



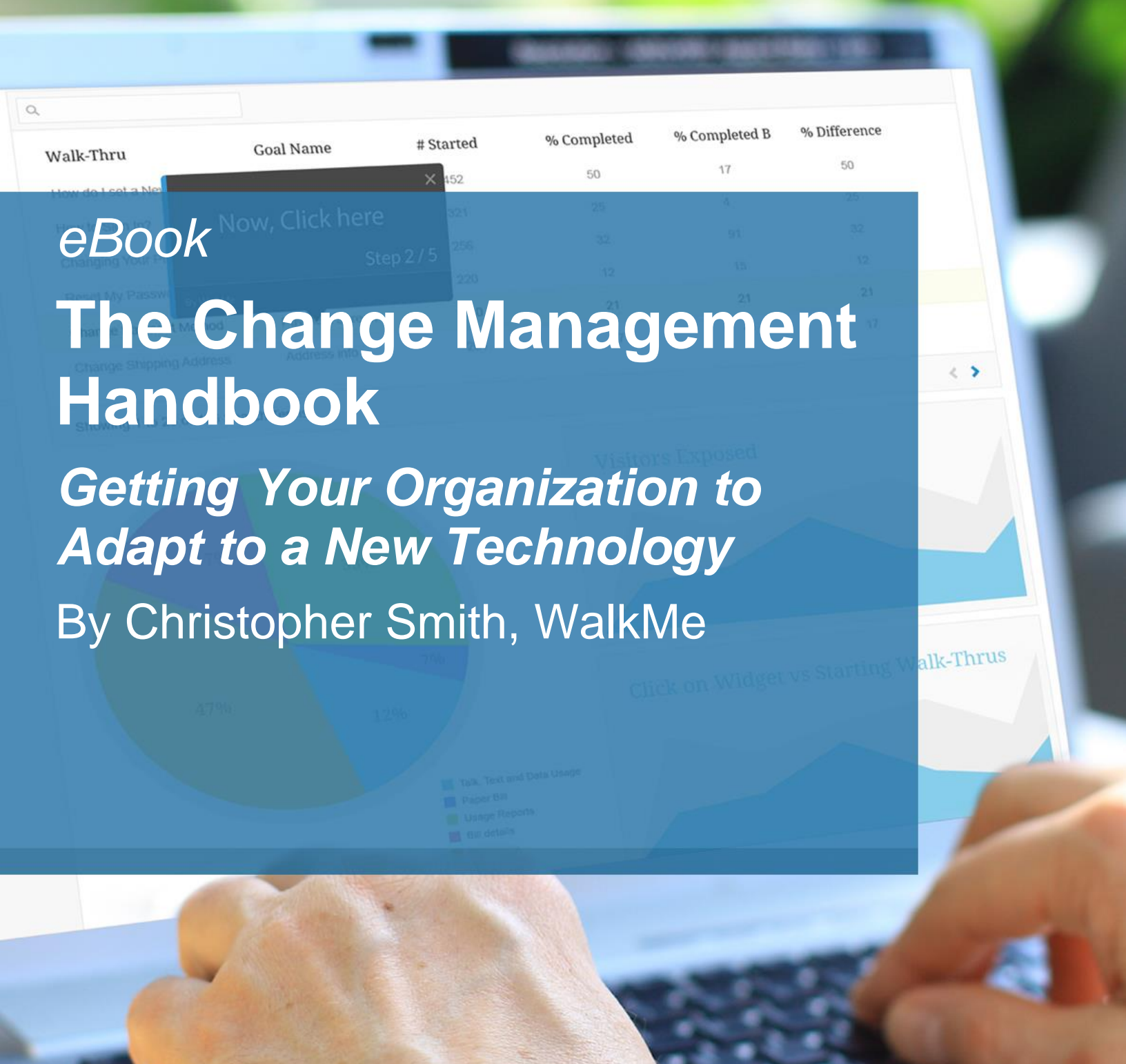
The Enterprise Class
Guidance and Engagement Platform

eBook

The Change Management Handbook

Getting Your Organization to Adapt to a New Technology

By Christopher Smith, WalkMe



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Introduction – The Challenges of Software Changes in the Fast-Moving Enterprise

The business world has become very much defined by the need for speed and rapid adoption.

The goal is to make the orientation period as short as possible while reducing retraining and providing ongoing user support.

Change surrounds us and obliges us to keep up. Adapting to change is an absolute necessity for enterprises.

A critical factor in determining organizational success in recent years has been the ability of an organization to effectively recognize business challenges and adapt- That is, to make the necessary changes that foster growth and high performance.

This eBook focuses on how to manage major change in your company's software environment, specifically with migration to a cloud-based software, with replacing one cloud vendor with another, or with implementing a major upgrade, new business processes or policies.

Let's begin with some background.

Companies are faced with immense business challenges, such as:

- Constantly changing market conditions
- Increasing customer demands
- Tough competition
- A globalized world with both employees and customers communicate from far away locations and in different languages
- **And highest on the list, *the need to adapt to new technologies.***

The goal is to make the orientation period as short as possible while reducing retraining and providing maximum ongoing user support.

The objective of the change management process is to mitigate the impact of these challenges.

challenges:
impact of these

Adopting new software and processes entail numerous risks and challenges, including:

- overcoming internal resistance and getting user buy-in
- delivering training that works
- reducing onboarding time
- the need for continual retraining, until full competency is reached
- the need to avoid a significant drop in individual and team productivity, while the organization moved to the new system

The objective of the change management process is to mitigate the impact of all this both internally and to customers.

How to Streamline Software Adoption & Change Implementation

Gartner Research notes that “the benefits an organization plans to realize from a new software will not materialize until users have embraced and are productive with the new applications and processes.”

When approaching a change initiative – large or small - an organization should adopt a best-practices approach with the aim of making the process as smooth and quick as possible, while also leaving a positive impact.

In any software change process, your key objectives should be:

- **Make any software changes smooth and as burden-free as possible for users**
- **Provide a smooth transition and introduction to new software updates**
- **Limit costs related to software migration/adoption, including training, retraining and support**
- **Prevent profitability and productivity loss**

The right individuals, with the right personality, need to lead the project.

With those goals in mind, the best practices approach includes:

- Appointing a team sponsor who is accountable for the project. A department manager cannot by definition deliver enterprise-wide change by his or herself. The sponsor needs to be at the executive level or report directly to the executives.
- Make sure there is a clearly defined goal and scope. The cliché says, “You cannot get to where you want to go, until you know where you are headed.” That means there must be milestones and checkpoints. The right individuals, with the

right personality, need to lead the project, to wrestle issues to the ground and keep resources on target.

“Accelerate adoption by spotting and fixing productivity issues quickly.”

Gartner

- *Maintain a high level of multi-directional communication.* This includes briefing all teams and key managers ahead of time, getting employee feedback both before, during and after the process, developing a forum where people can ask questions, and overall looking at change implementation as not a “top-down” approach, but one in which the feedback and investment of all impacted is truly valued.
- *Identify key people who are learning the new system faster than others.* Empower these people to give guidance to others who are not grasping the concepts as fast. Give them reward and incentivize others toward high achievement.
- *Use the best methodologies for project management.* This could be something like continuous release or otherwise dividing up the work into the smallest logical pieces possible. This helps the project show results early and reduces overall risk.
- Gartner also suggests adoption can be accelerated by “spotting and *fixing productivity issues quickly.* Especially for deployments with a large numbers of end users, create a post go-live cadre of support staff that will visit each major functional area periodically for the first few weeks after go-live.”

That is more of a big picture approach, but when managing software changes, let us look at how to achieve specific objectives in ways that are practical and which leave a lasting impact.

How to Accelerate User Onboarding Time

Accelerating onboarding is best achieved when there is the proper motivation, open communication and the right strategy in place.

Accelerate onboarding means getting people up to speed on the software quicker. Onboarding is an ongoing process that can range from weeks to months. Onboarding is needed for either (a) new employees or (b) all employees when there is new system or updates to that system.

There are added benefits to adopting a strategy that effectively reduces onboarding. According to *HR Professional* magazine, “successful onboarding results in¹:

1. **Increase employee retention**
2. **Improve employee engagement**
3. **Provide consistent company information to all new employees**

We could add: making the data in the system more accurate, thus giving a more accurate picture and wider visibility into what is occurring across the business right now.

Accelerating onboarding is best achieved when there is the proper motivation, open communication and the right strategy in place. To get there, focus on these key things:

- Setting clear objectives and expectations. If developed properly, **training objectives are both specific and measurable**, and will tell instructional designers and training managers exactly what skills they want their employees to master, where they must improve their work, as well as how to overcome errors.
- Ensuring proper motivation. A motivated and engaged employee during onboarding is one who absorbs

¹ <http://hrprofessionalsmagazine.com/onboarding-case-study-hrpros-exclusive/>

Look at learning as a continuous process, one in which employees will continue to learn as the work.

learn as the work

information better and more rapidly, and which leaves a lasting impact on performance after the onboarding is completed.

Motivation can be achieved through individual and team incentives, conveying to employees “what’s in it for them,” and by making the onboarding process more “fun” and engaging through strategies, such as gamification.

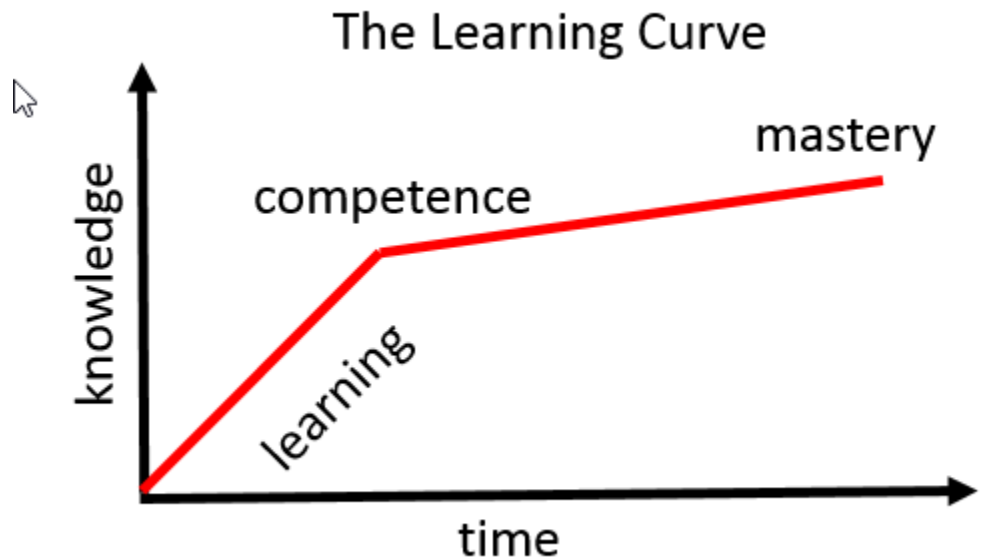
- **Have the right perspective.** Don’t look at the process of a user learning the new software as a one-time event, especially considering that in cloud-based software, there will be updated versions and features on a fairly regular basis. Look at learning as a continuous process, one in which employees will continue to learn as they work.

On this last point, [WalkMe](#) is an effective solution in that it enables change managers to “be there” with new users as they quickly and easily learn, and does not overwhelm new users with too much information right away. Rather, users receive assistance on a specific task as they work, in the exact moment of need.

How to Cut the Learning Curve

The learning curve is how long it takes to learn a system that is new to the employee or organization. The curve is a graph created when we plot time on one axis and knowledge of the application on another.

This curve should increase in a linear manner if training and in-work performance is working. If that is functioning correctly, there will be a point where the curve should flatten. There we can say that the employee has become competent in the new system or processes.



A big problem training managers face is not just the learning curve but the “forgetting curve”, as research shows that, on

average, learners forget 70 percent of what they learn within 24 hours of the training experience.²

Research shows that employees forget 70% of what they learn within 24 hours of the training experience.

By reducing the time needed for the formal training itself, and allowing employees to apply what they have learned immediately, ***WalkMe helps individuals and teams to remember and progress as they work, providing a direct and measurable link between training and performance.***

exbeueuce

² "Brain Science, Overcoming the Forgetting Curve" April 10, 2014.

<http://www.learningsolutionsmag.com/articles/1400/brain-science-overcoming-the-forgetting-curve>

How to Increase Employee & Team Productivity

Productivity is output divided by resources. As you add resources, output should increase, if the additional resources are contributing positively. If you cut resources, and want to maintain the same level of output, then productivity per resource (productivity) must increase. Resources are people, capital, and equipment (software).

One obvious way to boost productivity is to improve the quality of the resources. There are two ways to do that:

- 1. Boost output of each employee through training and giving them better tools.**
- 2. Boost the output of the team, by improving the way they work together.**

If a team is working in a manner in which employees are supporting one another, then the output of the team will be higher than the output per employee.

In other words, 10 people working together should get more done than 10 people working individually.

What tools and processes can the organization deploy to ensure that?

- 1. Improve knowledge through a combination of in-work performance support, effective communications, mentoring, and provide an incentive to gain knowledge.**
- 2. Provide the team and employees better tools.**
- 3. Improve communication across the team through automation.**
- 4. Pick the right managers.**

When it comes to software changes, WalkMe helps enterprises to increase employee and team productivity by giving their

employees the ability to work faster and better, at higher levels of performance and accuracy. Workers can focus on WHAT they need to on the software, not HOW.

Furthermore, because of the strength of the initial onboarding process and the post-training, in-work performance support (see next section) provided, workers are able to receive immediate and direct onscreen assistance as they perform relevant processes.

As a result, there is no need to turn to the IT helpdesk for assistance, or to tap their coworker on the shoulder in order to ask for help, which would slow the coworker's productivity as well.

How to Provide In-Work Performance Support

Performance support focuses on long-term learning in the workplace instead of training.

Performance support systems aid employees doing their work and reduce training costs. For workers, this means providing online tools and access to information and support.

For management, this means deploying self-service tools, thus letting the employees handle their own support requests, and to speed and reinforcement training.

The most effective performance support is an in-work system that guides employees through a complete transaction in, for example, a new cloud-based CRM or ERP system. It provides on-screen guidance to navigate through the menus, select the proper screen options, and enter the data needed to complete a transaction.

This helps reduce tying up more experienced employees to show newer employees how to use the system, thus reducing the productivity of the more experienced staff.

This approach turns the traditional model—in which new employees are given training and then turned loose on the software—upside down. Because of the time lag between taking the training and using the system, the employee becomes confused as to how to proceed in a real-life scenario.

Performance support focuses on long-term learning in the workplace instead of in training.³

³ <http://www.learningsolutionsmag.com/articles/1144/16-performance-support-tips-strategies-and-tactics>

How to Provide Effective & Strategic Knowledge Delivery

Knowledge delivery means pushing out information to where it is needed when it is needed. When it is strategic it is part of a well-conceived plan to do that effectively.

This helps change managers provide workers with easy and real-time access to knowledge in a way that is impactful to their necessary tasks.

To know that knowledge is being pushed out where it is needed, an organization needs to take measurements at various checkpoints. This demonstrates that the approach and tools are working. It would also point out when they are not.

WalkMe helps change managers eliminate what we see as ineffective knowledge delivery, a process which is often tedious and burdensome. Through the onscreen assistance the platform provides:

- **Enterprises can do away with long video tutorials and confusing documentation**
- **Workers can maximize every moment of learning and operating the new software**
- **Workers don't have to worry about remembering every detail immediately, allowing them to proceed with confidence.**

How to Reduce Errors & Interruptions

Interruptions mean downtime. Errors means rework. Both result in a decrease in productivity.

In-work tools, proper training, and a well-designed system are keys to reducing errors. If the software is not well-designed, there is not much the organization can do to fix that other than a costly rewrite or redesign of modules and business process.

Performance support technology helps to reduce worker hesitation and errors by giving the guidance to employees that is needed to perform complex and unfamiliar processes on any software.

Instead of having to turn to the help desk for assistance (and waiting for them to arrive), or asking for help from coworkers which slows down the team, software users get the relevant and easy-to-understand help they need independently and immediately.

Interruptions mean downtime. Errors mean rework.

How to Lower Training Costs

Training costs can generally be divided into 3 categories:

1. **Direct Costs** – The costs for instructors, materials, workspace and other expenditures.
2. **Indirect Costs** – The fact that during training, an employee isn't productively working, which is what he/she was hired to do. The company loses money invested.
3. **Repetitive Costs** – The cost of retraining workers each time there is a software update, or when they are underperforming. This also could be seen to include IT support costs, due lack of knowledge retention.

Indirect costs include the fact that during training an employee isn't productively working, and the company loses money invested.

Retraining

One problem with change management is the need to conduct retraining. This occurs when:

- **Training on the new product was given too far in advance the ability to apply what was learned.**
- **Training given was too high a level or was not specific to individual tasks, so employees are flooding the support people with questions.**
- **The training was given all at once, instead of in small, digestible pieces.**

A key strategy in reducing costs on training is to use in-work tools to guide the employees and give them access to information and training online, so they can take it when they have time or review it again when they have questions.

WalkMe allows change managers to spend less time and money on long and overwhelming training sessions, while significantly reducing the need for retraining. It also frees the training budget to focus on strategies that will have a larger and longer-lasting impact.

How to Monitor Employee Performance on the Software

The first thing any change manager should ask him/herself at the end of the initial training on the new software is if the objectives have been met or not, and in which proportion the employees gained experience out of it.

Remember we spoke about training objectives earlier, which serve two big purposes. The first one is that they define the exact knowledge that is transferred during training, and the second is that they measure the success on a metrics-based situation.

The first thing any change manager should ask at the end of training is if the objectives have been met or not.

In other words, they help you to understand what worked and what did not, and for this reason they need to be both specific and measurable.

- **Did the workers learn to apply the knowledge to a direct skill or task?**
- **Are they able to complete a specific action independently?**

These are only a few questions you will need to answer.

In addition to having formed a training success assessment through immediate application and direct feedback, it's also important to monitor the skills developed carefully and continuously during employee's development process.

It's also important to integrate statistics and metrics in your analysis process. For instance, have a look at the speed improvement percentage over training, if the mistakes have diminished or decreased, and how many of them are calling the help desk for assistance.

Finally, it's important to develop the communication process with your workers, since only then you'll witness how the performance levels improved over a certain period of time.

WalkMe helps managers to monitor performance on the new software through detailed and comprehensive analytics, which shows where workers are succeeding and where they are struggling. This also helps to highlight instances where performance can be refocused and improved.

Conclusion – How WalkMe Works as an Onboarding Tool

Overall, WalkMe helps change managers overseeing software adoption, training and performance to accelerate employee time to competence and increase team and individual accuracy and productivity.

Through the real-time, on-demand guidance they receive at the moment of need, employees can easily retrieve information they need to perform their most important software processes.

As result, managers and employees alike can move ahead through the software change process with confidence, knowing there will be a smooth transition.

Good luck!

About WalkMe

[WalkMe™](#) helps enterprises to streamline software changes in a way that is smooth, easy and ensures that employees stay productive and successful. Our online guidance and engagement platform onboards new users faster and helps them to successfully apply what they learn on any software, in the moment of need. No need for lengthy training sessions, and no need for massive migration or IT helpdesk costs. WalkMe can help YOUR employees to perform the most important tasks, no matter how complex.

Leveraging the WalkMe™ enterprise class guidance and engagement platform, helps organizations to train their employees faster, accelerate employee time to competence, and help them to successfully apply what they learn on any software or website.

As they work, employees receive immediate, onscreen step-by-step guidance, in the moment of need, helping them to successfully perform their most important tasks, no matter how complex. Employees no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid mistakes.

As a result, WalkMe™ improves training effectiveness, ensuring a lasting impact on employee productivity while reducing training costs.