

ADOPTRACK™

"Bridging the Gap": Measuring, Monitoring, and Accelerating Adoption for Improved Value Creation



Boxley Group delivers world-class management consulting services.

We are your trusted and experienced business partner in Strategy Implementation, Information Management, Solution Deployment, Project Management, Organizational Change Management, Lean Six Sigma, and HES (Health, Environment, and Safety).



Introducing AdopTrack™

Organizations implement change for a reason, and usually the reason is to obtain some identified benefit. In business, projects or initiatives are usually the mechanism to bring about change. The change these projects bring into the organization ultimately come to life through adoption of the change to the individual's way they work or act. This connects how well we manage the adoption of change directly to a project's overall financial and strategic success. This critical correlation highlights the importance of monitoring, measuring, and managing adoption.

The old saying; "You get what you measure" is tried and true. If an organization truly wants to ensure the expected return on their investment is obtained, it makes sense to monitor and measure the most critical driver of value realization. AdopTrack™ is a system to measure adoption and quantify the value adoption contributes to the success of business projects.

Boxley Group is a global management consulting firm focused on creating value for their clients by identifying and solving their dynamic challenges. They have successfully developed a system called AdopTrack™, which measures adoption, ties adoption back to benefit realization, and provides adoption acceleration support.

Boxley Group's AdopTrack™ system is simple and powerful. It maximizes the significant benefit adoption has to a project and the expected value that project brings to the overall organization. In today's business, the value a project delivers, rarely equals exactly what was originally estimated. One of the greatest causes of this variation is the "people" not adequately adopting the needed change brought on by the project. The greater the project results or outcomes depend on people adopting the solution, the greater the variation can be expected in the value obtained.

The most important and strategic changes within organizations tend to have a greater dependency on people adopting new ways of working. Comprehensive and accelerated adoption directly contributes to the organization's ability to drive new business value, reduce costs, and deliver sustainable growth into the future for the enterprise.

Measuring Adoption and the Impact to Value

In business, projects or initiatives are initiated with the prospect of achieving some expected benefit to the organization. From the identified objectives, a series of complex calculations is accomplished to develop an expected benefit associated with the project (usually cost savings or revenue generation). In most projects a large portion of the expected Return on Investment (ROI) is usually associated with the people within the organization adopting a new solution, process, or new behaviors. AdopTrack™ allows an organization to monitor, measure, and improve overall adoption.

For example: When a project introduces a new technology or process impacting 150 employees, the success (realization of the expected value) of the project is tied to those 150 employees accepting the change and adopting the new solution. The up-take of new ways of working likely follows a path where different employees require different amounts of time to internalize and ultimately adopt a change to their work. Using AdopTrack™ to monitor

+01 713 401 9098
BOXLEYGROUP.COM

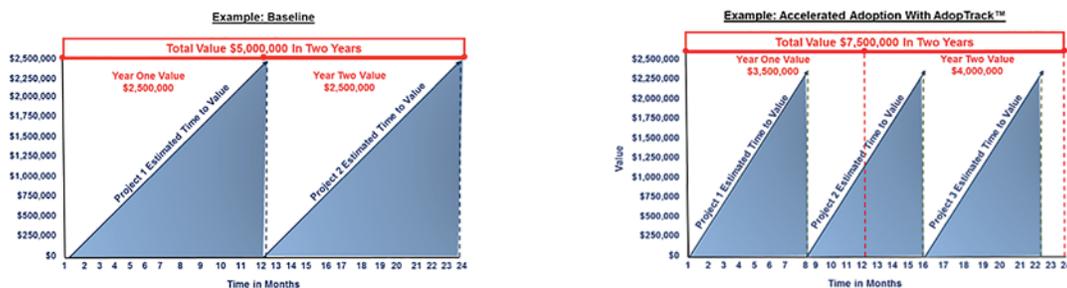


and measure the level of adoption within the organization will identify barriers or gaps in the adoption process. Once these barriers or gaps are known, action plans can be established to close the gaps or remove the barriers to adoption.

The AdopTrack™ System can also lead to increasing the speed of adoption. Speed of adoption is a measure of how quickly employees adopt a change to how they do their work when it is introduced by a project. The speed of adoption for a group of employees impacted by a change, or how quickly they adopt the change, has a direct and measurable impact on the return a project delivers (See examples below).

The measurable impact is based on the concept that money/benefit received earlier is worth more than the same amount of money/benefit received later, because it can be 'employed' or reinvested over time. The idea that money available at the present time is worth more than the same amount in the future is due to its potential earning capacity. This core principle of finance holds that, provided money can earn benefit or value, any amount of money is worth more the sooner it is received.

Below is an example of a baseline value delivered by projects over two years and the potential value which could be obtained with accelerated adoption using AdopTrack™. This demonstrates how speed of adoption can impact the overall value realization for an organization.



This simple analysis demonstrates how measuring adoption can directly impact the expected value return of a project. In the end, whenever a project or initiative impacts how employees do their jobs, then how quickly and how effectively the changes are implemented impacts the time-to-value realization and overall return on the initial investment. The AdopTrack™ system focuses on enabling and encouraging employees to embrace, adopt, and utilize the changes in the way they work, brought about by a project. This can directly contribute to higher return on investment through faster adoption, greater utilization, and higher proficiency.

CONFIGURING THE ADOPTRACK™ TEMPLATE

Step 1: Identify Project Objectives and Support Systems

Starting at the highest level, identify the overarching project objectives. Most projects have defined a handful of specific objectives that constitute success for the project. These are usually found in a Business Case or some other defined reason the business is embarking on this specific project.

Examples of Objectives:

- Performance Improvement
- Risk Management
- Cost Reduction

Also, ensuring the supporting systems are in place to facilitate a successful project is a critical success factor in meeting the overall project objectives. Identify the needed supporting systems.

Examples of Supporting Systems:

- User Support
- Leadership Engagement and Sponsorship
- Solution Design
- Technical Performance

Step 2: Determine Adoption Measures

For each of the identified Objectives and Supporting Factors; determine which systems need to be in place, what are the targeted or expected behaviors, and/or which specific activities need to be happening for the project to be successful. From this information build the associated adoption measures.

Example:

Objective: Performance Improvement	
1	Improved Information Sharing
2	Improved Accessibility of Information
3	Easier to Find Documents
4	Reduced Rework and Duplication of Files

Step 3: Establish Adoption Measure Status Statements

Using the standard five-step Adoption Curve, create a status statement for each of the five potential adoption statuses as they relate to each of the individual Adoption Measures (See Adoption Measurement Instrument example below):

1	Awareness	Awareness of the change
2	Understanding	Understanding of the change
3	Engagement	Engagement by the organization to implement the change
4	Adoption	Adoption of the change
5	Ownership	Ownership and continual improvement

Step 4: Complete the AdopTrack™ Measurement Instrument

Once the Objectives, Supporting Systems, Adoption measures, and Status Statements are documented, complete the AdopTrack™ Measurement Instrument:

Adoption Measurement Instrument Example

Adoption Measure	Status of Adoption					Current State	Target State	Comments and Actions
	1 Awareness	2 Understanding	3 Engagement	4 Adoption	5 Ownership/Transfer			
Performance Improvement								
1 Improved information sharing	The team is aware of the information sharing capabilities.	The team understands how to create, update, and share information but may not necessarily put key documents in the solution. The team is moving toward integrating the solution into daily activities.	The team places most key documents in the solution. The team actively uses some of the solution's information sharing and versioning practices day-to-day.	Information sharing and versioning are optimized in the daily activities of the team.	The team stores most to all key documents in the solution. The team encourages new members to the group to exhibit best practices around information sharing.		2.5	
2 Improved accessibility of information	The team is aware the solution enables accessibility of information and supports workflows.	The team understands how the solution enables accessibility of information - Documents are uploaded as final drafts only - not as working collaborative versions.	The team actively uses the solution to improve availability of information - Documents are properly checked out, edited, and checked in with comments.	Accessibility of information is optimized in the daily activities of the team.	The team has developed a long-term business strategy around information and workflows.			
3 Easier to find key documents.	The team is aware of the solution's filter and search features.	The team understands how filters, filters and metadata to find documents.	The team is using column filters, metadata and existing views to find key documents	The team is using personal views to find key documents	The team is creating and using public views to find key documents - Key documents are easily managed through well designed pages, lists, document libraries and views.			
4 Reduce rework and duplication of files.	Team members are aware of document version control to prevent duplication of files.	Team members understand the solution prevents rework and duplication of files via check-out and version control.	Team members are using the check-out feature to prevent rework. - The team knows whether a particular document is the latest version.	The team knows whether a particular document is the latest version and has significantly reduced duplicate files.	The team knows whether a particular document is the latest version and has eliminated duplicate files.			

Adoption Measurement with AdopTrack™

Adoption measurement can be accomplished within departments, across business units, geographical regions, or any combination of these based on the magnitude and scope of the project. It is best to break up the Adoption Measurement groupings by logical boundaries and roll-up the metrics within the larger organization.

The AdopTrack™ System does not stop at just identifying a one-time snapshot of the overall level of adoption within an organization. Boxley Group will work within and across individual departments or entities to determine their unique level of adoption (these individual metrics are then collated to develop the overall organizational adoption percentage). During these Adoption Measurement Sessions, the current level of adoption is identified, along with the desired or target level of adoption (taking into account an agreed upon timeframe) for each of the individual adoption measures. When the desired level of adoption is higher than the current level, action items are identified to bridge the gap. The action items are then managed and monitored to ensure continued improvement. These intra-organizational adoption measures provide a visible competitive motivator and an actionable leadership metric.

Adoption Measurement Sessions are then carried out at regular intervals until the level of adoption reaches the established target or management determines the amount of time and resources to carry out these activities is providing diminishing returns.

The AdopTrack™ system used by Boxley Group is unique, in that Organizational Change Management (OCM) activities continue to be accomplished after the solution has been deployed into the business to ensure thorough adoption throughout the organization. These measures are an important factor in ensuring the overall success of obtaining the expected level of value from the project.

Monetizing the AdopTrack™ Metrics

The level of adoption within an organization is a beneficial and useful metric. Boxley Group can take this and help the organization identify and apply a monetized benefit to the associated level of adoption. This simple and powerful activity really brings to life the business value the organization is achieving as adoption is accelerated. Conversely, this can also focus attention on benefits not being realized, due to the deficiency of adoption.

For each of the project objectives, Boxley Group works with the business to determine which stakeholders need to adopt and use the solution for the specific objective to be achieved. From this, a broad estimation of the total number of users can be determined. The total number of users/stakeholders can then be divided into the total overall expected benefit to determine an approximate level of benefit by individual stakeholder. Having this number facilitates the ability to determine the total percentage of contribution a department, business unit, or other entity may have to the overall benefit realization.

The AdopTrack™ system will establish adoption measures which are used to determine the adoption percentage within a department, business unit, or organization. Using the estimated project benefits and the percentage of adoption, leadership can easily determine the value realized and unrealized. This information can be used to define whether to increase or decrease targeted change management activities. Also, being able to show the potential benefit being left on the table due to the lack of adoption is a powerful motivator for leadership's support for the needed OCM activities.

SIMPLE EXAMPLE:

A project is expected to deliver \$10 million dollars in value. If the company is measured at 40% adoption they have only realized \$4 million dollars and they are leaving \$6 million dollars of benefit unrecognized.

CONCLUSION

The ability to adapt to change is a key component for organizations to stay competitive in an ever-changing and more complex business environment. Companies habitually invest millions of dollars in projects which never meet their ROI targets because the change is not adequately adopted. Adoption is often seen as intangible and hard to quantify in order to measure the value delivered. Boxley Group's simple yet powerful AdopTrack™ system is focused on creating value for their clients at levels beyond expectation. The AdopTrack™ system ensures adoption level transparency, leading to accelerated adoption, and improved value realization.

AdopTrack™ presents a convincing case for the importance and potential value measuring adoption can bring to a project by directly connecting adoption to project and organizational value and goals. It illustrates, effective adoption has significant impact to project financial performance and delivery, organizational goals, and strategic objectives. When you begin to look at adoption as a means to create value, it is not difficult to make a convincing case for using AdopTrack™ to measure and monitor the adoption levels of each and every project a business undertakes.

About the author: LARRY POWERS

Larry is an Organizational Change Management (OCM) professional at Boxley Group and is passionate about advancing the science of practical OCM. With over 20 years practicing this discipline, he is a proven leader in the field. He is proficient at developing, implementing, and maintaining value driven OCM and Organization Development strategies and programs within small companies and worldwide operations.

For more information on this article, AdopTrack™, or the Boxley Group, please contact the author (Larry.Powers@BoxleyGroup.com)