A FIELD GUIDE
TO USER ADOPTION

5 Proven Ways to Make Technology Adoption Stick within Human Services Agencies

THE ROAD
TO BETTER OUTCOMES

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A FIELD GUIDE TO USER ADOPTION:
5 Proven Ways to Make Technology Adoption Stick within Human Services Agencies

Technology is all around us — improving our lives, making mundane tasks faster and easier, and bringing efficiencies to the workplace like never before. So why is it then that so many agencies struggle with getting their teams to adopt new technology consistently? Why do some agencies implement a technology solution, only to watch it fail on the front lines? A little bit of planning, foresight and a properly aligned approach can often make the difference between the success and failure of any technology project.

This Field Guide has been designed to give you five proven — and practical — ways to make sure any new technology you roll out within your agency is successful, used by everyone, and has the impact you've been planning for!

1. **ASSEMBLE A STRONG TEAM**

2. **SOLVE YOUR USERS' PROBLEMS FIRST**

3. **MAKE A SOLID PLAN**

4. **FOCUS ON PROCESS CHANGE**

5. **MAKE SURE USERS ARE WELL COACHED AND CONFIDENT**

1 ASSEMBLE A STRONG TEAM

Establish a technology adoption team early on in the process with a broad range of individuals who can be involved in various parts of the project. Four categories of team members are listed below:

EXECUTIVE LEADER

Because this is a business project and not an IT project, it must be driven by an executive leader who will take on the following key roles:

- Determine the overall project goals
- Connect the project to the agency's overall vision
- Establish desired process changes and reinforce cultural acceptance

- Assign the project to a Head Coach to drive the project details
- Help choose a vendor
- Establish and maintain executive oversight during implementation

HEAD COACH

Usually a program administrator or supervisor, the role of the Head Coach is to make implementation successful according to agency goals, as well as:

- Oversee the project implementation
- Troubleshoot challenges with implementation and user adoption
- Encourage adoption and usage
- Assemble resources to help with user interface, infrastructure and/or technology issues

ASSISTANT COACHES

Typically a supervisor or lead worker, these individuals help with:

- Professional skill development of staff
- Collecting feedback from the team to give to the Head Coach
- Meeting with frontline staff for on-site visits and mentoring

PROJECT MANAGEMENT TEAM

In addition to your coaching team, the project management team can be rounded out with additional team members, such as IT staff, trainer(s), peer advocates and additional executive representation. Together, the team is responsible for making sure the project is on track and hits all the important milestones.

SEE NEXT PAGE FOR

BUILDING YOUR TEAM WORKSHEET

BUILDING YOUR TEAM WORKSHEET

Use this worksheet to establish a project team. Look for team members that display leadership traits, and jot down some names on the lines below.

EXECUTIVE LEADER: _____

The leadership role is critical in helping the organization understand the importance of the project and gaining broad buy-in. The leader must display timely and effective communication to explain the project to staff and how it will help workers in their daily jobs.

HEAD COACH

The Head Coach must be a strong leader who is well-respected in the organization and displays the following traits:

- Understands business processes and technology
- Good communicator
- Can build solid team consensus
- Future-focused
- Positive attitude

NAMES:

_____
_____
_____

ASSISTANT COACHES

Assistant coaches put a face on change, so either select influential, well-respected colleagues or ask for volunteers that fit these traits:

- Well-respected among staff
- Good communicator and listener
- Influential amongst peers
- Positive attitude

NAMES:

_____
_____

PROJECT MANAGEMENT TEAM

Your team must have representation from other departments, such as IT, trainers and other key roles in your organization that display the following:

- Good time management
- Meets deadlines
- Technical aptitude

NAMES:

_____
_____
_____

2 SOLVE YOUR USERS' PROBLEMS FIRST

This may go without saying, but it is often overlooked when rolling out new technology: Focus on your users' problems and solve them, and the adoption rate will soar. If you're solving real problems, you can expect real adoption. Here are a few more factors to consider:

MAKE SURE THE TECHNOLOGY IS EASY TO USE
On client visits, social workers need to focus their attention on a child or family, and cannot fumble around with technology. If it's not easy, your users will lose trust and revert back to pen and paper.

....

IF TECHNOLOGY SOLVES USERS' PROBLEMS, IT WILL REDUCE FRICTION
Whatever reduces friction will be adopted. If users have to jump through a lot of hoops to do something, they won't do it.

....

TECHNOLOGY MUST BUILD (NOT BREAK) TRUST
If trust is broken with a client, everything is lost. Technology use in the field must build trust, improve camaraderie and give everyone a feeling of working together, not against each other.

Focusing on solving social workers' problems will help **avoid a common scenario:**

Quote From the Field

"We had laptops and some workers were using those, but it created more work instead of making things easier."

- Jacob Meetze, Investigation and Assessment Social Worker, Beaufort County CPS

"I gave you the technology, but you don't use it."

"The technology you gave me doesn't help me do my job."

USER SURVEY WORKSHEET

Use the ideas in this worksheet to gauge how your staff will react to new technology. One of the most effective ways to solve users' problems is to get input early in the process. This can be accomplished with a survey that identifies key user issues and explains the business reason behind the survey so your users know why it is important. Below are a few sample survey questions you could use:

SAMPLE SURVEY QUESTIONS

Additional resources

Check out the Northwoods blog article titled **"Top 12 Apps for the Mobile Social Worker"** for helpful tools in the field.

- What types of technology are you comfortable with? Why? List some specific examples.
- What devices/software have you struggled with? Why? List some specific examples.
- What challenges in our agency do you feel technology can solve? Of these, which are most pressing?
- What previous solutions have we used to address challenges that have not worked? Why?
- Do you feel that technology has been a barrier to interacting with children, families, and adults? If so, how?
- What specific tasks do you tackle each day that you think technology could help automate?
- Do you think technology can help engage children, families, and adults (for example: games, drawing photos, online applications, etc.).
- Take a moment and think of a few questions of your own, and jot them down here. Your questions should focus on the use of technology, challenges that can be solved with technology, barriers to technology use, etc.

WRITE YOUR ADDITIONAL QUESTIONS BELOW:

_____

_____

_____

_____

_____

_____

_____

3 MAKE A SOLID PLAN

The success or failure of any project can commonly be traced back to whether or not a successful plan was in place. In fact, did you know that 39% of projects fail due to lack of planning, resources, and activities?[1] That being said, it is essential to develop a plan for how the technology will be rolled out within your agency.

THE PLAN SHOULD INCLUDE:

TIMING
When do you plan to do the rollout? How much time will be needed? What do schedules look like? How many meetings will be needed?

TEAM
Who will be a part of the training and rollout? Will there be champions? Will there be any detractors to the process?

METHODOLOGY
How will the training take place? What methodologies will you use? Classroom training? In-field training?

RESOURCES
What resources will be needed — both human and capital? How much training time is required? Do you need new equipment?

RISK
What potential risks exist? How can they be avoided or reduced?

Famous Words

"If you fail to plan, you are planning to fail!"

- Benjamin Franklin

By the Numbers

39% of projects fail due to lack of planning, resources, and activities.[1]

PROJECT PLAN WORKSHEET

Use the information in this worksheet to identify considerations for a project plan that balances the time, risk, and resources it will take to complete your project. It is important to consider what else is happening within your organization, what other projects you're committed to, and what risks exist. Here are some practical plan elements you'll want to get in writing:

PROJECT PLAN

TIMING

Draft a project timeline with milestones like a start date, end date, technology upgrades, etc. Compare your timeline to other agency initiatives and consider if they are competing, or complimentary. Can the timelines overlap, or do they need to be separate?

RESOURCES

Document how much time you think will be required for staff to participate in the project while continuing day-to-day work and learning new technology. Work out a process with your IT lead about how much interaction is needed and how often (meetings, emails, etc.)

TEAM

See worksheet #1 for building a team, and be sure to include this in your project plan. Include all key players, influencers, champions, and representatives from all appropriate departments.

METHODOLOGY
Use the table to consider and evaluate two distinct training and support approaches:

TRADITIONAL APPROACH		COACHING APPROACH	
Pros	Cons	Pros	Cons
1. Requires less time.	1. Workers are challenged to apply training to specific job.	1. Workers understand how to use technology for a specific job.	1. Requires more staff time and resources.
2. Requires fewer dedicated resources (trainer vs multiple coaches).	2. Workers are less apt to stick with the technology.	2. Workers more apt to stick with technology.	2. Requires cultural shift.
3. Easier to schedule for trainers.	3. Difficult to schedule for field-based workers.	3. Immediate and real-time support.	3. Could fall during high-volume service times.
Other Pros:	Other Cons:	Other Pros:	Other Cons:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4 FOCUS ON PROCESS CHANGE

When implementing new technology, training often focuses on the technology and not the processes or people that support it. Because new technology is really more about process change, that's where the focus needs to be.

HERE ARE SOME PRACTICAL WAYS TO KEEP THE FOCUS WHERE IT BELONGS:

MAKE SURE THE TECHNOLOGY IS EASY TO USE
On client visits, social workers need to focus their attention on a child or family and cannot fumble around with technology. If it's not easy, your users will lose trust and revert back to an old way of doing something.

ELIMINATE REDUNDANT STEPS
Take a closer look at what day-to-day tasks can be made more direct, less redundant, and less repetitive. Even eliminating a few small redundant steps can save hours of time, which can really add up over the course of a year.

DESIGN FOR MOBILITY
The advent of mobile technology has opened the door to re-thinking process automation in the field — empowering social workers to do their job while with families, while waiting in a courtroom, while in transition. Not to mention the ability to access all files while away from the office.

EVALUATE EMPLOYEE ROLES
As technology reduces steps, improves efficiencies, and frees up time, give yourself the flexibility to re-think roles within your agency. You may find that hours (or days) can be shifted to other tasks or responsibilities that allow you to better server your clients.

"Strong leadership and maintaining energy for change among employees are two principles of success that reinforce each other when executed well. For example, when leaders ensure that frontline staff members feel a sense of ownership, the results show a 70 percent success rate for transformations. When frontline employees take the initiative to drive change, transformations have a 71 percent success rate. When both principles are used, the success rate rises to 79 percent."

What Successful Transformations Share: McKinsey Global Survey Results, McKinsey, March 2010

SEE NEXT PAGE FOR

PROCESS CHANGE WORKSHEET

PROCESS CHANGE WORKSHEET

Use this worksheet to ensure new technology achieves the organization's goals. This can be done by empowering others in helping re-engineer business processes and connecting technology with business needs. One way of doing this is to follow a process such as the Plan, Do, Study, Act Model:

PROCESS CHANGE

THE 4 STAGES OF THE PLAN, DO, STUDY, ACT MODEL

1. PLAN

Identify a simple process your agency wants to change (for example, take a photo in the field). Write a simple process here:

_____

_____

_____

2. DO

Enact the plan with a simple request (for example, ask workers to use new technology to submit one photo this week). Jot down how you'd like to see the process change using new technology:

_____

_____

3. STUDY

Evaluate how the new process worked. Ask users for feedback, issues, and best practices. Document how you think users might respond to your sample new process:

_____

_____

_____

4. ACT

Use the feedback provided to document and finalize a new process. Communicate it to your team through instruction and training. Document how you might roll out this new sample process in our organization:

_____

_____

_____

If you follow a model like this to document all processes within your organization, you'll be poised for successful change, one small step at a time.

5 MAKE SURE USERS ARE WELL COACHED AND CONFIDENT

Users that only receive classroom training will lack confidence using new technology. Instead of a typical classroom-style training that so many organizations employ, consider a coaching approach, which has been proven to be much more effective.

A COACHING APPROACH IS CRITICAL

A coaching approach is radically different than a typical instructor-classroom scenario. It is designed for protective services to ensure maximum user adoption and works like this:

HEAD COACH
Trains a small group of power users that are project champions

ASSISTANT COACHES
Will train social workers via mentoring, visits daily huddles and feedback.

MENTOR
Assistant Coaches encourage co-workers, mentor others and facilitate the sharing of best practices.

VISIT
On-site field visits boost social worker confidence and provide real-time feedback.

HUDDLE
Daily 15-minute huddles with Head and Assistant Coaches help answer questions and discuss pressing topics.

FEEDBACK
Make sure users have a safe environment to share what's working and what's challenging.

FRONTLINE STAFF

SEE NEXT PAGE FOR

COMMUNICATION WORKSHEET

Making it Real

When students sit... in a lecture-style environment, they retain 20%. When they practice... that increases to 75%.[5]

By the Numbers

Workers increase productivity by 86% when coaching is added to training.[6]

COMMUNICATION WORKSHEET

Timely, regular, and purposeful communication about the project is critical. Use this worksheet to develop your own communication matrix to make sure workers understand the project status, what to expect, how to use technology, and how processes may change over time.

COMMUNICATION PLAN

HOW WILL YOU COMMUNICATE?	WHO WILL COMMUNICATE? *(roles)*	HOW OFTEN?
All-staff meetings		
One-on-one employee meetings		
Staff emails		
Newsletters		
Bulletin boards		

Additional resources

Get detailed information about the Northwoods Coaching Model in our **business brief** and **7-video series** titled "Cookie Cutter Training Won't Cut It For Protective Services."

COOKIE CUTTER TRAINING WON'T CUT IT FOR PROTECTIVE SERVICE

Amy Moe | Mental Health and Chemical Dependence Social Worker
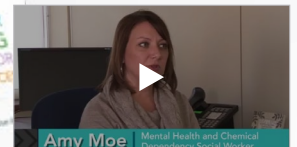
Determine which types of communication will keep users connected to the project goal so they continue using the technology.

SOURCES

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[5] Susan Ayers, What Are the Benefits of Hands-on Training? http://www.ehow.com/about_5136211_benefits-handson-training.html

[6] Maximizing the Impact of Executive Coaching," The Manchester Review, 2001, Volume 6, Number http://www.slideshare.net/patweiland/coaching-roi

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