



Change management:

Enabling customer success in a rapidly evolving workplace



Partner Profile:

Vitalyst is a global provider of lifecycle adoption solutions for Microsoft 365, Teams, and Dynamics 365, and provides comprehensive services across all three phases of the adoption lifecycle: change enablement, onboarding and activation, and continuous learning.

Its unique PROPEL™ methodology and Digital Adoption Platform enable customers to consume training solutions tailored for their specific needs.

The company started in 1992 with the advent of email and grew over time by focusing on helping customers' employees stay productive. Vitalyst has delivered training courses around in 22 countries.

Vitalyst customers include Nintendo, CBS, Pacific Life, Coca-Cola United, and Southern California Edison Company.

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Challenge: New tools, new expectations

More and more, organizations are turning to change management experts to help them improve the success of technology rollouts. That's good news for Vitalyst, which built its business decades ago helping workforces learn new tools. As tools continued to change, the need for its services grew.

"Organizations adopting a new, cloud-based environment must also help employees adjust to a faster pace of technology updates," says Barry O'Donnell, President and CEO at Vitalyst.

Why do some enterprise technology projects succeed where others fail? Vitalyst says what makes the difference are programs that encourage adoption and drive usage. "When you look at the pace of digital transformation and why projects fail, research indicates that change management makes a big difference. Customers are six times more likely to succeed when change management principles are leveraged," says O'Donnell.

Solution: A methodology to drive technology adoption

Vitalyst focuses on change enablement, a bottom-up approach to adoption that complements essential change management efforts, which tend to be top-down and planning focused. Its proprietary methodology called PROPEL is based on the Prosci ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement) methodology. PROPEL includes customized user training and support that accommodates the different ways that a diverse, multigenerational workforce wants to engage and learn.

"PROPEL starts with a Change Enablement Workshop and assessment that enables us to understand the skill gaps and learning elasticity of an organization," said O'Donnell. "Some executive-level priorities may be different than at the user level. PROPEL helps ensure we understand all of those things and provide the best recommendations for moving forward."

Demand for Vitalyst services grew as customers around the world adopted game-changing services like Microsoft Teams, available with Office 365 and Microsoft 365. It also helped that Vitalyst built relationships at Microsoft, including with its Customer Success Managers, and with other Microsoft partners offering complementary services.

"When integrated into a well-designed program, change enablement will accelerate adoption of new technologies by transferring the accountability for change to individuals," says O'Donnell. "In many of our most successful engagements, Vitalyst works hand-in-hand with a world-class change management practice like Microsoft Services, to bring its program to life and deliver optimal technology consumption."

Teams represents an entirely new way of working. To realize the potential of Teams for cross-team collaboration, says Keith Carvalho, VP of Alliances at Vitalyst, organizations must prioritize learning and help employees build the skills they need to use the app effectively. The goal is to get employees to adopt Teams for chat, conversations, meetings, files, and tasks. Here is a look at one Microsoft 365 engagement.



Pacific Life – Insurance

Pacific Life believed that Microsoft Teams collaboration tools could help it support digital transformation across its 3,500-person company. Nancy Wang, who oversees change initiatives at the California-based insurance company, says the company considered Teams a new communication channel that could supplement email and replace its intranet. Wang says Pacific Life also realized it wasn't enough to deploy Office 365 and Teams. They had to get people to use the tools.

Value: With Vitalyst, she says the company was able to maintain its focus and keep the project on track. Because Vitalyst used Teams to manage the project, leaders learned it faster and grew into advocates. Vitalyst also brought writers and communication professionals to create use cases and documentation to build out the internal Resource Center. "It was such a heavy lift and it was just such a relief," says Wang.

Results: Six months later, the company says more than 65% of people are using Teams monthly and more than 80% are using Office 365 monthly.

"Vitalyst made sure we hit our go-live date. And our usage numbers went crazy—you know, off the charts. We're still working on getting people to do more than chat on Teams, but it's a great entry point."

– Nancy Wang
Change Management Center of Excellence Lead
Pacific Life

Lessons learned in the field

It a recent Microsoft Ignite conference, Nancy Wang from Pacific Life discussed her company's engagement with Vitalyst and offered some advice to other companies planning implementation of Office 365.

Start with Exchange. "We made the mistake of leading with Teams even though Vitalyst recommended Exchange first," recalls Wang at Pacific Life. "Teams has limited functionality without Exchange. We got people excited once and now—with the Exchange rollout, which adds functionality like calendaring, we have to get people excited again."

Conduct pilot groups with non-IT people. Learn what you're doing right and wrong by including some people who are among your biggest resisters, says Wang.

Don't lead with training. Start with a user assessment, then run a campaign to build awareness and interest. People need to understand the value to them and the company, says Wang. "If people don't have the context for what you're doing, why you're doing it, what's in it for them and how they are going to benefit, you will be disappointed with your result."

Tools for successful engagements

Vitalyst developed its expertise helping customers adjust to multiple iterations of Microsoft Windows and Office. Projects today are more challenging, according to Vitalyst's Carvalho, and typically focus on moving organizations more fully to the cloud and using new collaborative tools, which require new ways of working. "Often we have projects in which Teams is the first workload," he says.

With its PROPEL methodology, Vitalyst can tackle change enablement projects for organizations of all sizes. "After assessing business and end-user needs, Vitalyst customizes a plan for each customer with recommendations to communicate, train, and drive excitement around employee use cases, new capabilities, and other benefits. Once the plan is in deployment mode, the team remains agile. "Things come up that you didn't anticipate, or customers didn't share," says Carvalho. "Stakeholders come out of the woodwork with different concerns. Because we execute the work—not just plan it—we can be flexible and pivot, regroup, and move forward. It's a differentiator."

Communication to all stakeholders is key, he adds. People want to know that the effort required to adjust their behavior matters and that the process is working.

Promote active and visible sponsorship. Carvalho says this is probably the key ingredient for success—identifying and getting business leaders out there "really evangelizing and communicating why you're doing this."

Help customers see progress. Vitalyst has built long-term partnerships as organizations come to realize that change is the new constant in a cloud-based environment. Carvalho says customers recognize that they need a partner to help them manage not only the initial learning curve that goes along with new technology, but also ongoing effort associated with new releases, features, and customization opportunities of Office 365.

To help clients manage continuous transformation, Vitalyst offers a managed service called Adaptive Learning. The service brings together on-demand end-user training and support services accessible from within Teams and SharePoint. As part of the service, Vitalyst releases new courseware each quarter with 1:1 live "how-to" coaching and email campaigns that encourage users to get up to speed on new capabilities as they become available. Vitalyst then works side by side with its customers to translate data and qualitative findings to further improve the learning campaigns.

Some of the key analytics are easily accessed through Adaptive Learning dashboards. The tools track adoption success by measuring usage of apps and advanced features. The dashboards help client organizations see how

Microsoft 365 adoption has transformed how users collaborate, and also suggest technology use cases that can drive additional business value.

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– Keith Carvalho
VP of Alliances
Vitalyst

"We see that our engagements accelerate solution adoption from 2 to 5 times faster than other solutions."

– Barry O'Donnell
President and CEO
Vitalyst

