



Adoption & Change Management (ACM)

“The People Side of Change”





The successful adoption of Microsoft Teams Phone represents a change in behavior

It is more than a set of products—it is a fundamentally different way of working

This change is about people.



What is Adoption & Change Management?

ACM Defined



The application of a

- **Structured process** (ADKAR)
&
- **Set of tools** (Communications, Training)

focused on leading the **people side of change** while achieving a desired **business outcome**.

A **Awareness** – Of the need for change

D **Desire** – To participate and support the change

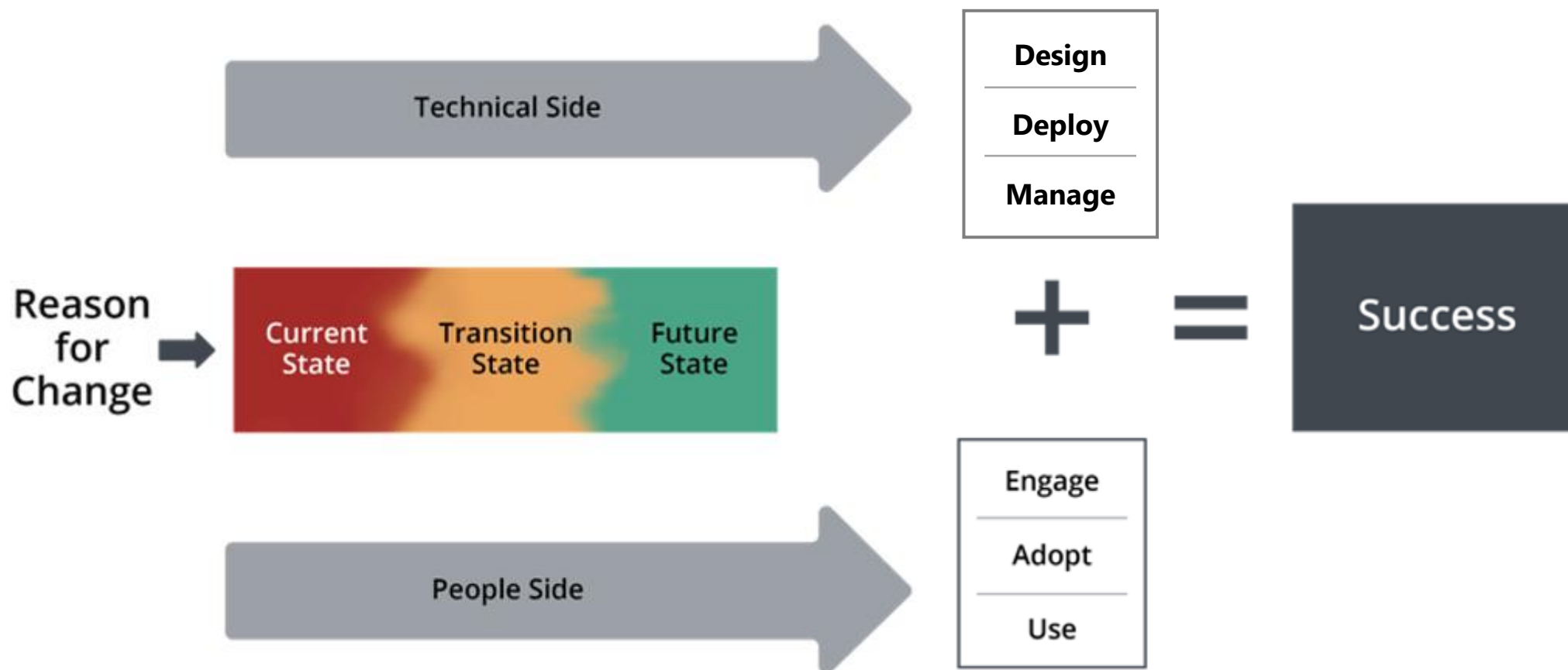
K **Knowledge** – On how to change

A **Ability** – To implement desired skills & behaviors

R **Reinforcement** – To sustain the change

It's all about...

The Technical Side Working With People Side Of Change



Reasons to Invest in ACM

Increase probability of project success



Manage employee resistance to change



Capture people-dependent ROI



Build change competency into the organization



ACM for Every Stage

New Solutions

Working with a partner that has a dynamic Adoption & Change Management (ACM) offering is critical as you begin your transition to a new solution.

Workforces are naturally resistant to change, and deploying new technology requires a comprehensive and tailored approach to ensure users of all skill levels get the most out of your investment.

Existing Solutions

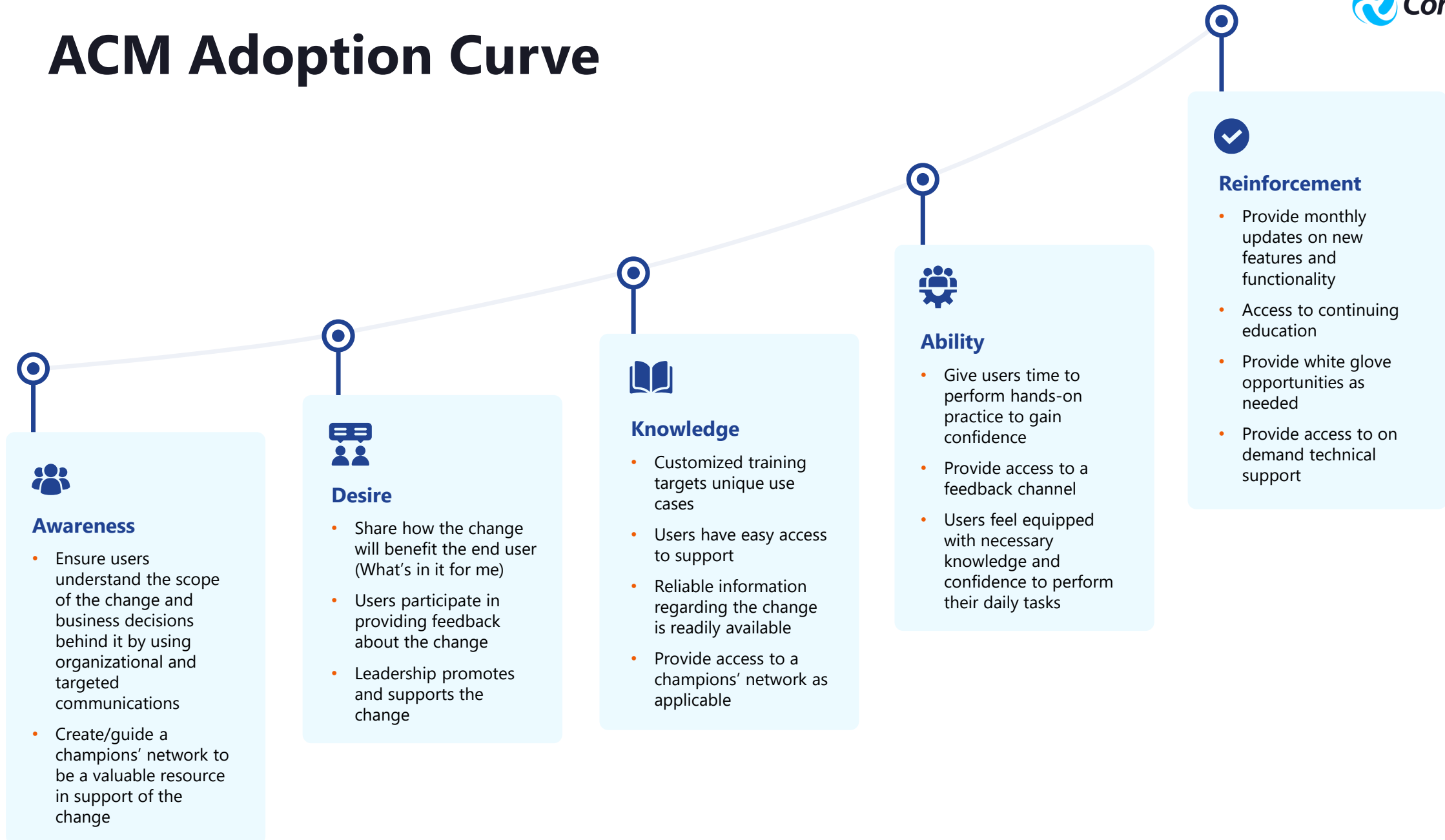
Dealing with a botched technology deployment? Avoid unhappy users, achieve solution potential, and realize anticipated ROI.

When deployments go awry, our Adoption & Change Management team works with you to realign your business goals, eliminate sources of friction, and strategize adoption and acceptance of your new solution.



Adoption & Change Management at Continuant

ACM Adoption Curve



ACM Methodology

Discovery and Assessment



1

- Conduct Adoption & Change Management (ACM) workshop
- Gain an understanding of key business objectives and success metrics
- Identify key stakeholders and champions
- Analyze device requirements

Strategy and Design



2

- Create Adoption & Change Management (ACM) plans
- Create awareness campaigns
- Provide recommendations to accommodate all types of adopters and learners
- Develop custom end-user training classes based on unique use cases

Execution and Implementation



3

- Execute awareness campaigns
- Execute end-user training, both virtual and in-person
- Distribute post-training surveys
- Provide white glove service and hyper care

Monitor and Expand



4

- Summarize results of post-training surveys
- Review success metrics and ongoing adoption strategy
- Define regular health checks
- Conduct additional training for continued education



Services of the ACM Practice



ACM Workshop



ACM Workshop Agenda

- Introduction to Adoption & Change Management
- Review of Scope
- What we Know
- Success Criteria
- Sponsors
- Champions
- Communication and Awareness
- Resistance Management
- Training Strategy
- User Discovery
- Devices Recommendations



ACM Plan

ACM Plan – Example Topics

- ACM Approach
- Awareness & Communications
- Leadership & Sponsorship
- Champions
- Resistance Management
- Reinforcement
- Training

Prepared by

Continuant Inc.

Adoption and Change Management (ACM) Team

Adoption & Change Management Plan

Microsoft Teams Phone

September 2023



Communications Plan

Communications Plan – Customized

Target audience: All Employees

- All Hands Announcement

Target audience: Champions

- Champions of Microsoft Teams Phone

Target audience: Impacted employees

- Coming Soon
- Coming Soon Reminder
- Getting Started

Target audience: User Acceptance Testers (UAT)

- Coming Soon
- Getting Started

All Hands Announcement

Why is This Important? To announce the planned transition from our existing Cisco phone systems to Microsoft Teams Phone, ensuring users have ample time to prepare for the change.

Send To: All Employees

Send From: Executive Sponsor

Timing: Approximately 1 month prior to the transition

Subject Line: IMPORTANT TECHNOLOGY CHANGE: Microsoft Teams Phone!



Training Plan

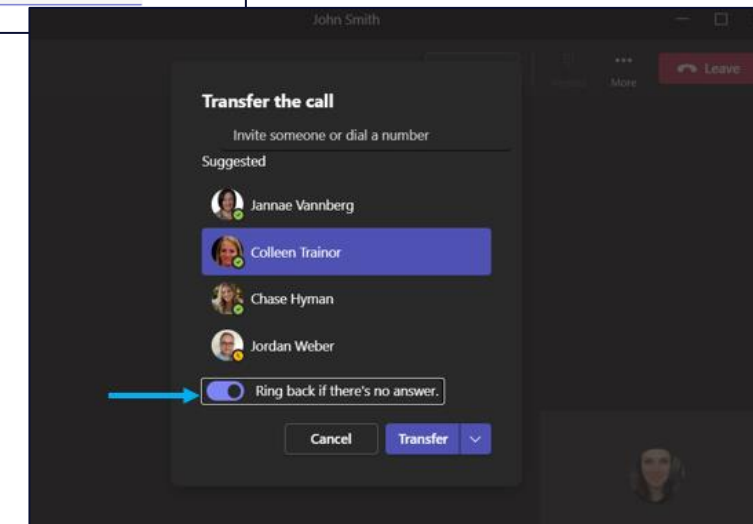
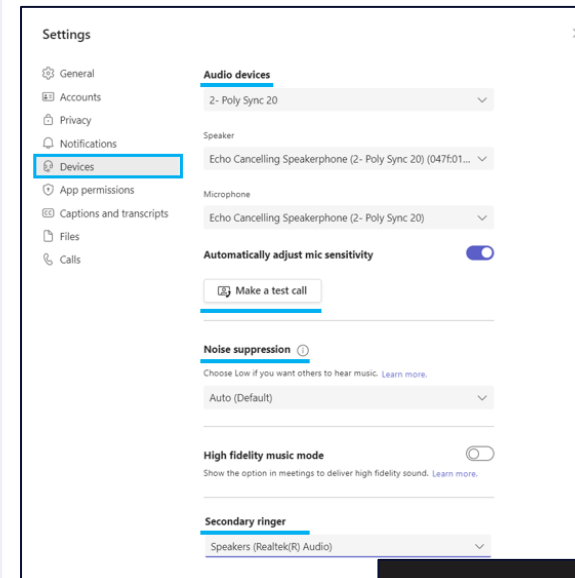
Training Plan – Reaching all types of learners

Virtual instructor led training Basics

- **Topics:** Overview of the Calling Interface | Call Settings | Receiving & Making Calls | In Call Features | Microsoft Teams Mobile App
- **Audience:** General users
- **Duration:** 1 Hour

Advanced

- **Topics:** Basic Training + Delegation | Call Queues | Priority Access
- **Audience:** Recommended for Executives, Executive Assistants, Receptionists, Power Users...
- **Duration:** 1.5 Hours



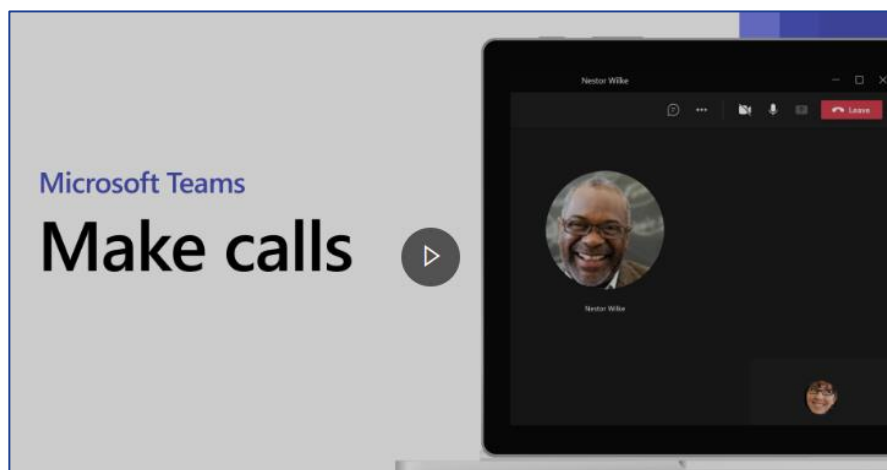
Recorded for future needs

Training Plan – Reaching all types of learners


Quick Start Guides – customized

- Basics
- Settings & Delegates
- And more...

Microsoft Training Videos



MICROSOFT TEAMS PHONE



Quick Start Guide - Basics

Microsoft Teams Phone Overview
 You can make or receive phone calls directly through Microsoft Teams. Your computer or device's microphone and speaker or a connected headset is used for audio.

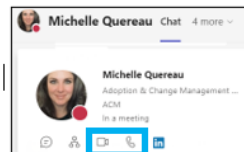
Getting Started

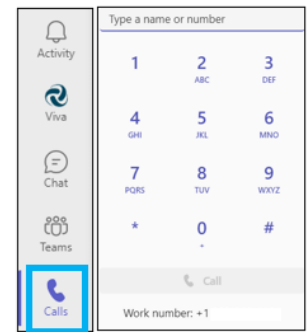
MAKE A CALL

1. Click **Calls** from the left side panel.
2. On the dial pad enter the number of the person OR type the name of the contact.
3. Click **Call**.

Tips:



- Your Teams phone number is listed beneath the dial pad.
- You can also initiate a call by clicking on the profile picture of anyone in Teams.




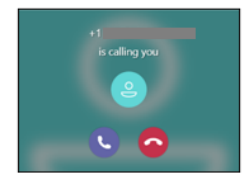


RECEIVE A CALL

When someone calls you, you'll get a notification that lets you accept or decline the call.

- Click  to answer the call.
- Click  to decline the call.

Tip: You may also see the option to accept the call and enable video as well .





Persona Analysis & Device Discovery

Persona Analysis Overview

Day 1

- ACM Introduction
- Persona Profiles

Day 2 & 3

- User Interviews

Day 5

- ACM Plan & Device Suggestions
- Findings & Recommendations

Employee Questions:

1. What is your job title?
2. What is your work setting/style?
 - Do you work at a stand-alone or shared station?
 - Do you move around a lot, stationery at your desk or a combination?
 - If move around, do you need to be connected for calls or meetings?
3. Do you use a desk phone?
 - If yes, what type do you have (if known) and is having buttons on a phone vs
 - If yes, do you use a sidecar? If so, what do you use it for – speed dials?
4. Do you use a soft phone?
5. When/how often do you use your desk phone vs. cell phone vs. soft phone?

Work Style Interviews



Duration: 30 minutes

Please select your preferred date, January 30 or 31 and then select an available timeslot (Notice times are listed in EST) for this 20-minute interview.

OK

Persona Analysis Output

Up to 8 Personas are Identified by:

- Job Titles
- Work Style Setting
- Technology Needs
- Device Needs

PERSONA DESCRIPTION

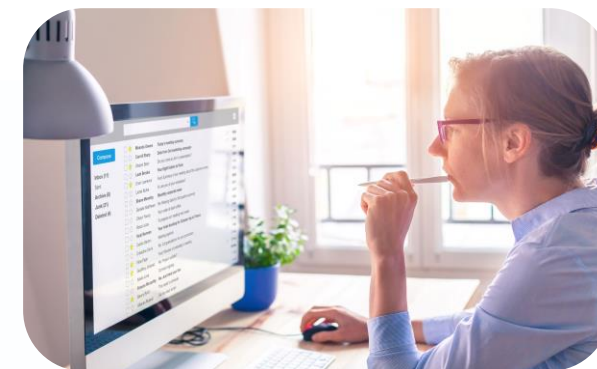
- Managers and directors who spend most of their days in meetings.

USE CASES & SCENARIOS

- Currently making calls with a headset connected to their PC. May be more successful with a wireless headset that enables them to walk around the office.



Road Warrior



Executive Assistant



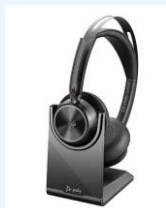
Office Collaborator



ACM – Device Discovery

Example Devices

Bluetooth headsets



Puck devices



USB headsets



Desk phones



Typical Questions

- Current plan for device deployment?
- **Headsets:** Required? If so, wired or wireless?
- **Desk phones:** Required? If so, touchscreen or buttons?
- What work setting (s) need to be considered?
- Preferred Vendor?

Thank You

Get in touch with us:
www.continuant.com