

# Adapt to Adopt

*A Human Approach to  
Software Implementation*



Supporting Workbook

Dr. Anna Hunter, EdD

# Using this Workbook

Greetings, Dr. Anna here! I am so thrilled that you have decided to join me on a journey to put your people first while introducing software to your team. As an educator, through and through, I figured it would be a good idea to give you a tangible tool to use while reading. After all, we all have different learning styles!

*Adapt to Adopt: A Human Approach to Software Implementation* is designed as a hands-on experience which walks you through several exercises for navigating the software implementation process. To benefit the most from the material, use this workbook to take notes as you consider your team's journey through the complex world of software implementation. While reading *Adapt to Adopt*, you will be prompted to reflect, strategize, and plan so you can best lead your team through change. Each workbook activity lists the chapter and heading to reference in the book, which will guide you through the activity. This is really where you put what you learn into practice. So be brave and give it a shot!

## *Tips (before you get started)*

- 1) All exercises in this workbook are to help you take what you learn from the *Adapt to Adopt* book and apply it to your own organization. Each organization is different, so there is no "right" answer. Do your best with the knowledge you have and don't hesitate to gain additional thoughts from others in your organization!
- 2) I provide prompts and ideas in the book to help you with each exercise. If you get stuck, re-read the section of the book to get your wheels turning again.
- 3) Just because you may not think an exercise will benefit for you, I encourage you to complete it anyway. The more you process and plan upfront, the better you will be able to guide your team and be prepared for the unexpected.
- 4) You don't need to be an organization leader to get the full experience from these exercises. Complete them from your perspective and you will gain helpful insight!

As always, please reach out if you have any questions, and even better, to share your successes! Contact me by visiting [www.anna-hunter.com](http://www.anna-hunter.com). I can't wait to hear from you.





# Self Reflection

## *Chapter 4 - Define Your Role in Change, Leader Disposition*

Reflect on your current disposition as a leader. Assess yourself and take notes on the following factors.

Be honest with yourself!

*Your current state of mind.*

---

---

---

---

---

---

---

---

*Your motivation for the change.*

---

---

---

---

---

---

---

---

*Personal agendas that could impact the change.*

---

---

---

---

---

---

---

---

*The urgency of change.*

---

---

---

---

---

---

---

---

# Project Champions

*Chapter 4 - Define Your Role in Change, Keep an Eye on Culture*

Reflect on your team culture. Think about your team members and respond to the following prompts to decide who you need in your corner throughout the change process.

*Which employees embrace change and show eagerness to explore new possibilities?*

---

---

---

---

*Who on your team carries significant influence among others?*

---

---

---

---

*Who is vocal about challenges and concerns, and may benefit from this new software?*

---

---

---

---

---

# Stakeholders

*Chapter 4 - Define Your Role in Change, Involve Stakeholders*

Consider all possible stakeholders inside or outside your organization. Identify the people who will need the highest level of involvement throughout the software implementation.

**Stakeholders:**

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

# Clarify the Current Issues

Chapter 5 - Build a Case for Change, Clarify the Current Issues

Make a case for why you can't continue moving forward with your current systems. Fill in each of the blanks below as a guide:

*"We are currently doing*

---

---

*which is resulting in*

---

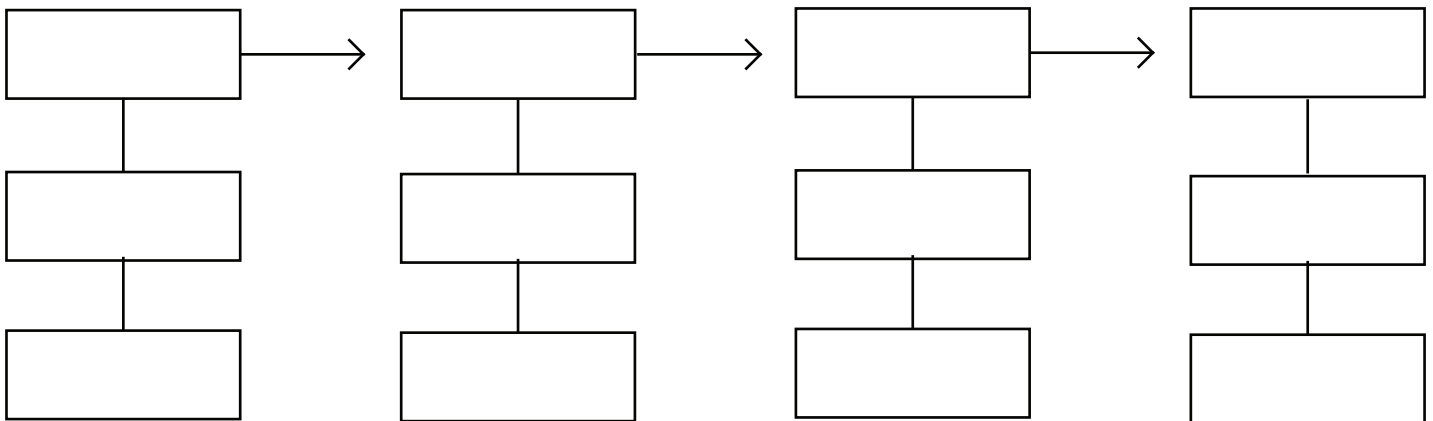
---

*It is impacting our ability to achieve our vision and goals."*

---

## Practice Process Mapping

Choose a workflow in your organization that you know pretty well. Practice creating a process map by filling out the primary and sub-steps below.



# Clarify the Current Issues Cont.

*Chapter 5 - Build a Case for Change, Clarify the Current Issues*

## ***Create Your Process Map***

Choose a workflow in your organization that will most likely be impacted by the new software. Create your process map using the space below.

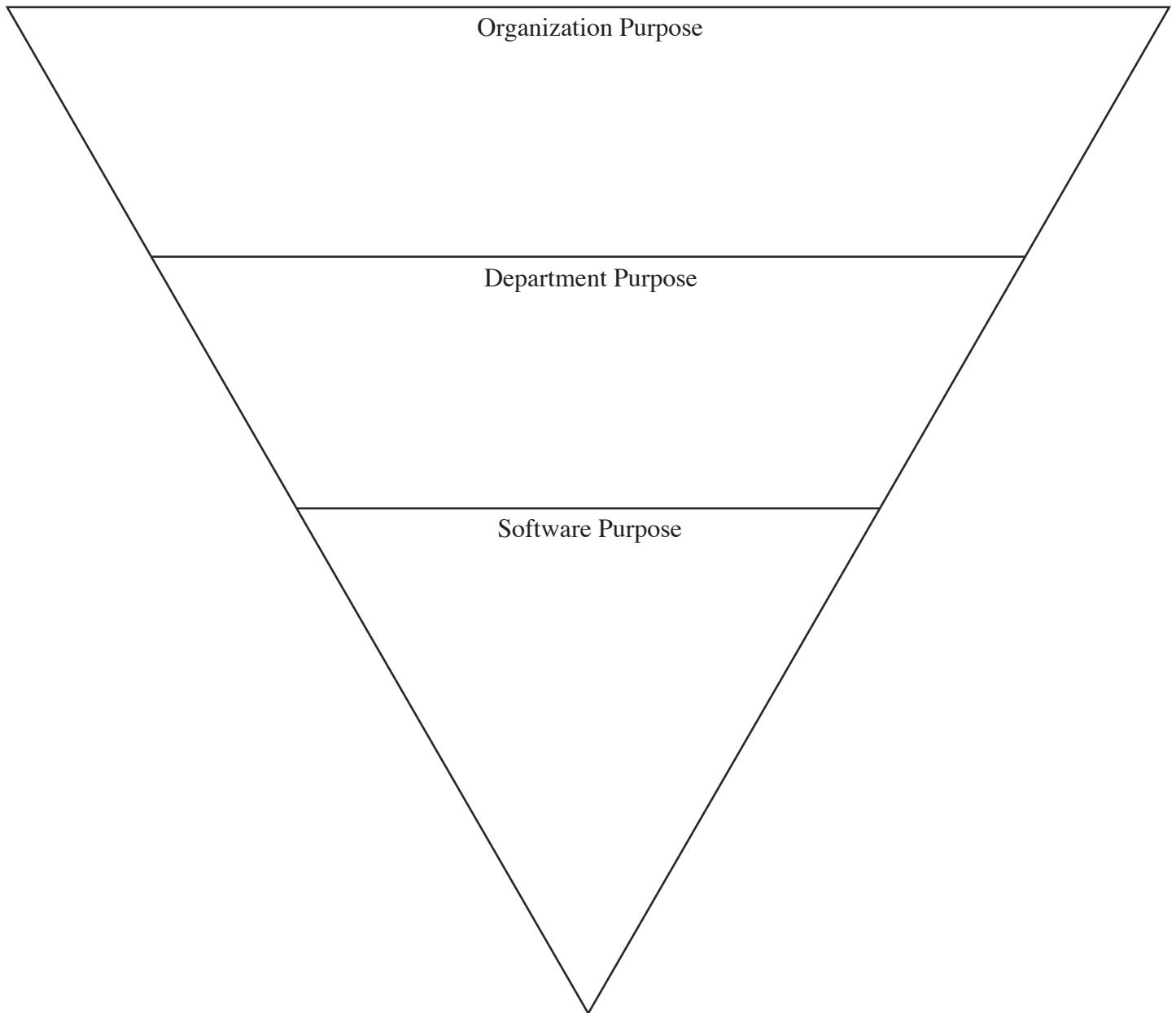


# Communicate Underlying Consistency

*Chapter 5 - Build a Case for Change, Communicate Underlying Consistency*

## *Align Software to a Greater Purpose*

Fill in the diagram by adding your organization and department's purposes. Write the purpose of your new software by aligning it to the broader department and organization.



# Build Consensus Around Priorities

Chapter 5 - Build a Case for Change, Communicate Underlying Consistency

Fill in the blanks below to create goals for your change.

## Goal #1

A goal of \_\_\_\_\_  
is to \_\_\_\_\_  
\_\_\_\_\_.

## Outcomes for Goal #1

Fill in the blanks below to create two outcomes for the goal above.

As a result of \_\_\_\_\_,  
\_\_\_\_\_ will \_\_\_\_\_  
\_\_\_\_\_.

As a result of \_\_\_\_\_,  
\_\_\_\_\_ will \_\_\_\_\_  
\_\_\_\_\_.

## Goal #2

A goal of \_\_\_\_\_  
is to \_\_\_\_\_  
\_\_\_\_\_.

## Outcomes for Goal #2

As a result of \_\_\_\_\_,  
\_\_\_\_\_ will \_\_\_\_\_  
\_\_\_\_\_.

As a result of \_\_\_\_\_,  
\_\_\_\_\_ will \_\_\_\_\_  
\_\_\_\_\_.

# Commit to Resolving the Problem

Chapter 5 - Build a Case for Change, Commit to Resolving the Problem

Begin creating your assessment plan by writing your goals or outcomes in the first column. Fill out the rest of the columns for each goal or outcome.

<i>Desired Goal or Outcome</i>	<i>Timing or Frequency</i>	<i>Assessment Method</i>	<i>Preparation and Needs</i>

# Identifying Resistance

## Chapter 7 - Navigate Resistance

List all your team members who may resist the introduction of your new software. Identify the type of resistance, consider the source of their resistance, and determine what they might need in order to overcome this resistance.

<i>Team Member</i>	<i>Type</i>	<i>Underlying Source</i>	<i>Needs</i>
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		
	<input type="checkbox"/> Indifference <input type="checkbox"/> Skepticism <input type="checkbox"/> Reluctance <input type="checkbox"/> Resistance		

# Respond to Resistance

## *Chapter 7 - Navigate Resistance*

Walk through the following prompts for each team member that is reluctant or resistant to the new software. Then determine how you will respond based on the insight gained.

*How familiar is this person with the new software?*

---

---

---

*What are their frustrations or stress levels at the moment?*

---

---

---

*What level of impact does this employee have on the success of the new software?*

---

---

---

*What influence do they have among other users?*

---

---

---

*What approach might this person respond to best?*

---

---

---

*Is there a single part of the new software that they don't connect with?*

---

---

---

*What is the best way to respond to this team member's concerns?*

---

---

---

---

---

