

# GROWTH THROUGH STAKEHOLDER COLLABORATION



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## Stakeholder Engagement: Adoption Services

We have generally found that Investment Management companies have not been satisfied with their earlier Cloud implementations. There is an emergent trend to take advantage of the new generation of technology. Poor adoption has led to many projects failing, with failures reaching 75% for those projects involving CRM. For once, the technology is not to blame!

- Our Adoption Services encompass all elements of cloud engagement through out the enterprise, from strategy through operations to stakeholder behaviour and end-to-end value streams (client stakeholder to outcome). This is all part of our **outcome** - based methodology.
- Core to our approach are defining and agreeing real-time measurements especially related to those that influence positive behavioural change such as the use of Lead Indicators and Leaderboards.
- We deploy behavioural and learning experts that assess the readiness of the client organisation to adopt the cloud solution, including consideration to competency, capacity and resilience to change. This results with an adoption plan that includes:
  - Stakeholder buy in – using communication & engagement
  - Preparing and measuring behaviour change
  - Performance management
  - Education, training and accreditation
  - Centre of Excellence for sustainable learning
- Our approach is aimed at enabling our clients to reach a high level of self-sufficiency, and to provide on going thought leadership, advice, support and further development.

### Our Methodology

#### Understanding

- Business Goals & Outcomes
- Needs & Constraints

#### Engage & Evolve

- Sponsor & Champion
- Behavioural Risk & Change
- Business Data Dictionary
- Measurements: lead indicators
- Collaboration
- Communications
- Education & Training

#### Designing

- Object Model / Custom Objects
- Adaptive Solutions
- Reuse / AppExchange

#### Build

- Configure & Develop
- Systems Integration
- Data Migration & Data Quality
- Test & Iterate

#### Deploy

- User Acceptance Testing
- Production / Review

### Adoption Services