

Eight Steps for Engaging User Adoption Getting the most from your Territory and Account Planning

By Ron Snyder

The biggest reason new initiatives fail is insufficient planning; poor implementation, and resistance within the organization- especially the user base. I have found that the following process helps people rapidly embrace and support the adoption of new methods and tools. Missing any of these steps slows progress and increases time and cost. Though this process largely sequential, some steps can occur in parallel.

1. CREATE A SENSE OF URGENCY

- Examine the user community and competing pressures
- Identify and discuss challenges and opportunities

Obstacles:

- Complacency from past success, lack of visible crisis, low performance standards and insufficient feedback from external sources perpetuates clinging to the status quo
- Dismissing the approach because, “we tried it before and it didn’t work”
- Not understanding that it is necessary to go through all eight stages of the process to create significant change (i.e. thinking steps can be skipped)
- Cultural issues, including organizational arrogance (i.e. “we know what we are doing”)

2. GATHER SPONSORSHIP

- Put together a group with enough power to lead the change
- Get the sponsorship group to work together like a team

Obstacles:

- Underestimating the challenges in engaging adoption and the importance of a strong, empowering guiding coalition
- Trust issues among members of the sponsorship group
- Cultural issues, including arrogance and the “not invented here syndrome”

3. DEVELOP A VISION AND STRATEGY

- Create a vision to help direct the adoption effort
- Develop strategies for achieving that vision
- Optional: establish a pilot group where the method can be tested and fine-tuned

Obstacles:

- Underestimating the importance of having and selling a clear vision and reason for the change... and the role it plays in helping to direct, align and inspire action
- Failing to emphasize the value of individual and team learning for on-going success
- Cultural issues, i.e. taking short cuts or insufficient focus on any one initiative

4. COMMUNICATE THE OBJECTIVE

- Use every vehicle possible to constantly communicate the new vision and strategies
- Have the sponsors model the expected behavior; use the methods, tools

Obstacles:

- Thinking you have communicated the vision and purpose enough
- The sponsorship team doesn’t “walk-the talk” and doesn’t examine their actions

5. ENSURE ACTION

- Remove obstacles/barriers
- Change systems or structures that undermine adoption
- Encourage and reward risk-taking and nontraditional ideas, activities, and actions

Obstacles:

- Allowing barriers and breakdowns to block use of new methods and tools
- Failure to examine existing systems and structures and create new ones that support the vision and eliminate those that don't
- Insufficient leadership engagement to generate broad based action
- Resistance to change and fear of undesirable consequences

6. PUBLICIZE SHORT-TERM WINS

- Look for and capture improvements in performance, or "wins"
- Engage management to enable wins
- Visibly recognize and reward people who achieved wins and made them possible

Obstacles:

- Failing to focus on short-term wins
- Lack of celebration, acknowledgement and rewards for those who achieve the wins

7. BROADEN ADOPTION AND CHANGE

- Use increased credibility to change associated systems and procedures that don't support the change vision/objective
- Hire, promote, and develop people who can implement the needed changes
- Reinvigorate the process with new initiatives, themes, and change agents

Obstacles:

- Declaring victory too soon (often with early wins); a major change effort takes time
- Failure to develop the leadership and management capabilities
- Risk aversion
- Failure to leverage progress already made

8. MAKE IT PART OF THE CULTURE

- Create better performance through customer and productivity-oriented behavior, better leadership and more effective management
- Articulate the connections between new behaviors and organizational success
- Develop leadership to enable further progress

Obstacles:

- Not anchoring changes firmly in the culture
- Failure to get people to realize how specific new behaviors and attitudes helped improve performance

Without this kind of process, the adoption of new methods and tools fails miserably!

This was informed by John Kotter's [Leading Change](#).

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Plan 2 Win Software was founded by sales veterans and former VP of Sales. We saw that Sales Force Automation Systems needed territory and key account planning tools.

Our sales planning software enables Salesforce.com (SFDC) users to create and manage territory and account plans right in their SFDC environment. They capture key trends in the industry, geography and vertical market. Sales execs, then, develop strategies, identify target accounts, business opportunities and partners to leverage and develop action plans to grow their business. These plans are perfect for Quarterly Business Reviews (QBRs) and strategic account reviews. This enables sales teams to fill their funnel with better prospects, make better use of their time and resources and produce better results!

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