All Aboard!

KEYS TO SUCCESSFUL USER ADOPTION OF CLOUD-BASED COLLABORATION PLATFORMS

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1 Introduction

So you've decided you need better ways to collaborate. Perhaps your team is tracking 150 projects at a time. Perhaps you work with contractors scattered all over the country. Perhaps conversations just get too confusing by email, or spreadsheets aren't flexible enough, or people are missing deadlines.

Perhaps you've flirted with online collaboration services already, and it's time to get serious about it. But unlike a typical business application with an obvious benefit—you can't do your job without it—collaboration fundamentally transforms work culture. When you ask people to collaborate, you're telling your co-workers, managers, associates, and business partners to change the way they do things, and busy people naturally resist the effort it would take—even if it will benefit them.

How do you persuade people to collaborate online?

Managing a successful transition requires a proactive strategy and marketing plan. In many ways, it's similar to any software rollout. At Redbooth (formerly Teambox), we've been working with organizations of all sizes for the past six years to perfect our award-winning collaboration platform. We've distilled our experiences into this practical guide, sharing useful insights, proven best practices—and mistakes to avoid—to help you accelerate user adoption of a cloud-based collaboration platform. We'll walk you, step-by-step, through the planning, development, implementation, and maintenance phases of adopting a cloud-based collaboration platform into your business processes:

- Defining the Need: Business Goals
- Choosing a Collaboration Platform
- The Test Drive
- The Pilot Phase
- The Rollout
- Ongoing Evaluation and Improvements

2 Defining the Need: Business Goals

First, you need to discover how your organization would benefit from a cloud-based collaboration platform. You do many things well. How can collaboration help you do them better? What isn't working now that collaboration can help you overcome?

Present your ideas to your stakeholders and the executive sponsor. Before handing over budget and staff time, they want to know:

- What is the business value of online collaboration?
- How—specifically—would it help us do what we do more efficiently?

To address those questions, you need to study your potential user base. The purpose is twofold: to understand how things are done today and to learn what works and doesn't work that collaboration could enhance or resolve. Begin with informal conversations with various stakeholders, gathering perspective about questions such as:

- How are tasks managed now? Email? Spreadsheet? Wikis?
- Are project teams typically in the same building or geographically dispersed?
- How do group members interact? Personal meetings? Email? Conference calls? Chat? Video conference?
- Is there an existing collaboration/project management platform? Who uses it? How well does it meet the need?
- When people go on vacation or leave the organization altogether, what happens to their projects? Can the organization access that organizational knowledge, or is it lost in a terminated email account?
- Are there cultural or language barriers to consider?

COLLABORATION VS. EMAIL

Collaboration does not replace email. Email is familiar, useful, and here to stay. It works best for short, direct communications, but becomes clumsy when used for back-and-forth collaborative activities and conversations. Effective collaboration platforms actually incorporate email as one of many tools that help teams keep projects on track.

Use the insights from your informal discussions to develop a formal online survey that you ask potential users to complete. To attract participation, offer a tangible reward—such as a gift card or techno-gadget—to those who complete the survey. With the knowledge and insights gleaned from informal discussions and the formal survey, you can position yourself to manage a successful user adoption initiative.

What's in it for me?

Collaboration requires change, and people usually perceive change as disruptive. You need to understand why they would make the effort. People resist change for a variety of reasons, such as:

Unwillingness to share information People working in competitive environments want to avoid giving adversaries potential weapons. Some may view collaboration as a threat to job security and even exploit a collaboration platform, feeding misleading information into it to deliberately sabotage rivals. In extreme cases, the organization may first have to confront some deeply rooted, harmful practices and work values.

"Us vs. them" group mentality Larger organizations can unwittingly create functional silos that impair collaboration between groups such as product development and marketing. Introducing collaboration within groups may naturally lead to collaboration between them.

Distrust in management Stratified organizations may suffer from distrust between authoritarian managers and their employees. Teaching managers to coach instead of control, to reward instead of punish, leads to a more receptive environment for collaboration, which emphasizes capabilities and communication instead of job titles.

Cultural differences Global organizations must address and reconcile disparate behavioral norms between groups in different nations. Looking someone in the eye is expected in the United States, but can be offensive in Japan. Collaborative capabilities such as HD video conferencing help people from different cultures to connect not just as colleagues, but person to person.

It's Sales 101 Take the time to understand what motivates users to change their ways, and then you can convince them to do something, such as adopt a collaboration platform. Overcome resistance by discovering and answering their question: "What's in it for me?"

For example:

- A CEO wants the assurance that when an employee leaves the company, that person's organizational knowledge resides where others can use it.
- A project manager needs to hold team members publicly accountable for completing assigned tasks on time.
- A marketing manager is afraid of missing out on the latest discussion.
- An administrative assistant wants to reduce the number of people pestering him for status updates.
- An outside contractor wants to feel more connected to team members in the main office.

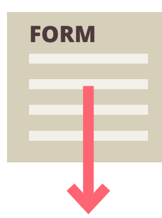
The Formal Survey

You don't need to spend hundreds of thousands of dollars hiring specialists to design, administer, and interpret surveys. Using the information you gathered from your informational interviews, you can draft a few questions to dig in to identifying the need within your organization. In this case, you need to create questions that establish the need to invest in a collaboration platform.

To return actionable responses, instead of freeform answers, a formal survey uses scale-based questions to measure opinions. How do you do that? By framing the questions that users answer by multiple choice or scale; for example:

1. How often would you use a desktop video conferencing app?
   a. Once a month
   b. Once a week
   c. Daily
2. How likely are you to use a task-management application:
   1—Not at all likely
   2—Somewhat likely
   3—Very likely
   4—Extremely likely

Online survey tools such as surveymonkey.com or Google drive can host your survey and tabulate the results, providing you with the data you need to develop an action plan. We've even created a sample Google form-based survey you can copy and modify.



Get the Survey

3 Choosing a Collaboration Platform

Based on your survey results, you can define the capabilities you need in a collaboration platform. Factor in considerations such as:

Deployment options Public or private cloud? Most organizations find it most cost effective and least troublesome to use a public collaboration service, but for regulatory compliance reasons, some organizations may prefer to deploy in a private cloud behind the firewall.

Device support What user devices and operating systems do you need to support?

Internal collaboration tools What features—calendars, chats, HD video conferencing—would you use to collaborate with team members within the organization? You may also want integrated email support.

External collaboration tools How would you like to interact with customers, freelance contractors, partners, and regulators? For example, you may need non-user read-only accounts or issue tracking and submission.

Ease of use How easy is it to create custom workflows or set up templates to manage recurring tasks?

Task management What capabilities do people need to manage tasks?

Third party integration Does the collaboration tool allow you to use services you already depend on, or offer new services that would enhance your processes? Does it need access to specific APIs? Do you need integration with tools such as: Box, Dropbox, Evernote, Google Drive, or Microsoft Outlook?

Vendor professional services Do you need the collaboration platform vendor to offer professional services such as: implementation, localization, multiple language support, on-site training, or phone support?

With your wish list in hand, evaluate collaboration service providers and their platforms. Then factor in pricing. What's your budget? Can you justify the cost with measurable improvements? What is the difference in cost between a collaboration service provider and an in-house solution?

Make sure you choose a collaboration vendor that listens to your suggestions for improvement, can respond to your calls for help, and supports you during the lifetime of the platform.

Try to reduce the candidates to a short list of two or three providers. Now you are ready to take them for a test drive.

The Redbooth Collaboration Buyer's Guide has more information to assist you with the selection process.

4 The Test Drive

The test group should be small—no more than four to five people—and agree to use the tool for a short-term, non-critical, but necessary, project. A successful test will incorporate these elements:

Exclusive use Test drivers agree to use the tool exclusively for the project, abandoning direct email, outside conference calls, texting, or passing notes on paper during meetings about other projects.

Gather feedback and measure success The team should use the tool to gather feedback during and after the test. Record anecdotal impressions such as:

- How easy or difficult is it to use?
- Does it let us do what we needed to do?

Also, specify quantifiable success measurements such as:

- How much time do tasks take compared to current methods?
- Is there a measurable percentage increase in productivity?
- Does it cost less than what we do now?

Post mortem At the end of the test project, the team should weigh both quantifiable measurements and anecdotal impressions to assess the quality of the collaboration platform. Talk about surprises: What did they discover that was unexpectedly helpful? What happened that was particularly frustrating?

Go/No go? Based on the post-mortem evaluation, the test team recommends whether to abandon the collaboration tool or proceed to a pilot phase.

Sample Test Drive: Establishing a Team Charter

Drafting a team charter would be a useful test of a collaboration platform. The exercise brings a new team together to agree upon purpose, goals, roles and responsibilities. It builds team cohesion and trust and establishes team communication, reporting, and decision-making procedures. Within the collaboration tool, follow these steps:

Step 1: Schedule an initial charter definition meeting
Proactively verify that everyone on the team can attend, so that every stakeholder invests in the formation of a useful team charter. Don't just set up an HD video conference, send an email announcing you've scheduled a meeting, and hope people show up.

Step 2: Running the meeting
Provide enough time for brainstorming and discussion of each agenda topic. To make this project a reality and not just wishful thinking, distribute the agenda in advance of the meeting, asking attendees to come prepared with recommendations. Also consider which topics, such as documenting roles and responsibilities, might be best defined in follow-on meetings using collaboration tools such as group chat or a shared document.

Step 3: Outline the elements of your team charter
An effective, actionable team charter includes the following seven elements:

Background—Discuss why the team exists, the problem you're asked to solve, how that problem affects the organization's goals and objectives, and the consequences of the problem going unchecked.

Mission and objectives—What does the team want to achieve? Be specific. These questions will help you define useful objectives:

- Is the goal SMART? (Specific, Measurable, Attainable, Relevant, and Time-bound)
- Can everyone on the team live with it?
- If we accomplish this objective, what impact would it have in our success?

Scope and empowerment—Does the team have the skills and resources it needs to accomplish its mission?

Roles and responsibilities—Designate a project leader. Who are key stakeholders in which areas? Who is the executive sponsor? Which team members are responsible for vwhich deliverables?

Team operations—Identify frequent and recurring activities that would benefit from a clearly defined, documented process. This may include your meeting guidelines, schedule, and format; conflict resolution process; outline of your decision making process; and distribution list for team communications.

Team member assessment—Will the success of this project be a factor in team member annual reviews and bonuses? How does work on this project tie to work objectives as a whole? Where does each team member's responsibility and accountability begin and end?

Signatures and approvals—Makes the agreement official, deflecting any surprises or disagreement at assessment time over project deliverables and definition of success.

5 The Pilot Phase

Ideally, test driving your short list of collaboration vendors yielded a clear winner: the platform that seems best suited to the needs of your organization. Now it's time for a pilot phase. In your excitement over the platform, don't skip the pilot phase and head straight to rollout. The pilot phase is the critical proving ground that validates two things: whether the platform lives up to its promises, and whether you can convince users that their work processes will change for the better when they use it. It's the testing ground for your "What's in it for me?" premise, where you gain initial traction that will accelerate adoption during rollout.

Planning and endorsement The first step is designing the pilot plan. Depending on the size of your organization, select two or three small groups to participate. Thorough plans include these elements:

Identify champions—Choose groups that have one or more people eager to champion the platform. They will be the immediate resource for most pilot users, the people answering questions and encouraging day-to-day participation.

Define goals—Specify the "What's in it for me?" factors, the purpose of the pilot, and how you'll measure success.

Communication—Build momentum and raise interest with a detailed communication plan that tells participants what to expect before, during, and after each step of the pilot.

Develop resources—Set up online resources (ideally within the collaboration tool) for answering questions and gathering feedback.

Get approval—Take your plan to the executive sponsor for endorsement, funding, and signoff.

Launch the pilot Proactive communication with pilot groups continues during every step of the pilot. Best practices include the following:

Train the champions—Prior to launch, train the champions on the product. Most collaboration vendors have a knowledge base or training materials that you can leverage for this task.

Executive announcement—Draft an announcement from the executive sponsor that endorses the project, briefly explains its value, and encourages full participation. Ideally, the executive delivers the announcement in person at the launch meeting, but if this is not possible, prepare a video, social media posting, or at last resort, an email.

Launch meeting—Gather everyone for a launch meeting that explains the purpose of the pilot, outlines the "What's in it for me?" benefits, introduces the platform, identifies champions, announces online and staff support resources, and specifies how you will measure success. You may also wish to announce a reward or incentive for those who participate.

Train pilot users—Depending on how comfortable users are with learning and using information technology, train pilot users through champions or formal training.

Gather feedback The pilot phase should be long enough to gather useful feedback from participants and generate excitement that leads to widespread user adoption. Proactively work through champions to encourage users to post feedback, develop and share workflow templates, and engage in online forum discussions seeking useful information such as:

- Did users receive adequate training?
- Does the tool work as advertised?
- Is it easy to learn and use?
- Does it support the capabilities users need?
- Does anyone use the integrated third-party tools? Which ones? How well do they work?
- What are people doing through the tool that no one anticipated?

If the pilot stalls, revisit the "What's in it for me?" messaging for your users. Talk to participants and learn what motivates them. Refine and communicate the message until it resonates with users and they ramp up usage and participation.

Post mortem Assess the success of the pilot phase and determine why it succeeded or failed. Be honest. Success or failure often has little to do with the quality of the tool, but results from intangible management and interpersonal factors. Ask yourselves:

- What did you do well?
- What could you have done better?
- What didn't you do that you could have done?
- Did you respond appropriately and promptly to questions or issues that arose?
- What assumptions did you make that were wrong?
- Did you have appropriate and adequate support resources? or did you misuse or not use the resources you had?
- Did your champions support you or sabotage you? Why?

Write a post-mortem evaluation, and if you decide to proceed with a rollout, learn from the experience to develop the official rollout strategy and marketing plan.

6 The Rollout

The official rollout begins with revisiting your business goals. Based on what you learned in the pilot, does the original business value still hold? Or did a better one emerge? Consult your stakeholders and revise or restate the business value of adoption. Then formulate a realistic, scalable strategy for rollout and attracting participation.

Strategic approach

Your rollout strategy should address the following factors:

User culture Corporate culture influences how adoption propagates through an organization. How does information travel? Who do people listen to? What's the best way to spread the word?

For rapid adoption, most plans will exploit more than one of the following routes, supporting them with training and incentives:

Bottom-up Equip and reward group champions and power users that drive adoption

Middle-out Leverage the relationships of mid-level managers, who are well positioned to influence people both up and down the organization

Top-down Encourage executives to lead by example, both as sponsors and participants

Deployment method Depending upon your organization's size or work culture, you may opt for one or more of the following deployment methods:

Viral—Announce the platform, tell everyone how to enroll, sit back, and let people join and invite coworkers. This passive, "if you build it, they will come" approach is often the way organizations first use collaboration platforms. However, the viral method is unpredictable, rarely leading to widespread adoption on its own.

Managed rollout—Deploy according to a phased plan, first to the departments that will benefit most. Metering availability helps organizations scale support resources, adjust as needed, and focus on working with power users and champions to gain traction. This high-touch approach works well in larger enterprises or highly segmented organizations.

Complete migration—Release the platform to the entire organization at once. This "do-or-die" method works well as a final step of a managed roll-out, or for highly integrated organizations with a competitive culture that quickly engages with new initiatives or technologies.

Targeted marketing

After you define your user approaches and deployment methods, create a marketing plan. No matter how powerful or easy-to-use your platform is, the path to successful adoption includes targeted marketing. There are two categories of proven best practices for marketing the platform's value to engage individual users and accelerate adoption: personal motivations and "seeding."

Personal motivations It's impossible to overstate the critical need to understand and convey the "What's in it for me?" message to user groups. Align underlying personal motivations for adoption with the advantages that the platform provides. For example, the CEO can see that the platform gathers and stores organizational knowledge, so if a team member goes on vacation, someone else can step in and cover for that person with minimal transition time. Or the administrative assistant can use the task manager and reporting capabilities to receive and resolve requests, with fewer interruptions during the day.

CHAMPIONS AND POWER USERS

Champions **are designated local experts who encourage, teach, and support everyone in the group to adopt the collaboration platform during and after a rollout.**

Power Users **are enthusiastic users who on their own initiative find creative ways to adapt the collaboration tool to improve business processes. For example, a power user may create customized task list templates and process flows, sharing them with other groups projects on track.**

Don't overlook the value of rewarding participation with incentives such as gift cards, but you can also recognize power users and champions on leadership boards or awards presented during company events, such as an all-hands meeting. Some organizations have also charted success through "gamification," that leverages a tool within the platform for an instructive game with the promise of some reward.

Seeding practices Conventional marketing practices such as advertising and events help get the word out and capture user interest. We've already discussed the grassroots value of power users and champions, who provide one-on-one, personal coaching and encouragement to their immediate teams. Casual events such as lunch & learns offer another way to demonstrate the tool to skeptical, but hungry, users. Finally, using the platform as the only way to access and manage content vital to a certain project pulls even the most reluctant users on board.

Communicate, communicate, communicate.

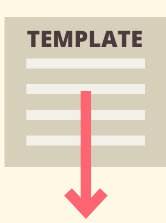
Don't assume that your user base has the bandwidth (or interest) to pay much attention to your rollout. Communicate with users at every step: before something happens, as it occurs, and after it's done.

Begin with drafting email blasts: one set from the rollout team, and another set that managers can personalize and distribute to teams to encourage participation.

Your email should touch on:

- What did you do well?
- the date the platform is available
- what it is and what it does-- share your vision for how the platform will positively impact the workflow
- a few compelling use case ideas for folks new to online collaboration
- timing and location of any training
- next steps for getting started

We've also created ***a template*** you can copy and edit to suit your needs.



Get the Template

Here are some of the considerations you may need to address in your communication plan:

Training People won't use a system they don't understand. Training takes several forms: formal onsite or online classes, self-serve video-on-demand, and one-on-one informal coaching. You can purchase formal training from your collaboration platform vendor, use its online knowledgebase, or leverage its white-label training materials. Some organizations choose to multiply the value of formal training by providing it to champions, who then take responsibility for individually training people in their groups.

Helpdesk support Many organizations have a helpdesk that fields questions from users and helps them navigate the many systems they use to do their jobs. Early engagement of helpdesk personnel creates a partnership supporting ultimate success. The collaboration provider typically has a knowledgebase that your helpdesk personnel can access to assist struggling users.

Support and discussion forum No rollout proceeds exactly as planned. Successful rollouts gather feedback during the process and adjust resources and processes in response. Leverage your corporate social platform or wiki pages to solicit feedback during the rollout, spotlight user-designed task list templates and process flows, and tell engaging stories about how users are "owning" the platform to improve business processes.

Overlapping systems Your organization may have pockets of users that already use a collaboration platform—just not the one you're rolling out. Reach out to those groups. Make agreements about how the company will use each system during the rollout. Assuming you've managed a successful rollout and enjoyed enthusiastic user adoption, you need a final cutover plan for these users. A successful transition includes data migration from other systems into your platform and ample advance notice to affected users of the cutover plan and shutdown date.

Measure and communicate success At the end of your rollout, don't just measure user adoption rates. Assess the impact on corporate culture, and communicate results to the executive sponsor and other stakeholders:

- How is the collaboration platform changing the way people interact?
- Can you measure improvements in business processes?
- Do people meet deadlines more consistently?
- Do managers sleep better at night during a product launch?

Finally, acknowledge and congratulate the many people who contributed to its success.

Epic Fail: Going Metric in the U.S.

After more than a century of dithering over the issue, the United States Congress passed the Metric Conversion Act of 1975, establishing the Metric Board at NIST "to coordinate and plan the increasing use of the metric system in the United States." [1] Despite successes among the scientific community and later, hard-goods manufacturers, in 1981 the Board admitted that its efforts were "largely ignored by the American public," and it disbanded a year later. In 1988 Congress amended the Act, officially designating the metric system as "the preferred system of weights and measures for United States trade and commerce," but few people noticed or cared.

The metric system is easier to use than the convoluted weights and measures standards inherited through trade with England. The rest of the world—including the United Kingdom—converted in the 1960's. Why did the U.S. effort fail?

No compelling driver for change. The Board failed to identify or communicate any urgent need to convert. The "What's in it for me?" story left the average American unconvinced. People pumping 10 gallons of gasoline into their cars or buying a pound of hamburger for dinner understood what they were getting. Their attitude? "If it ain't broke, don't fix it."

No shut-off date. The Board complained that it "lacked the clear Congressional mandate necessary to bring about national conversion." Conversion was always voluntary, and Congress issued no shut-off dates for the old system. For example, Congress never told weather stations to stop reporting temperature in Fahrenheit, never erased miles from highway signs in favor of kilometers, nor mandated that the food industry recalibrate its packaging equipment and stop publishing English weights. No one was forced to change, and the few that did later reverted because users, customers, and audiences clung to the old, familiar ways.

[1] Office of Weights and Measures/Metric Program, National Institute of Standards and Technology, "Toward a Metric America, The United States and the Metric System, a Capsule History" October 1997, revised May 2002. http://www.nist.gov/pml/wmd/metric/upload/1136a.pdf et seq.

7 Ongoing Evaluation and Improvement

The primary rollout is done. Now it's time to shift into ongoing evaluation, maintenance, and improvement mode. Persistent support and communication helps allay potential drop-off in usage rate from people who lose interest in the tool and revert to previous methods. You also need support and maintenance budget to prevent product obsolescence. Like supporting any software application, you need budget and staff to manage ongoing tasks such as the following:

Manage your internal support pages and discussion boards Keep postings organized and up to date. Identify, implement, and communicate changes resulting from user feedback and suggestions, and credit the people who suggested them. You'll have sample materials from your vendor to use as a starting point, but it is important to customize them to reflect your organization's voice and culture.

Standardize ways to share templates and process flows throughout the organization Align information-sharing practices with how people use the tool.

Train new users and helpdesk staff Integrate training with employee onboarding and staff training programs.

Quarterly reporting Measure items such as adoption rate, productivity advantages, number of helpdesk calls, and overall cost savings, and report them to stakeholders, executive sponsors, and management. A quarterly status report should include recommendations for continuing improvements demonstrate the continued value of the collaboration platform and justify budgets for ongoing maintenance and support.

Manage upgrades Handle an upgrade as you would handle a rollout. Adapt vendor upgrade information to communicate new features and capabilities to users, while reflecting your organization's unique needs and workflows. Update helpdesk-support and user-training resources. If you decide to go the cloud platform route, the bulk of the heavy lifting will be done for you other than communicating what's changed to your users.

Acknowledge and reward power users Support their innovations and leadership with ongoing communications, events, leaderboard postings, and other creative "attaboys."

Ongoing benefits of collaboration

As your organization continues to invest in the collaboration platform, keep in mind that cloud-based collaboration delivers ongoing benefits such as the following:

Agility Providing an easier, faster way to manage tasks, measure accountability, and enhance communications helps organizations focus on their core competencies and enhance business agility.

Instant-on Bypassing traditional application infrastructure investments, integration issues, and software development cycles, cloud-based collaboration brings users online faster at a much lower cost.

Pay-as-you-grow Budgeting per-user subscriptions helps organizations predict and control costs as they build user adoption.

More productive relationships Using collaboration tools such as HD video conferencing helps people get to know each other, especially for teams distributed across cities, countries, or worldwide. Building trust and confidence among team members results in more successful projects.

8 About Redbooth

Redbooth (formerly Teambox) is a collaboration and communication platform that provides a single place for teams to collaborate and get work done. Redbooth is used by companies across the globe including Airbnb, Al Jazeera, Apple, AT&T, Avis, BBC, Canal+, Cisco, Discount Tire, Deutsche Telekom, Duke University, Harvard University, Intuit, Novartis, Spotify, Subaru, ReMax, and Volkswagen Audi. Founded in Barcelona in 2008, the company is privately held and headquartered in Redwood City, California.

Want to keep up on the latest and greatest trends and best practices in collaboration and virtual teamwork? Subscribe to the Redbooth blog:

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