

Improve Software User Adoption with These 7 Proven Success Steps



A new workflow automation tool was burdened with a difficult-to-learn user interface and workflows which didn't fully match users' jobs, resulting in employees who didn't use the tool or did so incorrectly. Because managers didn't believe the tool facilitated their employees' work, they didn't recommend it or use the tool's reporting features to drive decision-making.

As a saying goes, a tool is only as good as the person using it. That saying presumes that the tool being used is the correct choice and of high quality, and that the tool's user knows how to properly handle it. In real life, especially in business, that's not always the case.

When a health plan's IT applications team initially rolled out a much-needed workflow automation tool to the organization's 75-employee marketing department, all involved had high hopes that this tool would eliminate workflow bottlenecks and improve employee productivity. The first results were the exact opposite.

Unfortunately, because the new tool was burdened with a difficult-to-learn user interface and workflows which didn't fully match users' jobs, marketing employees either didn't use the tool or did so incorrectly. Worse, marketing managers didn't believe the tool facilitated their employees' work, so they didn't recommend it or use the tool's reporting features to drive their decision-making.

The health plan's IT team needed to quickly resolve this potentially costly rollout dilemma. The approach this team took to address this issue offers seven valuable lessons that other IT departments might use when planning similar

software implementations.

The 7 Success Steps

The IT team's revised software implementation approach focused on employing best-practice configuration and design processes, delivering effective end-user training and providing extensive project communications. Key takeaways:

1. **Don't assume prior success means future success** – The IT team had previously worked with marketing on several other successful projects, and that prior success meant little to this initiative. To ensure user adoption on this particular rollout, the IT team needed to plan as if working with a brand-new client.
2. **Engage regularly with senior leadership** – The IT team regularly consulted with the marketing department's top leaders to understand their priorities, obtain guidance, and ensure active project support.
3. **Plan a phased rollout** – While it may be far more time-efficient (at first) to roll out a new tool to an entire department, a phased rollout may make more sense if a tool is new and/or complex. The IT team planned an initial basic workflow for a subset of the target users, to ensure initial success.
4. **Collaborate on tool design** – To gather business requirements and align future process and automation tool workflows, the IT team built in multiple collaborative design sessions and document reviews with marketing department directors, managers and staff members from each sub-team within the department.
5. **Develop iterative reporting specifications** – In addition to gathering marketing team input for the tool design, the IT team also collected data use information from the client's business partners, key leaders and systems team to improve data optimization analysis and maintenance. Key questions included: "How will end users use this data?" and "What is the best way to present this data?"
6. **Develop a proper training curriculum** – The IT team ultimately created a comprehensive, multi-tier staff and manager training program that included curriculum, materials and defined modules.
7. **Communicate regularly** – As part of its work to deliver outcomes-focused project planning and management, the IT team placed a heavy emphasis on dependency management and end-user communications.

Conclusion

The IT team's configuration of the new workflow automation tool and end-user training were completed on schedule. Feedback from managers and end-users after training was positive with user adoption far exceeding prior efforts to introduce this tool. This significantly enhanced the IT team's internal reputation.