



Best Practice in Technology Adoption

Date: May 2017

Prepared By: Monica M. Keith, Director of Advancement Operations at Colby College

Category: Advancement Management

Comments To: bestpractices@advserv.org

Comment Period: July-Sept 2017

Description of Practice:

Workplace technology is continuously evolving to address and adapt to the changing needs of businesses and organizations. There are several factors that can lead to new technology tools and projects – therefore, technology adoption is increasingly important as a strategy to empower users to become more effective and efficient in their personal and professional work, and for their employers overall.

Prospective Users of Practice:

- Organizational leadership/directors
- Department directors
- Technology trainers
- Information Technology and Services staff
- Advancement Services/Operations staff

Issue Addressed: Workplace technology adoption as an important practice for staff development and meeting organizational goals. The practice includes an assessment of department/division technical capacity, overall needs and goals and the potential to develop a technology adoption plan for training, planning for new technology/tools, and overall onboarding efforts.

Desired Outcome: Integration of a technology adoption strategy or plan when anticipating new technology tools or projects, and as part of overall onboarding programs.

- A strategic planning process for technology planning/adoption
- Collaborative approach to reviewing new tools across teams
- Training elements
- Stakeholder alignment
- Collective organizational priorities, outcomes and success
- Leadership and technology adoption
- Measuring success

Process:

1. **A strategic planning process** for technology planning – involves several steps, including:

- Audit of current technology software and hardware and usage
- Identify/Indicate organization goals and priorities
- Identify existing gaps or duplication to meet organizational goals/priorities
- Assess staff technical capacity, investment and talent
- Development/Review of budget
- Leadership support for new technology and training

2. **Collaborative approach** to reviewing new tools across teams – when considering new software or hardware to implement for your unit, or more broadly across several departments, it is important to include representatives to collectively identify needs, goals, capacity and alignment. An investment of time and energy in the planning discussion encourages investment in the overall process which can ultimately promote the success of adoption.

Some potential strategies include:

- A standing agenda item for leadership to discuss technology planning and/or initiatives with directors or staff
- Creating a technology advisory committee
- A dedicated position to technology training and talent development

3. **Training elements** for assessing and implementation of new tools - when identifying and assessing new tools to add to your technology portfolio, it is important to consider training across all levels of introduction and implementation. Ultimately, new or different tools will have a direct impact on how some people will accomplish their jobs and scope of work – another reason it is important to include them in the

discussion and to some extent in the process. Furthermore, there will be varying types of users of whatever tool is being presented, on top of varying levels of users and user skills and capacity. Therefore, from the beginning, it will be important to identify the impact of new tools and to consider all of the training needs - and anticipate the time (and potentially a financial investment) for scheduling group training, individual training and specialized training and then when new systems/procedures will take effect. Training elements to be considered [when evaluating new tools or current tools] can include:

- Overall training goal(s)
 - Define the measure of success (adoption/usage)
- Staff capacity and training needs
 - Identify early adopters/champions
 - Identify power users
 - Training plans for other types of users – secondary, tertiary
 - Training mediums and documentation
 - Ongoing training plan
- Processes directly impacted – direct and indirect
 - Identify documentation that needs to be updated
 - Specialized training for communicating changes in process (not technology training)
 - Ongoing assessment and refining opportunities

Introducing new technology is also an opportunity to address business process changes, such as streamlining a manual or otherwise less efficient business practice. For example, taking the opportunity of moving to a product that integrates with your primary database for biographical changes or online giving (i.e. moving data from one platform for manual entry vs. automated imports). Having the strategic planning process and a collaborative approach which includes various staff will provide opportunities for these processes to be revealed, and training considerations will further enable consensus on how to address and improve business processes.

4. **Stakeholder alignment** –stakeholders are constituents who have an interest in the assessment, decision and implementation of new technology tools, beyond being directly impacted as a user (as indicated above). There are two primary types of stakeholders – internal and external. It is important to identify opportunities for stakeholder impact – to create or maintain alignment of priorities and goals, or potential shifts in how to achieve them.

- Internal stakeholders – these can be colleagues from your department or other departments within one division impacted by how your tools or processes change;

- External stakeholders – these can be other departments, specifically your organization’s IT department, finance department or communications office, or other software vendor/partners.

Involving internal stakeholders into the planning conversation will enable a more efficient big picture assessment of scope and impact - and stimulate camaraderie and alignment to promote adoption. And, these internal stakeholders will likely identify external stakeholders and impact that might not otherwise surface until much later in the process.

5. Collective organizational priorities, outcomes and success – workplace tools/technology have the capacity to bring together and align staff with very different responsibilities, from departments and event different locations. Whether it is a platform for communication (i.e. a new email tool) or an enterprise system (i.e. database conversion) – identifying the opportunities to address or create collective priorities and goals will foster success.

When considering new tools or technology, some areas where there can be gains in bringing together divers yet collective goals include:

- Communication – internal or external
- Project management
- Document management
- Cloud-based applications/storage

6. Leadership and technology adoption - adoption of workplace technology, and specifically new technology, can be a challenge - whether your organization is small or a large corporate entity. Yet, it is an essential part of operating effectively. Therefore, leadership plays a vital role as the champion of technology adoption. Some opportunities for presidents, vice presidents, or directors include:

- Communicating the benefits that existing or new technology will provide;
- Being transparent throughout the process about goals, impact and expectations;
- Offering ongoing and dedicated training and support to maximize employee adoption;
- Being open to feedback and ongoing communication.

7. Measuring success – success for technology adoption can be defined in several ways - depending on your organization’s goals. For some it can be resolving a gap to a key process, and for others, 100% usage of a new tool by all organization staff. Either way, defining the goal for bringing new technology into the mix and aligning it to a specific organizational priority/goal it addresses is the first step.

Then, there can be several measures of success, including:

- Reducing inefficiency (i.e. manual processes, duplication, etc.)
- New and more efficient processes (i.e. eliminating sacred cows)
- Enhanced collaboration and/or communication
- Staff development – increased skills and capacity
- % of users using new technology

Regardless of how you define success, it is important to measure and share success stories and milestones. In addition, creating a feedback loop that allows for continued conversation will also build investment in technology review, champions/partners and other adoption strategies.

AASP Recommendation:

A technology adoption plan can be useful as an overall goal, a strategy as part of a specific technology implementation or for onboarding/training new staff. It is important to consider several factors [when developing either of the options]. It is a best practice because it encompasses many factors such as: an audit of the current state of your technology usage; a review of staff capacity and talent; dedication to training; budget; the potential to align other collective goals; and potential leadership support. Any combination will be valuable to an organization – but woven together technology adoption is less a tactic and more of an approach that empowers people to be more proactive in identifying new tools or opportunities to be effective in their work.

Sample Policies & Procedures:

- [Sample advancement technology group structure](#)
- [Sample on-boarding training](#)
- [See best practice on on-boarding](#)
- [See best practice on developing a roadmap to best of breed solutions](#)