THE M-FILES
USER JOURNEY

M-Files®
The Smarter Way to Work.

THIS DOCUMENT...

Offers insight and guidance on the user adoption process and the user journey from a **change management** perspective
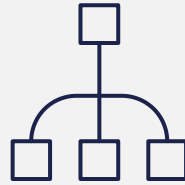
CONTENTS

1

Introduction to User Personas

2

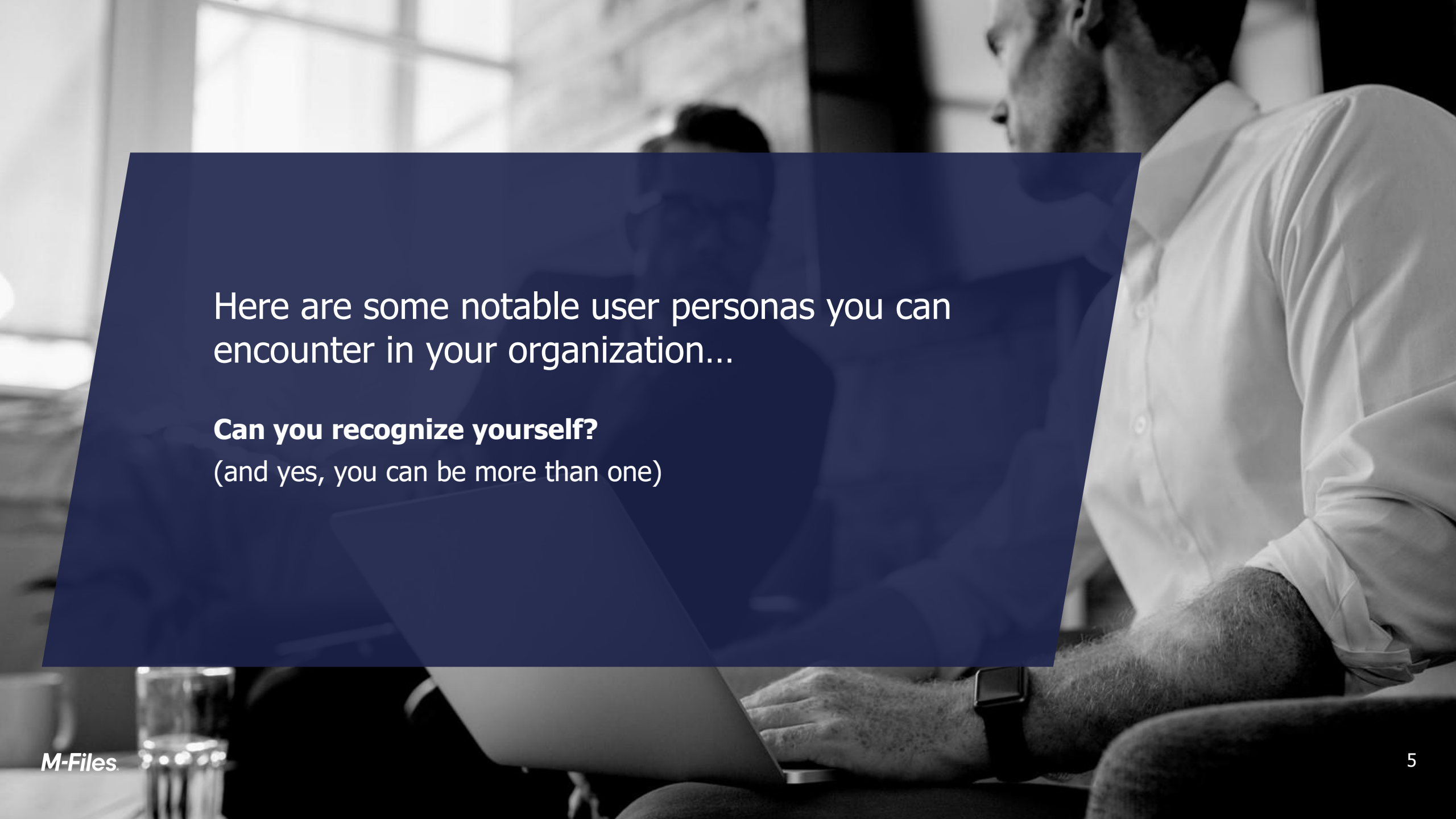Product adoption from an organizational perspective.

The User Adoption Curve

3

Product adoption from the user perspective.

M-Files

THE FIRST THING TO UNDERSTAND IS THAT NOT ALL USERS ARE THE SAME.

Users encounter and approach new technology in various ways.

Some of these differences can be explained by personality, but they can also be explained by how excited or motivated an individual is about a specific technology, particularly a technology that they believe will enhance their work.

M-Files

Here are some notable user personas you can encounter in your organization...

Can you recognize yourself?

(and yes, you can be more than one)
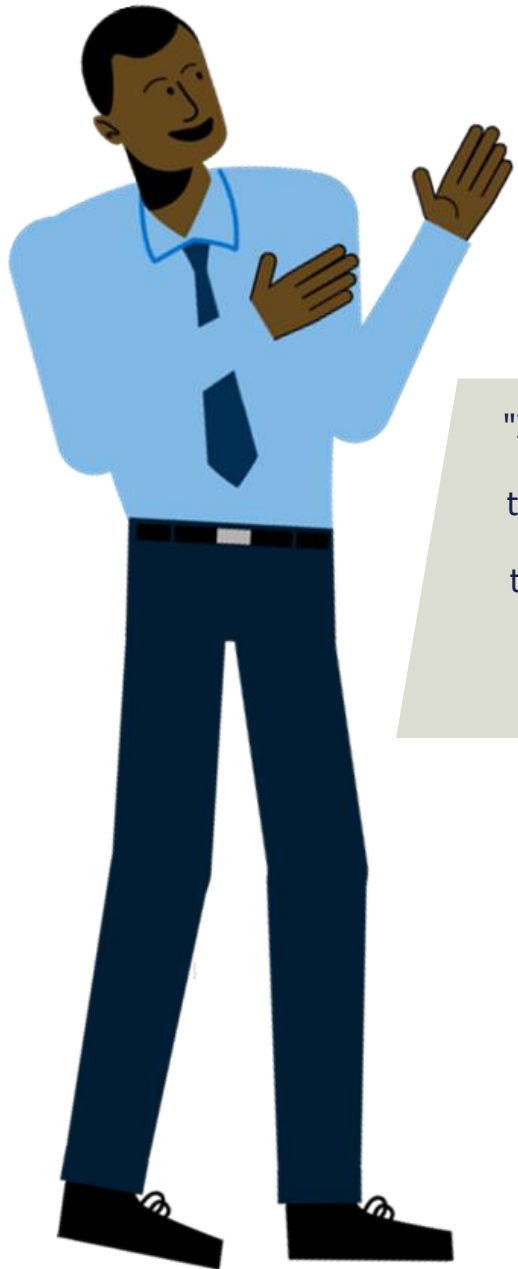
M-Files

NINO – THE TECH ENTHUSIAST

"I get excited about new technology. I often skip tutorials and just start clicking around."

Notable characteristics
- Enjoys diving into new technology
- Highly motivated to learn new technology
- Often the first to explore and dive into new tools
- More detailed & feature oriented

Strengths
- Highly technology literate
- Can help cultivate excitement around technology changes
- Independent and motivated learners

Challenges
- Struggles to see the larger business utility of new software tools
- Gets too stuck in features and details
- Can get bored easily. Their excitement for a new tool can quickly fade
- Gets frustrated when training doesn't give him space for independent exploration

How to enable this type of user
- Let them dive in and explore
  - Make information and tools available for their own independent exploration, particularly early on
- It's good to give them elevated responsibility and problems to solve (i.e., creating views or user acceptance testing)
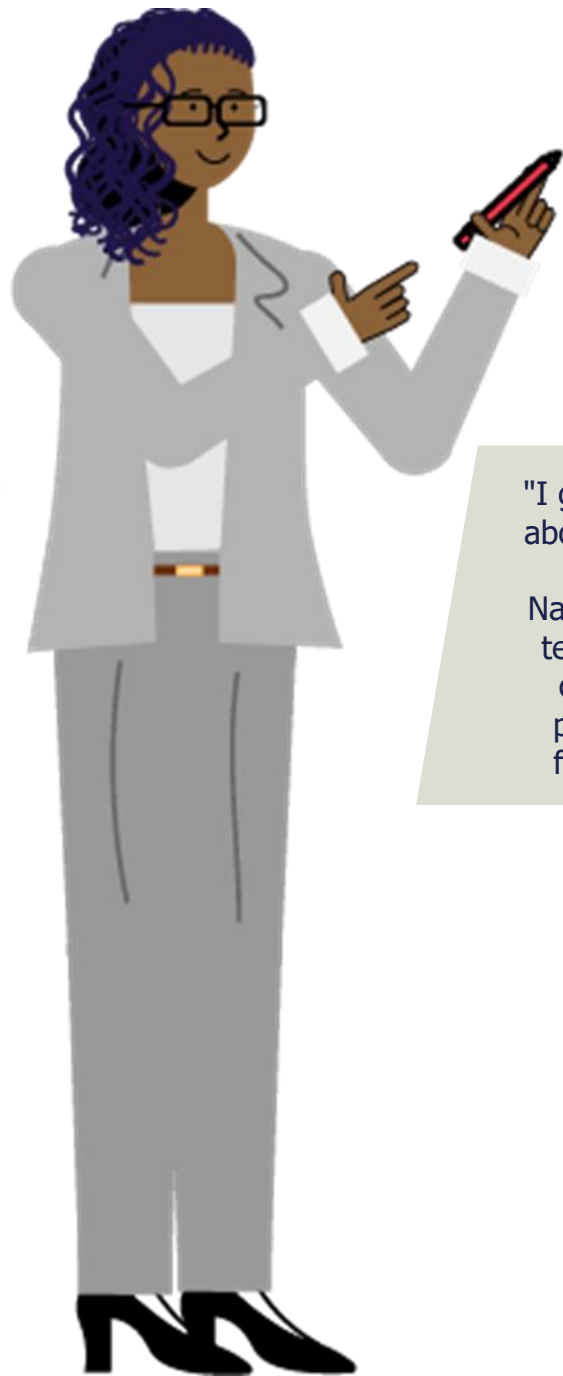
KATHRINE – THE TECH VISIONARY

"I get excited about the big picture. Namely, how technology can help propel us forward."

Notable characteristics
- Concerned about the business case of new technology
- Strategic and conceptual thinker
- Concerned about technology reputation
  - Rankings, like Gartner and Forrester
  - Exposure at conferences
  - Discussed by other business leaders
- A community learner - Learns best with others (not independently)

Strengths
- Highly business literate
- Visionary – understands the potential of technology for the business
- Can help cultivate excitement around technology changes in the beginning
- Can connect the technology with the bigger business picture

Challenges
- Not a tactical or detailed thinker
- More excited about the concept, less excited about the actual features and implementation
  - Conceptually on board with new technology early on, but not practically
  - Excitement for the new tool fades when she actually has to learn it
  - She can quickly become a late adopter

How to enable this type of user
- Let them in on the business plan and the strategy
  - If they are not given the change to discover the business potential, then they may quickly adopt a negative attitude about the change

M-Files
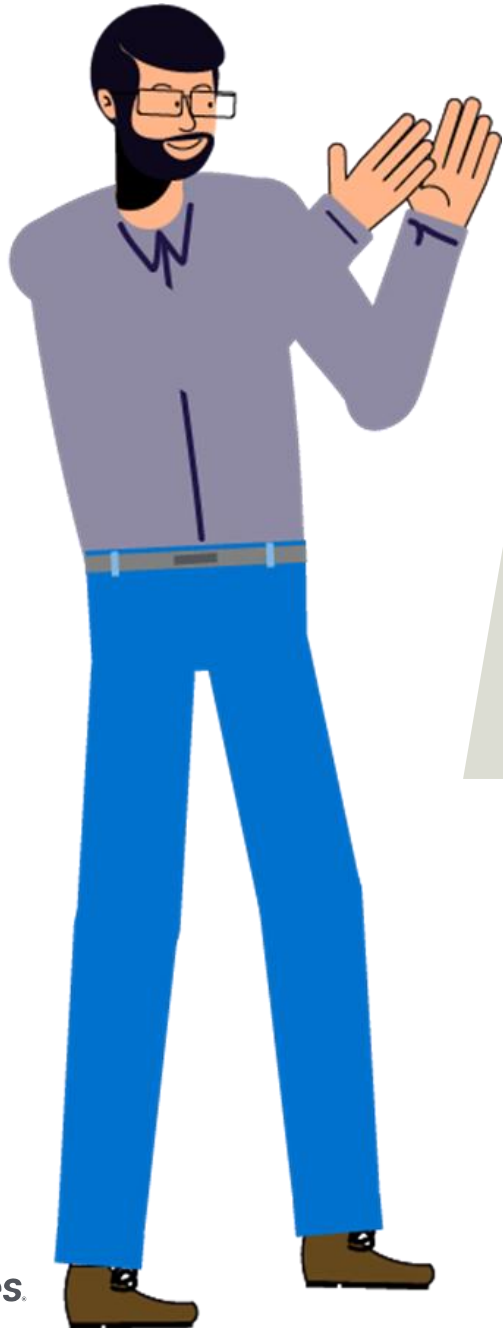
STEVE – THE TECH PRAGMATIST

"I am happy to learn something new, especially if it will help my work."

Notable characteristics
- Practical thinker
- Great listener
- Both an independent and community learner
- Takes great pride in his work and wants to do his job well
    - If it's required for his job, he'll do it

Strengths
- Reliable, you can trust this person to follow through on assignments and tasks
- Willing to learn new tools, particularly if he sees the practical benefit or value
- Can connect the technology with the bigger business picture

Challenges
- Often has a neutral attitude about technology, not overly excited, but not resistant either
    - More concerned about how this new tool will enable their work
    - They often will start learning the tool when they are told to
- Needs time allocated and some hand holding to learn new tools
    - May get frustrated if they don't feel supported

How to enable this type of user
- Give them time to consume content and learn the tool at their own pace
    - If they are given the chance to explore new tools and information, they will, especially if they believe it will be valuable to their work
- Communicate the benefit and value of the new tool to their work
    - This type of user is not motivated to learn if they don't know or see the practical value
    - They need practical, resonating use cases
- This type of user makes great M-Files champions

M-Files

LILIAN – THE TECH CONSERVATIVE

"Another tool? This better be worth my time."

Notable characteristics
- Highly literate in both technology and business
- Very intelligent and high performer
- Often scattered and involved in many things, both professionally and personally
- Disinterested or apathetic to technology changes (needs to be convinced to care)
- Less excited about the technology itself and more concerned with how technology enables more efficient work

Strengths
- Learns new things very quickly either independently or in a community
- Has the ability to understand features and technological details, as well as larger business applications and contexts

Challenges
- Needs convincing that this is not just "another tool"
- Often has limited mental bandwidth
  - It's difficult to get her to pay attention when talking about new tools and changes
  - She is often preoccupied in her own core work
- Sensitive to time wasting
  - Learning new things may feel like sacrificed time for her
  - "I don't have time for this." or "I have more important things to do."
- May be resistant to using time to learn something new if she doesn't see a good reason to

How to enable this type of user
- Give them good reason to care
  - Express the value and benefit of taking the time to learn M-Files, particularly, how this will help their work
  - Convince them that this is not just "another tool," and rather, they'll fall behind if they don't learn it
  - Help alleviate their time stress and allocate time and space for them to learn M-Files
  - Consider coupling M-Files training with a larger topic like increasing efficiency and reducing time spent on low value work tasks

M-Files

TONI – THE TECH SKEPTIC

"Why fix something that isn't broken? I was doing just fine before."

Notable characteristics
- Has a lot of experience and knowledge
- Needs well working processes
- A community learner - Learns best with others (not independently)
- Emotionally attached to his core work

Strengths
- Once he is bought into something new, he will champion it
- Very knowledgeable about his processes and work
- A trusted and reliable voice in his organization

Challenges
- Finds change overwhelming and disrupting
- Can be a vocal skeptic and often doubts that tools will lead to improvement
    - Especially if he feels that change is moving too fast for him
- Has tunnel vision
    - Anything outside of their core work is a distraction
- Cannot translate himself how a tool is applicable to his work

How to enable this type of user
- Needs face-to-face training and support
- Give this user an opportunity to vent and feel heard. This type of change can be very distressing for them
- Needs explicit explanations about how M-Files will help his work in particular
    - Needs a resonating use case that's reflective of their work, unable to translate other use cases to their work
- This type of user can be an enthusiastic champion or advocate once they've adopted M-Files

M-Files

User Personas are <u>not</u> User Roles

M-Files

USER ROLES DEFINE THE ROLES AND RESPONSIBILITIES FOR M-FILES DESIGN, IMPLEMENTATION, MANAGEMENT, AND USAGE
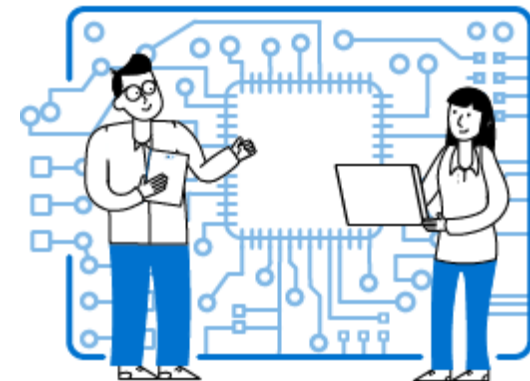
Learn more here.
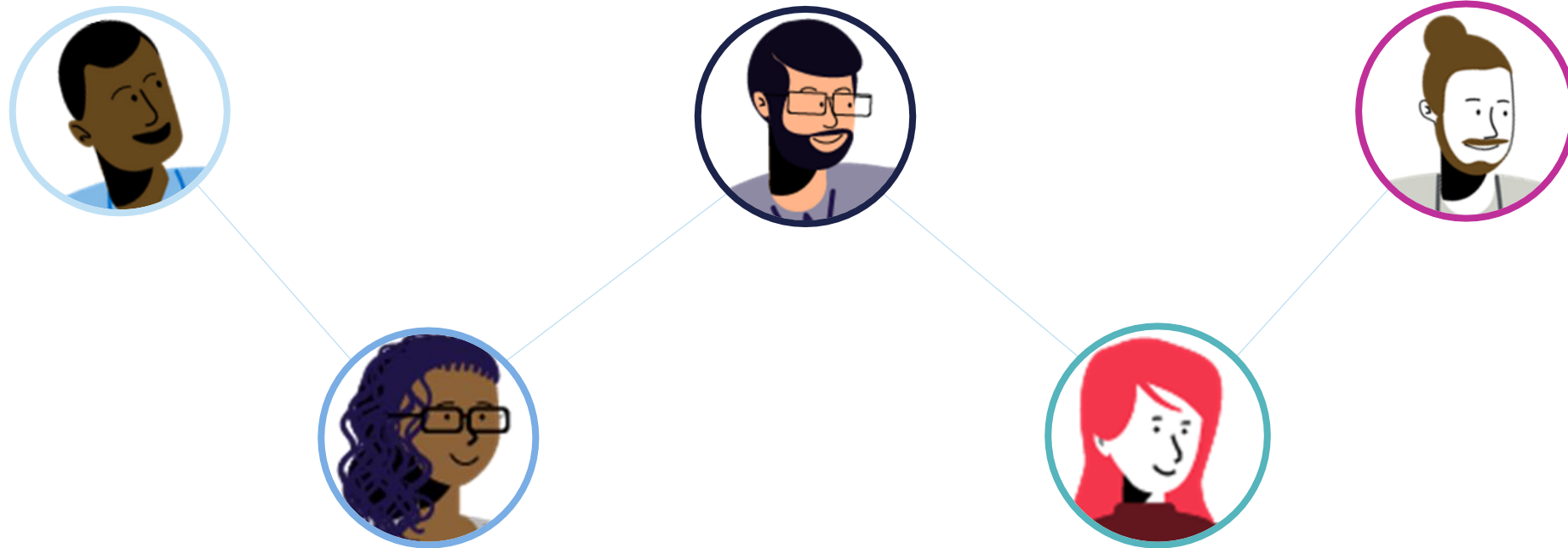

PROJECT TEAM MEMBER

CHAMPION

BUSINESS ADMINISTRATOR

USER

IT ADMINISTRATOR

USER PERSONAS REPRESENT THE VARIOUS PERSONALITIES, ATTITUDES, AND BEHAVIORS YOU CAN EXPECT TO ENCOUNTER WHEN IMPLEMENTING ANY SORT OF TECHNOLOGY CHANGE (NOT JUST M-FILES)

WE CAN PLACE THESE PERSONAS ON ADOPTION CURVE

TECH ENTHUSIASTS

"I get excited about new technology. I often skip tutorials and just start clicking around."

Nino

VISIONARIES

"I get excited about the big picture. Namely, how technology can help propel us forward."

Katherine

PRAGMATISTS

"I am happy to learn something new, especially if it will help my work."

Steve

CONSERVATIVES

"Another tool? This better be worth my time."

Lilian

SKEPTICS

"Why fix something that isn't broken? I was doing just fine before."

Toni

CHASM

2.5%	13.5%	34%	34%	16%
INNOVATORS	EARLY ADOPTERS	EARLY MAJORITY	LATE MAJORITY	LAGGARDS

M-Files
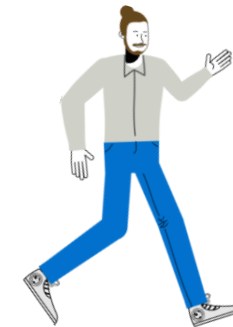
Product Adoption Curve Sources: Everett M. Rogers - Diffusion of Innovations; Understanding the Project Adoption Curve; Geoffrey A. Moore – Crossing the Chasm

This curve shows us how new technology is adopted from an

ORGANIZATIONAL PERSPECTIVE

M-Files

THIS ADOPTION CURVE SHOWS US HOW DIFFERENT PERSONAS ADOPT AT DIFFERENT TIMES FOR DIFFERENT REASONS…

PRAGMATISTS do most of the heavy lifting in helping the new technology stick in the organization

Not soon after are the **VISIONARIES**

The **CONSERVATIVES** jump onboard only after their colleagues.

You can count on **TECH ENTHUSIASTS** to jump onboard first

The **SKEPTICS** are last to adopt and often need more support to embrace change

The pragmatists become attentive and jump onboard once they see benefit to do so.
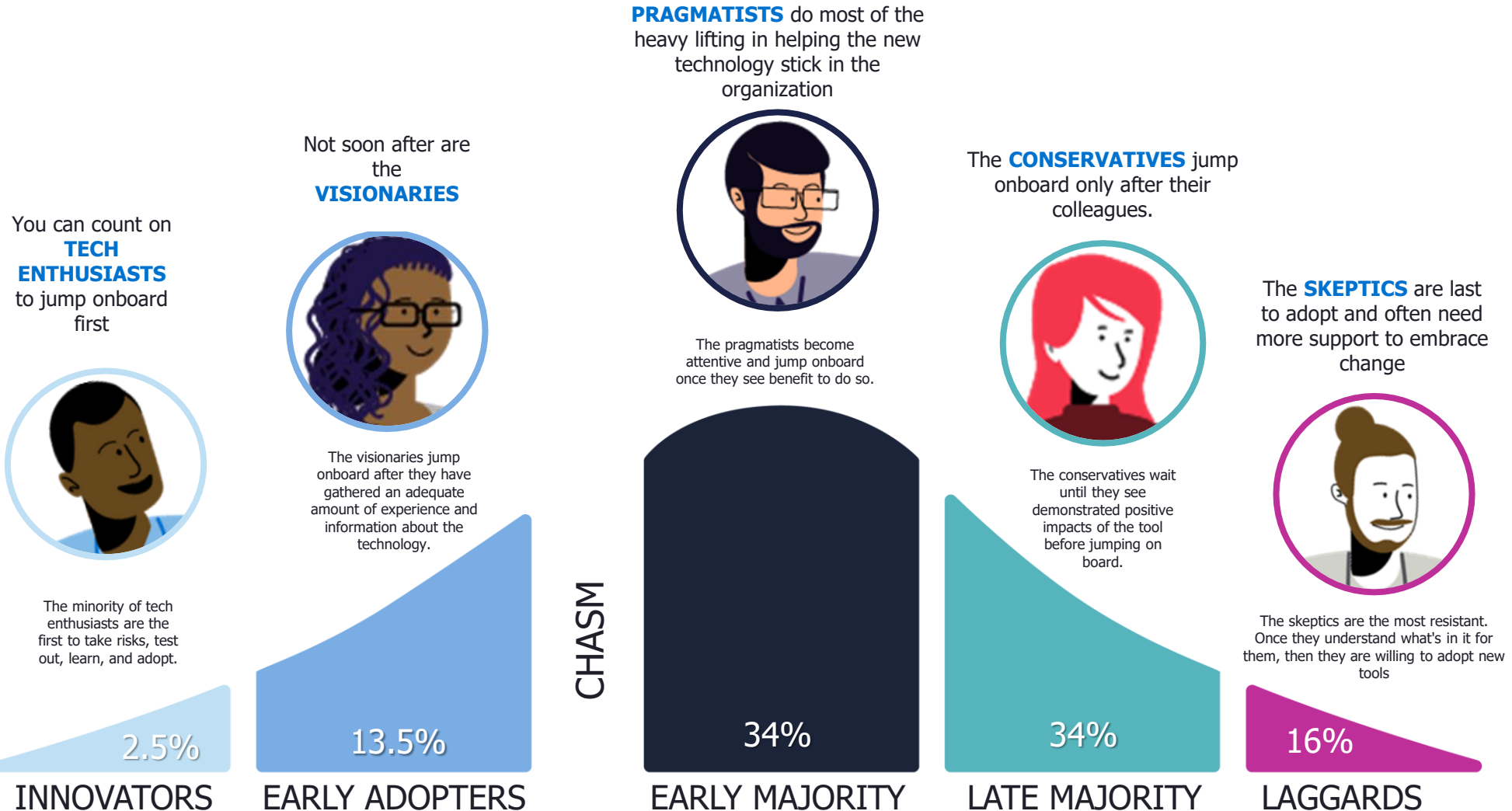
The visionaries jump onboard after they have gathered an adequate amount of experience and information about the technology.

The minority of tech enthusiasts are the first to take risks, test out, learn, and adopt.

The conservatives wait until they see demonstrated positive impacts of the tool before jumping on board.

The skeptics are the most resistant. Once they understand what's in it for them, then they are willing to adopt new tools

CHASM

| 2.5% | 13.5% | 34% | 34% | 16% |
| INNOVATORS | EARLY ADOPTERS | EARLY MAJORITY | LATE MAJORITY | LAGGARDS |

M-Files

Product Adoption Curve Sources: Everett M. Rogers - Diffusion of Innovations; Understanding the Project Adoption Curve; Geoffrey A. Moore – Crossing the Chasm

THE CHASM

The chasm represents the wide mindset gap between the enthusiasts and visionaries and the rest of the user personas.

Innovators and **Early Adopters** are inherently motivated to dive into new technology.
The other personas need more encouragement.

Overcoming this chasm is critical in making a change "sticky enough" so that it will be adopted in the wider organization.

SUGGESTIONS FOR OVERCOMING THE CHASM:

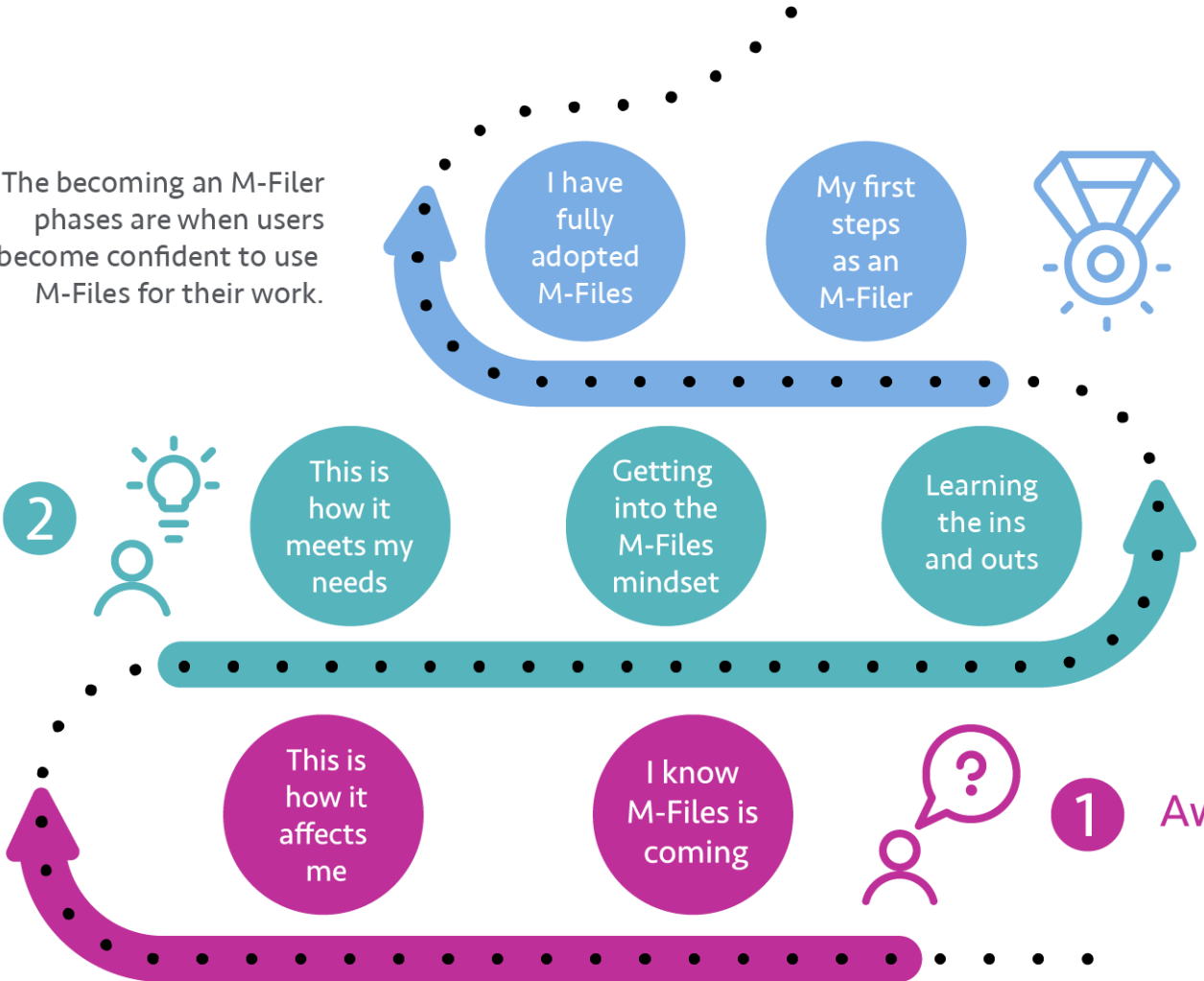|					
Leverage the first two user personas for cultivating organization-wide enthusiasm for new tool changes.	To win over the pragmatists, demonstrate and communicate the user benefits and how this change will help their work specifically. Don't just focus on the business benefits.	To win over the pragmatists, have a corporate sponsor explain the change thoroughly.	Offer a variety of learning and training options instead of pushing everyone through a webinar.	Accept that not everyone will start using the system at once.	Leverage champions sharing their own experiences so that it's not just a "management decision".

M-Files

It's not enough to understand just the organizational perspective.

It's also important to dive into the

INDIVIDUAL USER JOURNEY

THE M-FILES JOURNEY FROM THE INDIVIDUAL USER PERSPECTIVE

The becoming an M-Filer phases are when users become confident to use M-Files for their work.

I have fully adopted M-Files

My first steps as an M-Filer

3 Becoming an M-Filer

The Initial Learning Journey

2

This is how it meets my needs

Getting into the M-Files mindset

Learning the ins and outs

The initial learning phases are more active in which the users allocate time to learn about how M-Files works.

The awareness building phases are most passive for users.

This is when they first hear that change is coming and how it affects them.

This is how it affects me

I know M-Files is coming

1 Awareness Building

M-Files

DON'T LEAVE YOUR USERS HIGH AND DRY
Invest in communication, training, & support

I have fully adopted M-Files

My first steps as an M-Filer

3 Becoming an M-Filer

Support is key during the final stages. Users need to know where they can go to ask questions and get support.

It's also important to monitor usage and gather feedback.

The Initial Learning Journey

2

This is how it meets my needs

Getting into the M-Files mindset

Learning the ins and outs

Here, the most important thing is to **invest in training**.

This is not only about training services, it's also about allocating time, prioritizing, and incentivizing training.

This is how it affects me

I know M-Files is coming

1 Awareness Building

In this part of the journey, clear and relevant **communication is key**.

The users need to understand what is happening and why, as well as how the change with benefit them and their work.

M-Files

"I KNOW M-FILES IS COMING."

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

1

This is part of the initial awareness building phase of the User Journey.

At this stage, the user first learns that M-Files is coming to their office.

POTENTIAL MINDSETS	OBSTACLES / THREATS
Potential attitudes and mindsets organizations may encounter with their end users at this stage	Potential causes for why users are either slow to or completely fail to adopt M-Files

Worst case: Apathetic, resistant or hostile. May feel annoyed that *yet another* system is being implemented. May feel scared or stressed about the change. Or they feel they are too busy to care.

Best case:
Curious, intrigued, excited and perhaps eager to get rid of the old system.

Uncertainty and confusion caused by poor communication: the organization fails to communicate the change, why it's happening, who it will affect, when, and how.

Users feel scared or resistant to change. Doesn't see the benefit. See's nothing wrong with the current way of working.

Users feel too busy to pay attention or prioritize the change. Sticks to old ways.

Users are Annoyed: "It's yet *another* tool." Doesn't see the benefits for the change. Also feels that the change is too disruptive.

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

"Metadata-driven document management!!
I gotta learn about this. Where can I learn more and possibly download the trial?"

"M-Files has a really good reputation. How can I get involved in this project?"

"I wonder how M-Files will help with our work. Where can I learn more?"

"Another tool, really? I am way too busy to think about this now. I'll pay attention to this later."

LATE ADOPTERS

"I am not so sure about this. How is this supposed to help me with my work?"

"I KNOW M-FILES IS COMING."

ACTIONS TO TAKE AT THIS STAGE TO FACILITATE ADOPTION

At this stage, clear communication is key.

Users need a high-level understanding about what is happening and why.

ACTIONS TO FOCUS ON	GOALS The ideals we'd like to achieve for our users at this stage
High-level clear communication for why this change is happening, how it benefits everyone, and who is involved. Clearly explain how this will make everyone's jobs easier. Explain the <u>USER</u> benefit, not just the business benefit. Do not go too much into details at this stage (i.e. showing demos, etc.). High-level and big picture communications are enough.	**Understand the change.** They understand why the change is coming and they are already starting to see how the change will benefit them. **Excitement for change**. Convince users that better days are coming.
Dedicated User Adoption Efforts: Have a person in the project team who focuses on user adoption.	
Work with users early on. Include users in the design process. Involve and welcome their feedback.	
Invest in training and start early. Start with M-Files Essentials for the project team. Start working on the champion network.	

FOR THE EARLY ADOPTERS

At this stage, it is important to enable the early adopters and get them excited about M-Files. Ensure they have access to the information they need to be able to dive in. It's often best to include them in the process somehow, whether it be with the design, change management, or training.

FOR THE LATE ADOPTERS

Late adopters aren't likely to be invested at this stage. For those with a particularly resistant attitude, it's important to give them space to vent.

Overall, for these types of users, it's important to communicate why they should invest their time and attention into learn M-Files. Namely, in what ways these changes will benefit them.

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

2

This is part of the initial awareness building phase of the User Journey.

At this stage, the user learns more about how M-Files will affect them and their work.

POTENTIAL MINDSETS	OBSTACLES / THREATS
Potential attitudes and mindsets organizations may encounter with their end users at this stage	Potential causes for why users are either slow to or completely fail to adopt M-Files
Worst case: Apathy, confusion, uncertainty. Change can be disruptive. Some workers might be apathetic in light of their other responsibilities. **Neutral or Practical:** Some workers might be curious about how this will solve their problems. They might also start thinking about how they will take on the change. **Best case:** Curiosity, eager to learn more.	**Uncertainty and confusion caused by poor communication**: the organization fails to communicate the value. Demos are not resonating enough. Users do not understand the change, the benefits, and/or how it affects them. **Users feel too busy** to pay too much attention or prioritize the change. Sticks to old ways. **Users are Annoyed:** "It *another* tool." Doesn't see the benefits for the change. Also feels that the change is too disruptive.

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

"I have already downloaded the trial. Did you know that M-Files has a feature for ....?"

"I wonder how M-Files will improve our operations if we apply it to this and that. Who should I talk to?"

"I really eager to learn more. I think M-Files could really help me and my team. When will we have training?"

"I'll pay attention to this later on. I'll let my colleagues take care of this."

LATE ADOPTERS

"I am still not sure how this is supposed to help me. I don't get it. I am just going to keep on with my work until someone tells me otherwise."

"THIS IS HOW THIS CHANGE WILL AFFECT ME..."

ACTIONS TO TAKE AT THIS STAGE TO FACILITATE ADOPTION

At this stage, clear communication is key.
Don't leave your users in the dark on what's happening and whom it affects.

ACTIONS TO FOCUS ON	GOALS
	The ideals we'd like to achieve for our users at this stage

More detailed and clear communication: offer more details about the change, particularly using demos with well-resonating use cases. Communicate when this change will happen, who it will affect and how. It's important to still focus on the user benefits and key user pain points.

Dedicated User Adoption Efforts: Have a person in the project team who focuses on user adoption.

Have an ongoing dialogue with users to understand how they're perceiving and feeling about the change. This will help inform the communications strategy.

Give eager users tools to dive in and try out the new system.

Prioritize and incentivize: Help staff prioritize the change and incentivize people to go through with it.

Work with users early on. Include users in the design process. Involve and welcome their feedback.

Invest in training and start early. Start with M-Files Essentials for the project team. Start working on the champion network.

Cultivate certainty and excitement and alleviate fears, with well-resonating messaging and demos. Users understand why this change is happening, when, how it affects them, and what benefits this provides them and the organization.

FOR THE EARLY ADOPTERS

It's important to cultivate certainty for your early adopters. Uncertainty can cause a lot of negative emotions around change.

Similar to the previous stage, ensure they have access to the information they need to be able to dive in. It's often best to include them in the process somehow, whether it be with the design, change management, or training.

FOR THE LATE ADOPTERS

Similar to the previous stage, late adopters aren't likely to be invested at this stage. To help with this, make sure the messaging and demos resonate well enough with their work and their pain.

For users who feel too busy, they might need incentives to start paying attention and very explicit communications on what they should do and when.

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

3

GETTING INTO THE M-FILES MINDSET

This is part of the initial learning and training phase of the User Journey.
At this stage, the user starts to actively learn about the M-Files way of managing information.

POTENTIAL MINDSETS	OBSTACLES / THREATS
Potential attitudes and mindsets organizations may encounter with their end users at this stage	Potential causes for why users are either slow to or completely fail to adopt M-Files

Worst case: Finds the solution too confusing or difficult, very stuck in folder-based thinking. Doesn't want to give up folders. The system is not intuitive for them in the beginning, and they get very frustrated.

Neutral: Curious to see how this solution will solve their main pain points.

Best case: Eager to learn. Excited to see how M-Files will help make their lives easier.

Confusion, uncertainty, apathy, and frustration. M-Files feels too complex for them, and they give up. Some might not see how M-Files will help with their work.

Users are left high and dry. There is a lack of investment in training or change management, leaving users without resources, training or help.

Doesn't see the benefits of the new way. They might not understand how metadata can benefit them. The old way of saving information feels more familiar to them.

Training and learning environments are too complicated.

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

"I already understand metadata. I don't need any further explanations. I am fine just playing with the tool on my own."

"It's hard for me to concentrate on this training because I am constantly thinking about the business applications of M-Files."

"Wow. I really see the potential of metadata. I wonder what else M-Files can do."

"I get it. Metadata is better, but I'll invest my energy into this only when it's necessary."

LATE ADOPTERS

"Meta-what? What's wrong with folders? I know where all my stuff is."

"THIS IS HOW IT MEETS MY NEEDS"

ACTIONS TO TAKE AT THIS STAGE TO FACILITATE ADOPTION

GETTING INTO THE M-FILES MINDSET

At this stage, training is key.
Users need to understand the M-Files approach and value of managing information with metadata.

ACTIONS TO FOCUS ON	GOALS
	The ideals we'd like to achieve for our users at this stage

Invest in training and change management.
- Leverage M-Files Training and M-Files Learning offerings and at least, have the project team attend M-Files Essentials training.
- Identify internal advocates and champions. Use them to help onboard users to the M-Files mindset.
- Invest in a training and change management strategy.
- Create an effective learning environment (i.e. a simple sample or learning vault, with a well-resonating metadata structure, preferably a metadata structure that is similar to the one in their solution).

Have an ongoing dialogue with users to understand how they're perceiving and feeling about the change.

Prioritize and incentivize learning: Help staff with prioritizing training in their busy days and offer training incentives.

The users fully understand and see the value of the M-Files metadata-based way of managing information. They are eager to dump the old way and learn more about the new.

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

.

4

LEARNING THE INS AND OUTS

This is part of the initial learning and training phase of the User Journey.

At this stage, the user understands the M-Files approach, now they are learning the features more deeply.

POTENTIAL MINDSETS	OBSTACLES / THREATS
Potential attitudes and mindsets organizations may encounter with their end users at this stage	Potential causes for why users are either slow to or completely fail to adopt M-Files

Worst case: Eager to give up. Finds the solution too complicated, confusing, or difficult. They think that system is not as intuitive or as beneficial as promised. May want to give up and default to old ways. May feel overwhelmed with so much to learn.

Neutral: Not overly excited, but not negative either. Has an open mind to how various features can benefit their work and are maybe eager to see how M-Files works with other tools.

Best case: Sees the value of M-Files and how it will benefit them. Starts to connect the dots on how M-Files will make their lives easier. May already be thinking about how to use M-Files for other processes.

Inadequate or poor training.
- User confusion, uncertainty, apathy, and frustration. M-Files feels too complex for them, and they give up. Some might not see how M-Files will help with their work.
- Default to old ways. User may decide to just stick with old ways.
- Poor learning environments disrupt the learning process and don't allow users to see the value.
- Training is not prioritized well enough, not enough time to learn M-Files.
- Training is overwhelming or confusing, doesn't resonate.

Users are too busy with their own work to concentrate on training.

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

"Did you know that the M-Files community has all sorts of great information."

"This feels tedious. I am more of a big picture person."

"There are a lot of really useful features in M-Files that can help us with our work. I am eager to talk to the team about all the ways we can leverage this new tool."

"I don't need to absorb this information now. I am sure there is a user guide if I get stuck later on."

LATE ADOPTERS

"This is all way too much. My way of doing things was way easier."

"THIS IS HOW IT MEETS MY NEEDS"
ACTIONS TO TAKE AT THIS STAGE TO FACILITATE ADOPTION

LEARNING THE INS AND OUTS

At this stage, training is key.
Users need to start seeing how M-Files can help them with their work.

ACTIONS TO FOCUS ON	GOALS
	The ideals we'd like to achieve for our users at this stage
Invest in training and change management. • Leverage M-Files Training and M-Files Learning offerings and at least, have the project team attend M-Files Essentials training. • Identify internal advocates and champions. Use them to help onboard users to the M-Files mindset. • Invest in a training and change management strategy. • Create an effective learning environment (i.e. a simple sample or learning vault, with a well-resonating metadata structure, preferably a metadata structure that is similar to the one in their solution). **Prioritize and incentivize learning**: Help staff with prioritizing training in their busy days and offer training incentives. **Communicate and establish feedback loops with users.** Assure users that things can change, either with the system or the roll out plan. Invite users to give feedback on customizations for their department/function. Get them involved on the build.	**Users understand the practical, tangible value of M-Files for their own work.** They understand how to do their job in M-Files. **Users feel comfortable and confident** with changing to M-Files and continuing their work in the new system**.**

FOR THE EARLY ADOPTERS

During your training, it's important to invest in the pragmatists because once they understand how M-Files works, they are often able to connect the dots for themselves. For M-Files to stick in an organization, at least 30% of the users need to adopt the platform.

Visionaries might struggle during this stage because they prefer to focus on the big picture, rather than on details. It's important to let them work on strategy and operations while they are learning the features of M-Files.

You can leverage tech enthusiasts to help with training and championing various features.

FOR THE LATE ADOPTERS

Conservatives are less likely to pay attention fully during a dedicated training, but this is okay, because many of them are independent learners. So, it's important to make sure there are materials and support structures in place for them to troubleshoot later.

Skeptics need a lot of dedicated training. You can leverage champions and advocates to help these users onboard to M-Files.

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

5

This is part of the becoming-an-M-Filers phase of the User Journey.
This is the riskiest stage. M-Files is now live, and users must continue their work using M-Files.

POTENTIAL MINDSETS
Potential attitudes and mindsets organizations may encounter with their end users at this stage

OBSTACLES / THREATS
Potential causes for why users are either slow to or completely fail to adopt M-Files

Worst case: The user may not remember what they learned in training. May want to give up and default to old ways.

May feel scared to do anything in the new system out of fear of breaking it. They may not trust the solution.

Neutral: Interested to see how the roll out will go.

Best case: Feels confident about using M-Files. Sees the benefit and is eager to continue their core work with M-Files supporting them.

Users continue to work outside of M-Files. If the solution is not serving them or they are not trained properly, they will default to old ways (i.e. saving to folders).

Inadequate support to users. Users feel unsupported. They can't find answers to their questions and are likely to default to old ways.

M-Files solution is not supporting their work. For instance, they can't find relevant metadata to mark their documents/files.

Users are lost because their learning environments were very different from their actual environments. So, they feel a bit lost when they encounter their actual solution.

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

"I have learned all there is to know about M-Files. What's next?"

"My supervisor just told me that I am not committing to M-Files as agreed."

"This looks different from what we went through in training. I'll give this a fair shot and do my best. I can always ask if I have questions."

"Alright. I guess I have start learning this thing now. Hello tutorial videos and user guide."

LATE ADOPTERS

"I am totally lost. I am tempted to just save to folders again."

ACTIONS TO TAKE AT THIS STAGE TO FACILITATE ADOPTION

At this stage, support is key.
Users will need help and support as they learn how to do their work in M-Files.

ACTIONS TO FOCUS ON	GOALS
	The ideals we'd like to achieve for our users at this stage

Have adequate support and make sure users know where they can go for support
- Communicate resources like the Community, User Guide, and the M-Files Learning resources.
- Leverage advocates and champion network. Make sure users know who they can go to if they have questions.

Incentivize or force users to switch to M-Files.
- Have status checks or check ins to ensure that users are not defaulting to old ways.
- Shut off/edit access to old systems.
- Establish KPIs or other incentives for staff to start using M-Files.

Commit to project best practices:
- Don't launch the system before it's ready.
- Perform QA testing before launch.
- Involve users early on and create feedback loops so that they are included in the design process.

Monitor the roll out and establish feedback and communications channels.
- Create a teams, slack, or intranet page where users can ask questions and get support.
- Set up drop ins or meetings to gather feedback from users.
- Perform regular status checks to see how users are adopting the system.
- Monitor and identify individuals who need more support and support them.
- Be flexible to design changes in the beginning as users start using the system.

GOALS

At this stage, we aim for users to feel confident about using M-Files for their daily work. They have a proficient understanding of M-Files and they are eager to start their daily work using the tool.

They know where to go if they have questions or need support.

They like M-Files enough already to start thinking about how to use M-Files for other needs.

FOR THE EARLY ADOPTERS

Tech Enthusiasts might get bored, so it's important to give them some sort of role or task in helping with this phase.

Visionaries often struggle with committing to M-Files because they are more onboard conceptually, rather than practically. Visionaries make good basic users and it's important to make sure they commit.

FOR THE LATE ADOPTERS

Conservatives start paying attention and learning the system because they have to. Make sure support is available to them.

Skeptics need a lot of dedicated training and attention to help them get familiar with the new system. Leverage to help with this. trainers and champions

WHAT YOU NEED TO KNOW ABOUT THIS STAGE

6

This is part of the becoming-an-M-Filers phase of the User Journey.
M-Files is now an integral part of users' working lives. Learning continues, but not so actively.

POTENTIAL MINDSETS
Potential attitudes and mindsets organizations may encounter with their end users at this stage

Worst case: M-Files is not performing to their satisfaction and therefore, they label or conclude that M-Files is not a good system. They don't see, experience, or recognize the value.

Neutral: M-Files is just a tool and doesn't have any particular emotion or opinion about it.

Best case: User recognizes the benefits of M-Files to their daily work. They view M-Files as a great tool and would advocate it to their friends/colleagues.

OBSTACLES / THREATS
Potential causes for why users are either slow to or completely fail to adopt M-Files

Users going around the system. Over time, if the solution does not serve them properly or if they haven't been properly trained, users will go around the system (i.e. saving in local folders).

Variance in adoption level. Not everyone has been onboarded to M-Files in the same way (i.e. new employees).

System is not maintained well enough to serve users. Users feel that M-Files is not updated. Or user feedback is being ignored.

Users get stuck in habits and don't use M-Files to its fullest benefit**.**

USER PERSONA ATTITUDES AT THIS STAGE

EARLY ADOPTERS

" Look at what I built in M-Files. I wonder if they have an add-on for ...."

"I made a report about all the ways M-Files has helped our business. But I only do the bare minimum in M-Files, saving, sharing, and a bit of workflows."

"I use the system as it was intended to. I am also what you would call a super user. I manage many of our big business process in M-Files."

"I like M-Files. It's a good tool. I use it to manage and share my documents. As long as it supports me with my core work, I am happy about it."

LATE ADOPTERS

"I love M-Files. I was skeptical at first, but now I would be happy to advocate the system."