

SIX STEPS TO SUCCESS

DEPLOYMENT. ADOPTION. FASTER.

EDITION 2



COMPANY INFORMATION

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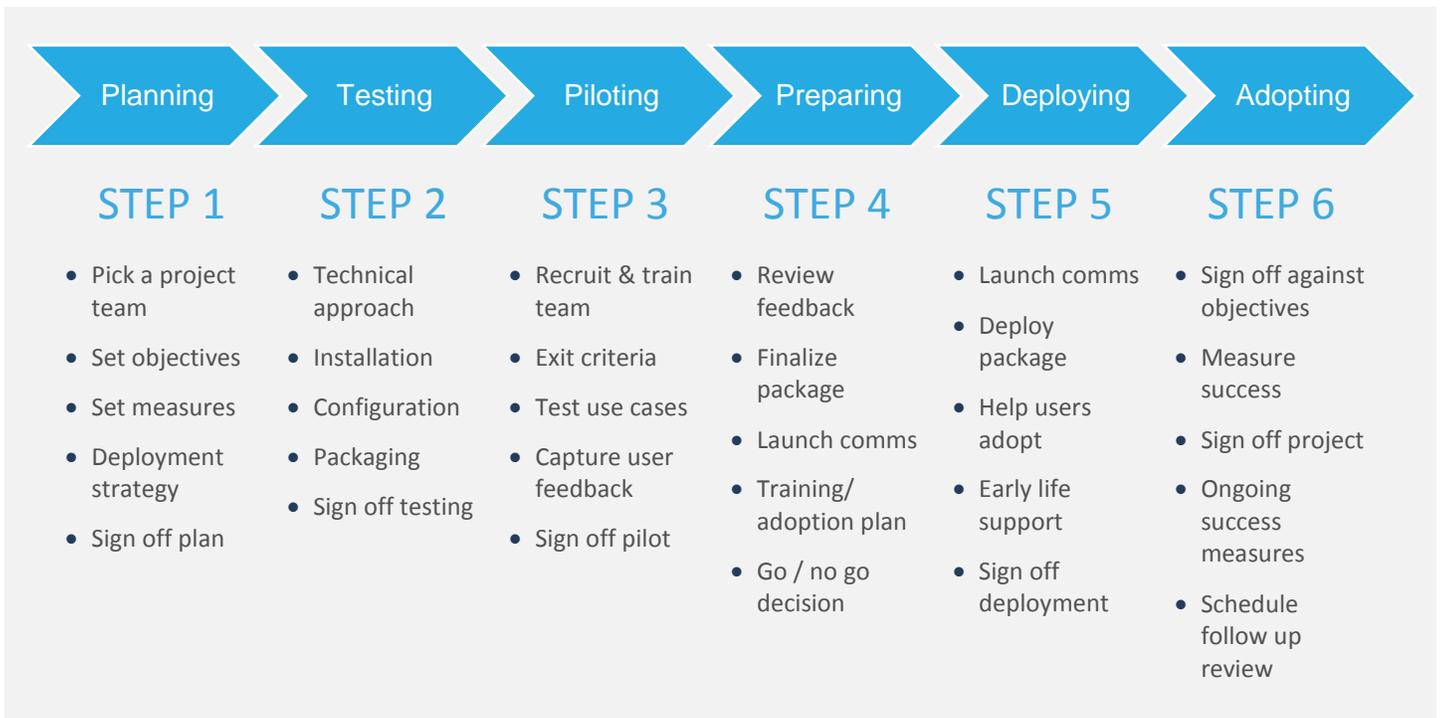
HOW TO USE THIS GUIDE

Welcome to the Workshare Six Steps to Success guide!

Your success is important to us, and we'll be with you throughout every one of these six steps to ensure the success of your Workshare solution, from deployment through adoption – in the shortest time possible. We have a tested process for enabling deployment and adoption, and we'll help you with a personalized plan and assist you with engaging your users and understanding what value means to you.

The remainder of this guide outlines the steps themselves and the key activities and output from each step. We are here to help you and your users get the most from Workshare. These steps will enable us to get there in the shortest time possible.

SIX STEPS TO SUCCESS





STEP 1: PLANNING

All successful projects have a plan. Understanding timelines, available resources, issues and risks will ensure your commitments are realistic. Being clear about what success looks like will ensure you know when your project is complete.

Activities 	
Pick a project team	Establishing who's going to be working on your Workshare project is vital to success
Executive sponsor	Who really wants your project delivered and can help make sure it happens
Setting objectives	What are you trying to achieve from your Workshare deployment, is it part of a bigger project? When does it need to be completed?
Deployment strategy	Knowing how and when you want to deploy is vital for planning
Measures	Deciding up front what success looks like, will help keep focus on the goal and keep up momentum

Outputs 	
Plan signed off	Your success manager will draft a plan of the activities and dates to help you track your path to value
Project Initiation Document	Produced by your Success Manager this will capture the key points about your project



STEP 2: TESTING

It's important to check that you can achieve the experience your after and that your systems work effectively together.

Activities 	
Technical approach	Establish your technical options
Installation and licensing	Choose your installation options and how you want to license your Workshare applications
Configuration	Choose the way you want your comparisons / metadata managed
Packaging	Prepare your initial deployable package for your pilot team

Outputs 	
Established compatibility	Workshare tested within your environment
Configuration for testing	All the options you want, configured for your needs
Package	A package ready to deploy and ready to test
Sign off	Testing signed off



STEP 3: PILOTING

A pilot gives a real world view of how Workshare will be for your users. You can get valuable feedback and remove any blockers before full deployment.

Activities 	
Pilot team	Having the right people testing is important, experienced and fresh users across all the relevant use cases
Pilot success measures	It's vital to decide what your success criteria is for your pilot
Pilot team training	Your pilot team have to know what to expect, and its important to ensure the training works for them before your deployment
Testing	Test all your use cases and processes and see how Workshare helps in the day to day of your business
User feedback	Understanding how your pilot team felt, will be invaluable when you're deploying to larger numbers

Outputs 	
Validated configuration	Knowing the options are right
Any problems resolved	If issues do crop up, they be can resolved before you deploy fully
Pilot signed off	Your executive sponsor and project team are happy to deploy



STEP 4: PREPARING

Before deploying you'll need a little time to prepare for the change and ensure a successful deployment.

Activities 	
Finalize your configuration	Finalize the configuration using the outcomes of your pilot
Packaging	Prepare the production package and get ready to deploy
Pre launch comms	Let your people know what's coming and what to expect
Training collateral	Finalize what training / awareness content you want for launch
Train the trainer / helpdesk	We'll make sure all your people are ready for Workshare
Adoption planning	How will you help your users get the most from Workshare

Outputs 	
Package	A package ready to deploy
Adoption plan	Your Success Manager will help create a plan to support your users and ensure your early days are a positive experience
Go / no go	Confirm you're ready to deploy



STEP 5: DEPLOYING

A slick well managed deployment is the best introduction to a change for your people.

Activities 	
Deploy	All at once, by region, office or team
Communication	A combination of active and passive comms, emails and intranet to ensure no one is surprised
Training	Preparing your people to get the most from the latest Workshare features

Outputs 	
Workshare deployed	It's now across your desktops
People adopting	People are trained and starting to use Workshare
Sign off	Confirm the deployment is complete



STEP 6: ADOPTING

Change isn't always easy. It's important to help your people get the most from Workshare. It's the measure of success and return on your investment.

Activities 	
Feedback	Understand how things are going for your users, trainers and support teams
Value	Measure your success, usage, and users' problems new opportunities
Ongoing value	How to ensure your increasing value and continuing to get the most out of Workshare

Outputs 	
Value achieved	It's important to demonstrate the great things you're achieving
Sign off	Your executive sponsor can sign off the project and as a success