

Preparing to Go Live With a New Process

Published on 03/28/2023

Onboarding can be a stressful milestone for many teams. There are new processes, new skills to learn, and users that need to be convinced to leave the old way behind. To make sure that your onboarding is a success, review some of the common challenges that teams face and evaluate the proven strategies for use in your company!

User Reaction: New software is challenging and scary.

This is a common sentiment across people at all levels and so we need to ensure that all the proper steps are taken to prepare your users for their new workflows and solutions.

What trainings do you want to run?

- Who in your org will need training? Can they be grouped together for a better presentation?
- Does everyone need to be trained directly? Will documentation or reporting be sufficient? Are your trainers available for any refreshers or make-up training?
- Will you need a variety of training topics? Will different teams only need specific information? Do different organization levels have more immediate needs requiring specific training?

What information resources do they have access to?

- Are they familiar with our team and feel confident in reaching out with questions? Is this something your team wants to be made responsible for?
- Are the end users capable of reading through user documentation and finding what they need? Should you centralize helpful documents for their reference?
- Have your users been made comfortable in finding the answers they need?
- Do your users feel comfortable creating test assets, proofs, or requests to practice with?

User Reaction: What's in this for me? How will I benefit?

As exciting as a new process might be for a Project Manager or process coordinator, team members may need additional convincing that this will be worth their time investment.

- Identify the problems that your users face in the current process. State them in a concise manner and explain how these problems will be resolved
- Share your ideas about what your team processes will look like after the new processes have been integrated. Will your users take on more responsibilities? Less?
- The designers and project managers aren't the only ones working within Lytho. There are also the users submitting requests and reviews. Help them have a smoother integration by calling out the benefits they'll receive and how making this easier on your team will make it easier on their side.
- Leadership will want to see value come from the time you've invested into the platform as well. How will everything you have done result in a cost reduction or risk mitigation?

User Reaction: Why didn't I hear about this sooner? I'm not ready!

People tend to be creatures of habit who like things, especially in our professional lives, to stay the same. To that end, we need to ensure that everyone feels informed and aware.

Three Email Strategy

- The initial update (2 weeks out) – This email aims to let your users know why things are changing, how they'll benefit, what will be expected of them – These tend to be the three major road blocks when it comes to adoption.
- The reminder (1 week out) – This email reasserts that you'll be moving into a new system, let's them know what they should be doing in the interim and asking for questions if they have it.
- The final reminder (day before going live) – This email is their final notice. It restates all of the important information they need (the link, to change bookmarks, all new work MUST go in the new system) – People don't often like to admit they are lost. This email provides them with a safe way to easily identify key information.

Teams that find ways to make their users feel involved with the new process see greater rates of adoption. Think of fun promotional campaigns, contests to encourage adoption, or even exercises using a recent office joke to make this feel like more than "another new piece of software".

You can find pre-made Lytho emails for Workflow [here](https://guide-ignite.inmotionnow.com/help/email-templates) (<https://guide-ignite.inmotionnow.com/help/email-templates>) and DAM [here](https://guide.lytho.com/help/dam-email-templates!) (<https://guide.lytho.com/help/dam-email-templates!>)

End Users often respond in these three ways:

- I have thoughts and lots of questions! – These users are great! They will challenge your own knowledge and understanding of the platform and help you better your developed strategies. You might even be able to build an FAQ or internal help guide based on their feedback.
- New software? Okay sure. – These users are indifferent to changes in processes and are here to do what they must. No issues here.
- Wait, Lytho? I've never heard of that. What do you mean we're already live?! – It is always going to happen that a user misses your email(s). Prepare for these late notices and how you plan to approach them. Perhaps you have an email drafted with the processes, rationale, and videos ready.

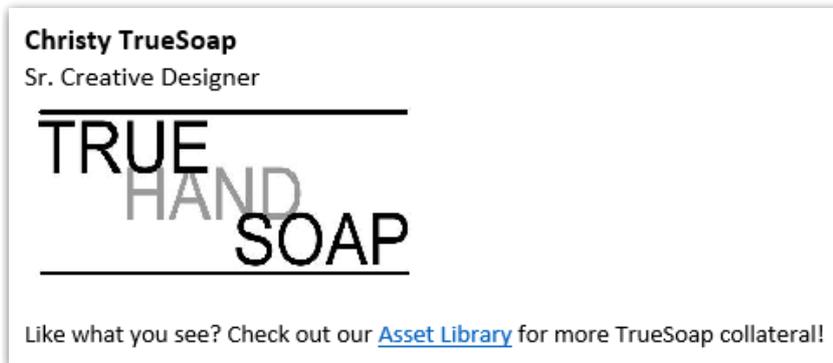
User Reaction: The new process is neat, but I'm just going to keep doing it the same way I always have.

As mentioned, people are creatures of habit and may resist the change for a perceived "easier" route. Remember, they may not see that this is more difficult for everyone else and may only see their own convenience.

Consistency is Key

- Reaffirming that you will not be facilitating the older methods will be rough at first, but eventually that process will fall away and we'll have this newer process to charge ahead.

- “Just this once” is a gateway to bad habits! Consider having a standardized email template on hand that you can reply with if a user tries to work around your new processes.
- All old documentation pointing to the old process should be archived or modified.
- Add a link to your requests, brand guide, or assets in your team's email signatures.



Leadership backing is CRUCIAL

Consider asking your Executive Sponsor to introduce the initiative during trainings and reiterate the reason for this update and value your stakeholders will start to see.

- All it takes is one leader to deviate from the process for everything to start falling apart.
- Leadership makes the BEST fans and their usage and support can create pathways to success for new initiatives.
- The more it is talked about internally, the easier it is to adopt, as an overall organization.

Think about the above concepts and how you might use them in your business!

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