PRODUCT ROLLOUT

LATVIV
Keeping the Spark Alive ™

ROLLOUT CHECKLIST AND BEST PRACTICES

Customer and vendor personnel interact with each other in circular phases, as outlined in the image below. These phases are circular since, after every cycle, there is an opportunity to sell more services and products and repeat the process. CSMs (customer success managers) are incented and should be motivated to keep repeating this cycle to boost vendor revenue. Excellence in each phase forms a strong foundation for the next phase and the next cycle iteration.
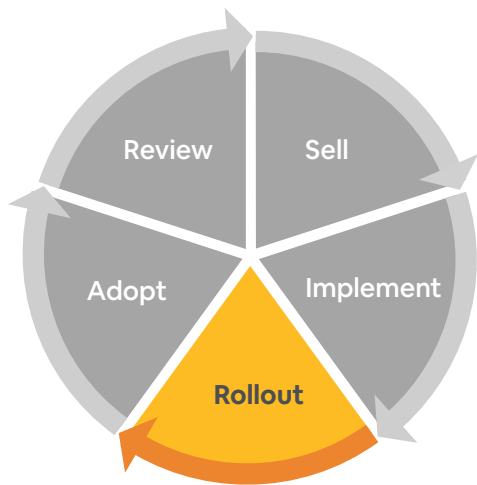

Figure: Customer Success Touchpoint Cycle

Latviv advises vendor resources to follow best practices, risk assessments, checklists, and templates to pursue a consistent approach across all phases. This eBook outlines a few checklists and best practices applicable during the Rollout phase. The full list of these elements is prepackaged in the Latviv platform.

ROLLOUT INTRODUCTION

Building and configuring a solution, accepted by the customer's management, is only half the battle as executed in the implementation phase. Getting it out to the masses, i.e., end-users, is the other equally significant undertaking and should not be overlooked or understaffed during the project's planning phases.

ROLLOUT CHECKLIST

CSMs should be mindful of the following sequential activities in this phase. It is a good idea to assign this checklist to be conscious of each item as they move along in this phase.

Activity	Description
Training	Vendor personnel leverage standardized training materials to tailor them for the customer-specific configurations. This material includes user guides, configuration-specific screenshots, quizzes, hands-on activities related to the deployed application, checklists, and supporting presentations. Vendors subdivide training into administration and end-user sessions. End-user training is delivered by vendor personnel to customer champions, influencers, and as many as end-users, vendor personnel can train on their own. Geographically distributed and language-specific Influencers and champions train the rest of the multilingual community if applicable. Vendors deliver administration specific training to customer points of contact that will take the administration role, such as adding users, updating configurations, and reviewing usage.
User Acceptance Test (UAT)	Customer influencer and champion personnel execute all administrative and end-user activities in the implemented vendor solution. Taking attendance timesheet software as an example, this testing team will test administrative steps such as: • adding employees and consultants using the system • setting up holidays in a year • configuring regular and overtime hourly rates by resource type and expense categories End-user testing steps will include submitting timecards and expense reimbursement requests.
Pilot Rollout	Before requiring all end users to use the application in practice, the customer project manager asks a few representatives to test and apply the vendor's software for production scenarios. If, for instance, the software is applicable for submitting attendance timesheets, the project manager first asks 5% of the users to use the software for submitting their daily timesheets and their traditional approach to submitting the same. The redundancy helps compare the existing environment and results with the post software scenario. Once outcomes are satisfactorily validated, the project manager pursues another pilot or the full-scale rollout depending on management's comfort level with the new solution.
Onboarding	Post-training, end users are provided login information, secured access to their areas of responsibility, checklists, and cheat sheets for pinup on end-user desks. Latviv platform maintains detailed checklists, best practices, risk assessments, and project templates for onboarding guidance.
Monitoring	Administrators check system usage, collect feedback from end-users, and confirm the realization of the desired value. Senior customer staff escalates issues with vendor CSM if results and benefits are unsatisfactory.
Vendor follow up	CSM follows up periodically with customer contacts to ensure rollout activities are progressing on the customer end. They reinforce deployed vendor products' value proposition through customer-specific marketing literature and talk tracks.

BEST PRACTICE: ADOPTABILITY OF SOLUTION

Workplace software or a workplace hardware product is not unlike any end consumer product in user acceptance. People accept products such as clothing, furniture, electronics, or appliances only if they appreciate the combination of aesthetics, value, utility, and ease of use of the product. We all know that vendors cannot force us to buy or use the product as end consumers. The same principles apply in the workplace. Senior management cannot enforce usage if a software solution, office hardware (such as copiers or laptops), or furniture does not offer utility, ease of use, or aesthetics to products' end-users.

When vendors roll out workplace solutions or products at customers, vendors tend to collect commitments from customer management or product champions that the customer will commit to using the product. These commitments are of limited value and teeth if the product is not inherently appealing to end-users. While it is essential to make end-users aware of a product's capabilities adequately and train them appropriately, vendors should design the product itself to be "adoptable" by end-users.

BEST PRACTICE: PRODUCT STICKINESS

Latviv advises CSMs to look for "stickiness" in their product implementations not to be uprooted easily in the future. CSMs can institute this stickiness at customer locations via integrations with customer's other systems, the scale of adoption, and acceptance by many users. Once users adopt the product and integrate with daily activities, customer retention becomes a straightforward exercise. Nonetheless, CSM's team should continuously pursue ongoing marketing activities at customer sites to maintain awareness of the vendor's products. Out of sight, out of mind is a critical risk that vendors should always watch for and remediate.

BEST PRACTICE: SUCCESS BREEDS SUCCESS

Maintain relationships with product champions engaged throughout the implementation process. Serve their needs

and address their feedback promptly. Celebrate their success with the product in all possible forums. Make them the hero in their respective groups and organizations. Work with them to document case studies, record videos, and prepare presentations. Help promote these collaterals at customer's knowledge sharing applications.

Look for winning techniques that help them be more productive, effective, efficient, and successful. Ensure they have access to up to date training materials to share with their colleagues and peers. Help them spread the word and get you more license revenue.

Success breeds success. Strive for frictionless adoption.

➤ Key Takeaways:

- Strive for frictionless rollout by fine-tuning all three aspects of implementations–people, process and systems

- Celebrate end user wins

- Help the customer spread the word and help you gain traction across their broader user community

BEST PRACTICE: CHANGE MANAGEMENT

Changing any aspect of a workplace employee is a non-insignificant undertaking. Making the shift in a person's daily schedule or activity is akin to changing someone's habit. It takes effort to socialize the need, educate, initiate, and monitor usage patterns until a person creates a new practice. Any visualized change needs to be well thought through before customer considers for application in the workplace.

Project coordinators need to watch for both overt and covert pushback. They need to prepare responses ahead of time for all potential objections from end-users. Both tangible and intangible benefits should be identified ahead of time, in addition to potential incentives that are meaningful to end-users.

Project managers should document a change management plan and share it with all relevant stakeholders. They should use the people, process, and systems framework to identify

dependencies across these three interconnected elements. Each potential issue or risk should be explored, discussed, and documented. They should locate mitigating solutions in addition to executing scenario analysis to identify all possible outcomes. Senior management should be presented with a holistic risk framework to take on the overall change management risk with eyes wide open. Typically, management at this stage accepts the risk as is, considers reduced risk after investing in mitigating solutions, transfers the risk to a third party, or avoids the risk by not taking on change management. Using the timesheet application example at an industrial organization, management could:

- move forward with the software's deployment across all its employees,

- deploy to only a subset employee base,

- transfer software-based timesheet responsibility to another third party, or

- decide to stay with the current procedures.

If the stakeholders decide to move forward with the change management initiative, periodic progress is monitored, shared with affected stakeholders, and reported to senior management. At appropriate project milestones, management continuously tracks the risk landscape and makes a call to proceed, risk adjust, or abort based on the information received on project coordinators.

➤ Key Takeaways:

- Any visualized change needs to be well thought through before customers consider for application in the workplace.

- Project coordinators need to prepare responses ahead of time for all potential objections from end-users and watch for both overt and covert pushback.

ABOUT LATVIV

Latviv is a provider of customer success management solutions and services, available as a cloud deployment option.

Latviv's solutions increase customer retention rates, boost upsell, cross-sell, and new license revenue, and help engage with prospects, with appealing customer success results.

Reliability and Better Security

The Latviv platform rides on the Google Cloud. Google provides cloud services reliably due to its experience operating its core services like Google Search. Security controls in the Google Cloud isolate and better protect data by various methods such as compartmentalization. The Google Cloud Platform meets the most stringent data security and data center reliability standards like SSAE16 and ISO27001, a level of protection that few corporate data centers can match.

The Latviv Difference

Latviv's SAAS platform passes the multi-tenant architecture cost savings to its clients, with an appealing pricing strategy. Latviv's scalable architecture and unique design make it easy to support its multiple client implementations on the same server instance. Each of Latviv's clients can, in turn, manage an unlimited number of their customers and engagements.

Latviv provides a rapid jump start through prebuilt content, system relationships, story tracks for working with all stakeholders, templates, and customer setup examples. System users can copy relevant content, update for their situation, and start using the system.

The platform uses an advanced decoupling framework to create a Lego block paradigm that Latviv users can use to create graphs, and capture disparate metrics, joined in user-determined dashboard views. With this highly flexible approach, users can create and articulate stories the way they want and link references to them to any system element.

Ask for a demo or better still, ask for free access. See it to believe it!

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