Adoption is the Key to Success
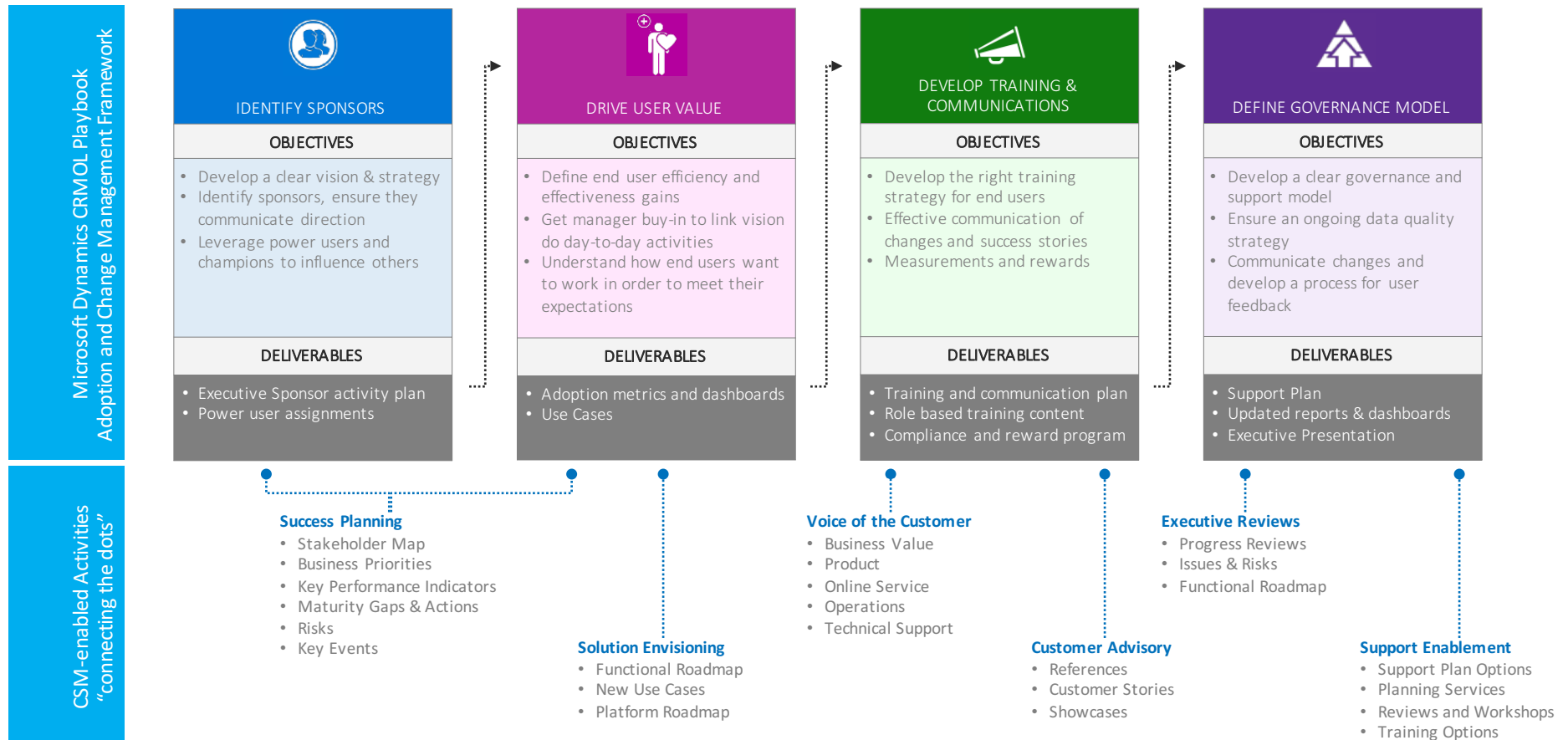
7 of the top 10 reasons why projects fail are related to adoption and change management[1]

Microsoft Dynamics CRMOL Playbook Adoption and Change Management Framework

IDENTIFY SPONSORS

OBJECTIVES

- Develop a clear vision & strategy
- Identify sponsors, ensure they communicate direction
- Leverage power users and champions to influence others

DELIVERABLES

- Executive Sponsor activity plan
- Power user assignments

DRIVE USER VALUE

OBJECTIVES

- Define end user efficiency and effectiveness gains
- Get manager buy-in to link vision do day-to-day activities
- Understand how end users want to work in order to meet their expectations

DELIVERABLES

- Adoption metrics and dashboards
- Use Cases

DEVELOP TRAINING & COMMUNICATIONS

OBJECTIVES

- Develop the right training strategy for end users
- Effective communication of changes and success stories
- Measurements and rewards

DELIVERABLES

- Training and communication plan
- Role based training content
- Compliance and reward program

DEFINE GOVERNANCE MODEL

OBJECTIVES

- Develop a clear governance and support model
- Ensure an ongoing data quality strategy
- Communicate changes and develop a process for user feedback

DELIVERABLES

- Support Plan
- Updated reports & dashboards
- Executive Presentation

CSM-enabled Activities "connecting the dots"

Success Planning
- Stakeholder Map
- Business Priorities
- Key Performance Indicators
- Maturity Gaps & Actions
- Risks
- Key Events

Solution Envisioning
- Functional Roadmap
- New Use Cases
- Platform Roadmap

Voice of the Customer
- Business Value
- Product
- Online Service
- Operations
- Technical Support

Customer Advisory
- References
- Customer Stories
- Showcases

Executive Reviews
- Progress Reviews
- Issues & Risks
- Functional Roadmap

Support Enablement
- Support Plan Options
- Planning Services
- Reviews and Workshops
- Training Options

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[1] Source: Fortune 500 CIO Survey by Deloitte