

# Coaching Adoption Playbook

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# The Adoption Planning Process

1. Identify key stakeholders
2. Identify business scenarios
3. Create Success Plan
  - a. Identify KPI benchmarks
  - b. Assess Technical Readiness
  - c. Assess Organizational Readiness
  - d. Develop Communication Strategy
  - e. Build Training Strategy
  - f. Identify Pilot group
4. Execute Success Plan
  - a. Communicate, train, and onboard!

# Step 1: Assemble Your Team

Use the following slides to identify stakeholders and others involved in the adoption effort.

# Identify your team members

Role	Identified Team Member	Responsibility
Project Sponsor		
Success Owner		
Support Owner/System Admin		
Training Lead		
Communication Lead		
HR Manager		
Stakeholders		
Champions/Pilot		

## Step 2: Identify your Business Scenarios and KPIs

Use the following slides to identify the scenarios that Coaching will help drive in your organization. Leverage this content to develop key messaging in your Awareness and Training engagements.

Questions to answer:

- ★ Why is coaching important to your organization?
- ★ How will coaching be implemented in your organization?
- ★ Who will be coaches?
- ★ What types of topics will your team members be coached on?

# Document and Organize Each Scenario

As someone in (Team), I want to (description of what I want to do) using (specific application of the technology). I'll know this is successful when (solutions success measure)....

As someone in (persona)	I want to (description of what I want to do)	By using (specific application of Catalyst).	I'll know this is successful when (identify success measure).
<i>Manager of Sales Team</i>	<i>Be able to develop and grow my team members</i>	<i>By using the Assessment and Development Activities in Catalyst.</i>	<i>I'll know this is successful when I see my team's skills knowledge and application increase on the Reports in Catalyst.</i>

# Establish Coaching KPI benchmarks

Questions to answer:

- ★ What is the measure you want to track?
- ★ What is the goal of this measure?
- ★ How often should reports run for this metric?
- ★ Where will the data for this metric come from? How will it be collected? Do any instruments (ie surveys) need to be created?
- ★ Who will own gathering the data? Who will own transforming it and analyzing it?

# EXAMPLE of Success Criteria Scorecard

Success Measure	Goal	How often will this measure be tracked?	Where will data come from? How will it be collected?	Who owns gathering and analyzing metric data?
<i>Improve Speed to Competency</i>	<i>Increase by 10%</i>	<i>Every 3 months</i>	<i>HRIS</i>	<i>HR Lead</i>
<i>Building better relationships between leaders and team members</i>	<i>75% agreement</i>	<i>Every month</i>	<i>Survey to users, both coaches and frontline employees</i>	<i>HR Lead</i>



# Step 3: Analyze Technical and Organizational Readiness

Use the following technical readiness checklist and organizational readiness tools to assess the willingness and preparedness of your users and your organization to start coaching.

# System Configuration Checklist

## **1. Setup People**

- Collect People Info
- Configure Org Structure
- Configure Job Roles
- Configure Users
- Assign Team Members to Coaches

## **2. Setup Assessments**

- Assign Assessments
- Assign Coaching Frequencies

## **3. Setup Performance Metrics**

- Define and add performance metrics
- Collect and upload performance metric data

# Organizational Readiness Factors

Use the following questions to determine if your organization is ready to adopt Coaching:

- ★ Think about a time when your organization adopted a new technology. What made the adoption successful or not successful?
- ★ Are there other key initiatives taking place that would hinder the focus on employees adopting Coaching?
- ★ What are the perceived risks and benefits of Coaching? How can you mitigate these risks and highlight these benefits?

# Step 4: Build Your Awareness Strategy

When planning for adoption and training, your audience needs to understand the “why” behind the change and “how” Coaching will help improve their daily experience at your organization.

Use the following slides to help capture this information, and leverage the content to develop key messaging in your Awareness and Training engagements.

# Identify your “why”

Answer the following questions to identify the awareness messaging that will need to occur within your organization.

- ★ How will Coaching benefit the organization? The employees?
  
- ★ What changes will you be asking of the employees in implementing Coaching? Think about not only the platform, but also daily interactions and ways of working. If there are different types of changes for different roles, make note of that.

# Identify your audience

Answer the following questions to identify communication audiences, cadences, and channels:

- ★ Who needs to be informed?
- ★ What do they need to know? This includes “why” statements, “how” statements, and changes expected of them.
- ★ How do they like to communicate?

# Gather resources and content

Think about the identified audiences, “whys” and other communications needed for bringing awareness, knowledge, and adoption to the organization.

- ★ What content or messaging will you need to create based on your audience(s) preferred channels?
- ★ Who will be the communications lead for the organization?

# Step 5: Build your training strategy

Use the following slides to help identify the training needs in your organization. Leverage this content to develop key messaging and training sessions.



# Key Training Considerations

Answer the following questions to identify training audiences, training goals, and training channels.

- ★ Who needs to be trained? Identify the groups impacted by the implementation, audiences who will drive the change forward, and support teams.
- ★ What does each group need to learn, both for the transition state and for the future state?
- ★ How does each group prefer to learn?

# Gather resources and content

The **Admin Resource Center** provides the following content to help with training:

- How To articles and videos
- FAQs for admins, coaches, and team members
- Quick Start Guides for coaches and team members
- Coaching Reference Guide

What are other content you will need to create?

Who will be the training lead for the organization?

# Step 6: Build your Pilot Program

Best practices are to launch Coaching to a small subset of users, referred to as a Pilot group. This group will be able to provide you with feedback on:

- ★ Communications and training
- ★ Success stories
- ★ Troubleshooting

The next slide outlines sample steps to get a Pilot group up and running.

# Build your Pilot Group

- ❑ **Identify users** for Pilot group
- ❑ Confirm Coaching configurations are complete
- ❑ **Execute communications plan** for Pilot group
- ❑ **Execute training plan** for Pilot group
- ❑ **Activate Pilot group** and begin coaching!
- ❑ **Collect feedback** and update plans as needed
- ❑ **Incorporate success stories** and have the Champions share their experiences with the larger group for greater peer impact!

# Congrats!

You are now ready to put your Success Plan into action.

Return to the Admin Resource Center to access an example timeline and Launch Guide for best practices on activating users.