Five Tips for Successful Adoption of a P&PM System

by Austin Locke

"To improve is to change; to be perfect is to change often."
Winston Churchill

Change can be difficult. Organizations, like people, are creatures of habit. We tend to stick to paths, plans, and processes that are familiar to us.

Portfolio & Pipeline Management (P&PM) involves driving change throughout an organization. You enable your business with P&PM because you want to manage your new product development process differently, and more efficiently, than you did before.

So, when a well-established business attempts to systematize portfolio and pipeline management by adding the people, processes, and tools necessary for this capability, it’s not surprising to encounter strong resistance to change.

Whether it’s the entrenched management veteran or the self-described amateur technologist, some individuals within your organization will likely resist your new P&PM initiative and the accompanying software system.

Here are five tips to drive successful adoption of your P&PM tool:

1. **Start Small** - You don’t need to create the entire organizational change by yourself, and you certainly don’t need to do it all at once. Begin by establishing P&PM capabilities at a single division or business unit. Once you’re successful there, you’ll have new advocates to help you transform the rest of the company.

2. **Share Success** - Once you’re up and rolling, be sure to share your success and the actual business results with the rest of the organization. If you’ve proved that P&PM can work, these stories will greatly increase your chances of successful organization-wide adoption.

3. **Simplify the System** - Learning a new software tool, or process can be very difficult. Users expect clean, simple, and easy interfaces, which often aren’t the strength of P&PM software. While the capability of the system may be very robust, you should initially only incorporate the functionality that is necessary to accomplish your goals. When it comes to the configuration, easy does it.

4. **Spell out Benefits** - When implementing your new tool, users will immediately ask, “What’s in it for me? Why should I be doing this?” It’s extremely important to clearly communicate senior leadership’s reasoning behind this investment and change. It’s not good enough to keep the benefits at the highest levels of the organization. Even the financial analyst that is punching data into the system needs to know why he is doing it and how they’re benefiting the business. Spell it out for everyone.

5. **Supply Documentation** - Document everything and make it available to users. Your personnel will change, people will be promoted, and the tool will evolve. Nothing is more powerful in these situations than step-by-step documentation explaining how the tool is used. The software may not be intuitive at first. It’s easy to create learning modules with tools like Office Mix to ensure that a new user can step in and keep your portfolio process running smoothly.

By following these recommendations, you’ll increase buy-in and drive adoption of your new P&PM system and processes. Remember, this one change is part of a much larger transformation for your organization; and to change is to improve.

Originally published on October 28th, 2014

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About the Author

Austin Locke
austin.locke@kalypso.com
Austin is recognized thought leader focused in the Strategy & Operations and Digital practices.