

Digital Adoption Nirvana

A **step-by-step checklist** to get your staff to successfully use the applications you introduce

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Digital Transformation that includes Digital Adoption

In 1995, John Kotter found that 70% of organizational transformations fail. A statistic that still holds true three decades later. With billions spent annually on these initiatives, the cost of failure is massive.

A 2023 Harvard Business Review study found that success hinges on 50 behaviors across 11 areas. **Six of these areas were especially critical:** organizations strong in them had a 73% success rate, compared to just 28% for weaker ones.

Successful leaders went beyond tools and processes—they created the emotional conditions for success. They inspired their teams with a clear purpose and supported them through challenges, helping stress become a source of energy.

Unsuccessful leaders lacked this emotional investment. When obstacles arose, negativity took over, leaders withdrew, and their teams followed suit.

In this guide, we'll dive into each of these 6 levers and offer you a step by step checklist to ensure digital adoption success.

The 6 success levers

- 1 Leadership's own willingness to change
- 2 A shared vision of success
- 3 A culture of trust and psychological safety
- 4 A process that balances execution and exploration
- 5 A recognition that technology carries its own emotional journey
- 6 A shared sense of ownership over the outcome



Technology is a powerful driver of productivity, adaptability, and business success, but organizations still struggle to get employees to effectively use the tools they implement. The pressure to accelerate digital transformation is constant, yet **traditional adoption methods (like dense one-off training user manuals) often fall short.**

This results in costly setbacks, including:

- Failure to realize the full value of tech investments
- Higher costs to meet strategic goals due to underperforming tools
- Inefficient workarounds, frequent system fixes, and repeated training
- Employee frustration and disengagement from tech-related obstacles

The solution? Rethink digital adoption. Not as an afterthought, but as a core part of your transformation strategy. With the right approach, organizations can maximize ROI and turn digital transformation into real progress.

So, how can you boost staff adoption and improve business outcomes? The good news is there are simple, effective steps you can take. These six levers are a great starting point to help you fully commit to change and drive digital adoption success.

Note: These strategies are examples, not a one-size-fits-all solution. Choose and adapt what fits your organization best.

1 Ensure leadership share the vision and model behaviours

The behavior of formal and informal (opinion) leaders significantly shapes an organization's vision, priorities, and decision-making.

A key question is: Are your leaders actively modeling, supporting, and encouraging new ways of working?

To drive digital adoption, leadership must lead by example. Here are practical strategies to help:

- **Encourage leaders to demonstrate personal accountability by including the project's success as part of their individual goals.**
- Incentivise management to demonstrate adoption of the tool.
- Develop short leadership videos to communicate the importance of the program.
- Develop executive leadership decks to provide leaders with materials to talk about the program and keep it on the strategic agenda.
- Develop manager briefing kits with slides and talking points to equip managers with resources to support the delivery of clear, consistent messaging throughout.
- Establish 2-way feedback channel(s) that give employees the opportunity to raise challenges.
- Establish a consistent cadence of leadership updates e.g. company meetings, newsletters, blog posts, collaboration tools, or email.
- Secure an executive to kick off launch events such as training and go-live phases to bolster employee support.
- Arrange leadership floor walking after rollout to establish personal connections with employees and to demonstrate personal commitment to their success.
- Establish manager / leadership "Office Hours" and create an "open door" policy for staff to drop in with questions, feedback, etc.
- Use leadership storytelling to paint an engaging change vision that clearly describes the purpose and create a compelling case for change that connects to what people value.



2 Create a system for change

Relationships among customers, employees, partners, vendors, and communities shape how work gets done and how people think and behave across the organization. For change to succeed, it must engage the entire organizational ecosystem.

The key question is: Are these groups connected and aligned in a way that supports new ways of working?

- **Set up a change network** to scale the impact of the change management program, generate active participation, and advocate for the new behaviors and ways of working.
- **Conduct showcases** to build broader awareness of the change effort, solicit feedback, and engage the organization in the conversation.
- **Engage opinion leaders** to amplify messaging and garner support. Change networks are one key channel for engaging opinion leaders.
- **Conduct a stakeholder assessment** to identify the key groups and individuals who will be impacted or have the ability to influence the success.
- **Develop a prioritized stakeholder engagement strategy** from the output of the Stakeholder Assessment to develop engagement strategies that are tailored to different stakeholder groups.
- **Leverage your PSA partner** to support the development of new organizational capabilities
- **Consider impacts to org design, role descriptions, or team structures** to determine whether the change calls for changes to the organizational structure.
- **Assess change capacity by conducting an assessment** of the various change initiatives happening across the organization to ensure teams have the capacity to absorb the change(s) being rolled out.
- **Establish a coaching/mentoring program** to ensure that staff have access to the guidance and resources they need throughout the change
- **Talk to other PSA customers and learn from their own experiences.**

3 Connect the value with the values of the team

The connection to what people care deeply about influences how a person is intrinsically motivated to think or act, so be sure to carefully consider a person's values, motivations and sense of purpose.

The key question to ask is: Do people see a connection between the new ways of working and their values, motivations, and sense of purpose?

Examples of strategies that help drive digital adoption include:

- **Communicate the “why” & value proposition** clearly. How does it support the organization's mission and vision? How will it contribute to the achievement of top-priority business objectives?
- **Identify and communicate the “WIIFMs”** by connecting the messaging to what people care about; define the “what's in it for me” message(s) that will resonate with different stakeholder groups.
- **Design direct experiences that provide a first-hand view** of the positive impact that the new technology will have.
- **Consider gamification** to incorporate an element of friendly competition and fun.
- **Set up an adoption buddy system** to provide opportunities for employees who have not yet been introduced to the new technology to shadow team members who are active users.
- **Use positive storytelling** to generate buy-in and support.
- **Host a rollout / launch event** to generate excitement, make it fun and recognise the individual and team contributions in making it a success.
- **Create a purpose-driven narrative** for the change that creates a clear tie to a higher-level purpose that employees can connect with.
- **Highlight key features & benefits** of the tool that will make life easier for those who use it.





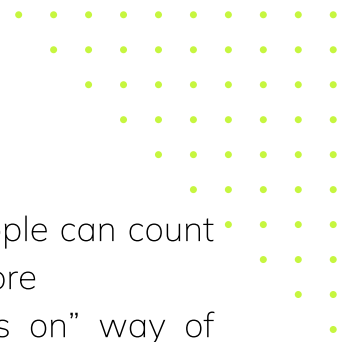
4 Provide resources to remove friction and enable adoption

Access to the right enablement resources influences people's ability to develop the knowledge and skills required to successfully engage, perform, or change.

The key question to ask is, Do people have the information, tools, training, and resources required to build new ways of working?

Examples of strategies that help drive digital adoption include:

- **Develop a clear on-boarding plan** that sets out incremental implementation milestones and expectations.
- **Avoid overly complex customisations** that delay rollout and adoption and inhibit the realisation of value from the new technology.
- **Make first impressions count** and make the experience frictionless for the users. Think of the flow of signing on, first welcome email, first login experience, add integrations once the baseline is set, undertake product walkthroughs and tutorials, ensure follow up.
- **Provide live demos and showcases** to show off functionality and features, and to instruct users on how to best use the tool.
- **Build a communication plan** to build awareness and understanding.
- **Roll-out a coaching program** so users have someone from whom they can get direct instruction, feedback and encouragement to use the tool.
- **Leverage super users as a social way to ensure widespread adoption** and ensure people have access to someone who is up-to-speed on new functionality.
- **Build a training strategy & actionable plan** for how users will be trained.
- **Run a train-the-trainer program to develop in-house capability to deliver end-user training.** Conduct a TTT session to provide instruction, coaching, and feedback to team members to prepare them to deliver training to their respective teams and new starters.



- **Hold office hours** to provide a time and place where people can count on bringing up concerns, getting coaching, and learning more
- **Provide self-directed onboarding tools** as an “always on” way of allowing users to get up-to-speed and gain hands-on practice using the tool, leveraging vendor product tours
- **Deploy classroom training** led by an instructor to create awareness and build skills around using the tool
- **Leverage in application learning centres** to allow users to access immediate, tailored, on-demand training from within the application, leveraging vendor provisioned learning centres, academies, and training webinars
- **Create an innovation space or practice lab** for users to come see and experience new features being rolled out and provide feedback and input for future development
- **Deploy a leader-coach strategy** where leaders and managers skill up first and enable their directs with the knowledge and skills to use the tool

5 Develop adoption incentives and rewards program

Formal and informal incentives play a key role in shaping behavior. To support digital adoption, reward systems must reinforce the desired changes.

The key question is: Do your performance measures and incentives actively encourage new ways of working?

Recognition and rewards help build momentum and show that digital adoption is valued at every level.

Here are some effective strategies:

- **Create an incentive plan** that drives adoption of new tools.
- **Publicly recognize early adopters** in meetings, updates, or with digital badges.
- **Use adoption dashboards to track usage** and spotlight individuals or teams embracing change.
- **Offer rewards** like gift cards, company swag, or spot bonuses for top users.
- **Launch a leadership recognition program** using collaboration tools to regularly highlight success stories.





6 Harmonize your people, processes and systems

Systems and processes shape how work gets done, how data flows, and how decisions are made to achieve business goals.

The key question is: Are your technologies, tools, infrastructure, and policies designed to support new ways of working?

Strategies to support digital adoption include:

- **Use collaboration tools to centralize conversations** and boost visibility—moving discussions out of inboxes and into shared spaces.
- **Build feedback loops through these tools** to gather and respond to user input.
- **Place desk drops as physical reminders** to reinforce key messages.
- **Run pipeline, resourcing, and forecasting meetings directly from your PSA platform.**
- **Shift meetings that rely on spreadsheets or slides into the PSA,** using live dashboards and reports—reinforcing the idea that “if it’s not in the PSA, it didn’t happen.”
- **Automate manual tasks where possible** to reduce friction.
- **Update policies, procedures, and workflows** to align with new tools and ways of working.



7 Digital adoption checklist

If you're determined to achieve a successful digital transformation process, **following these 6 levers will put you on the front foot** to drive strong digital adoption and, ultimately, get the most out of your PSA investment. Again, be sure to adapt these strategies to the specifics of your own firm to achieve the best results—and you'll have digital adoption nirvana in no time!

1 Ensuring leadership share the vision

- ☐ Encourage leaders to demonstrate personal accountability
- ☐ Incorporate behavior modelling
- ☐ Develop short leadership videos
- ☐ Develop executive leadership decks
- ☐ Develop manager briefing kits
- ☐ Establish 2-way feedback channel(s)
- ☐ Establish a consistent cadence of leadership updates
- ☐ Secure an executive to kick off launch events
- ☐ Arrange leadership floor walking after rollout
- ☐ Establish manager / leadership "Office Hours"
- ☐ Use leadership storytelling

2 Creating a system for change

- ☐ Set up a change network
- ☐ Conduct showcases
- ☐ Engage opinion leaders
- ☐ Conduct a stakeholder assessment
- ☐ Develop a prioritized stakeholder engagement strategy
- ☐ Leverage your PSA partner



- ☐ Consider impacts to org design, role descriptions, or team structures
- ☐ Assess change capacity
- ☐ Establish a coaching / mentoring program
- ☐ Talk to other PSA customers

3 Connecting the value with the values of the team

- ☐ Communicate the “why” & value proposition clearly
- ☐ Identify and communicate the “What’s in it for me”
- ☐ Consider gamification
- ☐ Set up an adoption buddy system
- ☐ Use positive storytelling
- ☐ Host a rollout / launch event
- ☐ Create a purpose-driven narrative
- ☐ Highlight key features & benefits

4 Providing resources to remove friction

- ☐ Develop a clear on-boarding plan
- ☐ Avoid overly complex customisations
- ☐ Make first impressions count
- ☐ Provide live demos and showcases
- ☐ Build a communication plan
- ☐ Roll-out a coaching program
- ☐ Leverage super users
- ☐ Build a training strategy & actionable plan
- ☐ Run a train-the-trainer program
- ☐ Hold office hours
- ☐ Provide self-directed onboarding tools
- ☐ Deploy classroom training
- ☐ Leverage in application learning centres
- ☐ Create an innovation space or practice lab
- ☐ Deploy a leader-coach strategy



5 Developing adoption incentives and rewards

- ☐ Develop an incentive strategy
- ☐ Recognize first adopters
- ☐ Use adoption dashboards
- ☐ Reward top users
- ☐ Establish a leadership recognition program

6 Harmonizing your people, processes and systems

- ☐ Set up collaboration tools
- ☐ Establish feedback loops
- ☐ Create desk drops
- ☐ Run pipeline, forecasting, resourcing meetings from the tool
- ☐ Leverage automation
- ☐ Update standard policies, processes, procedures