

Sales Enablement Adoption Playbook



- Project Objectives
- Launch Readiness Checklist
- Use Cases
- Roadmap
- Reporting Metrics
- Roles & Responsibilities (RACI)
- Project Management Tools
- Appendix A: Creating Content
- Appendix B: Best Practices



Adoption

100% Sales User Adoption¹ of Platform Online Collaboration

Active Users

68% Active Sales Users² – Consuming Content monthly

Participation

34% Sales User Participation³ – Contributing Content monthly

1. **Registered Users:** Users who have logged in at least once. This is the variable used to calculate Adoption.
2. **Active Users:** Users who have viewed at least one document, discussion, blog post, status update, poll, video, idea, group overview page, space overview page, or project overview page in the previous 30 days.
3. **Participating Users:** Users who have commented on, replied to, liked, rated/voted, edited, or created at least one document, discussion, blog post, status update, poll, video, idea, group, space, or project in the previous 30 days. It also counts any users who have joined a group in the previous 30 days.
4. **Contributing Users:** Users who have created at least one document, discussion, blog post, status update, poll, video, idea, group, space, or project in the previous 30 days.

LAUNCH READINESS CHECKLIST



ID	Action	Status
1	Adoption Reinforcement Plan	READY
2	Adoption Team Space on Converge	READY
3	Content Database (60 articles/pieces minimum)	READY
4	Gamification Mechanics (standard platform capabilities)	READY
5	Spaces (Groups 1 & 2)	READY
6	Spaces (Groups 3 & 4)	READY
7	Sales Rep Registration Instruction Guide	READY
8	Sales Rep Participation Guide	READY
9	Announcement (Groups 3 & 4)	READY
10	Kick-off Deck	READY

SALES-FOCUSED USE CASES



Area	Region	Use Cases	Category	Owner	Target	
Sales	NA	Selling skills (social selling, planning, objections, etc.)	Best Practices Sharing		FEB'14	
Sales	NA	Platform best practices			FEB'14	
Sales	NA	Thought leadership			FEB'14	
Sales	NA	Win / Loss lessons Learned			FEB'14	
Sales	NA	5 Question Drill (sharing / engagement)			FEB'14	
Sales	NA	Mistakes (for later phases)			FEB'14	
Sales	NA	General questions/help			FEB'14	
Sales	NA	Events	Team Collaboration		FEB'14	
Sales	NA	Onsite with customers (Account Development tips)			FEB'14	
Sales	NA	Talent search (basic): Looking for an expert			FEB'14	
Sales	NA	Industry insights	Insights (Non-proprietary)		FEB'14	
Sales	NA	Competitive insights			FEB'14	
Sales	NA	Customer insights (Persona-based problem solving)			MAR'14	
Sales	NA	Product insights			FEB'14	
Sales	NA	Client X insights	General Announcements (Org & System Updates)		FEB'14	
Sales	NA	Research (client groups)			FEB'14	
Sales	NA	Gamification updates			APR'14	
Sales	NA	Individual and group milestones/achievements	Deal Team Collaboration		FEB'14	
Sales	NA	Announcements			FEB'14	
Sales	NA	Big deal	Competitive Intel (proprietary)		APR'14	
Sales	NA	Includes proprietary intelligence and information	Persona-based Problems		APR'14	
Sales	NA	From Personas – Objectives, obstacles, fears, success metrics, problems			APR'14	

FIRST 90 DAY ROADMAP



02.04
Team
Kick-off

02.17
Executive
Kick-off

02.19
Rep Guide:
How to
Register

02.21
Report:
Adoptions

02.20
Rep Guide:
How to
Participate

02.18
Leadership Announcement:

02.28
Report:
Adoptions

03.21
Report:
100% Adoption Goal

03.31
Monthly
Report:
Participation

03.31
Gamification
Launch

03.21
Leadership Announcement:

04.18
Report:
Participation
Goals

04.30
Leadership Announcement:

04.30
Monthly
Report:
Participation

5 MONTH ROADMAP



	FEB		MAR		APR		MAY		JUN	
	1st Half	2nd Half	1st Half	2nd Half	1st Half	2nd Half	1st Half	2nd Half	1st Half	2nd Half
Public Spaces (Launch Timeline)										
Group 1										
Group 2										
Group 3										
Best Practices Sharing										
Team Collaboration Sharing										
Insights (non-proprietary)										
General Announcements										
Persona-based Problem Solving										
Use Cases (Deal Collaboration)										
Deal Team Collaboration										
Competitive Intel (proprietary)										
Gamification										
Leaderboard – within Spaces										
Leaderboard – Space vs. Space										
Reward										

ROLES & RESPONSIBILITIES (RACI)



ROLE \ RESPONSIBILITY	Space Management			Content Management				Gamification			Integration		
	Design & Create	Launch & Announce	Manage	Create Use Cases	Create Content	Curate Content	Poles & Research	Game Mechanics	Field Communication	Administration	Participation	Systems integration	Mobility
Sales Operations	A	R	A	C	C	I	C	A	R	R	I	A	A
Sales Training				A	A	A	A	R	R	A	I		
Sales Reps					R		R		I		R		
Managers					R		R		R		R		
Executives					R		R		R		R		
Marketing	R	A	R	R	R	R	C	C	A	I	I		
SBI	I	I	I	C	C	C	C	C	C	I	I		

INDEX:

R

= Responsible

A

= Accountable

C

= Consulted

I

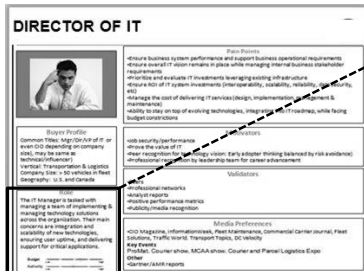
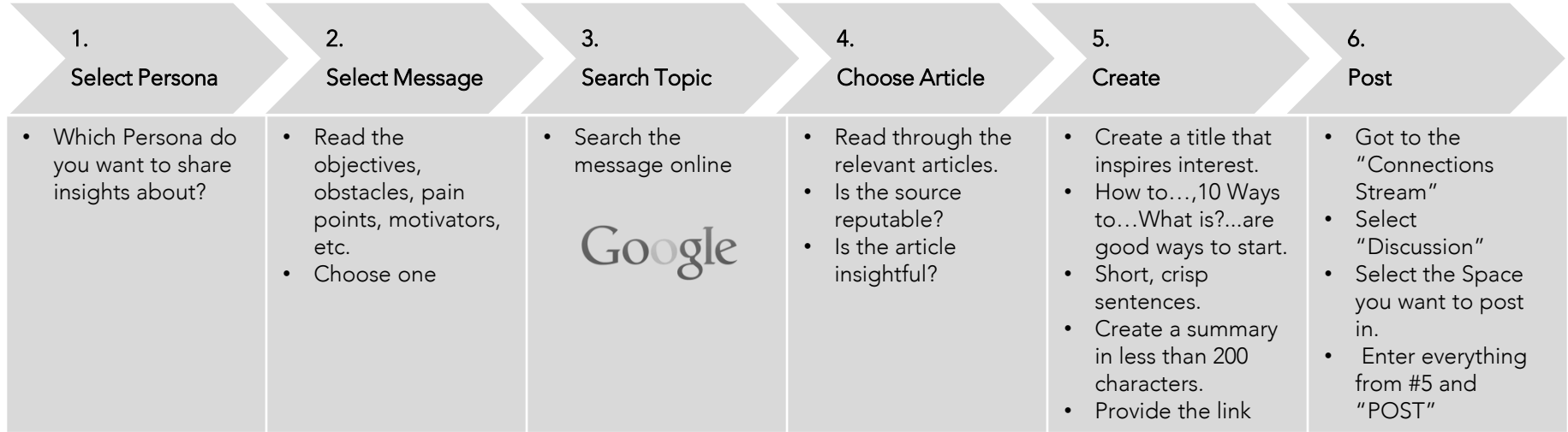
= Informed

APPENDIX A: CREATING CONTENT



- Sales related content should focus on the needs of the sales rep and sales manager (see Personas)
- Creating content can take several forms
 - Third-party article from an external website.
 - Client X article from external or internal sites.
 - Long form content shared from other internal site.
 - Informal, ad hoc sharing of thoughts and ideas.
 - Company-wide, team, or individual news.
 - Success stories and good news.
 - Comments and Likes on existing activity.
 - Q&A between peers.

CONTENT CREATION PROCESS



Motivators

- Job security/performance
- Prove the value of IT
- Peer recognition for technology vision
- Promotion to next level position

Persona Director of IT

Topic Motivator>Prove the value of IT

Title 22 Ways to Help the Director of IT Add Value in Their Organization

Summary Great piece on job security for you to share with a Director of IT.

Link <http://www.reliableplant.com/Read/23051/value-advice-employment-company-roi>

APPENDIX C: BEST PRACTICES

“Through 2015, 80% of social business efforts will not achieve the intended benefits due to inadequate leadership and an overemphasis on technology.”



**“Install and Leave”
will guarantee failure**

TOP 3 ADOPTION SUCCESS FACTORS



Jive Best
Practices*

- **87%** Senior leaders role-modeling
- **81%** integrating Jive into day-to-day activities
- **63%** Removal of other tools

*Percent of survey respondents reporting that these factors were "valuable," "very valuable," or "extremely valuable," from Nov 2012 survey of ~400 Jive customers by a top 3 global business consultancy.

List of Client X- specific best practices for optimal adoption

- Have deep use cases.
- Create a plan.
- Get the sales executives and leadership using the tool.
- Seed the field with quality content to jump start the conversation.
- Actively like and rate content.
- Create polls to solicit feedback. Then act on the feedback.
- Record everything and distribute your events via platform.
- Add value to existing systems. Use the plug-ins and links to existing systems.
- Mobilize access.
- Make it fun and use gamification.

TOP 10 REASONS SELLERS DON'T ADOPT



- Reasons why Sales Reps don't use Jive
- It doesn't match how I work.
 - I didn't even know about it.
 - My peers aren't using it.
 - It didn't have content/data.
 - The information wasn't valuable.
 - It's just another disconnected tool.
 - I can't access it outside the firewall.
 - I'm not recognized for using it.
 - It's difficult to use/look at

ADOPTION BEST PRACTICES



List of Client X specific best practices for optimal adoption

- Mandate that the “Connections Streams” page is the home page on all sales reps/managers browsers.
- Discontinue old systems and replace with Platform where possible.
- Limit number of Places/Spaces for sales reps to join and follow.
- Use gamification to incentivize the right behaviors in the sales team.
- Start with a simple use case. Introduce more complicated use cases gradually.
- Create content that is searchable with Tagging and key word taxonomy.
- Create content that will help sales make the number.
- Measure results on a regular basis.
- Test and validate everything on a regular basis. Adjust to improve performance.
- Include sales support and sales engineers to foster Q&A forums.
- Shift communications from email to Jive.
- Optimize users for search results by including key words/skills in profiles.

3 ELEMENTS TO ADOPTION



Be relevant to audience
Offer new insights
Incentivized participation

Content

Usability

Minimize navigation clicks
Simplify roll-out
Tag content
Make searchable
Test/validate use cases

Distribution

Centralized content
Limit number of available systems
Mobilize the content

FOCUS ON RELEVANT ACTIVITIES



Hours
 Search 8.8
 Collaborate 6.4
 Create 6.0

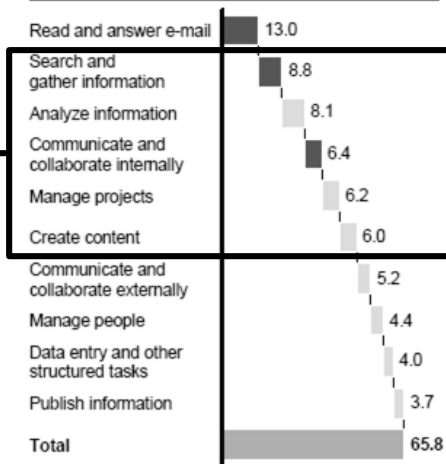


Exhibit A7

We adjust IDC data to estimate time spent on different activities by a typical interaction worker

Hours per week per activity

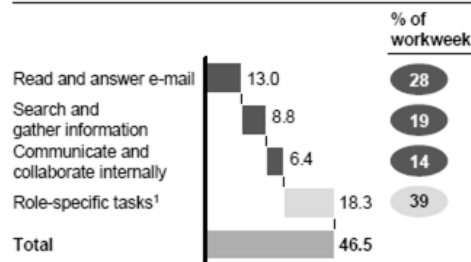
Activities in IDC report



■ Mandatory activities for interaction workers
 ■ Other activities

Adjusted activity list

Average workweek of people responding to the survey



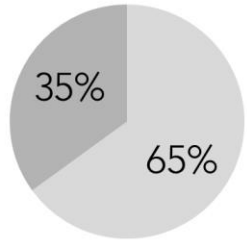
¹ Included activities depends on specific role, e.g., project management, content creation, people management, data entry, and information analysis.

SOURCE: IDC; McKinsey Global Institute analysis

MAKE CONTENT SEARCHABLE



“...search the company’s internal social network for mentions of those data...”



[Workers] spend 65% of a workday collaborating and communicating with others

- Shifting communication from a medium optimized for one-to-one communication (e.g., conventional e-mail) to social platforms can increase efficiency in several ways. Not only are messages conveyed more rapidly across the organization, but they are also searchable and accessible by many people.
- For example, a financial analyst looking for the information on a specific topic—say, the latest interest rate forecast for an overseas sales region—can search the company’s internal social network for mentions of those data, rather than initiating a long search by e-mail to find out who has the data. Or, a new employee or a new member of a team can quickly get up to speed by reviewing postings by colleagues.

USE GAMIFICATION TO REWARD BEHAVIOR



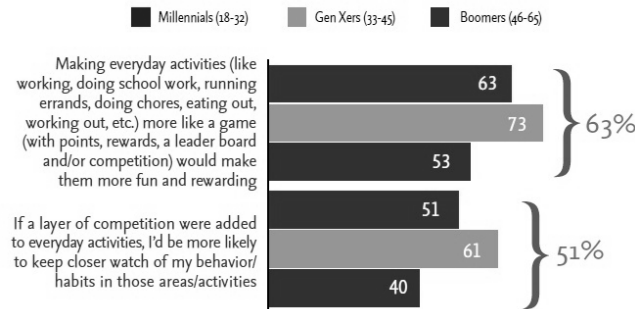
Gamification
increases Web
traffic 100%,
employee
collaboration
57%

- To build engagement, Bluewolf, an IT outsourcing and consulting company] added gaming components to internal and external collaboration tools: employees earn points for filling out fields on their profile pages, for posting or commenting using the internal communication tool, for publishing blog posts, for attracting visitors to those blog posts, and for sharing content via external social networks, as well as for receiving inbound clicks on those shares.
- Bluewolf monitors the success of its social media initiative via site traffic and internal collaboration. In the first four months after the program launch, collaboration via the internal social network increased by 57 percent.
- David Kirkpatrick, B2B social media: Gamification effort increases Web traffic 100 percent, employee collaboration 57 percent.

100-150%

What gamification claim the lift is in engagement metrics including unique views, page views, community activities, and time on site.
(M2 Research)

FIGURE 1B. GAMIFYING LIFE
Percentage of American and British adults who agree



51%

Number of American adults who agree that if a layer of competition were added to everyday activities, they'd be more likely to keep closer watch of their behavior in those areas.