USER ADOPTION BEST PRACTICES:

Ensuring Successful Software Implementations

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Introduction

Every change is a risk, a leap into an uncertain future. When a new CRM, financial management, fundraising, or other software system is proposed, many staff members may ask: What will the organization look like after the change? How will my daily work be different? Will I still be good at my job? You can offer thoughtful, well-researched guesses, but there's no way of knowing for sure until you go ahead with it.

For some people, this uncertainty will be paralyzing. It may even make them angry. They might lose their motivation to do their job or feel overwhelmed by all that the new system can do. You may have figured out all of the business and technical issues, but if you don't think about what your users need, their feelings can sink your software.

Planning with user adoption in mind is an essential part of any major software conversion process. In this report, we'll help you understand how your staff members might feel about their new software system—then we'll walk you through tips and best practices proven to help users gain the knowledge, skill, and confidence they need to get the most out of their organization's software. We'll also review case studies that provide you with a glimpse into how other nonprofits have approached user adoption and the outcomes they achieved as a result.

TABLE OF CONTENTS

Chapter **1**

WHY DO PEOPLE RESIST CHANGE?

No one knows for sure, but it's likely that our resistance to change developed as a survival skill. In the wild, surprises usually came in the form of large predators. It was often safest to hunker down or stick to the same proven routines that had always kept your ancestors safe from harm. You probably don't have any toothy predators at your office, but that doesn't mean that your staff members don't feel similar fears whenever organizational changes are introduced.

The good news is that people are incredibly adaptable. Yesterday's fears can become today's workflow. But only if you invest time in helping them through those fears. To do that, you need to understand what they're so afraid of. Some of the most common reasons nonprofit staffers fear organizational changes include the following:

- Loss of Control – It's fundamentally destabilizing to feel as though other people are making decisions about your life.
- The Unknown – Change brings a lot of unknowns about the future. Too much uncertainty will feel like walking the plank rather than taking steps forward as an organization.
- Broken Routines – Imagine someone took away your morning coffee or made it impossible to keep up your exercise routine. You'd likely be frustrated and a little unsure of yourself. Change breaks the routines that give us comfort.
- The Possibility of Failure – It's common to feel doubt when being asked to do something new. What if you can't do it? Or what if you're really, really bad at it? The fear of failure can grow into bigger fears, especially the fear that they'll lose their job.
- A Rebuke – For individuals who were invested in the old systems and processes, change might feel like a rebuke of past decisions.
- Loss of Status – There's usually at least one ingenious person on staff who has figured out a way to work around the old system's limitations. The software's shortcomings make this person very important to the organization. A new system is a threat to that person's role as the software "Superhero."

- Too Much Work – Changing software systems is always going to come with additional work. It will take time to learn the system and configure it properly. If your team is working at capacity already, a big software change can be a tipping point.
- Real or Imagined Threats? – Sometimes people express important concerns during the selection or implementation processes, but their gripes sound like fear or a resistance to change. How will you sort out the difference between real and imagined threats?

Some people compare the feelings that come up during a reorganization or a massive process change to the stages of grief outlined by Elisabeth Kübler-Ross—denial, anger, bargaining, depression, acceptance. While not a perfect fit, especially if you attempt to map the stages of grief to the user adoption process, the idea that change elicits strong feelings and that many of those feelings are similar to grieving is useful as a reminder that you're making a mistake if you try to minimize what users feel about the change.

How can you hope to gain full acceptance of your new system if you think that what your staff members feel about the change is unimportant?

Chapter **2**

BEST PRACTICES FOR GETTING YOUR USERS ON BOARD

We talked to nonprofit technology experts and gathered tips and best practices they've used to ensure that their teammates are empowered to do their best work in a new software system. *(You can read more about each of the organizations mentioned here in the case studies that appear later in this report.)*

Make Sure the System Works

It's easy to fall into the trap of thinking about user adoption as a problem caused by staff members. In fact, poor or inconsistent use of your system might actually reveal problems with your software's configuration. None of the tips below will do any good if your software doesn't help users do their job very well.

The Found Animals Foundation found this out the hard way when some users who resisted change chose to work around the new CRM system it implemented.

Get Users Involved Early

When users are involved in the selection and implementation processes your organization experiences two important benefits: their input can help you learn what you need to know to choose the best system for your organization and configure it properly; they feel valued by the organization and they develop a stake in the success of the new software.

Food for the Hungry Canada faced a big change when it selected NetSuite, including deciding whether to adopt unfamiliar sales terminology for its nonprofit programs and services or customize the new system to fit existing processes. The implementation team led an open and frank discussion about how much of the existing language and sales workflows to keep and what to customize. In the end, it developed an implementation that worked for everyone.

Involve a Diverse Group of Users

What can marketing people tell you about your financial software? How can a program leader help you implement a more effective donor management system? You'd be surprised. Sometimes it's hard to see what processes need to be different because they're so familiar.

By involving a diverse group of users, you're more likely to account for all the various use cases for your software and to configure it in a way that works well for the entire organization.

At the Found Animals Foundation, Randi Levin, Interim Chief Information Officer, noted that the organization would have benefitted from the involvement of a more diverse group during implementation to better understand and define existing processes and avoid technical issues down the road. "I saw both technical issues and a lack of understanding of the processes," she said.

Make Your Case

The new system might be exactly what your organization needs, but if it's forced upon people with little explanation, you should expect a bumpy user adoption process. Staff members need you to explain why the change is necessary and for you to outline how exactly it will benefit the organization. They also need to see how the system will benefit them personally. Many organizations hold multiple meetings about the new software before training even begins.

Have an Executive Sponsor

It's good to have powerful people in your corner. An executive sponsor can help sell the new software to users throughout the organization and will also be more likely to provide the resources you need to help users, such as dedicated time for training and reduced workloads while learning.

Find Champions

Your executive sponsor is a kind of champion, but you also need people throughout the organization to get behind the system. Recruiting a diverse group of champions also is a sound business continuity strategy. If your new system only has one or two "power users", the software will be vulnerable to neglect or misuse when that one person leaves. Multiple champions of your software will ensure that your organization will keep moving forward with your software.

Work With Dissenters

Conflict can be uncomfortable, but resistance may actually be a sign of progress. Most dissenters care about the organization and its processes and it's very likely that they're expressing legitimate concerns about the software or its implementation. Listen to them, gather their feedback, and fix what needs to be fixed. If you do that, you'll likely see your dissenter turn into a champion who values the software system and feels valued by your organization.

Don't Skimp on Training

The organizations that experienced the most positive user adoption processes invested a lot of time in planning and carrying out training. Many users just need time to warm up to the idea of something new and they need the information and skill to competently carry out their work. Trying to get training done quickly or expecting users to be proficient in the system without investing in them only sets them and your system up for failure.

The Leukemia & Lymphoma Society felt that its best move during the implementation process was to invest in training directly from NetSuite. If the organization had any hesitation about the added investment in training, it found that the effort more than paid for itself. The Society not only got effective training—its trainer was also able to work with the technical team at NetSuite to fix small configuration issues as they came to light during training.

Train in Small Groups

It might seem easy and efficient to knock out training in one big session, but people aren't good at learning that way. A recent study of undergraduate college courses found that students who attended large lecture classes were 55 percent more likely to fail the course than if they attended active learning courses.

An all-hands presentation might be a good way to introduce the software, but to help people really learn it they need hands-on experience and the chance to stumble through and ask questions along the way. In this setting, you also have more opportunity to assess people's skills and pinpoint where they are struggling. And small group trainings open up opportunities for colleagues to share ideas, which can accelerate both learning and innovation.

Some People Need a Buddy

There are always going to be a few people who struggle with the new system, even after two or three small-group training sessions. Maybe they're not tech savvy or are afraid of looking dumb in front of colleagues. These people could probably use a buddy, someone who knows the system well and who will be a patient guide. A buddy can work with the user at his or her desk and immediately when the user needs help.

The Detroit Zoological Society made a point of pairing everyone with a buddy during the process—trainers followed up one-on-one with every trainee and worked with them until they became proficient with the new system.

Keep Training Bite-Sized

Long training sessions waste time. Keep sessions less than half a day and build in breaks. Some organizations even run mini trainings with a five- or 10-minute demo and a few minutes for questions, although these work best as a follow-up to previous training or as a way to introduce new features of an already familiar system.

The Found Animal Foundation is considering expanding its online training resources by creating short videos that walk a user step-by-step through a process. “If you put too much into the training it’s like drinking from a fire hose,” said Interim Chief Information Officer Randi Levin.

Make Training Fun

Food, games, and prizes can turn drudgery into fun. Games are an especially effective way to engage people in training. A scavenger hunt or software olympics—activities that bring out the competitive side in some people—can help you guide users through the content you need to cover and will motivate them to learn.

Give Them Homework

What happens when the training ends? Unless they’re using the system, they’ll forget what they learned. Homework gives them a reason to keep going back to the system and allows you to monitor who understands how to complete certain tasks and who doesn’t.

The Leukemia & Lymphoma Society assigned specific tasks in a “sandbox” or experimental version of its ERP software. It then used system admin tools to track the activities of specific users to verify how successfully they completed the assigned tasks.

Build in Accountability

How do you know whether people are giving their best effort to learn the new software? You need a system in place to monitor activity and to check whether the software is being used properly. Some organizations make this information part of individual performance reviews and find that their staff members are more motivated to learn and grow with the software.

Give Users Visibility Into the Data

Some organizations hold regular meetings where system data takes center stage and find that they get more consistent and reliable data as a result. When everyone can see the data it becomes obvious who is and isn’t keeping up.

More importantly, visibility into the data allows users to see how their work affects the entire organization and helps them feel more invested in its success.

Food for the Hungry Canada shows the value of its data by holding weekly budgeting meetings where every attendee is responsible for a line item on the “profit and loss report”.

Force People to Use the System

Meeting agendas in the system, real-time budgeting, impromptu reporting meetings—there are a number of ways you can require people to use the system frequently. And the more they use the system, the more comfortable and proficient they will be.

The Leukemia & Lymphoma Society makes it a point to publish meeting agendas and other important documents in its CRM system so that it can guarantee that staff members will regularly use the system.

Say Goodbye to the Old System

Set a firm date when the former software will no longer be used, and then block people from accessing it. If you send a clear message that there’s no going back, people might find it easier to accept the change and move on. One nonprofit organized a tongue-in-cheek funeral for its old database as a light-hearted way to mark the transition and celebrate a successful implementation.

Chapter 3

CASE STUDIES

The following case studies look at actual organizations that have implemented NetSuite products to see where they succeeded with user adoption and what they learned.

Found Animals Foundation

Los Angeles, CA
Revenue and Support: $11.9 million (2014)

The Found Animals Foundation has a high tech solution to the very old problem of lost pets. In addition to veterinary and adoption services, Found Animals provides microchips that clinics across the country can use to register animals in a national database.

To carry out such an ambitious project, Found Animals needed a powerful software system that could manage its financial, point of sale, registry, and client data. Several years ago it chose NetSuite, but continued to struggle to carry out basic financial tasks. In fact, some finance users began working outside the system because they found it easier to complete some tasks without the use of the software—not because the software wasn't up to the task, but because the users had not been sufficiently trained on the new system.

Randi Levin, who joined Found Animals as its Interim Chief Information Officer in 2015, noticed early on that Found Animals staff members "didn't really know all the things [the software] could do." At the same time, simple processes were not configured simply enough to allow the software to function to its capabilities. "It was much more complicated than it needed to be," Levin said.

Found Animals needed to rethink how staff used its NetSuite software to allow them to get the most out of the system, which ultimately meant changing the way people did their daily work.

What Went Wrong?

Although Levin wasn't working with Found Animals when the organization implemented NetSuite, it was clear to her that the system was set up to fail without careful planning. "The accounting department must have selected and implemented the system without engaging IT staff," Levin speculated. She thinks other user groups may also have been left out of the early stages. "A more diverse group was needed at implementation," she said. "I saw both technical issues and a lack of understanding of the processes."

The need for a diverse selection and implementation team is especially important at an organization with so many user groups. Accounting and finance is the most active user group, but customer service, IT, marketing, and sales staff also need to use the system regularly. Without their input, not only are the workflows potentially more complicated than they need to be, but the opportunities for integration are limited. For a system such as NetSuite, which is built to be scalable through integration, Found Animals was not realizing the full potential of its system—all because it didn't draw on the knowledge and insights of users across the organization.

System Reboot

Levin decided that, to get the most out of NetSuite and begin using it to manage pet registry information, she had to get staff buy-in on the new system by showing them all that it was capable of doing for them and their work. She led meetings that illustrated how Found Animals could automate some tasks and increase the organization's efficiency overall. This early information campaign was a critical part of the system reboot.

"It was an easy sell," Levin said. "They recognized that the old way of doing things wasn't working." Showing users the benefits of new features and adjusting workflows was just the beginning. To drive home the benefits and deliver that efficiency, Found Animals staff needed one-on-one training and support.

"The best way is to show them personally. You have to go from a business process perspective and say, '*We're trying to accomplish this and this will benefit you and the business.*'"

— Randi Levin, Interim Chief Information Officer, Found Animals

Building on Successes

Now that Found Animals' technologies are configured to help it achieve its mission, it can build on that success. Levin has instituted biannual cross-departmental planning meetings to review software updates and determine how to best take advantage of new features.

Found Animals users have also been taking advantage of training materials that are optimized for use on mobile devices. In fact, Levin is considering expanding the online training resources by creating short videos that walk a user step-by-step through a process. She emphasizes that the videos will need to be short to be effective. "If you put too much into the training it's like drinking from a fire hose," Levin said. "It's overwhelming. Training in smaller pieces and that's business-process focused works much better."

San Francisco Society for the Prevention of Cruelty to Animals

San Francisco, CA
Revenue and Support: $28.5 million (2015)

The SF SPCA is one of the oldest humane societies in the U.S. and was a pioneer in the no-kill movement. As a large, innovative animal welfare nonprofit with programs to place pets in homes, provide veterinary services, and educate the public about caring for animals, technology plays a central role in helping each staff member do good work.

SF SPCA's finance team chose NetSuite to handle all back office functions. However, the organization's technology ecosystem remains complex, and staff in other departments continued to use existing systems with similar functionality, such as Salesforce and Raiser's Edge, which meant that the organization was not using the NetSuite CRM the way it was meant to be used—and therefore, was not benefitting from its true capabilities.

To further complicate the matter, the very specific software needs of an animal welfare organization inevitably have to be fulfilled by point solutions. SF SPCA needs a point of sale system that manages medical records in its veterinary clinic, and its adoption center needs to manage the steps and information in the adoption process—which it accomplishes with a system called PetPoint. These specific needs and the fact that not all departments were involved in the selection process meant SF SPCA found itself with different departments working in silos while the new system continued to be underused.

Lynne Tromble, Director of Finance/Controller, said that underutilizing the systems allowed historical divisions among departments to continue and possibly even grow over time.

Involving Users Breaks Down Silos

Like a lot of nonprofits, SF SPCA didn't set out to build such a complex software ecosystem. It happened as specific departmental needs arose and specific solutions were found.

The leadership at SF SPCA has changed since most of these systems were implemented, but Tromble believes that many of the software choices were top-down decisions that didn't involve the systems' users.

When organizations take this approach, the two most likely outcomes are:

1. Users resist the change and develop workarounds or simply ignore important tasks.
2. The implementation team attempts to configure the new system as closely to the old system as possible to cause as little disruption as possible.

It's likely SF SPCA took the second approach, which is why there has been very little effort to consolidate or integrate the systems and why departments continue to be siloed. When departments have very few opportunities to interact—and don't share data or software—staffers don't have visibility into what's happening in the rest of the organization. Software selection is about more than finding a tool—it is a major factor in your organization's culture.

Consultants Can Be a Crutch

Although Tromble started at SF SPCA long after it had implemented NetSuite, she quickly noticed how little knowledge users had of the system. Very basic tasks, such as editing forms or producing reports, were often sent to a consultant rather than done in house because staff weren't properly trained on how to use the system to complete them.

Outsourcing system administration tasks can seem like a quick and easy fix, but it can be costly in two important ways. The most obvious cost is in dollars—a good IT consultant is expensive—but even if your organization can afford to pay a consultant's rates, there's a bigger cost: you're outsourcing your organization's ability to think strategically about its software and the role technology plays in its future.

If staff members cannot do basic tasks, they won't be able to recognize opportunities to use the system in new and creative ways that can improve their effectiveness or efficiency.

Maybe your consultant will also act as an ongoing strategic partner, but again it will cost you, and there's the reality that, no matter how good your consultant is, she is not likely to be as close to your mission or as focused on your impact, especially when she is juggling other clients and projects.

Old Workflows Limit Potential

In the finance department, Tromble discovered that many of the capabilities of NetSuite were not being utilized. She speculates that this is primarily because the organization converted from QuickBooks, a relatively simple program that in most cases is not robust enough to serve a large organization. She thinks that leaders configured NetSuite to maintain already established workflows, which limited the new system from doing all of which it was capable.

The positive spin on this approach is that users were likely able to learn how to use the new system very quickly. But while there may be a short-term benefit, the downsides are long-term and severely limiting. Though configuring the system in this way meant that users were likely able to maintain familiar routines, it sacrificed the potential of the new system to transform how the organization met its mission.

Organizations that move from a simple system to a more powerful one without taking advantages of the added capabilities are impeding their own abilities.

At SF SPCA, nearly everyone uses NetSuite to file expense reports and another 10 to 12 users check budgets or drill down into financial data, but the system is capable of so much more. The limited configuration has meant that very little of NetSuite's reporting capability is being used. For example, accounts payable vendor fields are being left blank because they weren't used in QuickBooks.

"There are a lot of examples like [missing vendor information]. There's just enough information in the system to do what you need to do, but there's a lack of information to make strategic decisions," Tromble said.

User Adoption Shows the Way Forward

SF SPCA recognizes the need for greater efficiency. It also knows that the challenge ahead is big. It's unlikely that increasing the capabilities of NetSuite or integrating systems will be well-received without first showing users the benefits and training them to work differently.

Tromble believes that she'll need to focus first on expanding the use of NetSuite within the finance and supply chain user groups. To do this will require first exploring the capabilities of the software and making decisions about how her department will use it, then devoting time to one-on-one training to make sure everyone is proficient using the software.

Once the finance and supply chain users are able to show the benefits of expanding the use of NetSuite, she hopes to present CRM adoption to the rest of the organization, thereby addressing the specific issues it faces with Raiser's Edge.

"A lot of people don't like Raiser's Edge," Tromble said, "but it's familiar and they're comfortable with it."

Change is Hard

People don't like change. They don't like being told what to do. And, in the nonprofit world, they also can be so passionate about their mission that they see technology as a barrier, rather than a tool for change.

SF SPCA recognizes the value of NetSuite to run its organization and analyze its business data. Though selection practices and user adoption issues have resulted in challenges, the organization is on its way to making better use of its systems. Where it is still struggling is in figuring out how to build bridges across systems to make work easier, not harder. To do that, it's going to have to embrace change and figure out new ways to work across departments, starting with cross-organizational meetings about technology and data management. This, and other efforts to break down silos and refocus attention on making better use of existing technology, will set the stage for needed changes and will make it easier for users to buy-in when their technology and workflows change.

Lymphoma & Leukemia Society

Rye Brook, NY
Revenue and Support: $317 million (2015)

Approximately 170,000 people are diagnosed with blood cancer each year. The Lymphoma & Leukemia Society seeks to improve the quality of life for patients and ultimately find a cure by funding research, accelerating the adoption of proven therapies, and providing patients with the resources and information they need to live long, healthy lives.

LLS believes that to accomplish its goals, it needs to be transparent, cooperative, and flexible enough to seize opportunities as they emerge. Until recently, LLS felt that its technology was holding it back. It had been using a custom installed CRM system that was difficult to use, was not integrated with other software systems, and was growing increasingly outdated.

In 2015, LLS converted to Saleforce's CRM platform and NetSuite's Cloud-based ERP software. It also implemented other new systems such as Coupa and Concur.

> "We wanted systems that were agile, transparent, and allowed people to make decisions."
>
> **— JR Miller, Senior Vice President of Finance, Lymphoma & Leukemia Society**

Managing Major Change

LLS couldn't just teach its staff members the features and functions of the software. Financial data was now available daily, not just monthly. And data in systems that were once inaccessible to most users was now available with just a few clicks. The entire organization had to learn how to work differently.

Miller and Edison De La Cruz, Vice President Controller, started with how data was managed in the system. They redesigned the chart of accounts, figured out the dimensions LLS wanted to track, mapped the data from the old systems to the new ones, and outlined how to make sure the data was entered into the system consistently.

"Our old system didn't grow with the business," said Miller. "We had to rethink everything."

Early in the conversion process LLS took time to think about what users needed to make this change as painless as possible. The implementation team shared its data maps to help people understand how familiar data would be handled in the new system. It also created “cheat sheets” that clarified how data should be entered so that it would be consistent across the system.

These activities set the foundation of a thoughtful conversion.

Helping Users Adapt

De La Cruz played an important role in both helping the implementation team understand what users needed from the software and helping users learn what they needed to know about the systems.

“It was important to me to keep the user in mind,” De La Cruz said. “There were a lot of tasks we realized work better when users don’t think about them too much. I also wanted to improve workflows to help them do more in less time.”

Once Miller and De La Cruz had configured the systems to meet both user and business needs, it was time to start training users.

For training on its NetSuite system, LLS hired the vendor to run the entire training process. The live training exceeded expectations. Miller and De La Cruz found that the trainer was committed to making sure staff members would become skilled and confident users of the system. In fact, she took a lot of time before the system was even implemented to understand what LLS needed from its software and worked with both user and technical teams to make sure the system delivered.

“[The trainer] was outstanding,” Miller said. “She was prepared, knowledgeable, and patient. She listened and even offered her own constructive ideas.”

To reinforce the training LLS staff members received, De La Cruz designed homework projects in a “sandbox environment” and scheduled interactive webinars where users were assigned specific tasks to complete within the system and were given opportunities to ask questions or reach out for help. De La Cruz then verified that the tasks were completed and identified any areas where users needed additional support.

A Culture of Continuous Improvement

Now that LLS has integrated systems in place, staff members are able to use the increased visibility of organization data to see a bigger picture and make informed decisions. Management is also able to see when data is missing or incomplete. Miller believes this increased transparency is part of the organization’s commitment to continuous improvement—a concept that is core to the LLS culture.

"Now technology is not an inhibitor—it's an enabler," Miller said. "When issues come up, we get feedback that tells us whether it's a structural issue or a lack of skills or other issue. Then we're able to respond."

LLS has formalized this process improvement through monthly meetings to review the data and system usage, but he thinks there could be additional opportunities. One idea is to incorporate technology skills in performance reviews to better hold individuals accountable for knowing the system and improving their skills.

Miller recognizes that there's a lot of work to do, but overall he's satisfied with how well LLS has adapted to such a significant change. The new software is transforming how the organization meets its mission by removing distractions and obstacles to allow staff to carry out the important work of improving quality of life for patients of Leukemia and Lymphoma.

Detroit Zoological Society

Detroit, MI
Revenue and Support: $47.8 million (2015)

Each year, the Detroit Zoological Society reaches hundreds of thousands of people with wildlife education programming.

To manage the financials of such a large organization, the Zoo felt it needed a sophisticated database system that could integrate its software tools and make all of its data available in one system. That's why it chose NetSuite.

The implementation of such a powerful software system was going to be a big change for Zoo staff members. According to John Krueger, Chief Financial Officer, people in all 25 of the Zoo's departments needed to use the system. "Everyone got access, including logins and a dashboard setup," Krueger said.

How did the Zoo make sure that every staff member fully embraced the new system and became a proficient user?

> "I was impressed by the implementation methodology. NetSuite spent a lot of time, before even installing anything, trying to understand how people work."
>
> — **John Krueger, Chief Financial Officer, Detroit Zoological Society**

Adoption Starts at Selection

To select the software that best met its needs, the Zoo formed a committee that included both financial and nonfinancial staff members. The committee met frequently to discuss use case scenarios and workflows within each system it was considering to ensure that it chose a system that could meet every user's needs.

This committee's work not only informed the selection of the Zoo's software, it also played an important role in user adoption. By taking into account the needs of users across the organization, it also showed those users that the system is important to their success and that their ability to do their job well is important to the organization. The Zoo experience shows that early interdepartmental involvement brings both practical and cultural benefits—you get the most out of your software and you foster a culture that values the new system.

The Vendor Plays an Important Role

No amount of teamwork is going to make up for a system that isn't configured to your users' needs. At the Zoo, NetSuite made it a priority to spend time before and during implementation to listen to users and learn how they would like to use the system.

This upfront work also allowed the Zoo to make important decisions about what workflows to keep and which ones would be adapted to the new system. Overall, staff members preferred to minimize customization and learn new workflows, partly because the old way of doing things was so slow and cumbersome that many of those processes needed a reboot anyway.

"People were very happy with the new workflows," Krueger said. "Particularly the accounting staff, who were doing a lot of things manually." For example, before the Zoo implemented NetSuite, point of sale data had to be transferred manually—that's thousands of transactions each day that are now transferred automatically.

Train the Trainers

Training started with a core group—primarily accounting and financing staff. NetSuite provided training both via webinar and in person. Once this group of users had a thorough understanding of the system, they went on to train the rest of the organization.

Krueger recalls that, at first, it struggled with training. The trainers worked quickly to solicit feedback and adjusted the flow of the sessions to their audience, and the difference was immediately obvious. Participants left more satisfied with the training and feeling more confident in their use of the system. To make sure trainees got it, trainers followed up one-on-one and worked with them at their computers.

After the initial training sessions, the Zoo formed a process exception team that met monthly to review how people were using the system and to identify user errors. Overall, the team found very few patterns in the mistakes users were making, and were able to address errors individually rather than scheduling additional training.

Thanks to its new system and thorough training, Zoo staff members are now able to shift some of the time they spent on manual tasks to playing a more strategic role in the organization. "Accounting and finance time has been freed up and now they have more time to do analytical work," Krueger said.

This is another valuable user adoption lesson. A new software system can empower employees to make more meaningful contributions to the organization.

Employees who get to play a more strategic role in the organization thanks to the new software are more likely to be enthusiastic users of the system and to feel greater job satisfaction.

Food for the Hungry Canada

Abbotsford, BC, Canada

Revenue and Support: $8 million (2015)

Food for the Hungry is an international organization that mobilizes expertise and resources to improve the lives of people across the globe. A lot of organizations do similar work, but what sets Food for the Hungry apart is its approach. According to Mark Petzold, Director of Communications and Technology, Food for the Hungry tries to view international aid holistically and emphasizes "walking alongside" communities that are stuck in poverty to help them solve problems on their own.

This "walk alongside" mindset may have been why Food for the Hungry experienced such smooth implementation of its NetSuite software, and why its users have embraced the integration that's facilitated cross-departmental collaboration.

"Every staff member uses the system," said Petzold. "We've tried to be as collaborative as possible."

Fostering a Culture of Collaboration

Ten years ago, Food for the Hungry was running six different software systems, most of them installed on individual computers. As a result, its departments worked in silos. And department leaders, many of whom were responsible for managing inventories or working with staff members around the world, were forced to make decisions based on out-of-date information.

Food for the Hungry chose NetSuite because its Cloud-based technology and built-in integrations made it easier to collaborate across departments.

But increased collaboration and new software meant that staff members would need to change their workflows.

Users knew their current workflows were inefficient. For example, the accounting codes were extraordinarily long and visibility into data from other departments was low. But Food for the Hungry knew that, despite the obvious benefits of the new system, it would need to work with staff members to develop a configuration that worked for everyone.

“The implementation team was pretty open minded,” Petzold said. “We discussed workflows with people and figured out the right decision.”

Is Culture-Specific Language Worth Customization?

Nonprofits don’t have “salesforces” that pursue “customers” or “leads”. Yet that was the language built into Food for the Hungry’s new system—initially designed for commercial businesses, NetSuite’s software had not yet been modified to meet the more specific needs of nonprofits, though it has since. At first, Food for the Hungry staff members balked at the idea of using the language of commerce to help needy people. “When we were working on the configuration of our system we had a lot of spirited philosophical discussions,” Petzold said.

In the end, the organization decided to pursue only a few customizations because, while the language wasn’t nonprofit-specific, the functions and processes were the same. As a team, Food for the Hungry realized that it could spend a lot of time and money customizing its NetSuite software, but the benefits were minimal.

For continuity, the language in the system became the terms the organization used all the time. Ten years later, the language feels familiar and even natural—when someone refers to “customers” today, Petzold said, “No one bats an eye”.

Don’t Skimp on Training

Once Food for the Hungry was comfortable with the configuration of its system, the next step was training users. Every staff member—

from marketing managers to warehouse workers—would need to use the new system. But rather than view this as a monumental challenge, Food for the Hungry saw it as an opportunity to reinforce its culture of integration and collaboration.

First, Food for the Hungry helped people get comfortable with the new system by showing them what it can do and explaining why the organization was making this change.

Next, it flew the core implementation team to NetSuite headquarters for in-depth training. Food for the Hungry's "train the trainer" approach meant that Petzold and others needed to know the system inside and out and much of the time they spent in San Mateo was used to test out scenarios and ask specific, complex questions.

Once the implementation team had the information and resources it needed, it moved computers into a conference room and led small-group training sessions that mixed together people from different departments. This approach was intended to help individuals gain a more holistic understanding of the system and foster a collaborative culture.

NetSuite offers the ability to assign user roles that limit access only to system features and functions relevant to each job, providing a more-streamlined interface—for example, marketing users only see system functions related to their own work without having to navigate through features and dashboards used by the finance or fundraising teams. But Food for the Hungry opted out of this feature, instead choosing a standard interface for all users. As a result, the first training session—which was geared toward personalized roles—did not go as smoothly as it could have. The implementation team adapted and the rest of the sessions went very well. These first training sessions lasted only three hours. "That amount of time seems like the maximum people can handle and still absorb all the information," Petzold said. From there, trainers assigned homework tasks to nudge users to keep learning. A few weeks after the original training, Petzold and the other trainers led a more in-depth training session.

Petzold recalls that training was a big investment of time and money, but he feels that, in the long run, this thorough approach to implementation and training saved a lot of time and money. And most importantly, the staff came out of the training empowered to take full advantage of the system.

"If you skimp on training you're going to be disappointed with the results," Petzold said.

Maintaining a Culture of Collaboration
Food for the Hungry's NetSuite software and its collaborative culture have been in place for about a decade, but it still invests time in making sure the organization and its users are doing their best work.

An important support to its culture of collaboration is its "open book" approach to management. The organization holds interdepartmental meetings where department heads report on financials and recent activities. This level of transparency is facilitated by the software's reporting capabilities and reinforces the value of the software across the organization. It also allows everyone to see how the data they work with translates into real-world decisions.

Petzold also works collaboratively across the organization when software updates come available. He and his team continually explore the software in search of opportunities to use it more effectively. And when new features are made available, he first reviews the documentation and, if it seems useful, he'll then go to department leaders and get their input and work with them to figure out how it will affect staff members before going ahead and implementing new capabilities.

He emphasizes that for software adoption to be successful you have to have champions at multiple levels who help make the software an integral part of the organization's culture.

> "Training of new staff and making changes to the system is far more effective when it's done grassroots style, with the end-user pushing for education and changes ahead of IT."
>
> **— Mark Petzold, Director of Communications and Technology, Food for the Hungry Canada**

By ensuring that every department gets the most out of the NetSuite software, Food for the Hungry Canada is able to focus staff time on its core mission of alleviating poverty rather than on manual data manipulation and IT maintenance.

OTHER RESOURCES

Adoption Is Integral to Your Tech Project Success
Tucker Maclean recaps his presentation at NTEN's 2015 Nonprofit Technology Conference.

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10 Tips for CRM User Adoption
A succinct rundown of top issues managers face in promoting user adoption.

Why Some Organizations Struggle to Introduce New Technology Systems
Karen Graham discusses why some organizations are not getting good value out of their software and offers a few tips for how to work on improving user adoption.

Technology Impact on User Adoption
This webinar recording explores the idea of user adoption versus user adaptability and discusses key principles of a user adaptability plan to maximize the success of your technology roll out. NTEN members can view the recording for free.

Next in Nonprofits 6
Karen Graham discusses user adoption and much more on the podcast *Next in Nonprofits*.

ABOUT US

About this report

NetSuite commissioned Idealware to research and write this report for its own audience of existing and potential customers, and selected the organizations for the case studies from among its clients. NetSuite provided all funding for this report, but was not involved in the research or content creation and had no input into editorial decisions.

About NetSuite

In 1998, NetSuite pioneered the Cloud Computing revolution, establishing the world's first company dedicated to delivering business applications over the Internet. Today, NetSuite provides a suite of cloud-based financials/Enterprise Resource Planning (ERP) and omnichannel commerce software that runs the business of more than 30,000 companies, organizations, and subsidiaries in more than 100 countries.

About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources.

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