fuze

Welcome to

The Fuze Adoption Playbook

Table of Contents

Phase 1

Identify Stakeholders 3
Conduct an End User Survey 4
Create an Adoption Plan 5

Phase 2

Communication Templates 8
Posters 9
Town Hall 9

Phase 3

Fuze Ambassador Feedback 10
Use Case Workshops 10
End User Training 11

Phase 4

Launch Event 13
Go-Live Support 14
End User Self-Help 14

Phase 5

Adoption Assessment 16
Optimization Initiatives 19
Email Nurture Campaigns 22

"Technology success is dependent on user adoption, so involving our employees in the decision-making process was critical to us. Fuze was the clear choice, with features that matched the way our people want to work."

—Marcel Schilder, Group IT Manager, Boon Edam

"At Micro Focus, we knew we needed a UCaaS solution that would not only take the place of our multiple existing technologies, but that would align with the needs and strengths of our workforce. We needed a comprehensive change management plan to deploy a solution across our business, and the Fuze team worked seamlessly with our own company leadership to ensure our employees were bought-in and excited about the modernization of our communications technology."

—D. SKye Hodges, IT Technician, MicroFocus

"Fuze understands that as an enterprise business, replacing a communications system is complex. It's not just replacing phones on desks. Fuze took the approach of trying to understand our business and making sure that the Fuze solution was a good fit for us."

—Michele Buschman, VP, Information Services, American Pacific Mortgage

Introduction

Change is constant. Humans are constantly innovating and evolving, trying to make things better, faster, more reliable, and more efficient. In the business world, changes are often seen as a way to create competitive advantages, enabling the business to leverage technology and innovation to drive improvements and, ultimately, facilitate success.

As quickly as technology is changing, the delivery of cloud services is evolving as well. It's no longer just about deploying a solution. The delivery of cloud services is about people, processes, and the change management needed to accelerate the value of your investment. This is why it is crucial to have a defined onboarding and adoption plan so that you can address any concerns and create a positive response to change.

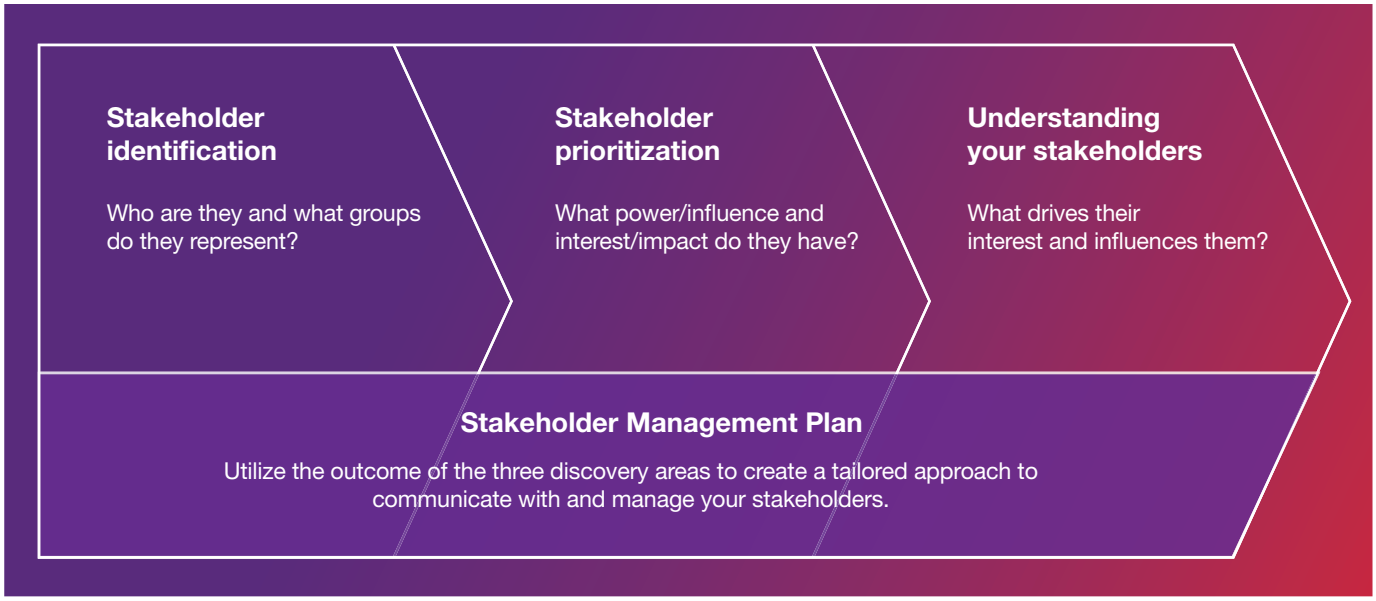
With thousands of implementations completed, we defined a structured approach to end user adoption, broken down into 5 phases: **Align & Strategize, Promote & Prepare, Understand & Educate, Enable & Excite, and Measure & Reinforce.** Each phase occurs at a particular point in your Fuze adoption journey, with several programs and initiatives belonging in each phase.

The Fuze Adoption Playbook was created to share our best practices for those with a vested interest in driving adoption and effective lasting change throughout their migration to Fuze and beyond. The resources include helpful tips, checklists, and templates to organize your team internally and effectively roll out the Fuze platform to your organization.

Phase 1: Align & Strategize	Phase 2: Promote & Prepare	Phase 3: Understand & Educate	Phase 4: Enable & Excite	Phase 5: Measure & Reinforce
Adoption Game Plan	Internal Launch Campaign	Engagement Plan	Go-Live	Ongoing Nurture
Identify stakeholders	Communication templates	Appoint ambassadors	End user self-help	Email nurture campaigns
Conduct end user survey	Posters	Use case workshops	Launch event	Adoption assessment
Create adoption plan	Town halls	End user training	Go-live support	Optimization initiatives

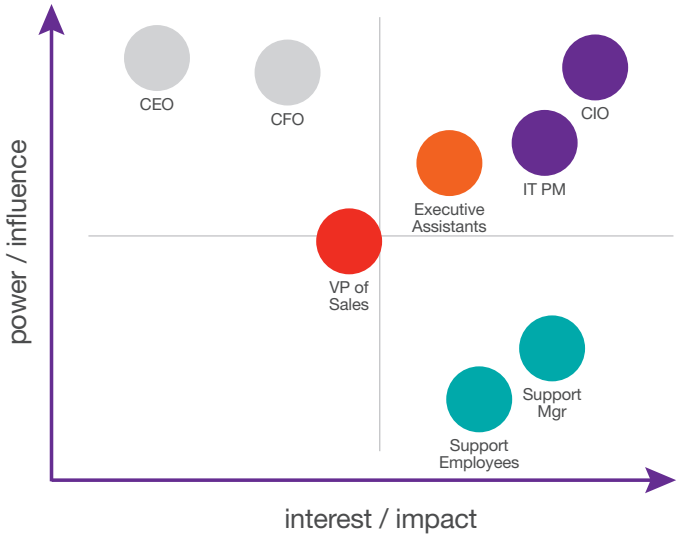
Phase 1: Identify Stakeholders

To ensure your project gains the appropriate buy-in and support across the entire organization, we strongly recommend you create a Stakeholder Management Plan as part of your adoption strategy. The high-level steps for creating this plan are below:



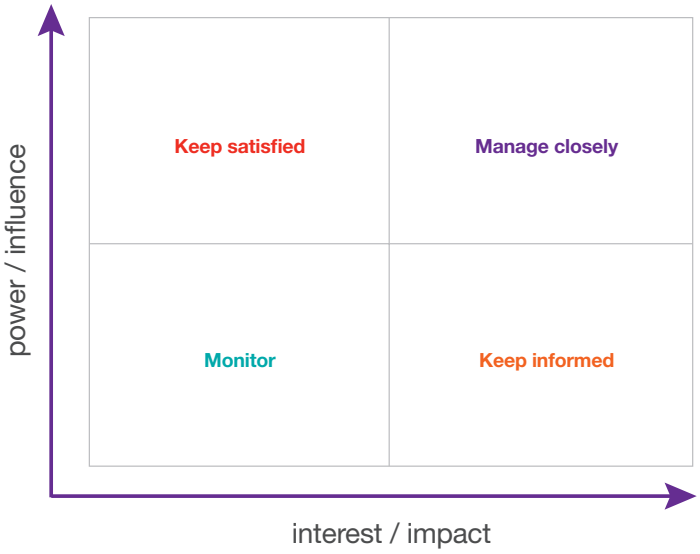
The first step is to **identify your stakeholders.** An easy way of doing this is to think of the project in terms of who will be impacted as well as who will impact it. What we've found is that the first will oftentimes be representatives of user groups whereas the latter tends to be more specific to a unique role or person (detractor or influencer).

Once you have your list of potential stakeholders, you could use the influence/impact grid (example depicted here) to understand where each stakeholder may sit. This leads us to the next step; **prioritizing your stakeholders.**



Understanding your stakeholders and their position on the grid can help you both prioritize and manage these stakeholders. This will be critical to the success of the project.

It's important to remember that influence is very subjective. It may be that your stakeholder map changes over the course of the project as you get to know more about each stakeholder. It's important that you adjust your communication strategy based on their evolving influence, interests, and involvement.



Use the questions below as a guide to better understand your stakeholders:

- What motivates the stakeholders? Do they have any interest in the outcome of the project?
- What do your stakeholders want to know about the project and how should you communicate this information to them?
- What is their current view of the project? Who/what has had an impact on this view? Can you change their view on the project?

Phase 1: Conduct an End User Survey

To better understand the potential impact of the project, it is important to understand your current state. The current state not only includes the technical details discussed during implementation, but also includes understanding what will change for the end users, how to measure that impact, and how to structure your adoption plan. We recommend using an end user survey to get a baseline for current behavior and current level of end user satisfaction with regards to their current communication toolset.

See below for sample text to use when sending an email to your end users to request their participation in the survey:

> *Please take 5 minutes out of your day to let the IT department know how well the communication tools provided to each employee are working for you by completing this online survey. Completing this survey is important so that we can better understand how you work effectively and fully support your daily communications needs.*
>
> *Please make sure you complete this survey by close of business on <insert deadline date>.*

- **Create the end user survey.** We suggest that you include the same questions in both the initial pre-deployment survey and in the subsequent end user surveys. This will give you baselines to track against over the course of your Fuze journey.
- **Send the survey.** It is also critical that you maximize the completion rate. To facilitate this, work with your key stakeholders to help reinforce the completion of the survey. Apply gamification tactics to incentivize people (e.g.: $10/25/50 gift card raffle, prizes related to your company's products, services, and swag). When distributing the survey, be sure to communicate that the survey is short, will help the end users directly, and there is a deadline.
- **Collect the survey results.** Use the data collected from the survey to segment your end users. To do this, organize the end users into categories based on one or more answers that they've provided in the survey. That allows you to define and prioritize both adoption objectives and design tactics based on the categories and percentage of users who fall into those categories. For example, end users that will need the Salesforce integration or those that may be unaccustomed to using a headset.

Think about using the data to anticipate how much change may be anticipated by each end user group. For example, if your company has decided to move the majority of their users to softphone (desktop clients) but 80% of your users are currently using a desk phone, you will know that you need a communication and enablement strategy to address this large group of people.

In summary, the end user survey can be a powerful tool for you to understand not only your end users, but also to identify opportunities for success based on your current state. The end user survey will serve as your baseline for usage and end user satisfaction. The end user survey is not only important for determining how to roll out Fuze to your users, but to gauge the satisfaction of your end users throughout the customer journey.

Phase 1: Create an Adoption Plan

Capture your baseline & set your goals

The adoption of Fuze is important to both the success of your investment and the realization of the benefits it has to offer to your organization. So how do you know if your organization has successfully adopted Fuze? While it might seem appealing, taking the approach of "let's measure everything and let the data speak for itself" could easily be overwhelming, time consuming, and ineffective.

For these reasons, **it's important to set very clear adoption goals and objectives related to specific teams, locations, and use cases.** These adoption goals should be directly related to bigger company objectives and your reasons for selecting Fuze. For example, if your company goal is to reduce cost through cutting down on business travel, it is important for you to track Fuze Meeting usage specifically against those employees who would have typically been on the road, instead of looking at company-wide usage.

Before you can set goals and create an adoption plan for your user base, you first need to understand how your organization is currently communicating. Once you understand the 'current state', you can set goals for the 'future state'. Without first setting your baseline, you may find that your organization is establishing unreasonable goals or not focusing on the right metrics.

There are two factors to consider when setting goals for and measuring adoption: **usage** and **end user satisfaction.**

Usage: Usage is leading indicator for adoption. You can track the usage of the Fuze platform through Fuze View and Fuze Discover. Using these tools, you will have the ability to drill down into call, message, and meeting activity by individual, team, and location. Keep in mind that certain departments or locations will have different use cases, as well as varying needs for the Fuze platform. For example:

- Your sales team or call centers will have a higher number of outbound calls.
- Your field employees will have a higher number of calls, messages, or meetings from Fuze Mobile.
- Employees who typically work from the office will have a higher number of calls from deskphones, if provided.

User Satisfaction: While usage is a leading indicator of adoption, user satisfaction is necessary for long term retention. You want your end users to feel that they are productive with their communication tools. The most reliable way to determine if your users are collaborating efficiently is through an end user survey.

Understanding how your end users currently communicate will strongly influence how you build out your adoption plan. You can discover key information regarding their collaboration preferences and learning styles. The end user survey is a powerful tool not only to collect a pre-deployment satisfaction baseline, but also to measure the satisfaction with Fuze over time. To do this, use the same questions in each survey for direct comparison over time.

Successful adoption looks different for every company. This is why it's important to set specific goals for individual teams, departments, or locations, and to continuously re-assess and adjust your plan accordingly.

Building your adoption plan

Before you can create your adoption plan, it's important that you've:

- Gathered the right stakeholders and captured their factors and metrics of success
- Know your baseline and have set specific adoption goals
- Understand the current state of communications and collaboration through surveying your end users

Below you'll find an example of activities you may want to incorporate in your plan depending on your goals. You can use this to create your adoption plan with the applicable initiatives and timelines associated with those tasks.

Communication planning

Based on the stakeholder identification exercise, you can design the appropriate cadence and method for communicating with each of your stakeholders. For example, you may have a monthly email update for some individuals, while you have a bi-weekly steering committee meeting for others. Additionally, you will need to identify how and how often to communicate to the rest of the company. Ensure agreement by reviewing the communications plan with your stakeholders first.

Adoption activity planning

Outside of your stakeholder management communication plan, you also want to plan out your adoption activities. Review the initiatives and considerations below to ensure you include the appropriate activities in your plan.

Phase	Initiative	Description	Planning considerations
Promote & Prepare	Pre-launch communication templates	Let your organization know that Fuze is rolling out in the coming months.	How far ahead and how often do you want to let end users know this change is coming?
	Posters	Build awareness of Fuze with posters. Treat the coming of Fuze as a special event.	Will you use your internal printing facilities or will you need to order prints externally? Take into account any lead time and costs.
	Town halls	It's time to get everyone aligned as to how they can use Fuze day-to-day.	Are there any opportunities to present the upcoming change in a company wide meeting?
Understand & Educate	Use Case Workshops	Understand how each end user group (role/team/department) communicates today.	Have a good idea of how these stakeholders are communicating today before the start of the workshop.
	Fuze Ambassadors	Pilot Fuze with a group of select end users to understand gaps or opportunities in enablement.	Work with your stakeholders to identify participants and their schedules.
	End User Training	Fuze offers a variety of resources to get your end users educated.	Take into consideration groups of users that will have to train in batches due to coverage.
Enable & Excite	End user self-help tools & documentation	Whether it is help.fuze.com or the in-app help, there are multiple ways for end users to self-educate.	Make sure your users know where to go and what to expect if they need more help.
	Go-live support	Determine who or what will be providing support to your end users during go-live.	Remember to send out communication to your end users to let them know how to reach out for support.
	Launch events	It's go time! Create an atmosphere of excitement on the big day.	Will you have a centralized point where users can come by or will you have people walking the floor?
Measure & Reinforce	Email nurture campaigns	Fuze sends a series of emails to make sure your users are logging in.	This is a good time to check in with Ambassadors and other users to see if they have logged in.
	Adoption assessment	Use Fuze View and Fuze Discover to get insights into Fuze usage at your organization.	Set up reminders on your calendar to review the data 30/60/90 days after go-live.
	Optimization initiatives	Your users have been using Fuze for a couple of months. Now what?	Once you've identified what optimization activities you will run, create a new project plan.

Phase 2: Communication Templates

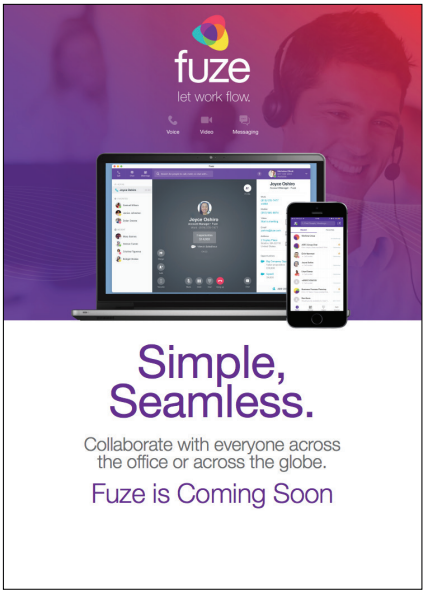
Fuze has created email templates to create awareness and excitement for you to send to your end users across the organization. These emails should be sent throughout the duration of your deployment following our suggested communications schedule. The email templates include videos, tips and tricks, and training reminders. The areas highlighted in bold will need to be customized (e.g. go live dates, contact information).

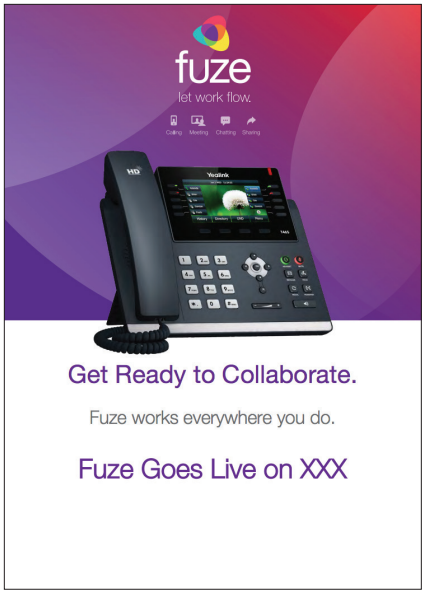
Below is a suggested end user email communication schedule.

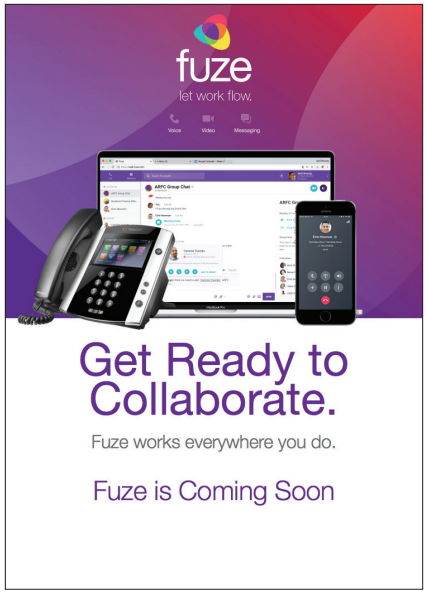
Ambassador Program Kickoff	Timetable
Bring your Fuze working group together	~2 weeks prior to go-live
Pre-Launch End-User Emails	**Timetable**
Email #1: Our Move to the Fuze Platform	1 week after the kickoff call with the Fuze project manager
Email #2: Preparing for our Move to Fuze	6 weeks prior to Go-Live
Email #3: Preparing for Fuze Launch	5 weeks prior to Go-Live
Email #4: Fuze Training and verifying training dates and agenda with Fuze project team (3 OPTIONS TO CHOOSE FROM)	
Email #4-V1: Private Webinar Training (if applicable to customer's purchase)	4 weeks prior to Go-Live
Email #4-V2: Fuze Onsite Training (if applicable to customer's purchase)	4 weeks prior to Go-Live
Email #4-V3: Fuze Public Training (if applicable to customer's purchase)	4 weeks prior to Go-Live
Email #5-V1: Fuze Go-Live Reminder	2 weeks prior to Go-Live
Optional Communication Emails	**Timetable**
End-User Email: Moving to a Softphone Application	4-5 weeks prior to Go-Live
End-User Email: An Intro to Fuze Meetings	4-5 weeks prior to Go-Live
End-User Email: An Intro to the Fuze Mobile App	4-5 weeks prior to Go-Live

Phase 2: Posters

The posters are designed to market Fuze to end users and prepare them for deployment. The posters should be posted in high traffic areas such as the cafe or reception area. These can be fully customized in illustrator (if you have the program) or text edited in Adobe Editor, print in 11x17 (North America) or A3 (EMEA). We strongly suggest involving your internal marketing team to help with messaging.







Phase 2: Town Hall

Word is already starting to spread that Fuze is coming. The employees at your company have seen the posters and emails announcing the arrival of a new communication tool, Fuze. It's time to have a more centralized conversation with the employees at your organization. Give your users more reasons to be excited about Fuze, provide a timeline for training and accessing the tool, and answer the questions they have. To do this, we recommend that one of the internal stakeholders of Fuze holds a town hall to talk about the coming of Fuze.

Phase 3: Fuze Ambassador Feedback

An important part of the adoption strategy is to get a subset of end users involved early on and excited about the move to Fuze. Your stakeholders should be able to help nominate and identify ambassadors. These ambassadors should be open to change and have a positive influence within the company, their teams, and lines of business.

This is a great opportunity for ambassadors to gain early access to new products, get recognition from executive sponsors and stakeholders, and potentially even earn a thank you gift, like Fuze swag.

The responsibilities of an ambassador are as follows:

- Submit or review the use cases from the use case workshop.
- Preview training material ahead of the end user training sessions.
- Test the use cases on the Fuze platform as part of QA.
- Provide feedback on training and solution prior to go-live.
- Help out peers in go-live period.

We suggest branding your team of ambassadors with a name (for example, FAN— Fuze Ambassador Network) to elevate the program.

Phase 3: Use Case Workshops

Use cases are essential to end user adoption. Rather than focus only on the specific features of Fuze, it's important to think about how your employees will actually use these features. Use cases are important for:

- Determining the collaboration needs of specific groups.
- Driving technical decisions and documenting process changes.
- Agreeing on success measurements.
- Establishing timelines to deliver use case benefit by providing input into the overall adoption program.
- Emphasizing how to use Fuze vs. how to use the features of Fuze when rolling out trainings.

Fuze recommends running a use case workshop with your key business stakeholders to identify and prioritize 3 to 5 initial use cases that will demonstrate measurable business value to end users. The first goal of the workshop should be to understand the desired outcome of the stakeholder, following the understanding of the stakeholder's current process for achieving the outcome, regardless of whether this process is working. Then you can ensure that your use cases are designed and implemented in the most efficient and effective way on the Fuze platform, and that you're focusing on the most impactful material when rolling out training to specific groups at Fuze.

So, how should you run your Use Case Workshop?

1. Document current state process for 3–5 specific personas or departments.
2. What are they key challenges these user types face with this current process?
3. How can the Fuze solution help overcome these challenges?
4. What is the measurable business outcome when these challenges are overcome?

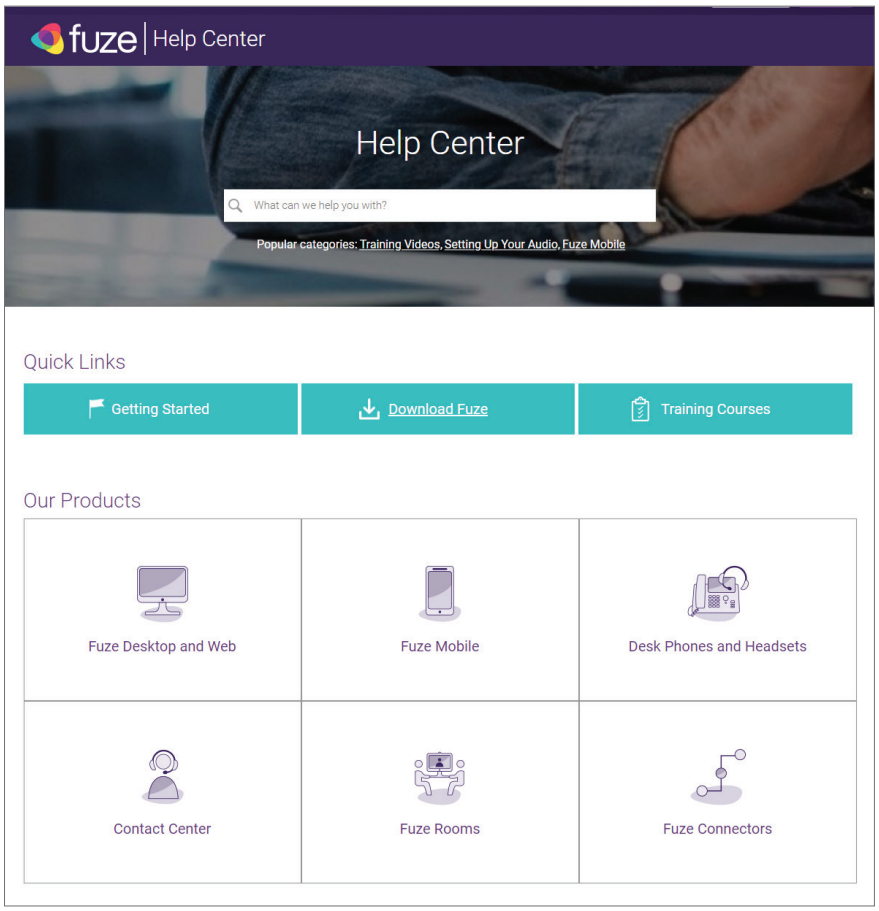
Phase 3: End User Training

User adoption is paramount in the ongoing use of any new software platform. Here at Fuze we are committed to providing your company with quality training and enablement options to ensure greater end user adoption. Every user learns in a unique way and thus we offer a variety of delivery methods to enhance the user's learning experience.

For customers who choose to work with Fuze to determine an end user training strategy, a Client Enablement Specialist will work with you to define a customized training solution for your team members and environment. Your Client Enablement Specialist will schedule trainings, point your users to self-service materials, and deliver professional, interactive trainings that enable your team members to use Fuze in the most efficient and effective ways possible.

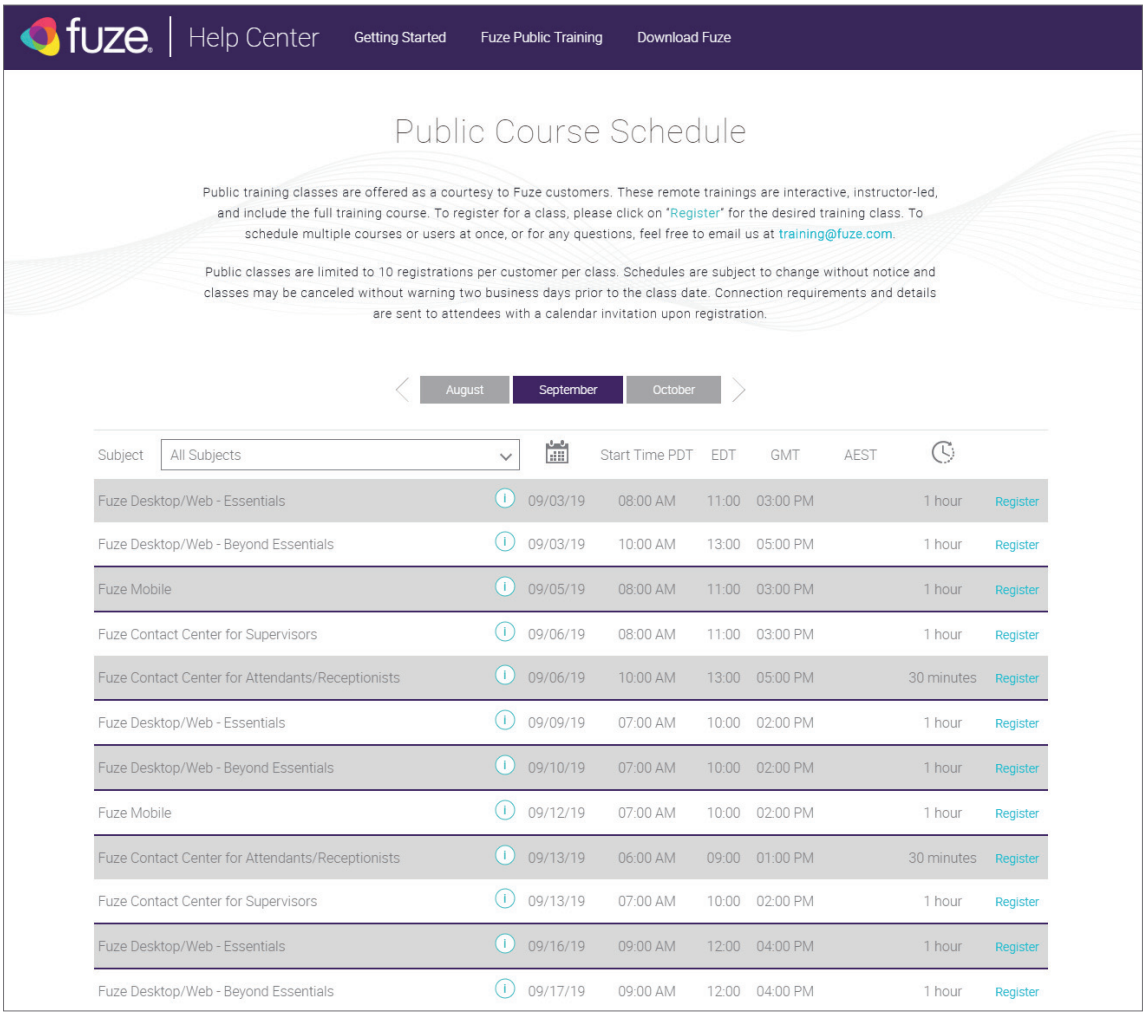
Customers can choose between self-service and instructor-led trainings. Each will be described in more detail below.

Our self-service enablement options are geared toward those who prefer to read through a guide or watch videos at their own pace. Customers who select these options will have access to a large library of training content including training course guides, short training videos, quick reference guides, and knowledge base articles. For end users, these can be accessed without needing any credentials via the **Fuze Help Center >>** help.fuze.com. This site has a plethora of training materials in English, as well as the ability to register for end-user training courses (limited to no more than 10 attendees per company per class).



Customers who have chosen **instructor-led training** will meet with a Client Enablement Specialist shortly after the project kickoff. At that time, Fuze will review all of the training delivery options and available courses, and make recommendations based on both the customer's environment and user base. The Client Enablement Specialist will differentiate between a variety of different user profiles and their training needs: including stakeholders, administrators, champions, and end users.

Public and private training classes can be delivered either remotely or on-site. Fuze offers a variety of packages to suit different customer training models at a reduced cost. Courses can also be delivered individually over a period of time. Instructor-led training can be delivered in English, French, or Spanish.



In the weeks and months following a customer's go-live, we suggest periodically checking with the user base to gauge how well the Fuze platform is being adopted. It is important to understand if the user base feels comfortable using all of the available features of the Fuze platform to optimize both productivity and satisfaction. If not, do they understand the basic features and know where to find training on them? This could be an opportunity to promote the self-service training materials once again, ultimately, you should utilize the end user survey results and statistics through Fuze Data to gain insights into user behavior and drive increased usage.

Phase 4: Launch Event

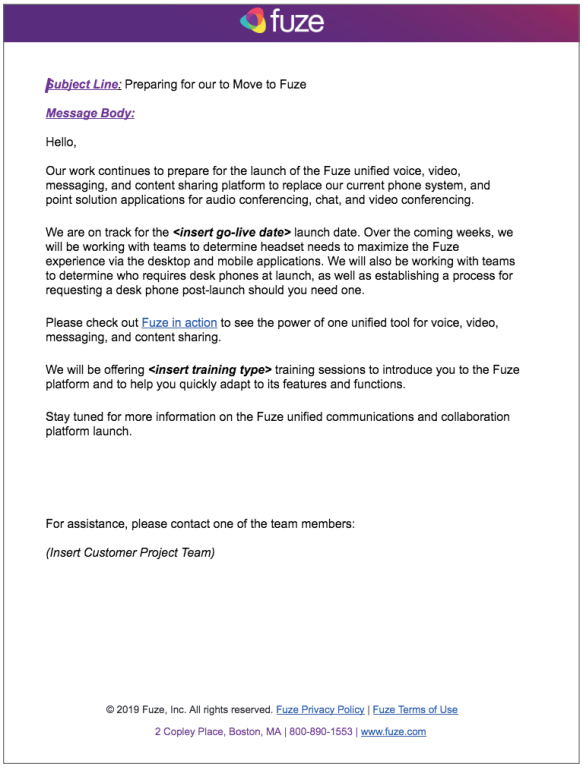
The launch event is likely to be the first time your end users experience the Fuze product. For this reason, it's important that the event runs smoothly. The most successful launch events have presence from your on-site technical team, internal stakeholders and Fuze ambassadors, as well as Fuze representatives.

Create a fun, inviting atmosphere to generate a buzz and get your users excited to use the Fuze product. Also, you want to make sure you create an environment where your end users are comfortable asking initial questions as they log in, make a call, send a message, or start a meeting for the first time.

No two launch events are the same. These events can vary depending on the customer, sites, or teams in attendance. However, all successful launch events have the same elements:

- Communication and advertising of the launch event leading up to the day.
- Fuze Ambassadors to help answer use case questions from colleagues.
- Key stakeholders in attendance for visibility.
- Fuze swag giveaways to get new users excited about the platform.
- This event is the first opportunity to advertise Fuze as an effective collaboration tool and talk through use cases.

Fuze offers launch party packages complete with prizes, treats, and on-site Fuze resources. Please contact your Fuze account representative to learn more about these packages if you would like help planning and executing your launch day.



fuze

Subject Line: Preparing for our to Move to Fuze

Message Body:

Hello,

Our work continues to prepare for the launch of the Fuze unified voice, video, messaging, and content sharing platform to replace our current phone system, and point solution applications for audio conferencing, chat, and video conferencing.

We are on track for the ***<insert go-live date>*** launch date. Over the coming weeks, we will be working with teams to determine headset needs to maximize the Fuze experience via the desktop and mobile applications. We will also be working with teams to determine who requires desk phones at launch, as well as establishing a process for requesting a desk phone post-launch should you need one.

Please check out Fuze in action to see the power of one unified tool for voice, video, messaging, and content sharing.

We will be offering ***<insert training type>*** training sessions to introduce you to the Fuze platform and to help you quickly adapt to its features and functions.

Stay tuned for more information on the Fuze unified communications and collaboration platform launch.

For assistance, please contact one of the team members:

(Insert Customer Project Team)

© 2019 Fuze, Inc. All rights reserved. Fuze Privacy Policy | Fuze Terms of Use

2 Copley Place, Boston, MA | 800-890-1553 | www.fuze.com

Phase 4: Go-Live Support

For larger locations, it's important to have an on-site presence for the day of the go-live. On-site resources and presence not only promote excitement for Fuze, but also provide end users with necessary support as they log in to Fuze for the first time.

Consider the following when thinking about both on-site and virtual resources for your go-live:

- **Create a dedicated physical space for your users to drop in and ask you questions.** This physical helpcenter should be advertised ahead of go-live.
- **Assign experts to walk the floor of your office.** These resources should see if employees have any issues logging in and help them through their first workflows with Fuze. Employees may not take the initiative to drop by the physical help center, so the mobility of these resources ensures that your reach is extended.
- **Ensure that you have technical assistance for when troubleshooting is required.**
- **It is important to provide a feeling of support to those who work remotely.** Keep users engaged with update communications and consider creating a drop-in clinic (via a Fuze Meeting) where remote users can drop in to ask workflow or technical questions. It may also be worth considering creating a "remote user group chat" so that those who are not in an office feel as though they are part of a group and can also help each other with questions they may have.

Fuze has an expert team of people who have experience in driving and supporting on-site launch events. Our team will be able to provide expert guidance, answer questions, and help get your users set up and using Fuze. We can even look at creative ways of engaging end users with Fuze incentives. Contact your Fuze representative to find out more.

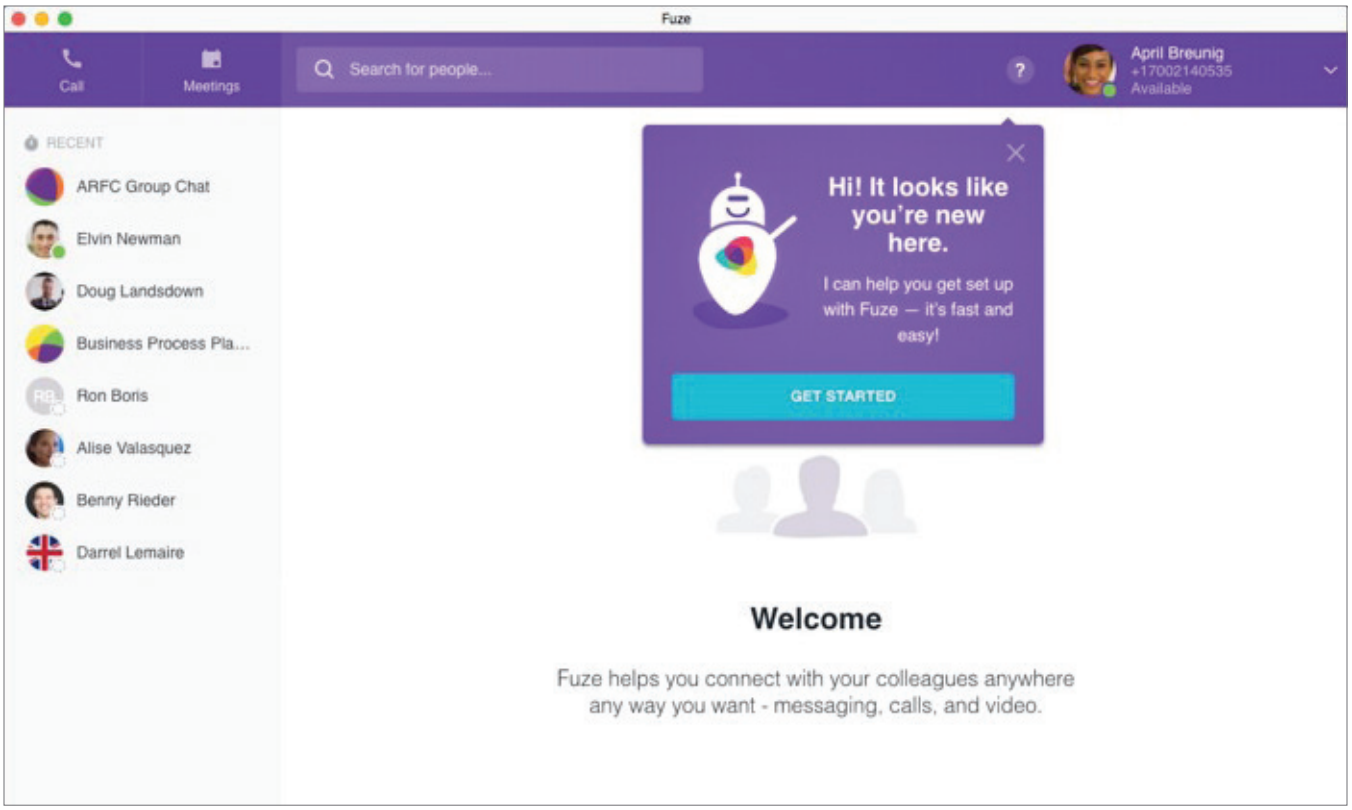
Phase 4: End User Self-Help

It's time to get your users Fuzing! Through the Hub, you can send your end users their welcome email to Fuze. This email will provide your users with their login credentials.

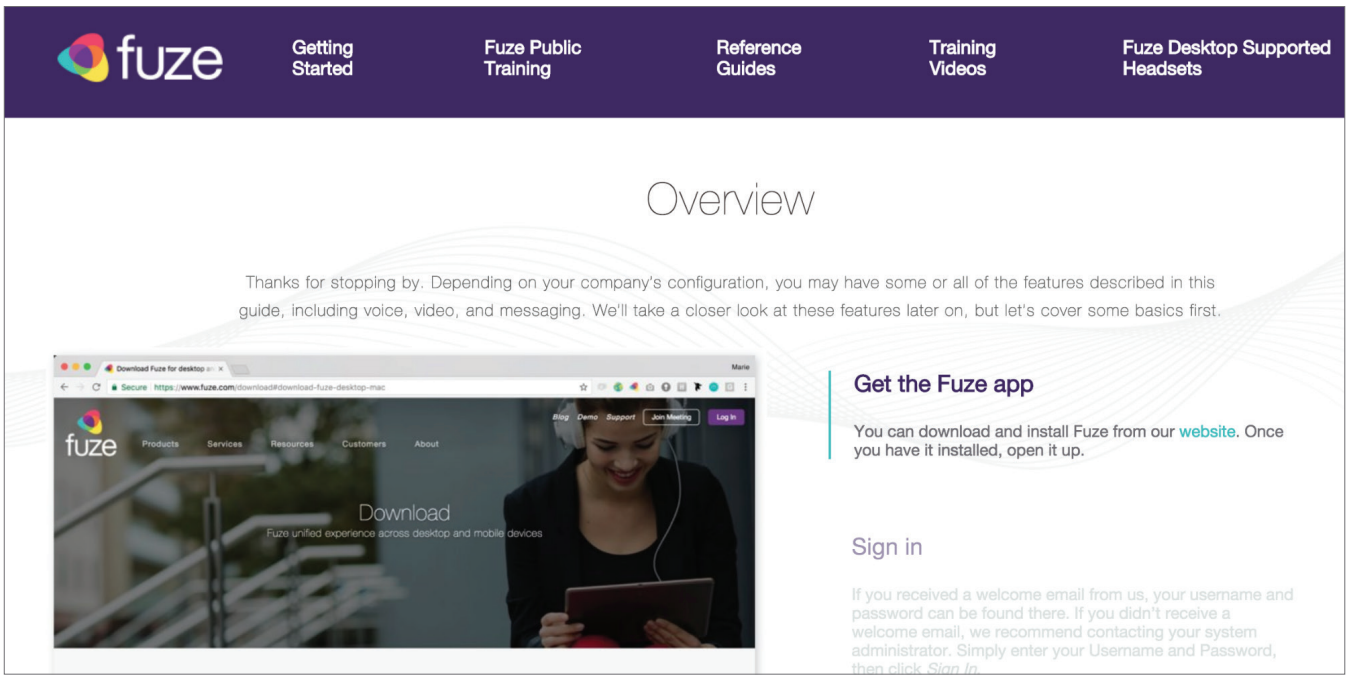
When a new Fuze users logs into Fuze Desktop for the first time, the user will be prompted to through a set of check-list items like selecting a Fuze avatar and selecting audio settings.

The Getting Started Guide is geared towards the first time Fuzer. This guide walks customers through the process of logging in to Fuze, as well as other basic concepts, like how to make a call or send a message.

Make sure to point your end users to the Fuze Help Center as a resource. The Fuze Help Center is home to hundreds of articles, covering everything from Fuze Desktop/Mobile/Web, to desk phones, headsets, and Fuze Rooms.



Welcome to Fuze



Getting Started Guide

Phase 5: Adoption Assessment

Now is the time to keep the momentum moving. Often, we find customers look at the go-live as a "project end." However, we recommend leveraging Fuze tools to assess adoption not only directly after your launch, but throughout your partnership with Fuze to gather usage data and adoption metrics.

There are two ways to analyze the adoption of the Fuze platform within your organization: **usage** and **satisfaction.**

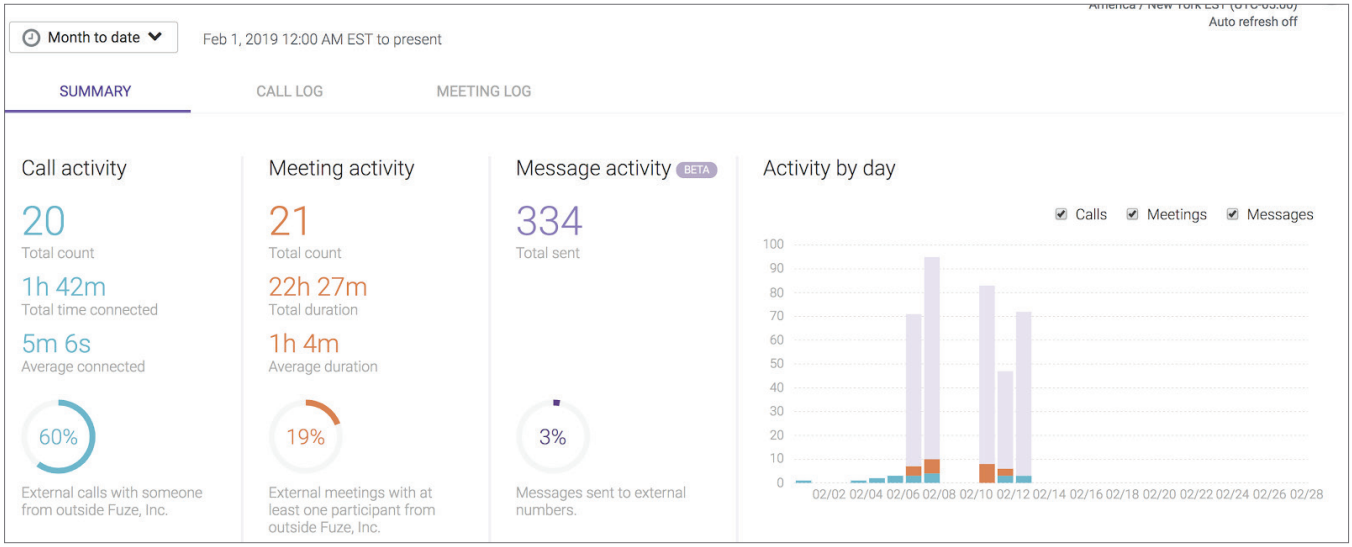
Usage

Fuze View and Fuze Discover are self-service tools that offer insights into how different individuals, departments, or sites are using Fuze.

First, look at Fuze View.
Fuze View is an interactive tool for users to easily visualize real-time data for queues, individuals, and departments. From graphical summaries to detailed call and meeting logs, users can quickly focus on the data that is most meaningful to them. Unlike most unified communications platforms, Fuze View is not just for administrators. With departmental access:

- Sales and recruiting managers can easily track call and meeting activity.
- Contact center managers can monitor call queues, ensuring their agents are productive and their customers are happy.
- Administrators can get a better picture of user adoption and usage patterns.

The homepage of Fuze View displays the total number of calls, meetings, and messages by the hour for the current day. This information can be broken down by departments and then even further down to the individual user level.



For a slightly more detailed snapshot, the bottom of the homepage breaks down active users in the last 90 days as well as active users by endpoint within the last week.

Next, drill down in Fuze Discover.
Fuze Discover is designed to provide deeper analysis with the ability to drill down into the historical data for investigation and to identify trends. It provides enhanced dashboards and data visualization, ad hoc analysis, customized reports, and the ability to export and schedule reports. Fuze Discover enables managers to evaluate the communications trends of successful salespeople and agents, overall employee engagement, and most importantly track ROI against goals for the organization.

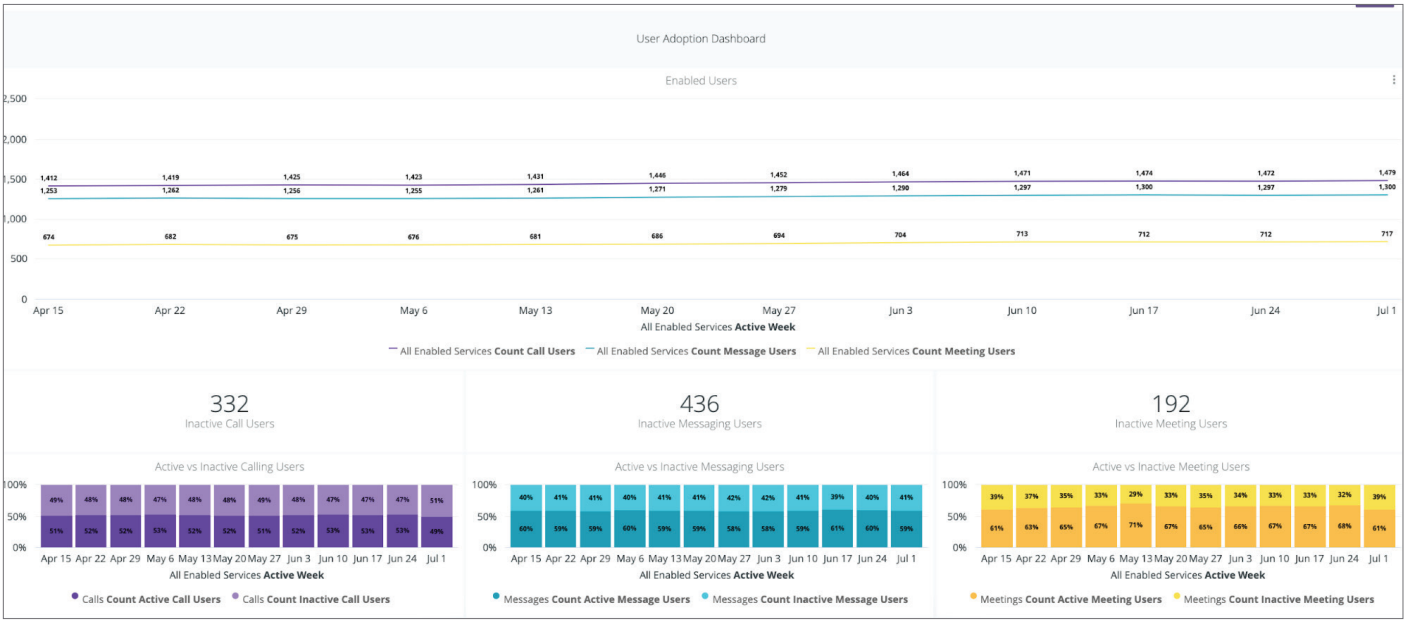
Exploring the Adoption Dashboard in Fuze Discover
Fuze Discover users have the ability to create reports and dashboards to gain more insight into how their organization is using Fuze. Specifically, individuals with Fuze Discover licenses can run reports to see if users' services are active or inactive based upon call, chat, or meeting activity.

Active Users: Users with active service that have generated one of the following actions within the selected timeframe:

- Voice: initiated a call
- Chat: sent a message
- Collaboration: hosted a meeting

Inactive Users: Users with an active service but has not generated any of the following actions within the selected timeframe:

- Voice: initiated a call
- Chat: sent a message
- Collaboration: hosted a meeting



Drill down to see the adoption rates of voice, chat, and collaboration by department, location, and individual.

Additionally, for those active voice users, you can drill down into whether departments, locations, and individuals are making calls from their desk phones, Fuze Desktop, or Fuze Mobile.

Adoption data is available dating back to January 1, 2019.

Satisfaction

End user activity described in Fuze Discover and Fuze View illustrates what your users are doing with Fuze, but it won't tell you why or how well it's going. A post-deployment end user survey will provide qualitative insight into how satisfied users are and what business value users are deriving from Fuze.

Without an end user post-deployment survey, you are likely to only hear from end users when they open support tickets. And some struggling end users may not reach out at all. The post-deployment end user survey will enable you to assess the business value added by Fuze and proactively identify users struggling with the transition.

More often than not, a user struggling to adopt Fuze is struggling with a solvable problem, whether a user has an unsupported headset, a poor home network, a misconfigured account, or simply does not understand how the app works. Users with solvable problems, yet who believe the app is at fault, are unlikely to open a support ticket. The end user survey will identify these users and provide you a course of action forward to improve their overall experience, and thus, adoption of Fuze.

If you distributed the pre-deployment survey, you will be able to compare results from the same satisfaction and business value questions. A comparison of the state of satisfaction before and after Fuze will illustrate the communication and collaboration improvements within your organization.

Phase 5: Optimization Initiatives

Adoption optimization is ongoing, and organizational shifts take time. However, you don't need to recreate the wheel to improve adoption within your organization. Our recommended approach and initiatives are not only meant for your initial rollout of Fuze, but to be repeated throughout your adoption journey with Fuze.

Usage

In order to increase usage of the Fuze platform, you need to first look at the data. After looking at how and by whom Fuze is used in your organization, there's a few things to consider regarding adoption data:

- Is the data showing expected behavior?
- How does the data vary across individuals, departments, and locations?

Most importantly, look at the original goals you set out for the organization in your Adoption Baseline and Goal Setting template. Focus on these initial goals you had set prior to the rollout of Fuze rather than trying to improve usage widely across the company in a haphazard way.

Don't panic if usage numbers are not what you expected; there could be a few reasons for that. After all, distinct teams within your organization work differently, gravitating toward different ways to collaborate via Fuze than others. Below are the most common scenarios to examine.

Increase Call Volume

Your observation: Two departments have low call volume: engineering and sales. For engineering, this may not be an issue. They may simply be choosing to communicate by sending messages and joining meetings. However, a low call volume for the sales team is worth investigating.

Next steps: Investigate how sales is currently communicating.

- Are they using their cell phones instead of Fuze Mobile? See if the sales team has Fuze Mobile downloaded.
- Retrain sales on the functionality of Fuze Mobile.
- Reinforce the benefits of all calls made with Fuze tosales leadership. It is easy for sales managers to understand who is making calls and the duration of these calls through Fuze View.
- Think about implementing Fuze for Salesforce. This integration makes it very easy for a rep to click-to-call directly from the web application and eliminates the need for manual activity tracking.

Increase Meeting Numbers

Your observation: Specific departments have a low meeting number. For teams like accounting, this might not be an indicator of an adoption-related issue. However, for highly interactive teams like marketing, this could be an item to investigate.

Next steps: Investigate how marketing is currently holding meetings.

- Is the team using the old collaboration tool they used prior to the rollout of Fuze? If you did not officially remove access to the collaboration tools in place before Fuze, there could be a chance teams are using this tool to meet and chat.
- Recruit and appoint an ambassador in the group. The may be able to help you identify the gap between usage expectations and reality in this group. If this person is a well-respected member of the team, ask him or her to start sending all meeting invites with Fuze Meeting IDs.

This could serve as a catalyst to get this team to start using the technology as you intended and better understanding the different use cases for Fuze.

Increase Sent Messages

Your observations: There's been a low volume of messages sent.

Next steps: Investigate shadow IT or old tools. Users could be using the collaboration tools that were in place before the rollout of Fuze.

- Implement programs to culturally cut down on the number of emails. Rather than asking questions or providing an update to a colleague over email, do so in a chat. The informal nature of chat can lead to a quicker resolution.
- Create team group chats. This is an easy way to provide specific individuals with quick updates, rather than spending time writing an email.
- Fuze Ambassadors should start 1:1 chats, group chats for projects, topic-based chats, etc. This would encourage others to participate in chat who may not have thought to start a conversation via chat.

Increase Fuze Mobile Usage

Your observation: Low number of mobile usage. For your field employees, this could be a red flag. For those who typically work in the office, this is a non-issue.

Next steps: Investigate how field employees are communicating.

- Are they choosing to use their cell phones instead of Fuze Mobile? Check to see if Fuze Mobile has been downloaded.
- Make sure the team is aware of the capabilities of Fuze Mobile. There could be a lack of education here — reiterate how easy and seamless it is to join a meeting while on the road using Fuze Mobile.

Increase Usage at a Particular Site/Office
Your observation: One particular site or office has lower usage of Fuze than other sites.

Next steps: Investigate how works are communicating at this site or office.

- Are they using the communication tool that was in place before Fuze?
- Do you have a strong ambassador in this office? If not, think about recruiting a well-respected "champion" in this office.
- Did this particular site receive the same go-live and end user training as the successful sites? If you noticed success with a go-live training, user support, or an uptick in usage after training at another site, it is a good idea to replicate those actions at a site with lower usage.

Satisfaction

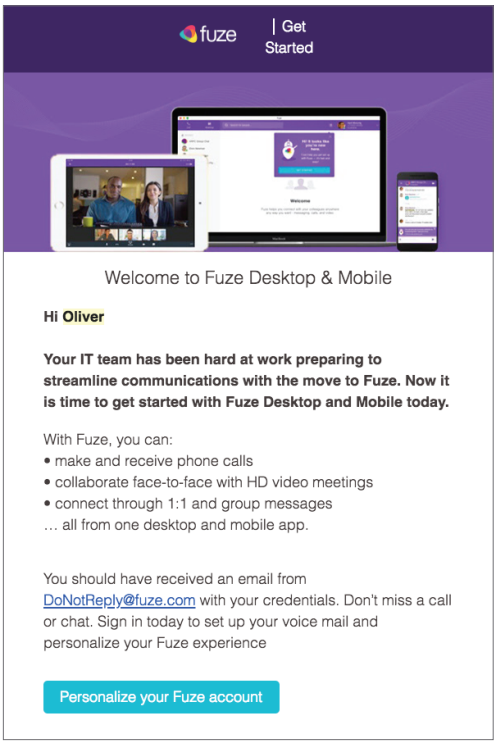
Assessing the satisfaction of end users is ongoing. It's important to check in with the sentiment of your users a couple times a year. The post-deployment end user survey guide found in the adoption assessment article can help you key into different individuals, teams, or locations or may be struggling to adopt. Based on their survey answers, you can start to create a plan influence of change of sentiment with these users.

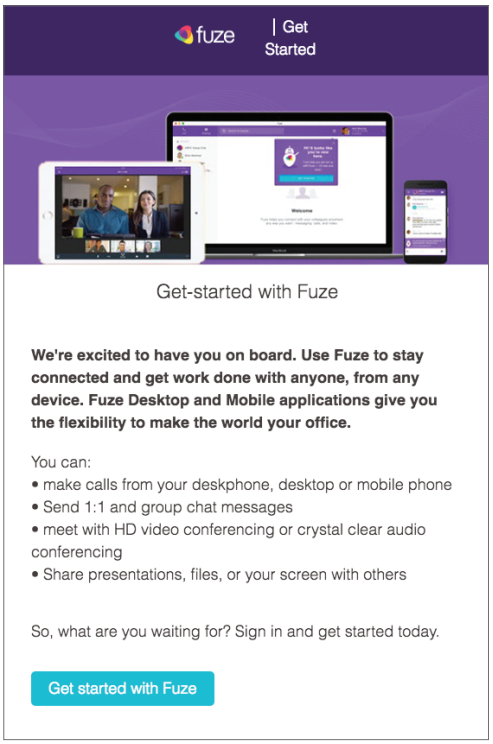
Whether you've already hit your adoption goals or there's still room for improvement, you should always consider the following:

- Successful adoption requires solid change management tactics. Are you proactively aware of how yourend users are adopting the change to Fuze?
- Review your initial goals and reasons for choosing Fuze. It may be time to create the next phase of objectives as well as identify success metrics to begin tracking based on what you've learned and observed from your users.
- Keep your Fuze ambassadors engaged and gather their feedback. Your end users could need additional training.
- Work with your team at Fuze to help you assess your usage baseline and consider building separate goals for specific groups of users.
- Keep your executive sponsor engaged to help support the change to Fuze within your organization.
- Create a plan to address continuous education post-go-live campaigns, whether it's regular Q&A webinars,sending your end users tips & tricks, etc.

Phase 5: Email Nurture Campaigns

After a particular site has gone live, Fuze will send your end users a series of emails to help get your users logged in and using the Fuze product. These emails will include a series of tips on issues such as setting up a profile, how to place a call, setting up a meeting, and sending a message. See below for examples of these emails.





Conclusion

End user adoption is a journey, and we're eager to help our customers leverage these adoption best practices that we've honed over the last 10+ years, and better understand why Fuze has been proven in the enterprise time and time again.

For more information and adoption best practices, visit www.fuze.com.