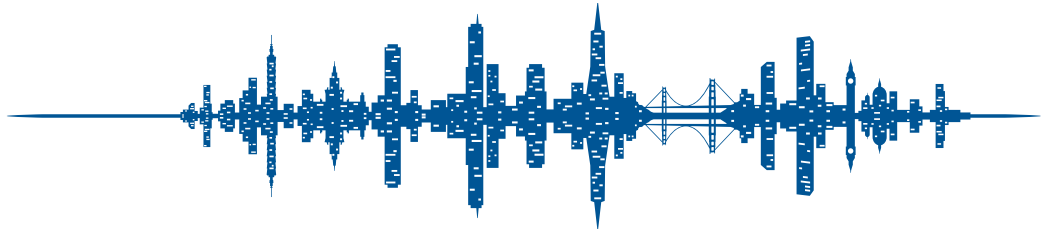


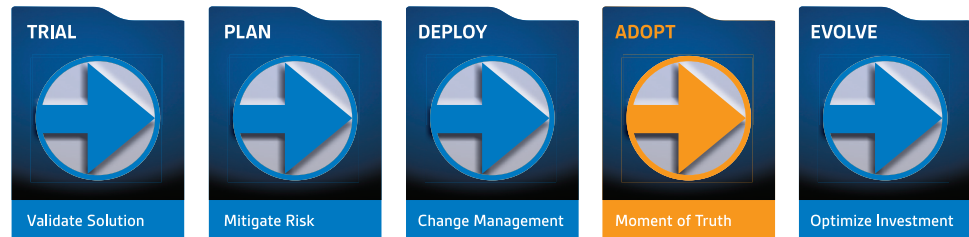
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Smarter Working UC Toolkit  
Adoption Guidelines for Success

Now that you have successfully completed the deployment of the audio devices in your organization, it is time to focus on the moment of truth — the first positive user interaction with the new technology. This first experience is of paramount importance to achieving optimal adoption rates. You should be thinking about what resources and services you can provide to help users make their first calls successfully. Consider how you can ensure employees are using the new audio devices. Discover what concerns, if any, users are experiencing and determine how you can address them.

In our experience, we find that the introduction of audio devices into an organization usually follows the five steps shown in this figure:



Phases of a unified communications (UC) platform and audio device introduction

This guide is one of a series of *Guidelines for Success* that provides best practices for integrating audio devices into enterprise environments. *Smarter Working UC Toolkit, Adoption Guidelines for Success* describes best practices to help users have a positive initial experience with the new audio devices, resulting in a trouble-free transition to the new UC platform beginning with the very first call. Other guides in the series include:

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- *Smarter Working UC Toolkit, Trial Guidelines for Success* provides IT best practices and recommendations for conducting an effective evaluation of an organization's communication needs by collecting user, manufacturer, and product data, and analyzing it to make the most informed decisions when selecting UC audio devices.

RESOURCE

- *Smarter Working UC Toolkit, Planning Guidelines for Success* provides IT best practices and recommendations for the successful integration of UC audio devices through assessing user requirements, developing communication strategies, and preparing the logistical infrastructure needed to ensure a smooth rollout that meets business objectives.

RESOURCE

- *Smarter Working UC Toolkit, Deployment Guidelines for Success* provides IT best practices, and recommendations for managing the physical delivery and installation of UC audio devices and for assisting users through the changes associated with the integration to a UC platform and the way they work.

RESOURCE

- *Smarter Working UC Toolkit, Evolve Guidelines for Success* provides IT best practices and recommendations for increasing UC audio device utilization, accessing and responding to changes in user needs, maintaining the right level of support, and planning for UC audio device upgrades or transitions.

## The Adoption Process

Once you reach the Adoption Phase, the primary focus is providing users with the resources and support to help them make their first calls successful. In addition, initial penetration and success of the integration is measured and positive results communicated. Goals are to achieve the target rate of initial usage and to measure the success based on the criteria previously defined. The major steps to ensure optimal success during the Adoption Phase are as follows:

- **Support the moment of truth.** Assist users from the moment they make their very first call. Ensure the appropriate training tools and support mechanisms are in place and ready to respond — and that users know where to find them. Encourage superusers to walk the halls and interact with new audio device users.
- **Verify usage.** Ensure as many users as possible have successfully completed their first call with the new audio devices. Collect and analyze data on communications platform usage, any equipment issues, and the initial impact on the company's operations and workflow.
- **Measure success.** Collect data on key success metrics such as the number of users, calls made, support calls, exchanges, and so on. Evaluate how these initial numbers are tracking relative to expectations set in the Planning Phase.
- **Communicate results.** Publish information showing positive developments and success stories, providing appropriate information to employees as well as executives.

## Support the Moment of Truth

The first call a user makes with their new audio device must go smoothly to get the best results during the Adoption phase. Encourage employees to make their first call to a specially designated IT support number to help them have a positive, productive early experience with their new audio device. During this call, IT staff can help with basics such as checking volume levels and overall transmit quality. They can also offer on-the-spot training, tips and tricks, and help employees with functionality they haven't learned yet, such as making conference calls. In addition, technicians can call users back to check their ability to receive calls as well as ringtones and volume settings. To incent users to call, some companies make a donation to a popular charity every time a user calls to provide feedback. Consider creating social media sites, Twitter accounts, Wikis and blogs to help users communicate and share ideas that will be helpful.

Depending on your deployment strategy of a one-time or a phased roll-out, IT support must be staffed and ready to respond to the initial support calls. This is a very important milestone in the success of the audio device adoption and the company's investment in UC as a whole.

Ensure users are aware of the variety of training and support resources that are available.

KEY INSIGHT

KEY INSIGHT

## RESOURCE

Frequent and widespread reminders of Web sites and blogs, Twitter accounts, and Help Desk phone numbers are helpful especially if delivered at the same time users are making their first calls. Remind and encourage users to take advantage of the *Smarter Working UC Toolkit*, *Video Setup Guides*, listed in the *Additional Adoption Resources* section, that provide short, menu-driven video clips showing how to setup and adjust many Plantronics UC audio devices, and how to make and end calls on specific UC platforms. These can be invaluable as users undertake their first calls.

## RESOURCE

- **Provide support.** Support of the new or existing communications platform and new audio devices throughout the organization means more than simply following up with employees. It also means providing training and services designed to enhance the first call experience, collecting and resolving initial comments, and paving the way for the data collection process. Leveraging the superusers you established during the Deployment phase to provide on-site resources during the day of roll-out and perhaps a day or two after, can provide users with a place to go for one-on-one help. In addition, day-of and post-launch walk around support can assist and encourage users to make that first and successful call. Consider a staggered audio device distribution if you are concerned about the strain on your IT resources. Provide instant replacements, exchanges, and upgrades as necessary. See the *Smarter Working UC Toolkit*, *Deployment Guidelines for Success* referred to in the *Additional Adoption Resources* section.

## KEY INSIGHT

- **Promote the use of approved audio device configurations.** It is important to dissuade users from even trying the embedded speaker and microphone in their computers or any other non-approved devices. Otherwise, they might be so disappointed with the performance and quality of the communications that they are unwilling to use any audio device, or worse, dismiss the entire technology as inadequate.
- **Promote user care of devices.** Although most audio devices rarely require ongoing preventive maintenance, a little care in the use and handling of the equipment is recommended. For example, devices with batteries should be kept in their chargers when not in use. Audio devices should be transported in the carrying case, if one is provided — not just tossed into a purse or briefcase. Care should be taken when eating, drinking, or applying makeup so that the microphone doesn't become clogged.

## BEST PRACTICE

Now is the moment of truth — a critical milestone and an early indicator of ongoing and sustained adoption. Everything you have prepared and done to this point is instrumental in making this moment a success. With the audio device infrastructure and support services in place and staffed appropriately, you are well on your way to achieving your goals and objectives. Yet support for new technology is not a one-shot or a short-term activity. It should be ongoing, offering a multi-faceted array of services to assist users with a range of technical, functional, and operational issues. The support services should be flexible and prepared for inevitable change down the road.

## Verify Usage

Success depends on verifying that employees are in fact using their audio devices and determining how they are faring during their first experiences. This can be facilitated by registering the audio devices with IT upon first use. It is equally important to design a verification methodology that is as positive and non-intrusive as possible.

- **Interview users.** There are numerous methods for determining the level and quality of usage. Visiting users at their desks and discussing their experiences can provide detailed feedback about the deployment, installation, first call, and any initial usage issues. Other methods include phone calls, email, online surveys, and department meetings. For ideas about questions to ask see the *Smarter Working UC Toolkit, Adoption Survey* referred to in the *Additional Adoption Resources* section.
- **Set up feedback vehicles.** As previously mentioned, the first call should be made to an IT Help Desk technician or IT support group who can answer initial user questions. At the same time, you should encourage employees to provide feedback by letting them know you're reaching out to hear their comments about their overall communications experiences with the new UC audio devices and UC platform.
- **Address user anxiety.** Every organization has some employees who are less comfortable than others with new technology. Most organizations also have people who are simply reluctant to change. Before approaching employees to verify usage, develop strategies for working with those who are hesitant. A good place to start is to ask these users to air their concerns, listen carefully, then restate them back to the employee. When you discover their specific issue — whether they are worried about equipment functionality, comfort, or their appearance — you can address the initial objection specifically and positively. You may find a whole group or department initially hesitant to use the new audio devices.

Between initial deployment and measuring success, verification of usage is a key step. By interfacing with employees to see how they're initially using the equipment, understanding the initial challenges they may be having, and working to ensure needs are met, critical information will come to light. You can use what you learn to make a future audio device rollout even more successful.

## Measure Success

Ultimately you'll want to evaluate your success against pre-defined quantitative and qualitative criteria and scheduled milestones. Capturing usage and satisfaction statistics is critical to providing insight into the success of the project. Without comprehensive statistics, it can be difficult to counter criticisms and concerns since unhappy users tend to be more vocal than satisfied users. Identifying successful aspects, as well as areas for improvement, can help IT refine processes for future efforts.

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KEY INSIGHT

As you gather and analyze initial results, use the information to help you determine the effectiveness of your strategies and plans. See what the data can tell you about opportunities for fine tuning. Additionally, the data you gather can be used to determine the kinds of communication activities you might develop to broadcast milestones and share good news.

BEST PRACTICE

- **Capture successful first calls.** When employees make their first call to the designated support line, it is a great opportunity to gather metrics and qualitative feedback about their experience. You can funnel this information into your metrics program. In the short term, the extent to which most people have a successful experience on their very first call is by far the most important and repeatable metric.

RESOURCE

- **Record user satisfaction.** Surveys, using tools such as SurveyMonkey or your company's preferred tool, can provide data on initial experiences and ongoing user satisfaction. Determine if employees are using the technology, and if not, why they are not doing so. If they did not call the IT Help Desk for their first call, find out if they are experiencing any problems when they use the audio device. Have them explain what happened the first time they plugged in and tried the audio device. For ideas about questions to ask see the *Smarter Working UC Toolkit, Adoption Survey* listed in the *Additional Adoption Resources* section.

BEST PRACTICE

- **Leverage existing IT data.** Metrics already tracked by the existing UC system, such as the number of calls, aggregate call time, and the ratio of inside to outside calls should be collected. Information currently captured by the IT department is also relevant, including support calls generated, types of calls, and warranty returns. You may want to add new incident categories germane to UC audio devices to existing IT support ticketing and tracking systems.

Use the information you collect in this phase to ensure your organization's initial success and satisfaction with the audio devices. It's easy to forget how you solved a problem the first time, or how smoothly things went in one department because of a small detail. Throughout the process, record lessons learned to gain insight — and provide feedback — for future use.

## Communicate Results

As you compile success stories and data that show productivity improvements and other positive outcomes, consider the most effective ways to share the news. Look into establishing periodic communication vehicles to talk to users about their experiences, including employee newsletters, a Web site with user videos, a Facebook page, a Twitter page, and a user blog.

BEST PRACTICE

- **Publish and promote success cases.** During the initial days and weeks of audio device deployment, we recommend distributing an occasional Heads Up or Now Hear This update to pass along how one group, or even individual users, solved a challenge or discovered a new way their new audio devices help them do their jobs. Be sure to refer to the users and departments by name. Once the deployment of the new platform is complete and

initial success is evaluated, ask the executive sponsor of the project to send a company-wide message. In it, they can share news and express appreciation for the way employees embraced the new technology. They can also describe some of the benefits to the company such as decreased conference call minutes and spending, reduced email and voicemail, increased instant messaging (IM) usage, improved collaboration via desktop sharing, and long distance cost savings.

- **Update technical information.** Tech tips and tricks should be broadcast to inform users on common concerns and potential problems. As information comes in about typical issues, update your list of FAQs to notify users of the new information and broadcast the information using other vehicles such as blogs, Wikis, and social media.
- **Capture initial reactions of users.** A video crew filming vignettes of employees getting their audio devices and successfully installing and using them for the first time can be entertaining and motivational.

KEY INSIGHT

## Evolve Audio Device Use

After the success of your audio device introduction has been evaluated and the use of audio devices is becoming common practice, consider evolving the utilization of audio devices to higher levels of integration, efficiency, and productivity to optimize the overall UC investment.

## For More Information

The Smarter Working UC Toolkit is the collective wisdom of customer experiences and lessons learned while integrating audio devices into a UC environment. It's a portfolio of best practices, recommendations, and off-the-shelf training tools designed specifically for IT organizations to leverage – ensuring accelerated end-user adoption. To access the Smarter Working UC Toolkit visit [plantronics.com/uctoolkit](http://plantronics.com/uctoolkit). We'd like you to be part of our community of learning.

RESOURCE

## Additional Adoption Resources

The following resources, available at [plantronics.com/uctoolkit/adopt](http://plantronics.com/uctoolkit/adopt), provide supplementary information to help in the adoption process.

### ADOPTION RESOURCES

<b>Adoption FAQ</b>	Provides responses and direction to typical questions IT organizations raise during adoption of UC audio devices
<b>Adoption Guidelines for Success</b>	Helps IT organizations prepare for successful user adoption of UC audio devices on a UC platform
<b>Adoption Checklist</b>	Provides IT organizations with a high-level list of items to consider for accelerating UC audio device adoption
<b>Adoption Survey</b>	Provides a list of suggested questions IT organizations can use to assess user satisfaction with the first use of their UC audio device
<b>Video Setup Guides</b>	A library of media-rich, on-demand, training video clips for many Plantronics UC audio devices and UC platforms

For more information, contact Plantronics at 1-855-UCTOOLS (1-855-828-6657) for US and Canada, or (001) 831-458-7628 (all other countries).

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