the “5 streams to user adoption” approach
- Plan when to revisit user adoption

Information Management (IM) is a business discipline specializing in providing solutions for optimal use of information within organizations.

While the features are important to Information Management’s success, the overall experience is paramount to easier adoption. Make sure the organization:

- Involves people who will be affected by the change in the design.
- Develops a plan that aligns the implementation vision with the corporate vision.
- Sets guiding design principles.

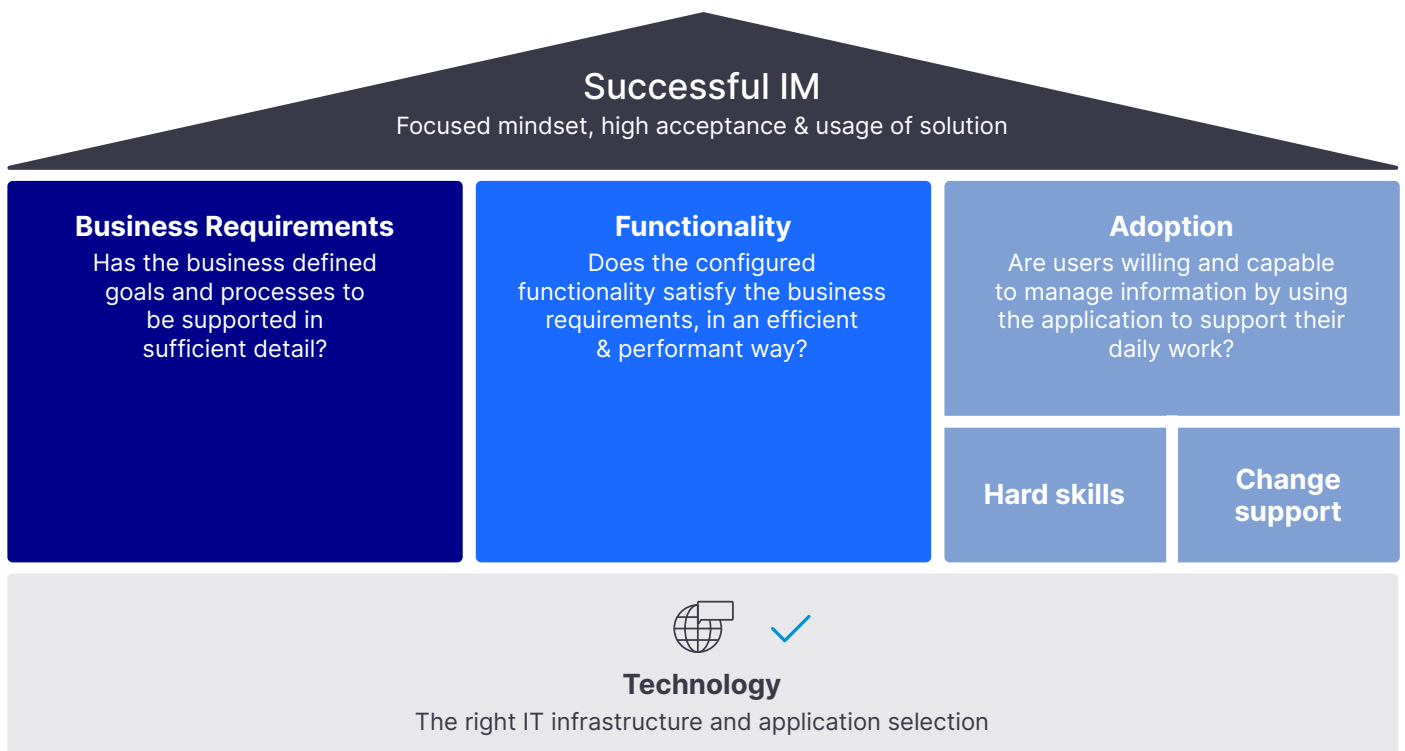


Figure 2: Successful IM relies on several factors

### The OpenText “Five streams to user adoption” approach

A successful, structured, people-centric approach begins well before the software is deployed and remains in use throughout its lifecycle. OpenText’s five workstreams to user adoption are based on our best practices, deployed in close collaboration with the project consultants during all phases and in line with change management models like ADKAR® from PROSCI®.

Let's have a closer look:

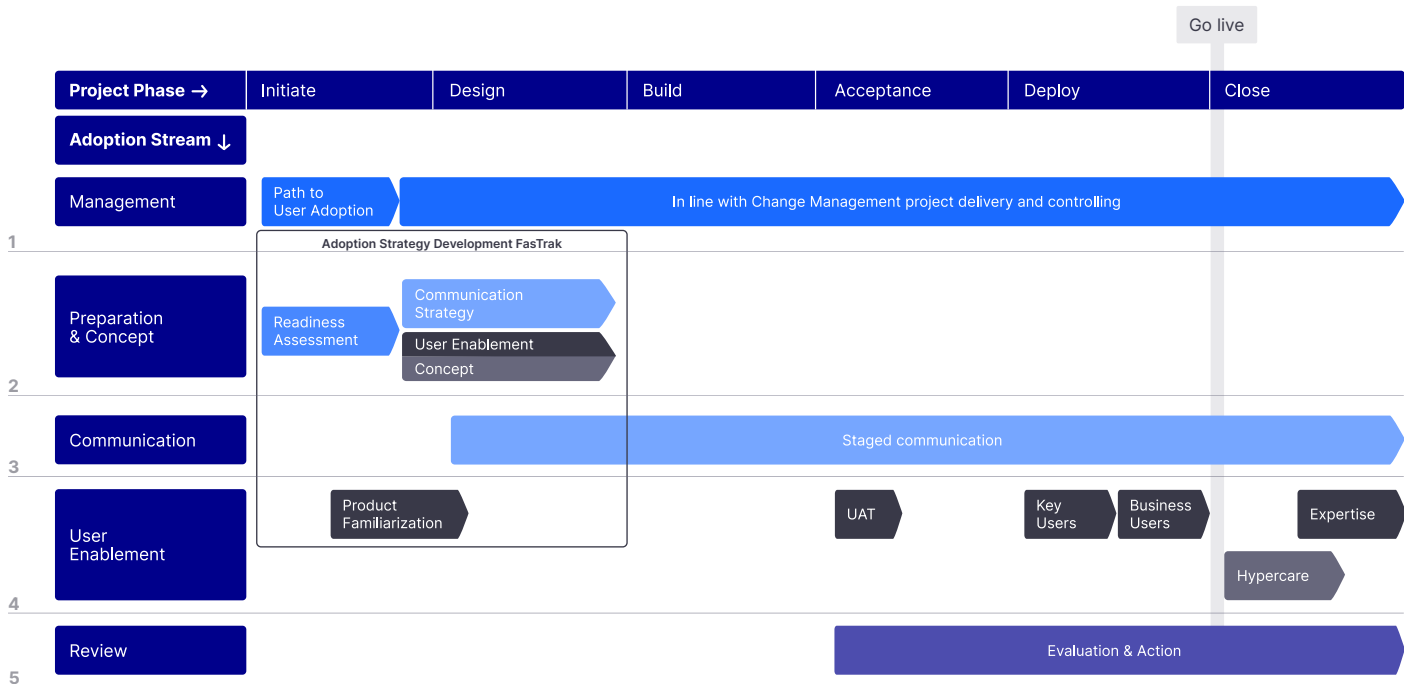


Figure 3: The OpenText “Five streams to user adoption” strategy

• **Stream 1: Management**

People change management, including all activities, is a sub-component of the overall software implementation or upgrade project. Effective project governance is key to success.

• **Stream 2: Preparation & Concept**

Most work contributing to successful adoption is done in the early phases of a project. To succeed in the **Initiate** and **Design** project stages, organizations must develop an adoption strategy:

**The Change Readiness Assessment** helps to pave the path to adoption from the current state to the target state. As an analysis of the affected, considering how the organization is structured into departments and groups and their respective characteristics, it helps answer the most important question: “What’s in it for me”? The subsequent work is to define success, objectives, and the in-between steps on the way to key results. How do I measure them? What are people-centric KPIs of this change?

**The User Enablement Concept** helps set up a framework for learning and people support. When is formal learning needed? When is informal support of users more effective?

Adequate answers to questions about the learning community, objectives, content, formats, and timing should be given.

**The Communication and Change Governance Strategy** involves the important role of sponsorship and people managers during the change. It provides guidance to identify resistance. The right communication objectives, formats, and timing help convert resistance into support.

- **Stream 3: Communication**

Communication is key. Build comprehensive, targeted, ongoing communication plans based on the strategy for three purposes:

- Promotion
- Commitment and Reinforcement
- Coordination

- **Stream 4: User Enablement**

Enablement is a core element in successful people change.

Building knowledge and ability starts with product familiarization for the project team. This prepares members for upcoming discussions in the software design phase. The enablement of all user groups has to be planned and delivered based on the recommended strategy while the project is progressing.

Enablement does not stop after going live! It is crucial to support the users, particularly during the first days after going live through hypercare. In-house expertise must be built. Newcomers have to be ramped up. All these activities will lead to a user community full of champions, working in an effective way that meets the objectives.

- **Stream 5: Review**

Habits take time to develop, and change is ongoing. There will be resistance as well as opportunities. Monitor and adapt to deliver a better experience by:

- Starting early to allow habits to form.
- Reviewing, evaluating, adapting, and evolving.
- Ensuring new habits are fully embedded into the business.

Regular evaluation of status, risks, and issues is needed. This might lead into a decision with the steering committee for readjustments to secure success.

### **When to revisit user adoption**

Even after having implemented the OpenText solution, there might be the need to rethink user adoption. Reasons for this might be:

- Upgrade or enhancement of existing information management solutions.
- Additional business departments and/or scenarios.
- Organizational change.
- Negative feedback from users and/or KPI results.

If the organization has had the software for a while, but it has not yet been adopted, look for the bright spots. Get teams or departments to share what they found interesting and how they use the technology to achieve their goals.

## Conclusion

Even though software change can lead to positive outcomes, it can still cause anxiety and the perception of threat. User productivity takes a nosedive when people become stressed over learning something new. Eventually, because they are being less productive, self-esteem drops and they experience feelings of inadequacy.

Emotional reactions to change are natural and unavoidable. The key question is how best to manage them to produce more clarity and less confusion. How can emotions fuel a project rather than block it?

Change must be carefully planned for organizations to successfully roll out a software tool and minimize resistance. User satisfaction is a key factor for a successful implementation. Determine what people need to excite, inspire, and nudge them to make the new software a daily habit and for it to become what is designed for: a tool to make work life easier.



Figure 4: Change management activities within software implementation

## Plan ahead for success with OpenText

OpenText can help accelerate and sustain effective user adoption, creating engaged and efficient users. A dedicated team of professionals focuses on simplifying user adoption of information management software to reach high levels of user satisfaction and accelerate rollout.

As discussed in the “Five streams to user adoption” the process starts with **Product Familiarization** and the development of an **Adoption Strategy** by conducting several workshops:

- Change Readiness Assessment
- User Enablement Concept
- Communication and Governance Strategy

The result will be delivered in a “**Recommended Adoption Strategy**” document.

Don't dismiss user adoption if you are already live. You may likely need to revisit it. Workshops for a **User Adoption Assessment** contain the following topics:

- Current State and User Experience
- Desired State and its Benefits
- Action Plan

and will provide the "**Recommended Adoption Realization**" documentation.

The next step for both the above scenarios is the execution and delivery of the recommended actions for **Adoption Attainment**. OpenText Learning Services Training Consultants have decades of experience in:

- Instructor-led and self-paced learning solutions curriculum tailored and developed to an organization's needs.
- Producing intuitive, interactive, multi-lingual videos and quick reference guides.

Use this guide as a start on your path to success. For more information on the adoption of information management, its tools, and its implementation, visit [opentext.com/learning-services/user-adoption](https://opentext.com/learning-services/user-adoption).





Successful technology implementation is not measured by whether the system is up and running, but by how many users are working in it each day.

In digital transformation projects, the majority of the investment goes into technology, but often companies struggle to get their users to adapt to the new system.

This guide delivers insight into the importance of user adoption and provides key strategies to maximize information management investments.

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#### **Inside:**

- Understand why user adoption matters
- Acknowledge the impact on users
- Watch out for the adoption gap
- Recognize the reasons for resistance
- Learn key strategies for adoption success
- Understand people-centric user adoption
- Learn the importance of change management

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#### **About the authors:**

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