

User Adoption Strategies: The Central Desktop Approach



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Executive Summary

How do you encourage effective user adoption of new collaboration tools, and in particular, the Central Desktop collaboration tool? This report provides evidence from a Web survey about the user adoption strategies being embraced by current Central Desktop clients, along with an analysis of which strategies are most effective for user adoption.

The key insight developed in this report is:

- The most commonly used user adoption strategies—web-based training, pages on the Intranet, over-the-shoulder watching, and easy first steps—are not necessarily the most effective user adoption strategies; but
- The most effective user adoption strategies—over-the-shoulder watching, real-to-life scenarios, zero other options, and executive support—require the foundational use of the most common user adoption strategies.

For example, web-based training is the most commonly used user adoption strategy, but it's not the most effective. Over-the-shoulder watching is. And if you look more broadly, there are two categories—or two phases—that respondents mentioned in their user adoption work. Phase one employed strategies that focused on training about basic concepts—what Central Desktop was, how to use the different features and functions, and so on. Phase two employed a different range of strategies that focused on how to actually make use of those features and functions within a particular group or organization.

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Introduction

What's the number one complaint from people charged with the implementation of new collaboration tools? They do the work, and then no one uses them! The very people whom the new tools are intended to help, empower, enable, and enhance ultimately reject the new tools and don't use them. Depending on which side of the fence you sit on, that's either a tremendous shame or a huge opportunity for improvement.

I see it as a huge opportunity. I believe in the power of good collaboration tools to make work life better, and by implication, I want to see the tools being adopted. However, after 15 years as a collaboration strategist—a mix of consulting directly to organizations on collaboration strategy, combined with numerous research reports as an industry analyst—the user adoption challenge is core and fundamental to moving ahead with improved approaches to doing work.

Collaboration tools aren't just a nice to have. In my workshops on collaboration strategy, I talk about four key trends that are raising the importance of having access to great collaboration tools at work:

1. The increased pace of business. Decisions have to be made faster—decisions about responding to competitor moves, customer opportunities, and marketplace dynamics. How can you make effective decisions faster?
2. The global nature of working with others. It is increasingly common to work with people who you can't work with in a face-to-face setting. You're in the United States. They're in France. Or Germany. Or Australia. How do you work together effectively?
3. The IT savvy of new employees. Many new employees, especially among the younger crowd, have better IT equipment at home than they are given in the office. In addition, they have had experience with using newer tools to collaborate with others. And what do most organizations give them? Email.
4. The technology options to support collaboration. The past decade has seen rise to a multiplicity of new technology to support collaboration. There has been and continues to be tremendous innovation on the supply side.

This report on the user adoption strategies being used by current Central Desktop customers aims to make a significant contribution to the capability of current and future Central Desktop customers to make effective use of the Central Desktop service. The report looks at the strategies being used by current Central Desktop customers, but more importantly, analyzes which strategies are most effective for user adoption based on survey responses.

Independent Research

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Disclaimer

The information provided in this research report is by necessity of a general nature, and its applicability to a specific business or organizational context is not guaranteed. Due professional care must be exercised in applying the ideas within this research report. All care has been invested in the preparation of this material, but the author accepts no responsibility for its application.

The Strategic Context

Installing the software—or in the case of hosted collaboration services such as Central Desktop, filling out the online Web form—is the easy part. The real challenge is in getting the people in your organization to use the new tools in a way that makes for an improved way of working, better business results, and better collaboration. In other words, user adoption is challenge number one.

About the Survey

This report presents part of the findings from a Web survey run during January to March 2010 by The Michael Sampson Company. The survey was focused on gathering data about the use and effectiveness of user adoption strategies for collaboration tools in preparation for a number of publications and conference presentations. While the overall survey collected data on many different collaboration tools—Microsoft SharePoint, Lotus Quickr or Connections, Socialtext, Google, and Central Desktop, among others—this report exclusively presents the summary data from over 200 Central Desktop administrators in client organizations.

This report has been prepared as a sign of thanks to the many Central Desktop administrators who gave 10-15 minutes of their time to complete the survey. Due to the support of the executive team at Central Desktop (the vendor), administrators at client organizations using the Central Desktop collaboration service were advised of the survey via a blog post on the Central Desktop blog (cdblog.centraldesktop.com/2010/01/collaboration-michael-sampson.html), along with a mention in the February 2010 Central Desktop newsletter. This garnered a very good response from Central Desktop administrators, meaning that there is sufficient data available to draw some robust conclusions about the use and effectiveness of user adoption strategies for organizations using the Central Desktop service.

It is hoped that the data presented in this report will help current and future Central Desktop clients. For example:

- For current clients, this report provides insight into how a reference group of current Central Desktop clients are tackling the user adoption challenge. This broader knowledge can be applied within current Central Desktop client organizations to increase the effectiveness of their user adoption approach.
- For prospective clients, this report provides previously unavailable data about the use and effectiveness of user adoption strategies championed by earlier adopters of the Central Desktop service. The data collated in this report will help ensure that as clients make the transition from the prospective state to the current client state, they will have sufficient insight to make the most of the Central Desktop service.

About the Report

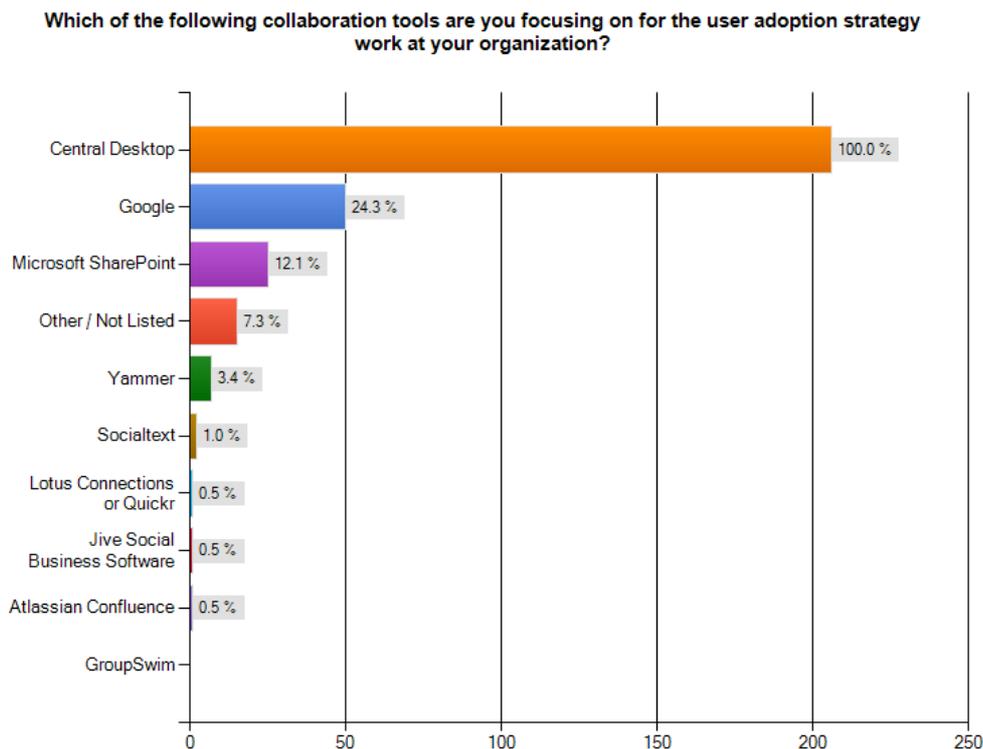
This report presents the findings from the Web survey, followed by a concluding section focused on answering the ‘So What Now?’ question. There were nine questions in the survey—the first seven focused on collecting data about user adoption strategies, and the last two focused on collecting demographic information and requesting permission to contact the respondent for more information. Data from the first seven questions are presented in this report.

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Central Desktop Plus Other Tools (Question 1)

Respondents were asked to indicate which tools they were focusing on for their user adoption strategy work, due to the fact that the survey was designed to look broadly at user adoption strategies across multiple tools. Respondents could select multiple options, and so obviously everyone using Central Desktop chose Central Desktop, but respondents were working with other tools too, the most common being Google (24%), and the second most common being Microsoft SharePoint (12%). See Figure 1.

Figure 1. Collaboration Tools and User Adoption Strategies



MANY RESPONDENTS HAVE TO DEAL WITH MULTIPLE COLLABORATION TOOLS, AND AS SUCH HAVE TO ENCOURAGE EFFECTIVE USER ADOPTION ACROSS A COLLECTION OF TOOLS.

In the “Other / Not Listed” category, the following tools were mentioned:

- Salesforce.com (4 respondents)
- Microsoft Groove, Salesforce Chatter, Microsoft SharePoint, and Email (2 respondents each).
- Many other tools were mentioned by 1 respondent each: OpenText, FirstClass, Bluefield, ActivCollab, Alfresco, Google, Higher Logic, Skype, Present.ly, Soho, Yammer, Quickbase, Pivotal Relationship, Confluence, and Drupal.

At a user adoption level, a big implication of dealing with multiple tools is developing a clear understanding and shared commitment within the organization about where each tool is best used. In cases where there is just one tool (Central Desktop), the user adoption work is easier (but not

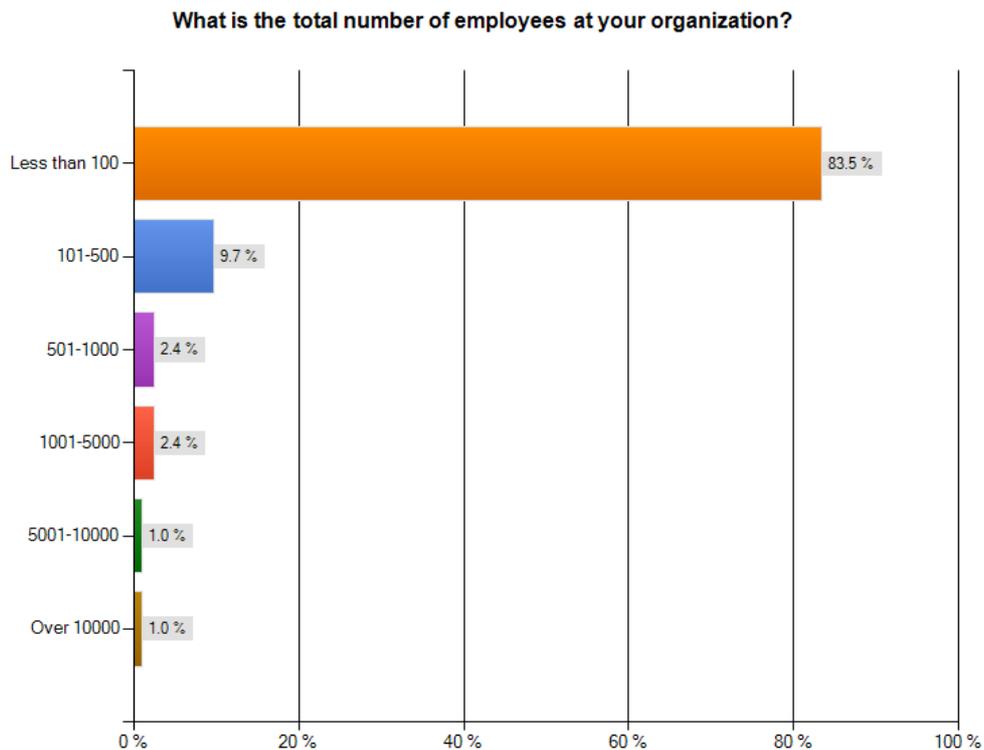
necessarily “easy”), because users only need to adopt one place to get their work done. When there are multiple tools in play, people have to slice and dice their work across multiple places—and therefore the level of capability required to know where each type of work activity should take place is much higher. That presents some challenges for simplifying the work environment.

For Central Desktop (the vendor), there are two implications. Firstly, it should be looking at the other key tools that its clients are working with, and see if there are opportunities to integrate with them—thereby simplifying the overall end user experience. Secondly, and conversely, there may be opportunities to upgrade the capabilities of the Central Desktop service to bring in more of the functionality that firms are currently getting from other systems.

Smaller Organizations Use Central Desktop (Question 2)

84% of respondents using Central Desktop are from organizations with less than 100 employees. The second largest grouping is the 101-500 employee sized organization, at 10%. There were few respondents from organizations with more than 500 employees. See Figure 2.

Figure 2. Organizational Size



THE MAJORITY OF RESPONDENTS USING CENTRAL DESKTOP WERE FROM ORGANIZATIONS WITH LESS THAN 100 EMPLOYEES.

The survey was not designed to gain insight into why Central Desktop was chosen as the collaboration tool for a particular respondent, but the answers of some respondents are illustrative:

- Central Desktop is easy to use. One respondent wrote, *“The tool is very easy to use -- once people hear about it they want to know more and they want to see what we are doing. We engage other offices through the tool and that generates interest.”*
- As a hosted service, there is no IT infrastructure required. That is, no one has to choose and purchase server hardware, install software, negotiate network connectivity, and manage and maintain the application; Central Desktop (the vendor) has already done all of those activities, and getting access to Central Desktop (the service) is as simple as filling out an online form, providing credit card details, and agreeing to the terms and conditions.
- As a hosted service, it is easy to share across multiple offices and locations. In particular, special security products do not have to be purchased and managed by skilled IT professionals; Central Desktop (the vendor) has already done that, and anyone with access to a Web browser at any end point can get access to Central Desktop (the service).

The benefit of this report, then, is that the strategies are anchored within smaller organizations. It does not seek to apply strategies from large organizations! If you are from a small organization and are using the Central Desktop service, these findings are directly relevant to you!

Few Organizations Have a Written User Adoption Strategy (Question 3)

Less than 10% of respondents indicated that their organization has a written User Adoption Strategy document or plan. **8.3% of respondents said they did have a written plan; the remainder (91.7%) said they did not have a written plan.** Given the responses shared throughout the survey, it is clear that many respondents had a plan of some description, but it just wasn't written down. Revisiting the previous question about the small size of most organizations using Central Desktop (the service), this is likely to be due to having a single owner of the Central Desktop service within each client organization.

There are benefits to having a written plan, however, even for small organizations. Key reasons include:

- The process of writing down your thoughts shows that you have thought through the user adoption challenge, and that you have developed an approach to dealing with user adoption. Deliberate intent is required to write a plan.
- You have something to show to others, as a communication device, and as a tool to encourage shared thinking and dialogue.
- It demonstrates that more than one person is involved; it's not a lone ranger approach. As we explore shortly the dynamic around the role of influential people in the user adoption process, having more people involved upfront is a good thing.

Finally, by documenting the user adoption strategy, I am not advocating a long and wordy document that merely takes up shelf space. One page will do, especially for smaller organizations. The one page strategy should contain the written summary of what will happen during the user adoption process—the various strategies that will be followed during the user adoption process. For example, it might say:

- We will start with base concept training.

- We will identify key opinion leaders in our firm, and make special efforts to educate them on the potential of Central Desktop.
- We will run workshops with different teams and groups to explore the use of Central Desktop to streamline and improve their work.

Finally, make sure you post the “one page strategy” in Central Desktop! That’s where it should be!

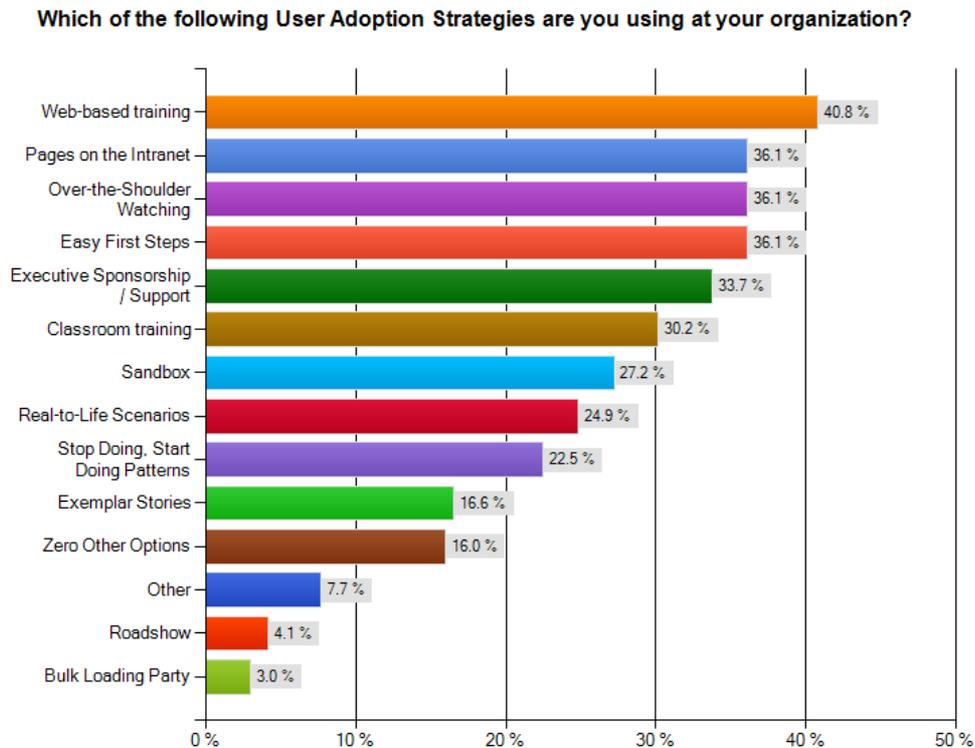
Use of Particular User Adoption Strategies (Question 4)

Respondents were shown a list of User Adoption Strategies at the beginning of Question 4—each with a name and a 1-2 line description. The list is re-produced below:

- **Classroom training.** Holding a training session in a traditional classroom where a trainer talks about the new way of doing things.
- **Web-based training.** Offering on-demand training through a web-based training program.
- **Pages on the Intranet.** A series of informational pages on the Intranet, that someone can read.
- **Over-the-Shoulder Watching.** Visiting someone at their desk for the purpose of watching how they work, and in order to suggest improvements.
- **Roadshow.** Putting on an event at different offices to advocate the use of the new collaboration tool, and to show people how it could be used.
- **Sandbox.** Providing access to a "testing only" system, where people can try out new collaboration tools or features.
- **Real-to-Life Scenarios.** Creating detailed descriptions of how the new tool can be used for a particular process or project.
- **Exemplar Stories.** Telling stories about how other people within your organization are using the collaboration tool, and the benefits they are getting.
- **Bulk Loading Party.** Holding an event to migrate necessary data from the old system to the new collaboration tool.
- **Stop Doing, Start Doing Patterns.** Identification of a particular process and how it is going to be done differently in the future, as a consequence of new tools.
- **Easy First Steps.** A series of simple first actions that someone can do within the new collaboration tool so as to get them using it for the first time.
- **Zero Other Options.** Removing competing or alternative ways of working, so that people have to use the new collaboration tool.
- **Executive Sponsorship / Support.** Where senior executive voice or demonstrate their support for the collaboration tool, in speeches or in actually using it themselves.

After reading the list, respondents were asked to indicate whether they were using that strategy, or not. Note that the question at this stage of the survey was a “yes/no” answer—the strategy was being used by the organization, or it wasn’t. Ranking of the effectiveness of the strategy was the focus of a subsequent question. See Figure 3.

Figure 3. User Adoption Strategies Being Used



RESPONDENTS INDICATED WHETHER THEY WERE USING A PARTICULAR USER ADOPTION STRATEGY OR NOT. THE MOST COMMON STRATEGY WAS WEB-BASED TRAINING.

The basic strategies are used most frequently. Education or training on basic concepts—via Web-based training, descriptive pages on the Intranet, and classroom training—are all focused on helping new users understand the features and capabilities of the Central Desktop service. With respect to Web-based training, the most commonly used approach, the good news is that it doesn’t have to be hard, because Central Desktop (the vendor) makes basic concept training available to customers of the Central Desktop service.

Out of the top six strategies, the other three are focused on a different intent. Over-the-shoulder watching, easy first steps, and executive sponsorship / support are focused on applying the basic concepts of the Central Desktop service within a particular group or organization. The intent isn’t education, but rather application.

Respondents were given the opportunity to comment about “Other” strategies they were using. Common themes were:

- Brown-bag lunches, or “lunch-and-learn” sessions where a demo was given of the Central Desktop service.
- The ethos to “Just Do It”, with learning through trial-and-error, with over-the-phone coaching to new users as they go through the process of learning.
- Regarding the “Zero Other Options” strategy, one respondent wrote: “*We just have projects that require it so people have to use it*”.

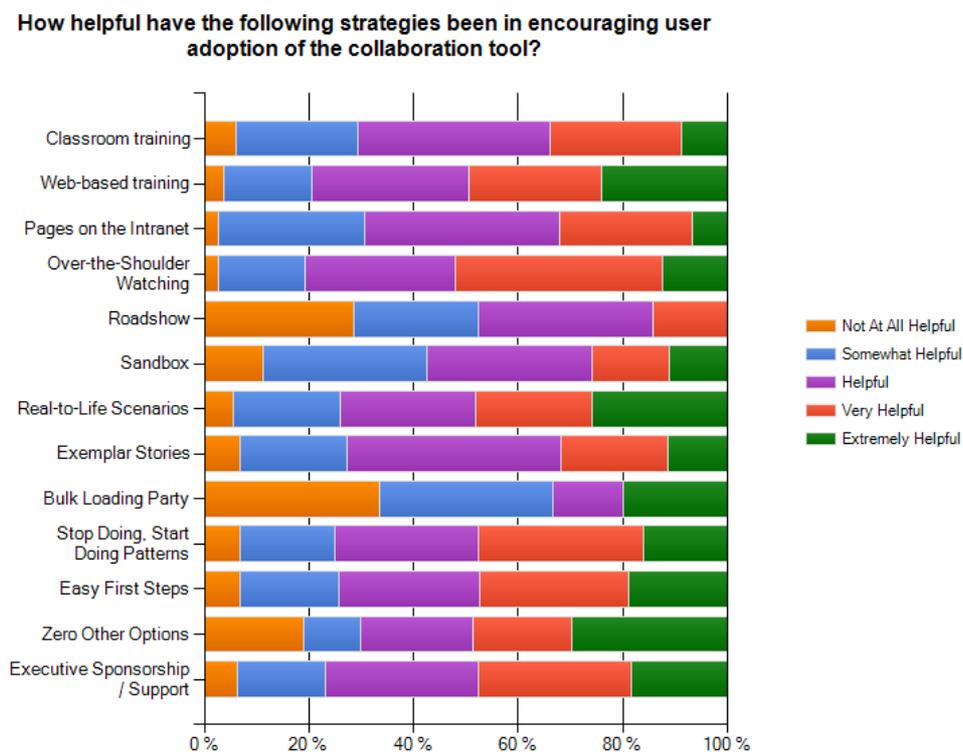
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- On the “Stop Doing, Start Doing Patterns” strategy, one respondent gave the following example of how they implemented it: “We directed that any new discussions, tasks, etc would be originated from the collaboration tool, as opposed to an email or phone call.”

Effectiveness of User Adoption Strategies (Question 5)

In order to drive an understanding of the perceived effectiveness of each strategy, respondents were asked to rank the strategies they were using on a 5-point scale—“Not At All Helpful” (orange), “Somewhat Helpful” (blue), “Helpful” (purple), “Very Helpful” (red), and “Extremely Helpful” (green). The effectiveness of each user adoption strategy is shown in Figure 4.

Figure 4. Effectiveness of User Adoption Strategies



RESPONDENTS REPORTED THE PERCEIVED EFFECTIVENESS OF EACH USER ADOPTION STRATEGY. ADD THE RED AND GREEN PORTIONS OF THE BAR TO GET A QUICK SENSE OF EFFECTIVENESS.

This is where the results get interesting.

- Web-based training is the most commonly used strategy, but is only the second most effective (49% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”).
- The most effective strategy was Over-the-Shoulder watching (52% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”). However, it was the second-equal most used strategy.

- Some strategies that are not so commonly used are effective when they are used. For example, “Real-to-Life Scenarios” was ranked eighth (8) in being used as a strategy, but is the fourth most effective strategy (48% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”). Likewise for the “Zero Other Options” strategy: it is one of the least used strategies, but it ranked third in effectiveness—49% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”.

Common Strategies vs. Effective Strategies

The key insight from Questions 4 and 5 is that, generally speaking, the most commonly used user adoption strategies were not ranked by the respondents as being the most effective strategies for encouraging user adoption. What was commonly used did not always equate with what was seen as effective.

However, that’s only half of the truth. The second key insight is that the most effective user adoption strategies rely on the most commonly used user adoption strategies being implemented first. Somewhere people have to be trained on the basic concepts of the tool—how to describe Central Desktop, what its various tools are, how it works conceptually. This is essential material that provides the underlying context for the more personal touch—the over-the-shoulder watching (one-to-one coaching), the zero other options, real-to-life scenarios, easy first steps, and others.

This survey data therefore provides empirical support for the recommendations in the “Six Steps to Collaboration Success” research paper (www.centraldesktop.com/whitepapers?w=six_steps) that I wrote in 2007. Basically Step Three of that report advocated a multi-stage process when introducing Central Desktop, starting with training on basic concepts, and then moving to more personalized exploration and wider group impact analysis.

User Adoption Strategies: What Worked Well (Question 6)

Respondents were asked to share any free-text comments about what worked well in their User Adoption Strategies work. Of the 206 people using Central Desktop, 134 respondents provided a comment to this question. Note that this question was focused on gaining insight into the effectiveness of different user adoption strategies, but without the constraint of funneling answers into pre-defined categories. It was a free-text question! What follows is an analysis of the common themes mentioned in Question 6, based on a coding methodology developed and applied to each of the answers.

There were six commonly mentioned strategies:

- Zero other options. Treat Central Desktop as the place to work.
- Make it real. Talk about application of the capabilities within the user’s work.
- People of influence have great power in encouraging people to use the Central Desktop service.
- Web-based training that is contextualized to the organization was more effective than generic web-based training material.
- Training on basic concepts lays an essential foundation.
- Just getting going. It’s not that hard.

Let’s examine each in turn.

Strategy 1. Zero Other Options

The most frequently referenced user adoption strategy was Zero Other Options. People wrote about the power of making Central Desktop “the single place” to do work, compared to providing a set of alternate and equally valid places. The multiple option approach leads to confusion among users, and makes user adoption much more difficult.

Sample comments about the value of the Zero Other Options strategy were:

- “Putting information that people need only on Central Desktop (including executives).”
- “Zero other options for a specific, time-critical project was great, but only for the small team involved. We’re getting a small team of young, smart interns to use Central Desktop to create a cadre of early adopters.”
- “Keeping alternative access to mission critical information to a minimum.”
- “Forcing the realization that work cannot be accomplished in another way.”
- “Just-in-time training and giving no other options to get the work done.”
- “Leaving no other options. ‘This is how we do it.’”
- “Allocation and monitoring of tasks via the new system.”
- “Presenting the solution as ‘the way’ to accomplish the needed tasks.”
- “Actually, what worked best was to have a ‘lighthouse’ team that started working with it, who had content valuable to others in the organization (for which we got frequent requests). Whenever we got requests for that information, we’d send it as a link to the answer. This increased awareness of the possibilities and when opportunities arose, other teams knew it was a good tool.”
- “We removed the shared file that people were accustomed to using and put all the information into Central Desktop. Any work related to clients had to be entered there. Also, any documents that needed to be approved had to be sent via Central Desktop or we would ask them to resubmit the correct way.”

Thus the key lesson from this feedback grouping is to not sabotage the use of Central Desktop by keeping alternate systems in place. Treat Central Desktop as the place to work, and expect that everyone will step up to using it.

Strategy 2. Make It Real

The second most frequently mentioned idea was to “make it real”—to talk about and demonstrate the use of Central Desktop for the real work of the group or organization, not just as a set of cool features and functions. Making it real also carries the sense that the person seeing the tool can visualize a connection between what they are being shown, and their own work. It’s made personally relevant to them. Sample comments were:

- “Examples and demonstrations using actual work product.”
- “Placing information on the system that affect people individually, to which they feel they must be able to respond.”
- “Interactive Q&A sessions and over-the-shoulder training rather than simple information providing.”
- “Hands on working through actual tasks and projects.”
- “Taking current problems and proving how they are removed or made easier by collaboration (e.g. files getting out of sync through poor version control and handling).”

- “Individual and specific training for team leads and managers.”
- “Showing people how I am using the tool for our projects.”
- “Asking people on staff to do a specific task that required them to use the tool, with a deadline and other important next steps resting on them doing it.”

While “Make It Real” wasn’t noted directly as a strategy in Questions 4 and 5, this was a meta-theme that respondents kept mentioning in the free-text answers.

Strategy 3. People with Influence

Having people who are seen as influential within the organization make use of Central Desktop was another frequently referenced user adoption strategy. For example, this was the place where executives were often mentioned—that if the executives were making use of Central Desktop as a place to work, then:

- It gave credibility to the use of the tool. The executives were using it, so it must be credible. Respondents noted the power of the “If executives are using it, I should use it too” signal.
- It sends the signal that executives could learn to use the tool, and by implication, that if executives could learn to use it, then others probably could too.

While executives are one type of influential people, they are not the complete story. Comments from respondents about the value of the “People with Influence” strategy included:

- “Having key individuals simply use the collaboration tool and then engage others by having them respond to it.”
- “Learning the benefits first hand and then setting an example.”
- “Build a core user group that could and would act as ambassadors and provide informal training.”
- “We’ve seen the most success when strong team leads drive all collaboration and communication through Central Desktop.”
- “Good selection of early adopters to spread the word.”
- “Use by influential members of the organization, responding to employees’ questions by telling them to find it on Central Desktop.”
- “Actually, what worked best was to have a ‘lighthouse’ team that started working with it, who had content valuable to others in the organization (for which we got frequent requests). Whenever we got requests for that information, we’d send it as a link to the answer. This increased awareness of the possibilities and when opportunities arose, other teams knew it was a good tool.”

Strategy 4. Contextualized Web-Based Training

Central Desktop makes a range of web-based training materials available for its customers. These provide non-customer specific training materials on the capabilities of the Central Desktop tool, and can be used by any Central Desktop user. A couple of respondents directly mentioned the role of the Central Desktop training materials in their success with the tool:

- “The on-line getting started training module was very helpful. Internal tips and tricks dissemination was useful as a follow up facilitator of adoption.”

- “The online tutorials were the greatest help.”

A number of respondents mentioned that they had developed their own specific training materials, and these were recorded and made available to users over the Web.

- “Creating web pages to illustrate the efficacy of tools.”
- “Web-based training was effective—the sessions were recorded and archived so that those unable to attend a scheduled time could access the material and direction.”
- “We created simple help pages for new users—short, simple, and to the point. These worked much better than the Central Desktop help files.”

Note that in both groupings, a respondent has compared the effectiveness of the Central Desktop training materials with their own internally developed training materials. It will always be the case that targeted training material that speaks to a particular context and work role will be more valuable than generic training material that talks about the capabilities of a tool. That’s just the way it is—not just with Central Desktop, but with other tools too. The trick is to use the best of both approaches—the Central Desktop training materials for training on basic concepts, and the specific training material to train on how a particular team, group or organization is going to make use of the capabilities of the tool in order to get their work done.

Strategy 5. Training on Basic Concepts

Another frequently mentioned strategy was training on basic concepts within the Central Desktop service.

- “Taking it a step at a time. Starting out with file sharing and then task management.”
- “Getting people to watch the Central Desktop online videos.”
- “Fully documenting the steps involved in performing workspace tasks in client administration.”
- “I just needed to explain and show users how to do typical operations, but I also needed to explain some core concepts, for example, file version history and how to combine it properly with the ‘track changes’ and ‘combine documents’ features of Microsoft Word.”
- “Web seminars showing ‘how to’.”
- “Quick wiki FAQs (frequently-asked-questions), one-on-one training. The Central Desktop videos helped to a degree, but were sometimes too long.”
- “Telephone call with hands-on step-by-step training to see, use, and discuss value and vision of where it can go.”
- “Taking baby steps incorporating Skype and meeting agenda’s, showing the use in screen-sharing sessions online.”
- “We taught the basic capabilities of Central Desktop and had the team come up with ideas on how we could use it to better communicate.”

As we have already discussed in the section “Common Strategies vs. Effective Strategies”, training on basic concepts is an essential first step to helping people understand what’s possible, so that the discussion can move to how the Central Desktop service can be applied to their work. Some of that contextualization and personalization is mentioned in the comments above.

Strategy 6. Just Start

The final strategy grouping that was mentioned frequently was on the power of just getting going. Respondents wrote the following comments:

- “Just use it. Central Desktop's interface was intuitive enough and we had nothing else appropriate that we could use to begin with.”
- “I'm just at the start of this so ask me again in six months, but so far the people who I have involved are taking to this like the proverbial duck to water.”
- “Again, if I understand the question correctly, people jump in and start using the program, referring to ‘Help’ as appropriate. Occasionally, our organization will have a training session if people seem to be missing a concept.”
- “Just get on and do it.”
- “As a small team informal communication of what, why and how was sufficient. It is important to have a tool with a relatively low learning hurdle to minimize frustration, as well as integrating to existing ways of doing things, such as email. Using the tool for simple tasks like document sharing and using email notifications draws people into the tool and gets them familiar with it.”
- “Just doing it.”
- “Our adoption strategy was simply to let people use it. Nothing beyond that.”
- “Just start using it.”
- “Just putting Central Desktop out there and letting folks go at it.”

The key lesson is to not overdo the thinking and planning stages. Lay the foundation, and then get on with it. Observe what people are doing, and if corrective action is required, step in and provide training or coaching.

User Adoption Strategies: Doing Differently (Question 7)

The final question of the survey asked respondents to comment on what they would do differently with respect to user adoption, assuming they were able to start over. Of the 206 people using Central Desktop, 134 respondents shared their perspective. There were four common and recurring themes in what respondents wrote in their free-text answers:

- They would focus on making it real to the people who were being asked to use the Central Desktop service.
- They would spend more time upfront gaining a better understanding of the Central Desktop service, and how it could best be used at their organization.
- They would offer better initial upfront training to prospective users.
- They would seek stronger executive support and action.

Let's look at each in turn.

Recommendation 1. Make It Real

The most commonly mentioned theme was about “making it real”. This plays back to the key insight from earlier responses that there are two essential stages: train on the basic concepts, and then contextualize and personalize the use of Central Desktop within the user's work. Some of the comments from respondents were:

- “Spend more time talking about existing processes, and then map them to the new [Central Desktop] tool.”
- “Real life scenarios.”
- “Have more best practice scenarios in place.”
- “Focus more on cycle times of existing processes to demonstrate immediate value.”
- “Give people a trail to start with—small actions, tasks, agree on meeting schedules, milestone and time tracking functions, etc.”
- “Have a specific list of tutorials and develop our own in-house strategies. This will evolve as we continue to learn all of Central Desktop’s capabilities.”
- “I should have thought through and developed several killer applications.”

Recommendation 2. Better Understanding of the Service

The fundamental capabilities of the Central Desktop service—what it can and cannot do—have a bearing on what it can be used for. As with any collaboration toolset, the Central Desktop service has a range of high fitness-to-purpose scenarios, along with a range of lower fitness-to-purpose scenarios. Building what they were doing off a clear understanding of the capabilities and features of Central Desktop was the second most common theme in the answers to Question 7.

Respondents wrote:

- “Have a better understanding of the best practices before making others go through the trial and error.”
- “Move it along a little faster. Have responsible staff spend a little more time learning the capabilities of the tool before implementing a structure for workspaces.”
- “It would have been great if we had our Instructions/Guidelines document completely together from the beginning; there were many things that we didn’t discover (about how Central Desktop organizes, how Central Desktop works) until after we started actively using it. It is sometimes hard to get staff out of their old habits now and can be difficult to find tasks.”
- “I would probably brainstorm the uses better and see what else we should be using it for so it can be implemented all at once. I think we were unsure of all the features and functions available when we first started.”
- “Take more time to prepare the working environment.”
- “Mastered the software more deeply myself first.”
- “Have an explicit discovery period to establish best practices.”
- “I would try to learn more about what we as a company would do with it first before creating the system and then modifying it later.”
- “It would be really nice to have Central Desktop (the vendor) provide their vision of how to use Central Desktop (the service). Versioning of files, wikis, databases—there are many options but some simple administrative things take us too much time to determine a process for. It would be nice to have a set of ‘recommended processes’ from the Central Desktop folks.”

Perhaps these comments reflect the dark underbelly of instant-on collaboration services, of which Central Desktop is an example. Because it is so easy to sign up, because you can start using the service within minutes of deciding to, because the service itself is so easy to start using—for these reasons, the risk is that upfront thought about how to best use the service, along with

careful planning to that end, can be thrown to the wind. The feedback from early adopters of the Central Desktop service: take time upfront to do your due diligence about how you will use the capabilities of the service within your group or organization.

Recommendation 3. Better Initial Training

The third most frequently mentioned recommendation was to do more initial training with users of the Central Desktop service. While recommendation 2—develop a better understanding of the Central Desktop service—was mainly focused on the administrator within a client organization, “better initial training” shifts the focus to the end user. They need to understand what you can do with the service, so they can make effective use of it. Respondents wrote the following pieces of recommendation:

- “More personal training first.”
- “Make sure that all new employees get a short introduction to the system shortly after starting work.”
- “I would spend more time on upfront training before we launch.”
- “I would incorporate more training.”
- “I would have liked to have had time / opportunity to have a communication campaign to introduce users to the ideas and concepts prior to rolling out the solution.”
- “More training up front.”
- “More preliminary question and answer sessions with users.”

The comment above about training new employees in the Central Desktop service is worthy of a follow-on mention. When buying into the use of a new service for supporting team and group collaboration, there is the upfront training and education process. But we mustn't forget that new people joining our organizations will require some upfront training and education themselves. This helps them get up to speed with the new system, and more importantly how it is used to facilitate group work and business processes at the organization they are joining.

Recommendation 4. Executive Support and Action

The final most frequently mentioned group of comments focused on the role of executives. Respondents would seek greater support from executives, along with executives actually doing something with the Central Desktop service. Talking is good; doing is much better. Here are some of the comments made by respondents:

- “Follow a similar approach, but solicit more executive sponsorship support.”
- “I would seek for higher level support in the organization.”
- “Gotten top management buy-in.”
- “Gotten departmental manager buy-in.”
- “Get buy in from the upper level earlier in the process. Grassroots demand worked well for getting a solid base of dedicated users, but often the upper level executives flummoxed progress by reverting to old systems and email attachments.”
- “Insist on Executive role modeling of the tool.”

As mentioned earlier in the report, executive involvement sends two crucial signals: first, that they are using the service, and so everyone else should too (organizational validity), and second, that if executives can learn to use the service, so can everyone else (human validity).

Other Recommendations

Respondents made various other comments about what they would do differently. In order of frequency, recommendations included:

1. Develop a strategy for using Central Desktop, and introducing it to the organization (7 mentions).
2. Create a series of easy first steps, to induct people into Central Desktop (6 mentions).
3. Remember that user adoption is a process, not an event. It takes time! (5 mentions)
4. Treating Central Desktop as the place to work, and eliminating other options (5 mentions).
5. Offering ongoing training (4 mentions).

Your Roadmap to Successful User Adoption

This report has provided clear insight into how current Central Desktop customers are encouraging effective user adoption of the Central Desktop service. By analyzing the survey responses, I propose this fundamental rule: **While users have to understand the basic capabilities of the Central Desktop service, it's the personalization and contextualization of those capabilities within their work process that is the key to user adoption.**

Thus your user adoption strategy will be most effective when you deal with both aspects:

1. Implementing specific strategies that educate users on the basic capabilities of the Central Desktop service; and
2. Implementing specific strategies that demonstrate the application of the basic capabilities of the Central Desktop service within the user's work, role and processes.

Both aspects are essential, so if you help people understand basic capabilities without the personalization and contextualization, then it is unlikely that end users will adopt the Central Desktop service. They will hear the "what", but will not understand the "why".

In concluding this report, then, I leave you with three key recommendations:

- **Educate staff on Central Desktop.** If you have a small organization, do it in person with small groups. If you have a larger organization, leverage alternative ways of delivering the fundamental education on capabilities: your own pre-recorded Web-based training, pages on the intranet, or the Web-based training material from Central Desktop.
- **Get influential people using Central Desktop.** If the executives at your organization are using the Central Desktop service, tell everyone. Better yet, get them to tell everyone. And even better still, get them to make it part of their work life, not something special or different. The executives point others in the organization to material in Central Desktop. Files are stored and reviewed from there. Calendars and task lists are maintained there. Business processes happen in there.
- **Focus personal attention on applying Central Desktop to work.** Since most organizations using Central Desktop are smaller in size, take a personal approach to leading users to effective use of Central Desktop. Explain the vision of how Central Desktop can be used. Give scenarios from your work and processes of where it can be used. Make it the place where work happens, and remove alternatives.

Thank You

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About The Michael Sampson Company Limited

The Michael Sampson Company is a Collaboration Strategy firm focused on improving the performance of distributed teams. We advise end-user organizations on collaboration strategies. Part of our mandate is to prepare vendor-independent research reports for our organizational clients. All of our research is internally funded, which means that no vendor has requested the authoring of our reports, nor underwritten the research. The analysis is impartial, and not influenced by vendor agendas. These reports have been prepared to assist organizations in making wise decisions about improving the performance of distributed teams.

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