
ONBOARDING USERS TO NEW TECHNOLOGY

OBJECTIVE

Participants will understand the framework for driving new technology adoption and reducing support burden.

THE PROBLEM

Rolling out new technology is the easy part...

Getting the buy-in of the team can be more of a challenge.

The Cost of Poor Implementation



Increased Support
Tickets & IT Burden



User
Frustration



Low
Adoption Rates



Shadow IT
& Workarounds



Wasted
Licensing Costs

FRAMEWORK FOR SUCCESS

1

COMMUNICATE

Set expectations
before the
change happens



2

EDUCATE

Provide training
at the right time
and depth



3

SUPPORT

Be there
when
questions arise



4

REINFORCE

Sustain
adoption
over time



1

COMMUNICATE

Set expectations before the change takes place.

ANNOUNCE EARLY

Give people time to mentally prepare. Surprises breed resistance.

EXPLAIN THE “WHY”

Connect the change to business goals or user benefits.

SET A CLEAR TIMELINE

When is it happening? What do users need to do, and by when?



Multiple touches across
multiple channels. One
email isn't enough.

2

EDUCATE

Provide training at the right time and depth.

JUST-IN-TIME

Train close to go-live. Too early and they'll forget.

FOCUS ON TASKS, NOT FEATURES

Teach what they need to do, not everything the tool can do.

KEEP IT SHORT

Respect their time. A 5-minute video beats an hour-long webinar.



Offer multiple formats.
Some prefer video,
others prefer reading.

3

SUPPORT

Be there when questions arise.

MAKE HELP EASY TO FIND

Centralize resources. Don't make people hunt for answers.

ANTICIPATE COMMON QUESTIONS

Build FAQs proactively. Address friction before it becomes frustration.

EMPOWER LOCAL CHAMPIONS

Train power users who can help their peers. Support scales better.



Track what questions come in. They tell you what your training missed.

4

REINFORCE

Sustain adoption over time.

FOLLOW UP AFTER LAUNCH

Check in at 2 weeks, 30 days, 90 days. Adoption isn't a one-time event.

SHARE WINS AND TIPS

Highlight success stories. Share shortcuts and power-user tips over time.

MEASURE AND ITERATE

Track adoption metrics. Use data to identify who needs more help.



The first 90 days are critical. After that, habits are set—good or bad.

CHOOSING THE RIGHT MODALITY

Match the format to the need.

VIDEO

Best for:
Visual
processes,
software
walk-
throughs,
broad
audiences



QUICK GUIDES

Best for:
Step-by-step
tasks,
reference
material, self-
service
support



LIVE TRAINING

Best for:
Complex
tools, hands-
on practice,
Q&A and
discussion



eLEARNING

Best for:
Visual
Compliance,
knowledge
checks,
trackable
completion



EMAIL/ MESSAGING

Best for:
Tips,
reminders,
announce-
ments, links
to resources



BEST PRACTICES

Don't

- ✖ Overload users with too much information.
- ✖ Deliver once-and-done training.
- ✖ Forget to reinforce learning.
- ✖ Assume one size fits all.

Do

- ✓ Break information into digestible chunks.
- ✓ Introduce concepts over time & when users need the skill.
- ✓ Reinforce with follow-ups, job aids, refreshers, and real-world practice.
- ✓ Tailor training to different roles, skill levels, and use cases.

KEY TAKEAWAYS

1. TIMING IS CRITICAL

Deliver training when users need it, not weeks before or after.

2. KEEP IT SIMPLE

Focus on what users must know to succeed—nothing more.

3. STAY PRESENT

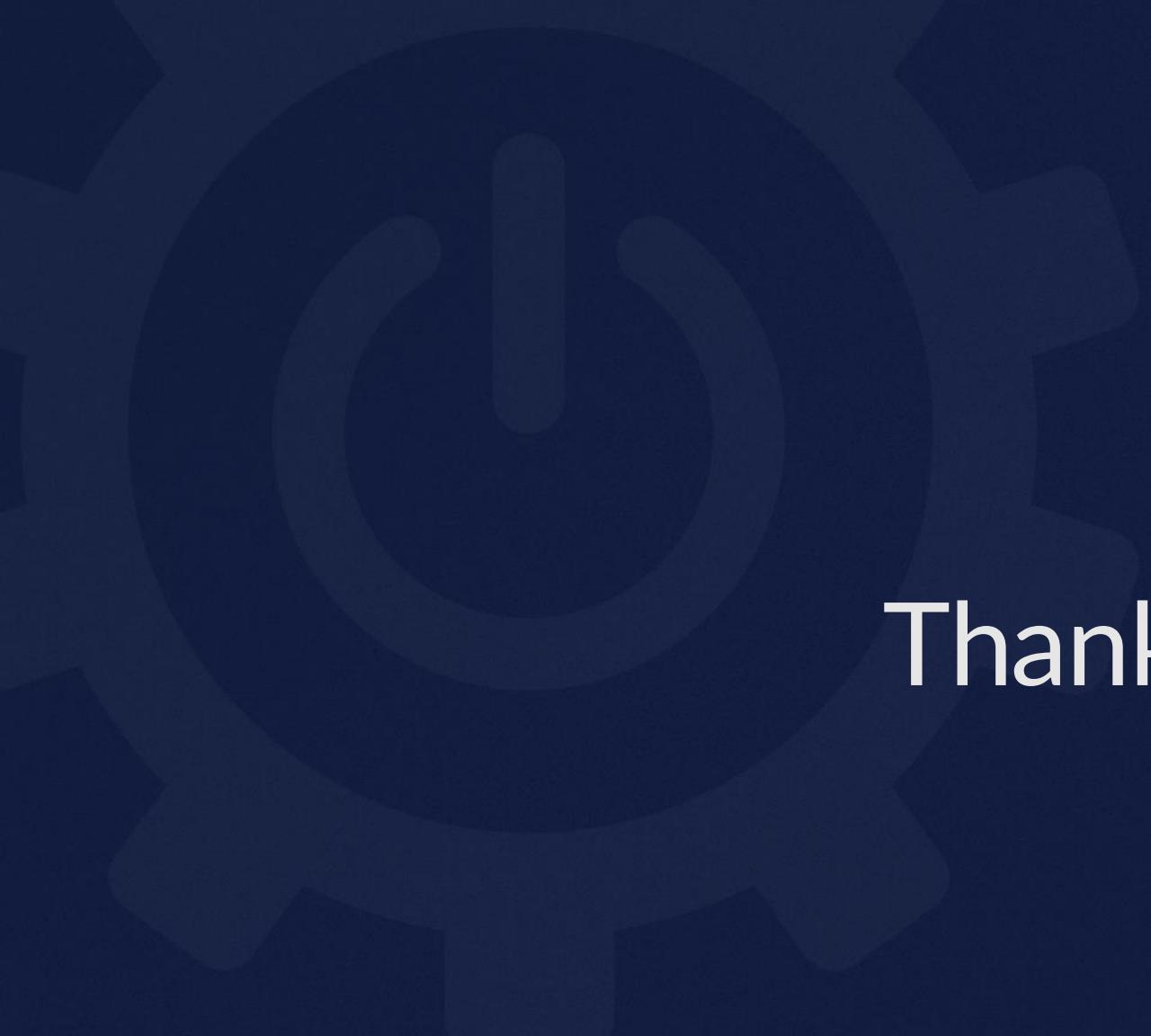
Adoption requires ongoing support beyond the initial training.

4. OFFER OPTIONS

Different users need different paths to learn effectively.

QUESTIONS





Thank you.