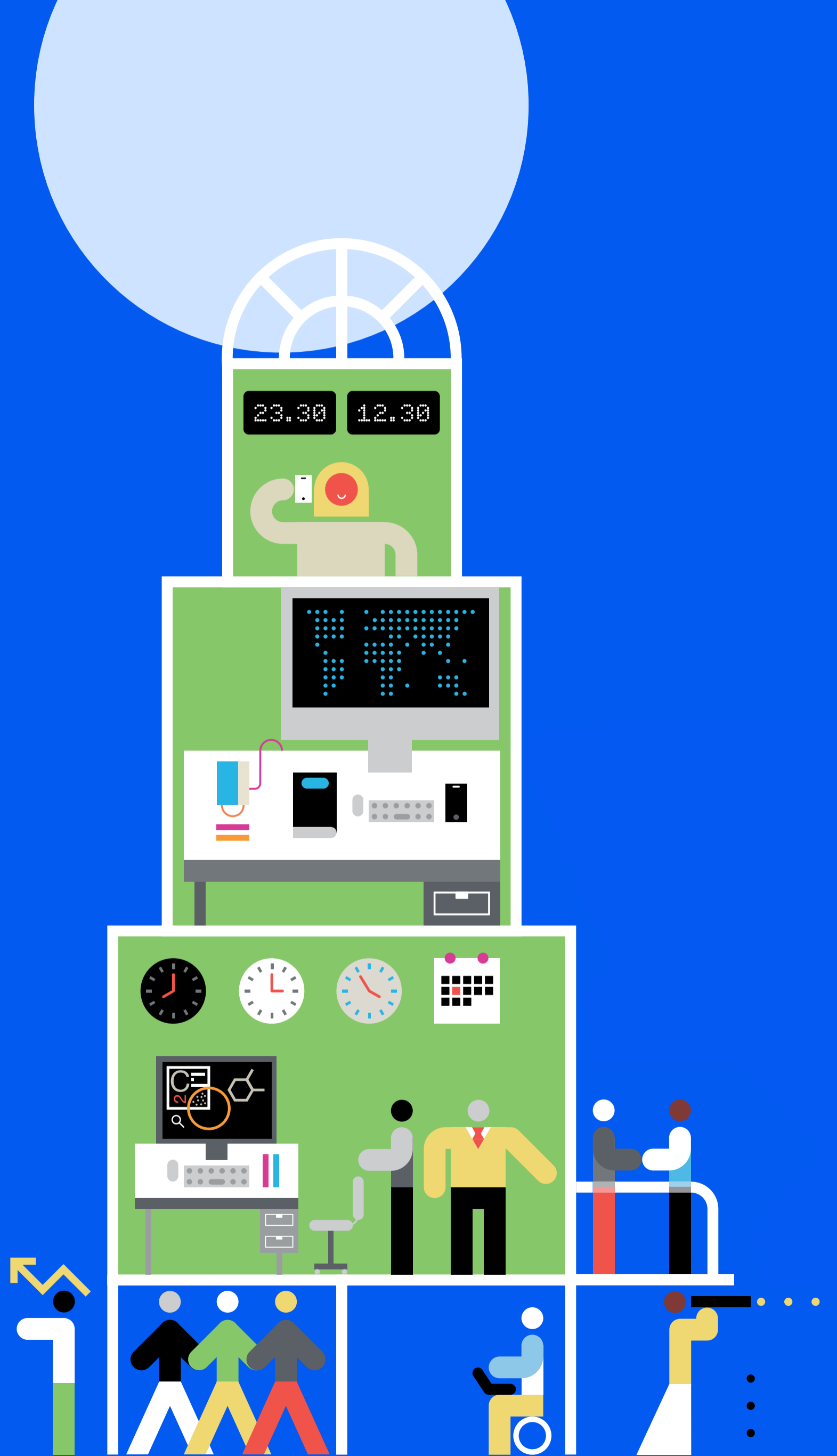




The Future of Frictionless Work—Ensuring a Smooth Ride and Making It Stick



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Comprehensive Game Plan

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Chapter 1: The Case For A Comprehensive Game Plan

As the workplace rapidly becomes more digital, employees who once welcomed technology now face a complex array of products just to achieve simple tasks. In other words, workplace technology is in danger of becoming its own worst enemy.

Many strategic IT decision-makers (ITDMs) have long identified and championed the need for workplace digital transformation—and successfully introduced intelligent workspaces for an integrated, streamlined experience.

While embarking on that major digital transformation to improve the employee experience is exciting, choosing a solution is only the first hurdle. Having seen an opportunity for change, the next challenge is ensuring that the journey is a smooth ride for everyone.

This guide provides strategies to support a successful digital transformation—and to mitigate the risk of an unsuccessful implementation and lack of product adoption. It offers best-practice advice and downloadable materials for key stages of the project: planning, implementing, adoption and ongoing optimization.



Implementation and Adoption Risks

Miscommunication could cost up to

\$26k

per employee in lost productivity²

Failed adoption could lead to losses in the⁵

\$Millions

Stalled usage on average leads to a

17%

loss in productivity, known as 'The Great IT Choke.'³

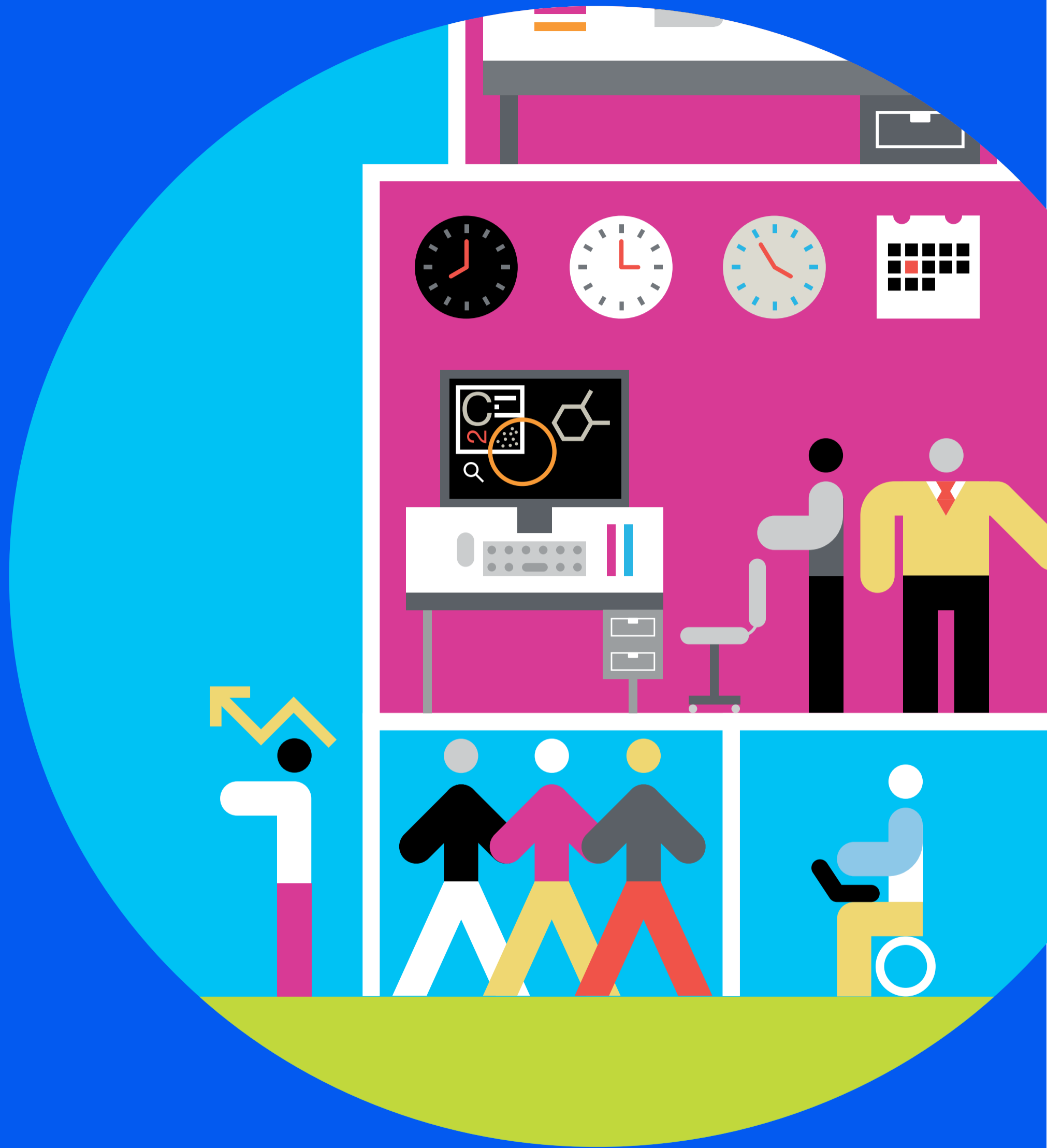
Poorly managed projects could see budget overruns of⁴

200%



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Chapter 2: Architecting Implementation



Chapter 2: Architecting Implementation

Communications, to ensure successful execution. This template offers an example framework:

Project Stage	Comms To...	Key Messages
Project Go-Ahead Decision	Senior stakeholders IT team All staff affected	Strategy, vision and purpose Project timeline, project objectives As above As above
Platform Decision	Senior stakeholders IT team All staff affected	Decision end why
Regular Project Updates	Senior stakeholders IT team All staff affected	Project progress, next steps, issues
Engagement With Pilot Users	Staff involved in pilot team	Timeline, objectives, success measures
Project Launch (pilot phase)	Senior stakeholders IT team Staff involved in pilot team	Timeline, teams involved Success measures As above Confirmation of support and support
	Senior stakeholders IT team	

The success of a digital transformation depends on various factors, such as effective teams, clear goals and healthy budgets, but working hard upfront to lay the groundwork thoroughly and thoughtfully will give the project a great head start.


i. Know the company's strategy and purpose

IT decision-makers must understand how implementing new technology in an organization feeds into the company's strategy. Relating plans and successes back to the company's plans is critical to getting crucial buy-in and engagement across the business. Teams want to understand the “why” as well as the “what.”

ii. Get stakeholders onboard

Engage key stakeholders as soon as possible with in-person meetings, briefings, data and discussions. This **Communications Plan Template** offers support for pulling this together.

ITDMs need continued support from the C-suite to drive the success of digital change; in fact, research shows that 72 percent of projects supported by “extremely effective sponsors” meet or exceed objectives. Remember that these supporters' needs and concerns differ from those of end users. Position projects in a business context, such as how productivity will improve or how processes will be transformed. Tailor the message to this senior audience by including return on investment (ROI) stats like improved revenue and employee engagement. Keep it short and simple—but be ready to dive into the detail when questioned.



“ The thing that I see today is that there is a gap between executive management and IT.

I think the smart thing for business leadership to do is to reach out to IT and try to understand it better, because moving forward it's going to be very difficult to innovate if you don't have the technology in place to provide for those things.

Clint Newell - President, Clint Newell Auto Group

”

iii. Focus on the user

Success doesn't happen without the end user; after the C-suite, they are your most influential and crucial stakeholders. The project will live and die on their response.

Tim Devine, global technology partner at PA Consulting, says there is a trap ITDMs need to avoid: “There is often a common misconception that if a product works for IT technically, then it will work for all of their users. Our experience shows that that is rarely the case. Few of the people who are going to use the solution are as engaged with it as the IT department, and so they struggle a great deal to use the solution.”

Engage users in the digital transformation project early on; understand their pain points and goals to be able to answer the burning question, “What’s in it for me?” Use this user [Workshop Plan](#) as a guide.



Item	How	Desired Output
Identify the user groups	Identify the user groups and their roles	Identify the user groups and their roles
Identify the user needs	Identify the user needs and pain points	Identify the user needs and pain points
Identify the user goals	Identify the user goals and objectives	Identify the user goals and objectives
Identify the user expectations	Identify the user expectations and requirements	Identify the user expectations and requirements
Identify the user constraints	Identify the user constraints and limitations	Identify the user constraints and limitations
Identify the user preferences	Identify the user preferences and choices	Identify the user preferences and choices
Identify the user feedback	Identify the user feedback and suggestions	Identify the user feedback and suggestions
Identify the user support	Identify the user support and resources	Identify the user support and resources
Identify the user training	Identify the user training and education	Identify the user training and education
Identify the user communication	Identify the user communication and messaging	Identify the user communication and messaging
Identify the user engagement	Identify the user engagement and participation	Identify the user engagement and participation
Identify the user adoption	Identify the user adoption and usage	Identify the user adoption and usage
Identify the user retention	Identify the user retention and loyalty	Identify the user retention and loyalty
Identify the user satisfaction	Identify the user satisfaction and happiness	Identify the user satisfaction and happiness
Identify the user loyalty	Identify the user loyalty and advocacy	Identify the user loyalty and advocacy

Working For The Users

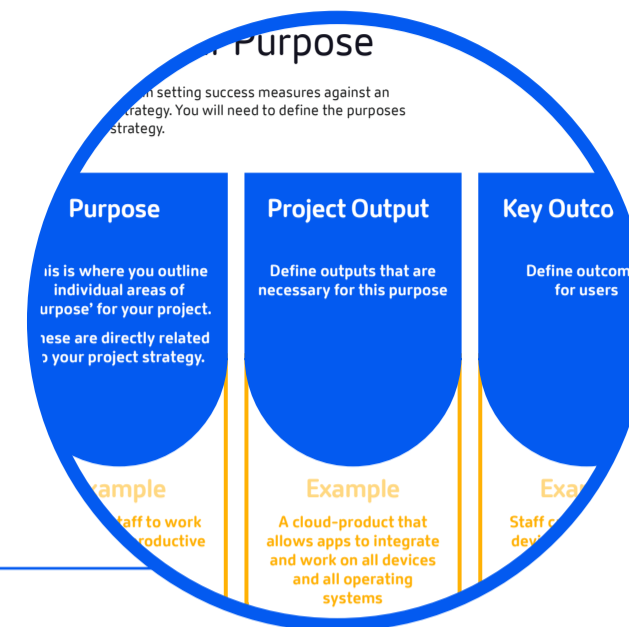
Marco Stadler
Team Leader of Workspace Services, Bechtle ⁸

“The goal of the project was simplifying the technology for everyone. We take user feedback very seriously, because it’s helping us to improve our deployment, or improve our documentation or even improve the system itself. We have been focusing on user experience, and it doesn’t matter if it’s user experience for administrators, technicians, engineers or the people who are doing their work in the back office or a salesperson; it should be easy to use for everyone. An important part of the project was not just delivering the technology but also telling the user how they can profit from using the technology.”

iv. Set goals and success measures

A digital workplace project should feed the company's overall strategy and goals, but it should also have its own objectives and measures of success to give IT teams specific focus.

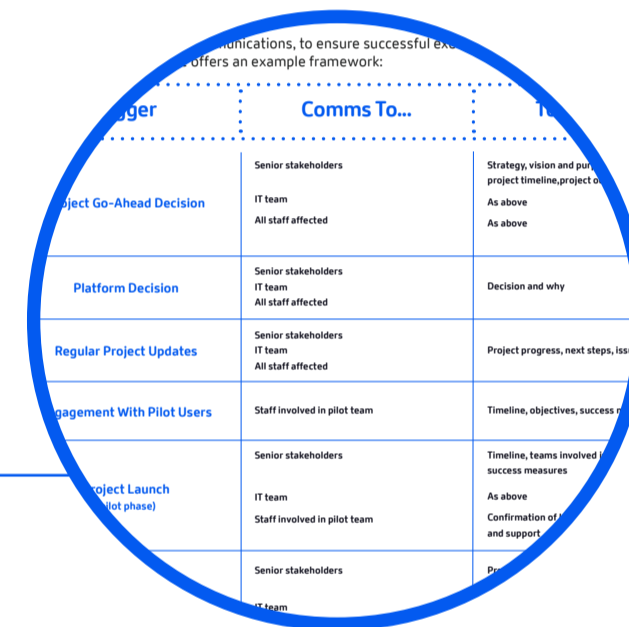
Consider the company's strategy and purpose, and extrapolate outputs, outcomes and metrics from the transformation that would satisfy those targets. Build this list using this [Outputs Template](#).



v. Overcommunicate with stakeholders and users

Communication plays a critical role in working with stakeholders and users. Create a steering group involving people from across the business. This core group provides a useful sounding board and can be the technology ambassadors and transformation champions among the rest of the organization.

This [Communications Template](#) provides a useful starting place for strategy.



vi. Plan the journey

Finally, ensure that there is a comprehensive plan.⁹ It's crucial to create a step-by-step, time-boxed process for the implementation that captures every work stream and task. Consider the tasks that need to be addressed in the bigger picture.

In planning for the macro as well as the micro, the implementation path is likely to be a smoother journey. This helpful [Planning Checklist](#) is a great place to begin.



Chapter 3: Diving In And Rolling Out



Chapter 3: Diving In And Rolling Out

It's encouraging and rewarding to see a digital workplace project headed toward implementation. When the technical side of the project is moving smoothly, it may be tempting to breathe a sigh of relief. However, now is the time to work at full throttle to ensure that the new product/s is efficiently rolled out and tested.

i. Be transparent and share progress

Ramp up communications and remind colleagues of the strategy and purpose behind the transformation. The Holmes Report¹⁰ suggests that poor communications can cost a business thousands of dollars in productivity and that companies with leaders who are highly effective communicators had higher returns. It's a danger that continues to threaten business, with many experts agreeing that lack of communication can result in the breakdown of productivity and overall employee happiness.¹¹

Keeping teams across the business up to date with progress and information supports the project and the business. PA Consulting's Tim Devine believes it's crucial to share plans, time frames and information about the product. "Strategy is vitally important, and there is a huge value in sharing it across the

organization," he says. "Also, people often don't know what's coming, so signposting your roadmap should help."

Use this [Communications Template](#) to support the project.

ii. Early testing in the pilot phase

Road-testing digital transformation is a great way to get key users onboard while avoiding the risks of an all-in launch. Soft launches allow a small group access to the new experience to gather their feedback. Beta testing with small groups and establishing a feedback loop ensures that the final product meets their needs.

Tim Devine stresses that products must be tested outside the perfect technology environment: “I’ve seen people embrace the principle of a soft launch but then fail to really make it work because they only launch to people who might be IT-aware enough to prove to themselves that it works. You’ve got to get people across the business, who aren’t working in technology.”

iii. Build a team of transformation champions

McKinsey research finds that companies that are successful in digital transformation typically “mobilized a substantial chunk of their workforce—at least 8 percent—to drive transformation initiatives. Some top performers deployed 20 percent or more.”¹²

There are a few tactics that assist IT leaders in achieving this. Engaging users at the beginning helps, but there is an important role for transformation champions and change agents¹³ to drum up excitement around the changes and to socialize the benefits. Find, engage and encourage these champions and you will have an army of digital-savvy soldiers. See this [Criteria Checklist for Transformation Champions](#).

Surprisingly, a key ally for supporting and sharing the employee experience when undergoing digital transformation is HR, particularly when it comes to onboarding. HR teams look at technology to help employees as a way to attract and retain talent or boost productivity.



iv. Perfect training strategies and onboarding

When launching a streamlined employee experience, a training plan is critical. A failed training strategy could lead to a failed project. Here are some guidelines:

- Relate the training to the product strategy, so employees still understand the “why”
- Tailor training to levels of expertise across teams
- Train digital champions and super-users first, and charge them with cascading the training
- Use a mix of in-person training and self-guided supplemental materials (see the [Training Materials List](#) for ideas)
- Create documentation that is clear and answers key questions
- User-test the user manuals

Training must-dos

- Allocate a budget for the training
- Don't set and forget—support and revisit



v. Ask for Feedback

Make sure a process is in place to gather feedback, focusing on the end users. Learn lessons in these early phases, and the next phase—company-wide adoption—will be a breeze.

Feedback Channels

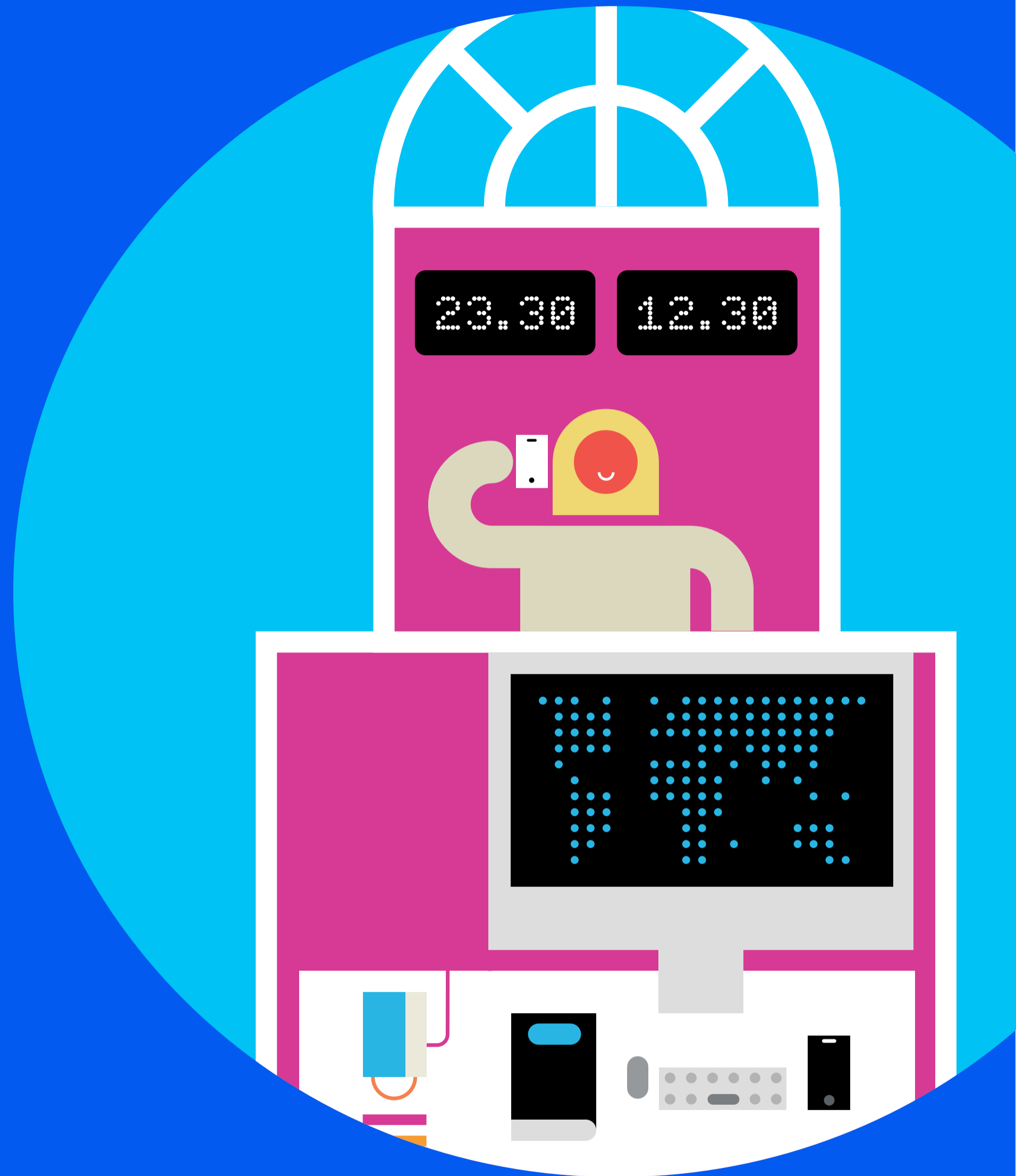
User Workshops

User Journey Testing

Surveys

Focus Groups

Chapter 4: Get The Team Started



Chapter 4:

Get The Team Started

Once a smooth implementation is complete and the frictionless digital workplace is in place, it's time to solidify user adoption and empower users across the business.

Build it and they will come? Perhaps not. Even with a rigorous onboarding process, getting employees to use a new experience regularly, and in the right way, can be a struggle.

How can IT managers mitigate this risk and increase employee engagement?

i. Move quickly and nimbly

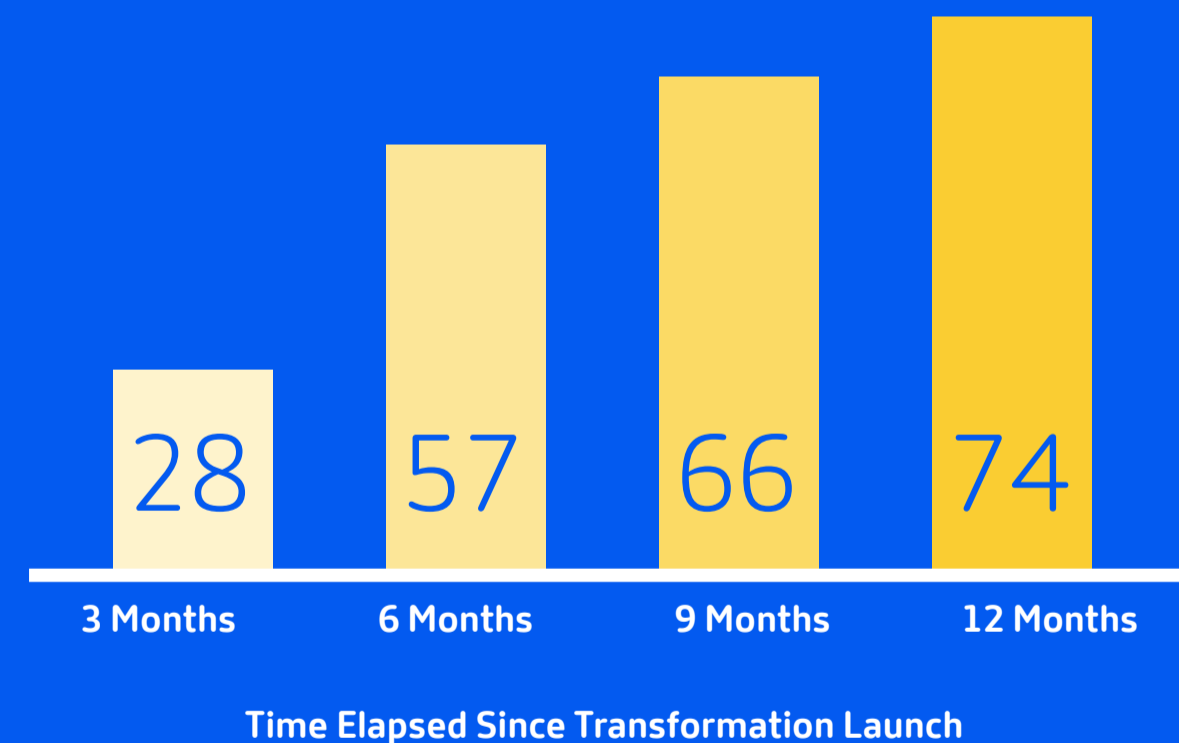
After the pilot phase, implement rapidly and consistently, particularly in the crucial 30 to 60 days. McKinsey & Company's report on digital transformations notes that the first few months "pack a powerful punch." In successful transformations, it explains, "companies sprint out of the gates, turning their initial burst of idea generation into an achievable, rigorous plan within a few short months."¹⁴

According to Tim Devine, if the groundwork was laid well, this is highly achievable: "Do it rapidly rather than drag your feet. Where it doesn't gain momentum is where people implement things they haven't done homework on, so things fall into a hole and you get a base of people not liking your software rather than people championing it. And if you haven't got that right, you get naysayers who damp down the momentum."

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The First Few Months Of A Transformation Pack A Powerful Punch

Share Of Transformation Value Achieved By Top-Quartile Companies Over The First Year, %





“Our Citrix Cloud environment gives us a lot of flexibility when it comes to doing acquisitions and growing.”

“Our Citrix Cloud environment gives us a lot of flexibility when it comes to doing acquisitions and growing. Having a limited IT staff, as those opportunities come up for us as a company we have to really be able to adapt to those situations in a very flexible and very fast manner. Citrix Cloud offered us simplicity [for] our initial development, our engineering and our testing, and it allowed us to roll out our applications quickly and in a very efficient manner.”

Jeff Robinson - Vice President of Information Technology, InTown Suites

ii. Spot quick wins

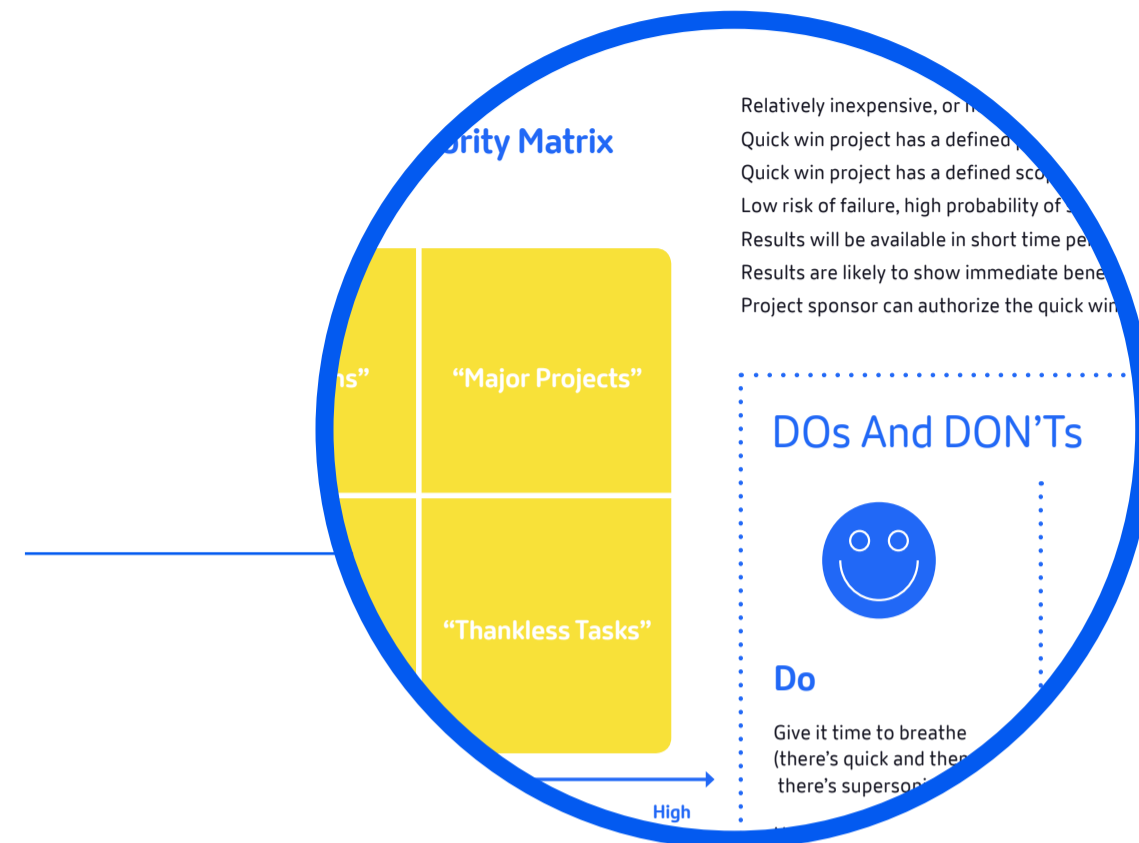
Being able to identify the fastest advantage for the end user also supports the overall rollout as end users see an immediate benefit of the technology. Managers must look for the first immediate benefit they can see, and look for what they can capitalize on; then they can slowly roll out the other benefits of the technology.

Identify the biggest bang for the buck in initial phases using this [Quick Wins Criteria Sheet](#) to help determine opportunities. These high-impact, low-effort projects will motivate the teams—and will help continue momentum.¹⁵

iii. Keep listening

User feedback and in-product data offer valuable insights that are critical to adoption rates. Look at analytics such as engagement rates and features popular with users. Conversely, consider the features that aren't being used. But don't rely on the data alone; carry out qualitative user feedback sessions. It can be eye-opening to get that information firsthand. Try this [User Feedback Workshop Plan](#).

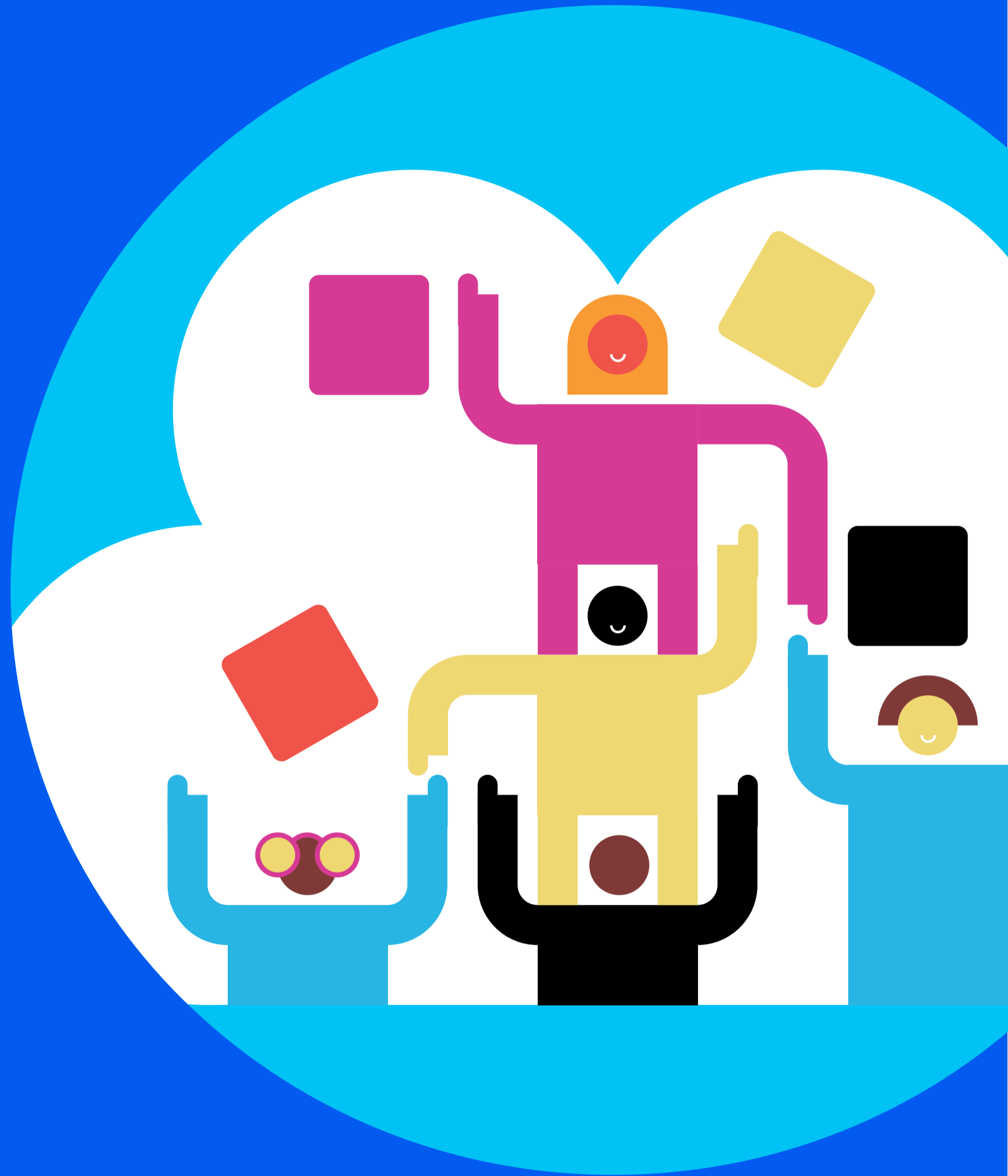
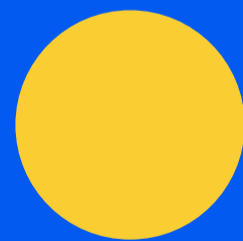
This range of information gathered allows for iteration; as the experience improves in the early days, chances of user adoption increase. When the adoption rates are healthy, it's time to move into management and further optimization.



and pain points from new

	What	How	Desired Output	Comment
15 mins	Scene setting Agenda for the day Warm up		Get employees on board	
10 mins	Gathering feedback - positives: Positives/benefits	Time-based brain dump (physical post-its) Staff share their post-its on a whiteboard one by one, hosted by workshop host	List of key benefits from the new system	Staff will be given 3 minutes to write on post-its Staff can be given prompts, such as: - What has changed? - What is better? - What problems have been solved? - What things are done faster? - What goals are we hitting?
5 mins	Summarizing	Workshop host to gather feedback post-its into groupings of similar type		
	Gathering feedback - pain points/negatives:	Staff split into teams Staff have 5 minute discussion sharing the pain points of the project Team leader writes up pain points on white board or sheet	List of key challenges from new system	Staff will be given 10 minutes to work in groups Teams can be given prompts, such as: - What are the new challenges? - What features aren't working for you? - What features are confusing?
	Summary session to share output	Team leader to share results of last exercise with rest of workshop		
15 mins		One member (A) from each team stay with their white board Staff to circulate and discuss issues on other	Ideas for addressing issues	

Chapter 5: Manage And Optimize



Chapter 5: Manage And Optimize

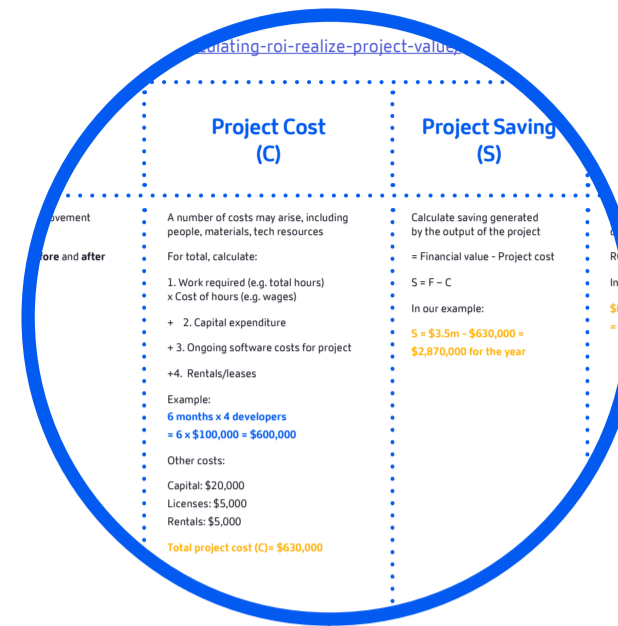
While the implementation is a truly incredible achievement, digital transformation of technology in the workplace needs continued management and optimization for it to really be valuable to the business. Here are four focus areas:

i. Incorporate feedback into the growth cycle

- Listen to the users as the product progresses and bring their feedback into the development cycle
- Beware of too much customization
- Be prepared to push back on the business

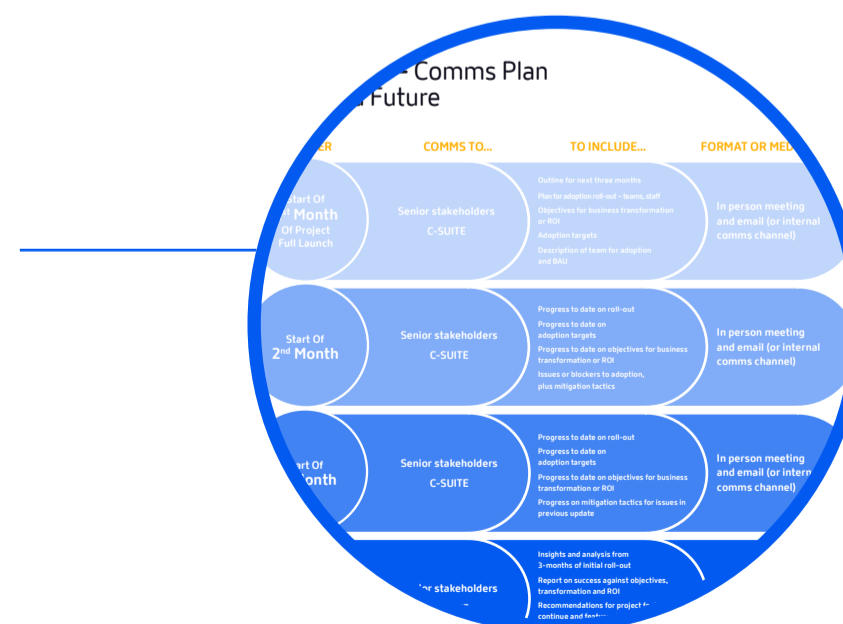
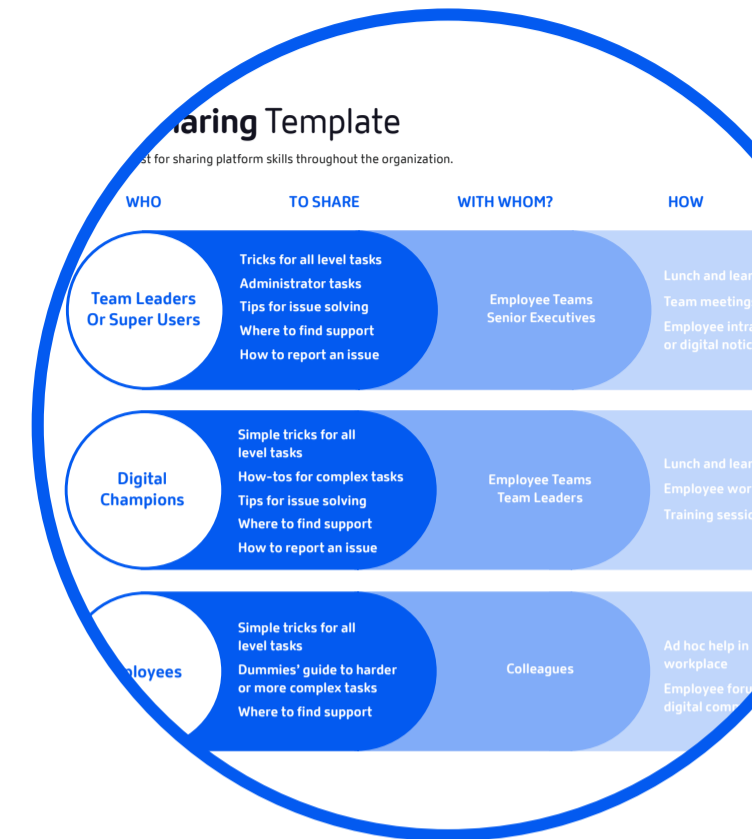
ii. Start, stop, keep





- Save money and maintain morale by being honest about the success of the platform and its features
- Ask technical colleagues to review
- Ask users to review
- Ask external consultants to review
- Overcommunicate about difficult decisions using the [Senior Execs Communications Plan](#)



iii. Analyze ROI

- Understand financial gains or losses—key for continued support from senior executives and will help prioritize areas for change¹⁶. This [ROI Template](#) will help
- Engage HR for help with qualitative assessment via staff surveys and focus groups
- Use IT heroes and digital champions to keep colleagues in the loop about iterations
- Share knowledge and upskill through team collaboration. Try this [Skill Sharing Plan](#)





“ Our key performance indicators and return on investment items are different than other markets.

We're looking at efficiencies—can the physicians see more patients that day with less cost? So our ROI for moving to the cloud was very different; our ROI was focus. Our staff can focus more on the end users and those patients that we service. The ROI wasn't dollars and cents in this case, it was 'Can we see more patients?'

Alejandro Romillo - President and CEO, Health Choice Network

”

Chapter 6: Build On Success



Chapter 6: Build On Success

At this stage, it's practical to carry out a post-implementation review¹⁷:

- How did the project deliver against its strategy and purpose?
- How did the project deliver against goals?
- What went well?
- What about the project and the process could be improved?
- Were the communications effective?
- Was the stakeholder engagement effective?

Don't let this become a blame game. A paper from the Project Management Institute suggests a reflective and constructive approach: "Project reviews and documentation of lessons learned are rightly considered to be indispensable project closing activities. If done diligently, lessons learned do not only provide valuable insights which can help ongoing projects, they also prove critical to the successful planning of future efforts."¹⁸

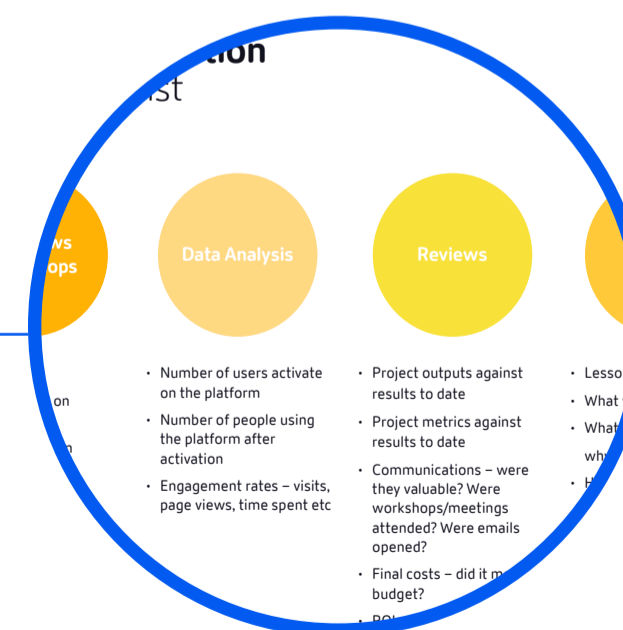
See this [PIR Plan Checklist](#) for help.


Finally, look to the future. Consider three points:

1. Use lessons and results from the digital transformation to tackle difficult decisions across the business, such as decommissioning outdated tools or reorganizing teams
2. Seize the opportunity to identify transformation champions who have developed their skills, while also identifying technology as a positive influence on their improved productivity
3. Prepare for future releases of workplace technology, using comprehensive feedback to inform what to keep and what to leave on the table

Your organization will now be ready for the future, in the knowledge that happy employees are using a frictionless experience that is here to stay.

Discover how you can transform work and keep business moving at [citrix.com](https://www.citrix.com)





“ It’s not just what we produce but how we do it. So how we do it is we want to be efficient and digitally minded.

We say that not just across my team, the technology team, but across all of the company. We want them to be a digitally enabled workforce.”

Ben Spencer - Chief Information Officer, Beazley

Appendix

¹ <https://internetofthingsagenda.techtarget.com/blog/IoT-Agenda/Four-ways-IoT-will-change-the-way-we-work-in-2020>

² <https://www.holmesreport.com/latest/article/the-cost-of-poor-communications>

³ https://www.citrix.com/content/dam/citrix/en_us/documents/white-paper/6-tips-to-simplify-your-next-software-roll-out.pdf

⁴ <https://www.business2community.com/strategy/project-management-statistics-45-stats-you-cant-ignore-02168819>

⁵ <https://www.business2community.com/strategy/project-management-statistics-45-stats-you-cant-ignore-02168819>

⁶ <https://cdn2.hubspot.net/hubfs/367443/2.downloads/research/2016-Best-Practices-Executive-Summary.pdf>

⁷ https://www.citrix.com/content/dam/citrix/en_us/documents/solution-brief/5-tips-for-a-smooth-implementation.pdf

⁸ <https://www.citrix.com/customers/bechtle-en.html>

⁹ <https://liquid-state.com/successfully-implementing-enterprise-software/>

¹⁰ <https://www.holmesreport.com/latest/article/the-cost-of-poor-communications>

¹¹ <https://collegeforadultlearning.edu.au/how-to-increase-your-employee-commitment-and-loyalty/>

¹² <https://blog.clearcompany.com/final-destination-organizational-transparency>

¹³ <https://www.mckinsey.com/business-functions/transformation/our-insights/the-numbers-behind-successful-transformations>

¹⁴ <https://www.imaworldwide.com/blog/whats-the-difference-between-a-change-agent-and-a-change-champion>

¹⁵ <https://www.mckinsey.com/business-functions/transformation/our-insights/the-numbers-behind-successful-transformations>

¹⁶ <https://www.projectmanager.com/blog/importance-quick-wins>

¹⁷ <https://www.isixsigma.com/implementation/financial-analysis/calculating-roi-realize-project-value/>

¹⁸ https://www.mindtools.com/pages/article/newPPM_74.htm

¹⁹ <https://www.pmi.org/learning/library/post-project-reviews-closing-processes-1425>