Service Description

Technology Adoption Management

What is it?

For this service, I will help you identify, evaluate, select and implement technology to support your business. As an expert, I am already aware of many options on the market and keep an eye on new developments that are continuously built to support innovation in real estate. While providing this service, I will take all of the knowledge we have developed while performing the audit and writing your strategic plan, and help you put it into action.

Why do it?

While you may certainly manage this activity internally, you are likely best served by having me continue to help you along this journey. We will use the knowledge we have developed in the audit and strategic plan to guide and support the process of putting it into action.

How does it work?

This service typically occurs in three phases for each tool we will implement. Over time, we will repeat this process many times to adopt all of the tools needed to overcome pain points and satisfy your business objectives.

Phase 1 - Evaluation: During this phase we use the guidelines in the strategic plan to build a custom set of requirements for the category of tool we will seek to adopt. Once this is complete, we will conduct a series of live demonstrations from providers. Once we complete all of the desired demos, I will prepare a comparison report evaluating each option and make a recommendation on which to choose.

Phase 2 - Selection and contract negotiation: Once we have decided we want to proceed with a particular provider, we will the proposals we have received and negotiate an agreement.

Phase 3 - Implementation: Once we have signed a contract with a provider, I will support the Implementation process. This involves a variety of activities and can have a high level of variability in terms of how much work is involved and how long this process ultimately takes. The descriptions below illustrate the types of activities involved.

1. **Project management**: I would serve as the person who maintains an overall view of all digital transformation projects being worked on and serve as the primary contact for each supplier. I would coordinate all schedules between you and the suppliers as it relates to any activity that needs to be done, monitor overall budgeting across the project, and generally be responsible for making sure everything gets done.
2. **Configuration support:** I will support the process of defining and building out the tailored configuration for each platform, however most of the technical work will likely be done by each supplier.
3. **Business Process Management:** We will need to document various company policies and processes to help correctly configure systems. We may also discover opportunities to modify and improve a process. I have some pre-built templates for descriptive documentation and use a whiteboarding tool to collaborate on visual designs. Once we have created a few sets together, I will teach your staff to use these tools and templates so they can do this on their own.
4. **Company Conventions Guides:** Conventions are the correct way something should be done within the context of the company. We write these to establish standards so that everyone in the company will use the system in

the same way. If we did not do this, everyone would come up with their own and it would be a messy free=for-all. Typically, we write a list of conventions for use of a particular platform and present it as part of the training process. We then monitor employee activity to validate comprehension & compliance, delivering additional training when needed.

5. **Data migration:** This involves collecting current company data and preparing it for and importing it into a new system. In most cases, the majority of this work will be done by the platform supplier, however they may need assistance interpreting information, supporting data clean-up and mapping fields, as well as verifying accuracy during import. Migration is an iterative process. It requires multiple rounds of testing to help assure success as well as user-acceptance.

6. **User training:** One of the most important activities is to properly train all users on new systems. The amount of training each person needs will vary depending on their digital literacy, how quickly they generally learn, how open and accepting they are of change, and the complexity of the platform they need to learn and its associated processes. I will lead the process of creating courses, however platform providers will typically lead actual training sessions. In addition, we may also designate some company staff to become platform experts and take on the responsibility of training new hires in the future, whether by one-on-one sessions, or building and delivering structured programs stored in a dedicated learning management system.

7. **User activity monitoring:** Once we have trained employees and we go live, I will monitor how they interact with the various systems. It is important to identify knowledge gaps or general misunderstanding as quickly as possible to prevent small problems from becoming big ones. This relates not only to general knowledge about a tool, but also whether users are adhering to company established policies, processes and conventions for entering data and generally using the system. Actively monitoring user activity will help us identify situations where additional training may be needed and reduce the incidence of bad data and general errors.

8. **Ongoing technical support:** Technical support will begin as a combined effort between me and the tool's provider. As you take on more technology and we complete more projects, we can discuss additional options if the volume of works makes this model difficult to maintain.

9. **Staff consultations for additional use of existing platforms or adoption of others:** Once a new tool is implemented, staff may find that they are inspired to potentially use it for additional purposes that were not originally anticipated. They may also want to look into other tools that can help support additional business needs. This is something that should be encouraged as it will increase engagement and deliver additional value to the company. To help support this, we will come up with a consultation process that a staff member can request to discuss their idea and help them figure out how to make it happen.

10. **Identifying opportunities for additional improvement:** As we use the new tools, we will learn new things about the information we interact with, as well as how the company operates. This will help us identify other opportunities for additional innovation that can help improve the business. I will build and maintain a list of such opportunities and periodically review them with you to see if we want to select any for additional projects.

How long does it take?

Implementing digital tools across the company should be viewed as a journey. In most cases, we will complete a series of implementations over a longer period of time than other work we have done together. This element will be defined in the strategic plan. You should expect us to work together for at least several months. For more ambitious clients with extensive needs, our journey together will take several years.

How much does it cost?

As a longer-term project with more variability in how much work there is, we are best served selecting a time-based contract, typically a bank of hours that I provide you each week based on an hourly or daily rate. You then get flexibility of scope and we can shift gears quickly should the need present itself.