

Portal User Adoption

Rolling out an enterprise portal requires a careful combination of design, training, and encouragement

Business Issue

A major manufacturer wanted to make vital sales and marketing information more easily accessible across brands and geographies. This information resided on PCs and shared drives across various departments.

The way information was used and catalogued was inconsistent. It was difficult to find needed information, which often led to 'reinventing the wheel.'

This was a perfect scenario for building an enterprise portal – to share information internally, as well as with key external partners who support sales and marketing efforts. The technology for such solutions is available and effective. In fact, our client had already designed and was implementing an Intranet portal based on Microsoft's SharePoint product. But he had serious concerns around the issue of adoption – a key to justifying the investment that had already been made.

Being the watchdog for the process side of things, so they could make an orderly migration from network drives to the portal, and establishing policies on how the tool would be used.

Adroit's Role

We were engaged to address the adoption issue with an extremely tight timeframe prior to roll-out, with the requirement of taking a collaborative, not a coercive, approach. Our role included:

- We designed and created instruction for portal coordinators and content creators that addressed the mechanics of using the tool. Deliverables included instructor guides, participant guides, and a series of job aids for each of the three audience groups.
- Once the development effort was complete, we hosted and delivered training sessions for more than 150 of the core users. The greater value was helping the company establish policies on how to integrate the portal into everyday workflow, and then ensuring an orderly migration.
- We also designed and implemented a communications program to encourage adoption. This included a series of multimedia events and vehicles such as teaser posters that created curiosity, and an email campaign.

Outcome

Adroit Consulting played several key roles beyond training development:

- Facilitated development of the migration plan to move documents from existing network locations to appropriate locations on the portal.
- Surfaced security issues that changed the administration of the portal through redefinition of user groups and permission levels.
- Facilitated the discussion on modification to the underlying folder structure to better serve the needs of the user community in production.
- Served as the last line of portal testing for the developers, identifying bugs, configuration errors, and performance issues.

Outcome Goals and metrics were set for adoption at a level that would support the ROI on which the project sponsors based the investment. Results are pending. The marketing campaign was well-received, but at the time of publication the portal and related training were not fully rolled out.