



Identify & reduce risk for successful SaaS adoptions



**How do you help
your team succeed
and realize your ROI?**



Identify & reduce risk for successful SaaS adoptions

Risk reduction in action

Many hazards that send projects sideways are avoidable. You need to know where to look. Starkweather Association Services and CILIP (the library and information association UK) implemented and adopted an enterprise wide membership system on time and in budget. Specific focus on risk-reducing best practices laid the foundation of success.

Risk-reduction practices can address the uncertainty that slows adoptions. This includes project management and change management best practices. Change management is a collective term for all approaches to prepare and support individuals, teams and organizations during change.

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Starkweather Association Services has been helping associations in the US, UK and Australia navigate technical adoptions since 2006, primarily as the preferred adoption partner of YourMembership®. The approaches are applicable to any technology adoption.

Besides the more obvious technical challenges an adoption presents, Starkweather found that associations often struggle with higher level issues. Many associations don't take the time to fully understand their goals, resulting in new technology but the same old problems.

More importantly, Starkweather has encountered many associations that don't understand the human risk their staff can bring to the project.

To help our clients reduce human risk, Starkweather developed a series of practices that grew into tools that we call Cirrus CM™ (change management).

These tools are divided into 3 products.

The first, our *Change Accelerator*, educates leaders about the most frequently encountered risks in a change project and provides recommendations for proactively addressing those issues.

The second tool consists of the *Team Change Assessment* and *Leadership Assessment*. These evaluate the

attitudes of staff to change and then evaluate the leaders' plans for managing staff during that change.

Starkweather provides reports that illustrate the risks the team and leaders bring to the project, along with action steps for remedying those risks.

The third tool is the *Progress Survey*. We run the team through self-assessments during training to get feedback on the quality of training and level of mastery of the new technology. This is also a place for describing any issues that may hold the organization's back from adoption.

Key takeaways

Understand the unique risks associated with a change project and make plans to mitigate them in the 5 stages of an adoption. Hazards include:

- Undiscovered, critical requirements overlooked in a truncated discovery
- A rushed time frame
- Disruptions that hit mid-project
- Integration uncertainty
- Human uncertainty

A project's greatest risk comes from the people who need to learn new systems and change their behavior. Staff resistance comes from many possible factors:

- Staff believing that the new system won't help them do their jobs
- Team members who are too overwhelmed to take the time to learn a new system
- Inadequate training
- Staff not having access to a clear change roadmap that describes the actions they need to take and when

Associations are always engaged in risk reduction through retention strategies, good governance and project management. Yet when it comes to technical implementations, many leaders and project managers don't understand how to reduce the inherent risks of adopting a new technology. More importantly, many leaders don't understand some of the threats because change projects are so different from other types of projects.

A few associations that Starkweather has worked with stand out as examples where they went into a change project understanding their risks and addressed them pre-emptively. The Chartered Institute of Library and Information Professionals (CILIP) is one such association. This paper follows their adoption to highlight some best practices.

A project's success can be jeopardized by undiscovered yet critical requirements because of a truncated discovery or requirements gathering process. Other threats come in the form of integrations that should, but don't work on a rushed time-frame, market or technical disruptions that hit mid-project and the many faces of human resistance.

What creates human risk?

Staff who are afraid of losing positional authority, who are unsure what to do next, who fear losing their jobs, who feel that the change is a mistake because they can't do something they have always done, and those who feel like the change is too big, given all their daily tasks.

Some leaders believe that because the staff all agree that a change is needed, they will fall in line behind whichever solution the leader selects. Some will, but it's not a guarantee. Moreover, during the implementation, when staff learn that the new solution won't work as hoped, a previously cooperative team member can become a liability.

To realize their ROI, organizations must begin by reducing risk during the 5 stages of a technology adoption: pre-adoption, training, technical implementation, pre-launch/launch and follow up. Reducing uncertainty in each part leads to success in the next.

What creates human risk? Staff who are afraid, confused or don't understand how the change will benefit them.

Set the stage

Gather the human and technical requirements

Align the goals

Identifying and reducing adoption risk begins by asking a lot of questions long before systems are purchased. The leadership of CILIP epitomized this process. Their pre-adoption conferences touched every team member, determining needs, learning what worked and what didn't. They made no promises, other than that every team member's input would be taken into consideration. CILIP's leaders embodied the best practices of engaging the team early, gathering human requirements, and listening to and preparing the team for change.

Creating a clear path forward is a best practice. From the CEO to the customer-facing staff in the trenches, teams need clarity in the form of a roadmap with a schedule of dates and deliverables. Let everyone know when and how they need to participate. The team was briefed with slide decks and videos made available to all. The plan was visible. Nick Poole, CILIP's CEO, listed among other goals, the desire to be digital by design, more efficient, disassemble operational silos within the organization and create a system to more thoroughly engage members. Project sponsor, Simon Bernie-Edwards, provided the strategy and timeline for the staff to see how and when that would happen.

Leaders found the technology solution that ticked the majority of their technical boxes and high-level goals in the YourMembership® AMS (Association Management System).

Among other things, CILIP was attracted to

YourMembership® because it offered risk reduction in the form of an all-in-one solution rather than having to integrate disparate systems. CILIP planned for a six-month adoption process, knowing that changing the team's workflows and customizing the system would take time. To further reduce uncertainty, CILIP brought in a partner with extensive experience in technology adoptions, Starkweather Association Services.

Starkweather used Cirrus CM™, a change management tool-set for SaaS (Software as a Service) adoptions, to identify and mitigate the risks from the human side of change.

This multi-part tool provides leaders with an in-depth understanding of how to prevent the uncertainty that slows adoptions.

CILIP's sponsor reviewed the Cirrus CM Adoption Accelerator™ in preparation for the change. As part of the pre-adoption work, CILIP also began using the Cirrus CM Team Readiness Survey™ and the Cirrus CM Leadership Survey™ to gather the human requirements necessary to understand and align the change goals.

With the risks understood and mitigation plans in place, CILIP ensured that the team knew where to find clear, ongoing change updates. In this case, updates were provided with the Trello boards (online project management tool, www.trello.com) that organized the complex components of the change effort.

Pre-adoption risk reduction

Immediately involve staff with the change

Make plans available to all, including goals & time lines

Get buy-in to the change vision

Get experienced partners to help with implementation

Begin looking at the human side of change early

Use scenario planning to budget for unforeseen difficulties!

The project executive sponsor is critically important to success. The sponsor's awareness of the importance of his or her role can be the difference between success and lost ROI. "Sponsor" isn't an honorary title; it is an active role that is vital to the success of the project.

According to a PROSCI® (www.prosci.com) study in 84 countries over ten years, active and visible project sponsorship is the primary element driving success.

Lisa Goldsmith, Data Manager, took on the responsibility of evaluating the system for GDPR (the General Data Protection Regulations) compliance and protecting the integrity of CILIP's data as it was migrated.

To continue reducing risk, CILIP and Starkweather created a plan around the minimum viable product (MVP). Leaders agreed on the most fundamental components necessary for launch. They understood that the system launch is a beginning, not an end, and that additional modifications post launch can ease both the staff and members into a new membership platform.

CILIP's Head of ICT and the project lead, understood the nature of technology projects and set aside a reserve for the potential need for customizations, and application integrations including SSO (Single Sign On) to other applications such as CILIP's VLE (Virtual Learning Environment) and PKSB (Professional Knowledge and Skills Base). Scenario planning like this is a recommended practice, since undiscovered requirements can slow momentum if a team isn't ready.

With the plan in place, CILIP began the first stages of implementing the system and adoption training, which ran concurrently.



Teach the team to embrace the new tools and measure their training goals.

Learning a new system presents a unique set of risks that must be considered. Training requires more than just exposure to tools and a one-time class on how to use them.

Starkweather created a training system that was both structured and flexible. The training system had weekly training goals and was run a bit like an agile scrum with small daily goals reviewed in 15-minute training sessions.

Scrum is a cooperative, team-oriented process framework that moves a team through discrete tasks to a weekly goal.

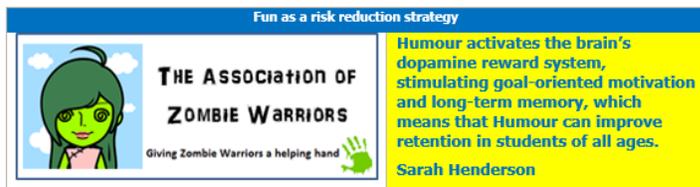
The project of learning the YourMembership® system was broken down into manageable pieces that could fit into the team's busy days.

Each session was recorded, so anyone who missed the training could get access to the questions and dialogue surrounding the topic. The 15-minute sessions built on each other, creating greater confidence as mastery grew. Each lesson provided documentation, team questions & a checklist for the team to record their participation. The training Trello board

provided a place for both positive and negative feedback, so the project leaders could understand objections to and issues with the new technology.

The schedule made learning easier and provided opportunities for review and Starkweather tracked team training and used leaderboards where the whole team observed how much each team member was participating. This created awareness, accountability and competition, all of which decreased obvious resistance.

To provide a training situation that would alleviate concern about learning on an organization's live site, Starkweather provided a sandbox site, **The Association of Zombie Warriors**. The sandbox site was designed to be light hearted to decrease inhibitions about learning and testing new skills. In the sandbox site, trainees created events, new member types, custom pages and did everything they might be called upon to do in their production site. The site encouraged learners to have a little fun, which is a rare commodity in a technology adoption.



Training must account for many variables

Fitting in training around everyday workloads

The mental exhaustion that accompanies learning new material

The need to accommodate different learning styles

Requests for custom documentation & videos

Creating a feedback mechanism for training questions & newly

Daily 15-minute training sessions reduce risk.

Short scrum training sessions solve issues identified by change management as posing risk.

15 minutes decreases training fatigue. Learning new material consumes a finite resource, self-control. Short training sessions preserve the self-control necessary for the other work.

This training is interactive, requiring feedback and has clear accountability. If team members don't participate, the whole team can see it.

Accountability, and subtle peer pressure, is an important tool of change management. People learn best using a spaced practice schedule.

New skill retention from spaced practice is superior even with a lesser amount of total time spent compared to mass practice (Kang 2016).

By successfully accomplishing small goals, the participants develop confidence in themselves and the system. This creates momentum for the change.

A key to managing change includes "shrinking the change" as advocated by the Heath Brothers in their book, *Switch*. (Heath 2010) The short lessons keep change manageable.

- Follow the roadmap
- Manage surprise requirements
- Negotiate scope
- Use agile project management

Reducing issues with technical adoptions begins by understanding the association's goals. Leaders need to identify the destination before starting to implement a new system. CILIP underwent a lengthy discovery process that created a clear articulation of technical and strategic needs. Additionally, CILIP created a dream team of tech friendly, change agile leaders and staff who could guide the organization through the complicated adoption process.

They met weekly with the Starkweather team to track progress and brainstorm solutions to issues. Using a Trello project management board leaders set weekly goals, and divided up tasks among dream team members, the agile-style project management provided transparency, feedback and accountability for the many adoption deliverables.

Early in the process, the department heads and dream team members agreed on the most important functionality, which became the MVP (minimum viable product). Starkweather and CILIP set a goal to *Not Slip the Launch Date*.

By focusing on the MVP, CILIP and Starkweather kept scope-creep at bay by moving 2nd tier priorities to iterations beyond the launch date.

As team members began to get their hands dirty in the sandbox site, previously unrecognized requirements appeared. This provided an important, early, hands-on look at the system that lead to more refined requirements pre, not post launch.

CILIP chose to use YourMembership® SocialLink™ to dynamically engage their membership. SocialLink™ is a closed social media system that allows group-wide or site-wide posting and chatting. Events, surveys and critical communications can be added to the member-wide dialogue with a click.

The team used the sandbox site to master the new technology so when their site went live, they could engage with members immediately. They also trained their volunteer *Digital Champions* to use the system to drive more engagement. To support their *Digital Champions*, Starkweather worked with CILIP to create custom documentation to introduce them to the system.

Every week Starkweather and CILIP met to work on technical tasks based upon the YourMembership® AMS implementation schedule. Where CILIP's needs deviated from the standard YourMembership® protocol, the plan was adapted to meet CILIP's priorities, timelines and resources.

The team implemented critical functionality and tested it in both the sandbox and production sites well before launch, allowing multiple iterations of feedback from the technical team, operational staff, leadership and other stakeholders. Effectively, the production site had been tested multiple times well before the launch.

The data migration from the current site was also modelled and tested multiple times prior to the migration. Starkweather & CILIP's managers developed reports to verify the member profile and financial data so that the data migration could be confirmed immediately after the launch.

By understanding the data and testing the upload and data migration, the team knew what the completed data should look like in place when it was successfully migrated.

Spend time on discovery to ensure you understand your goals.

If you have a sandbox site, use it to test the data upload and migration.

One of the most important practices to ensure success is to "know what done looks like."

Decide on your MVP and if you can achieve that, Do Not Slip the Launch Date.

Technology adoptions, such as a new association management system (AMS), provide an opportunity for growth and new member engagement. However, they also present a threat to morale, productivity and an association's finances.

Commented [MS1]: Why is this page so blank?

Pre-launch & launch

Punch list:

Is the data ready?

Can we accomplish our most important workflows?

Is the team properly trained?

Is the site ready for GDPR requirements?

Can we report on it all?

Have communications gone out to prepare the members?

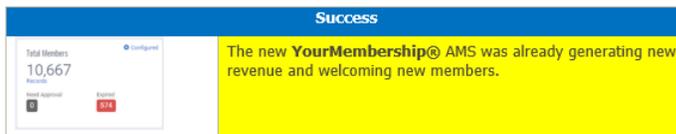
To reduce the risk of uncertainty, the IT and communications teams sent out test emails to understand the workflows of the new communications system. CILIP selected Informz® as part of the YourMembership® platform. Key team members learned how to create templates, target groups and master the Informz® campaign system which dynamically redirects communications based on user actions. This required hours of learning, experimenting and testing.

The training data demonstrated the team's growing confidence and proficiency in the YM system. Different departments learned at various paces, but all teams had custom documentation and workflows available for reference for the coming launch. By training in a sandbox site, the team was able to seamlessly transition to their production site.

Data was tested multiple times in a sandbox site, with iterations of data imported.

The data and the team were ready, so the decision was made to launch four days early. What had been scheduled for a Monday was moved forward to the preceding Thursday. With all the pieces in place, the Starkweather/CILIP team did the final data reports, data upload and then transitioned the DNS. The site went live.

The next day, CILIP ran financial reports to make sure that the new YM financial data matched the financial management system. The data on YM was off by £40. What happened? Between the launch on Thursday night and the reports on Friday, new members had already found the site and were joining and paying dues.



Make the change stick.

Reinforce value and new workflows.

When staff struggle, leaders need to support the team while keeping them accountable.

The follow up for CILIP was quite brief, mainly because of the intensive work up front. The follow-up component is often essential to associations continuing to embrace and trust the new technology.

Starkweather and CILIP had prepared so well, getting the team into training, measuring the training, providing incentives for training, creating documentation for the team and the *Digital Champions*, testing systems and communicating with users that the need for follow-up was limited.

Following the launch, the Starkweather team assisted with refining aspects of YourMembership® and Informz®, as well as assisting with custom documentation. CILIP's knowledgeable team grabbed on and key members caught on quickly.

Generally, the follow up reviews the items to be dealt with after launch that may have been postponed accomplishing the MVP.

This can include more documentation, some customizations, enhancements, further content migration and member facing documentation.

This is the time when many associations need to reinforce accountability measures to staff who want to go back to the legacy system. By adding proficiency in the new system as a KPI (key performance indicator) or task for a personnel review, this alerts staff that the change is permanent and they need to move forward.

CILIP's leaders had done this early in the training, so this did not become an issue for follow up.

In the words of the IT project lead, "the migration went really well, we launched with more than the MVP and there weren't any real drama's, to be honest - it was boring."

That was the goal: identify and mitigate the risks early so the launch would be smooth and without incident.

Consider the following questions for your next project:

Strategy

Is our strategy supporting our chosen technology or is the technology supporting our strategy?

When was the last time we reviewed our strategy?

Have opportunities opened for new sponsor types or member types since last evaluating your structure?

Do your staff have ideas about member or sponsor structure that are novel?
Sometimes the member-facing staff have an inside view on new opportunities.

When is the best time to launch the new site, and between now and then are there activities that could take away key resources? For example, an annual conference would interrupt training and implementing a new system.

If you had to distill the primary goal or goals of your site, what would those be? Is it generating new members? Communicating with existing members? Selling continuing education? Consider which interactions generate the most revenue when making this decision.

Does the site strategy support a positive and easy user journey?

To prepare for this, did we go through a thorough requirements gathering project that followed proper project management principles?

Special thanks to Lisa Goldsmith, BSc (Hons) MBA, for her assistance in reviewing and creating these questions.

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Data and systems

Which data do we need to migrate and from how many systems?

How have the systems requirements been evaluated? Has the entire team been consulted to find out what is and isn't working on the ground?

What checks have been put in place to protect the integrity of the data?

What are the legacy systems that can be abandoned?

Is the data organised for efficient reporting?

Are resources available?

Is a data impact assessment in place to evaluate the system for GDPR requirements?

Personnel

Has the entire team been consulted about the need to transition to a new system?

Have you created a space for the team to create a "wish list" for a new solution?

Whose job is being automated? Does that person understand that they will be given new duties?

Is a feedback tool in place so your staff's concerns are heard and addressed?

Will certain members of your team feel threatened because they were experts in the previous technology?

Have you made certain that everyone in the organisation understands the value they will experience from the new technology?

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Tools and systems used

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