



Getting Team Buy In on New Technology

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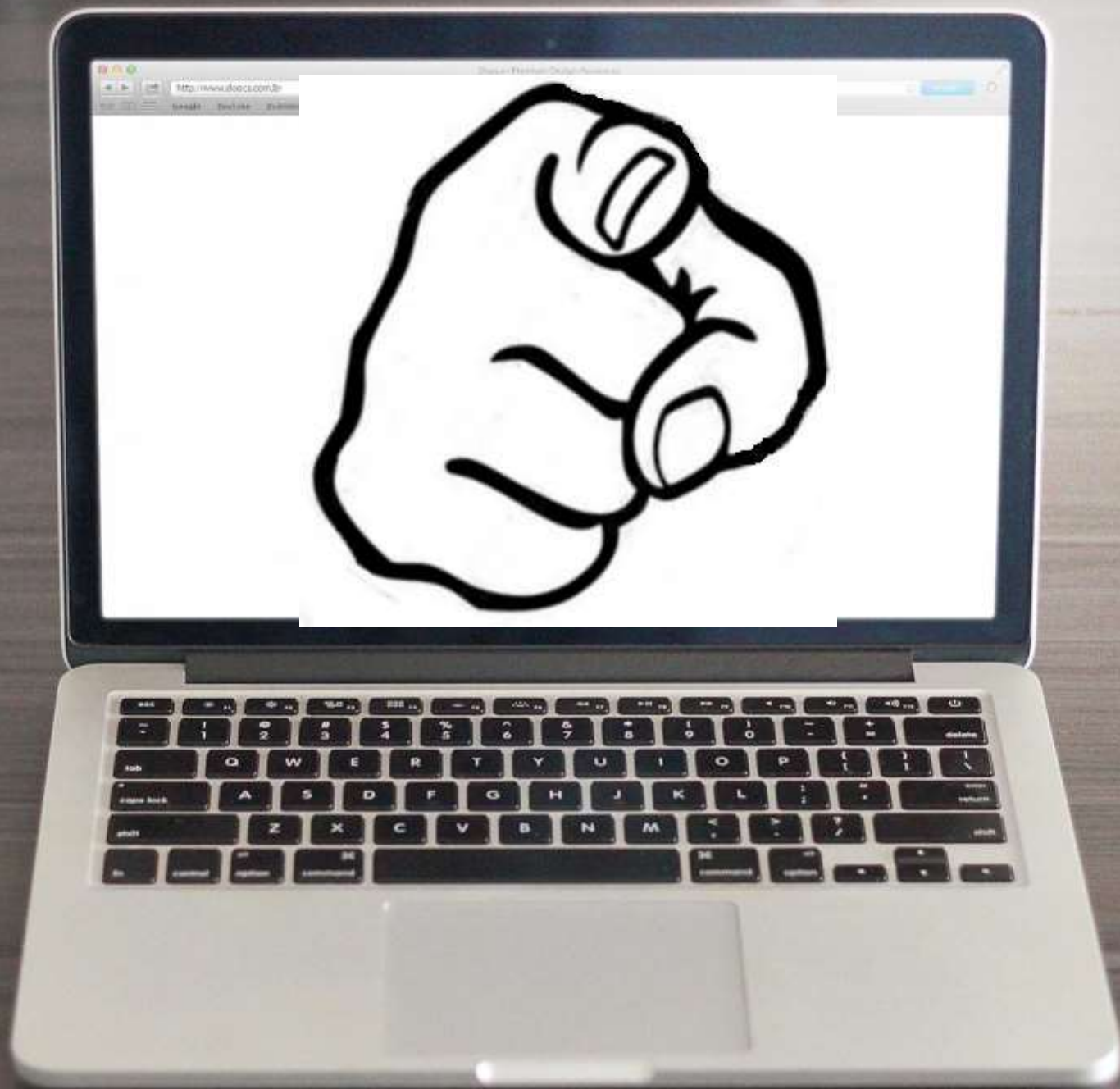


GROUND RULES











WHY IS CHANGE SO HARD?

Why Is Change So Hard?

CHANGE
is hard at first,
messy in the middle
and gorgeous at
the end.

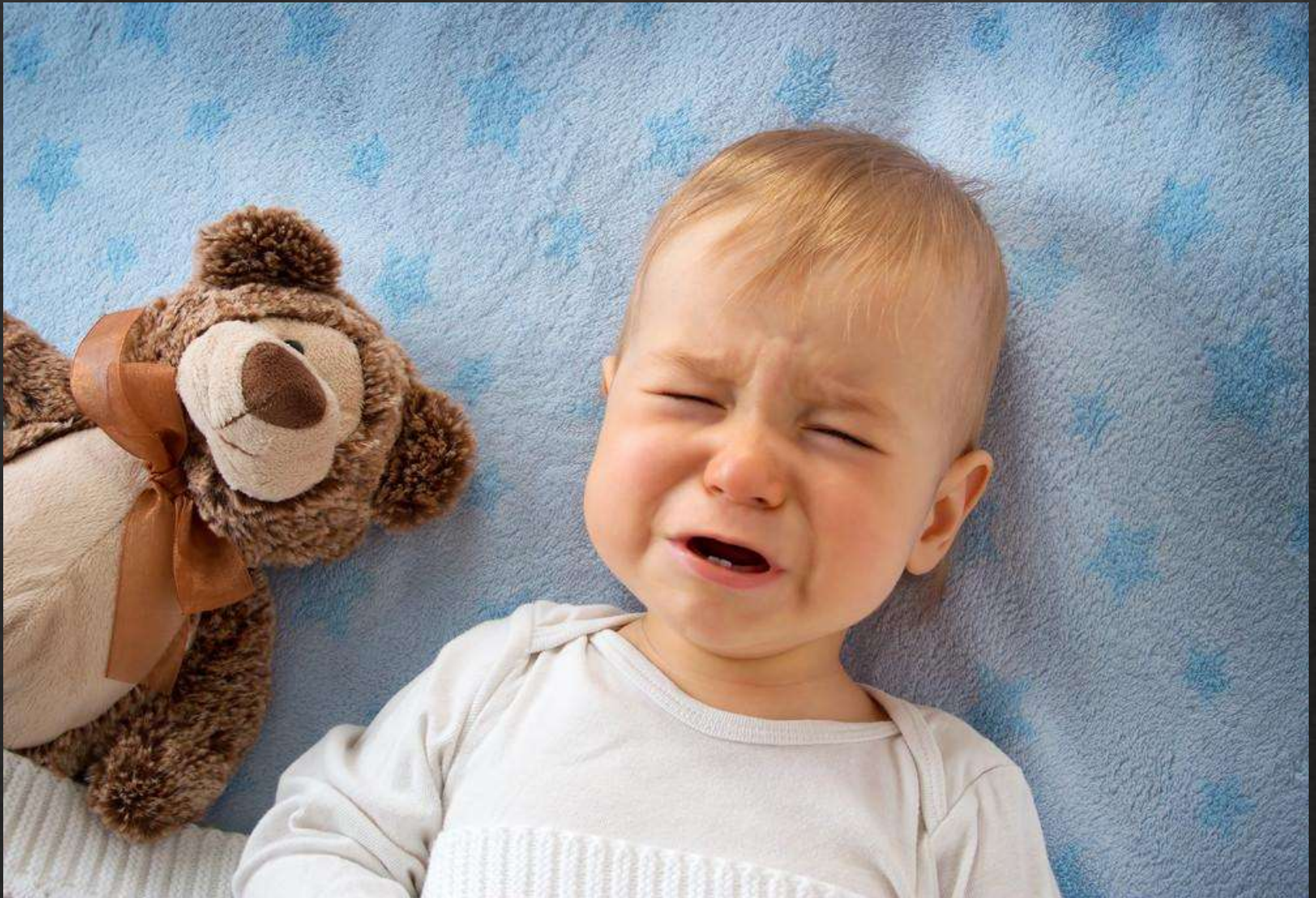
~Robin Sharma

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Why Is Change So Hard?

- Breaking Routines
- Slowing productivity - temporarily
- Short game vs. long game
- Overwhelming confusion
- Perfectionism
- “Busy”
- We try to eat the entire elephant
- Under estimation of the process

Why Is Change So Hard?



Why Is Change So Hard?

What is his long
term goal?
What short-term
goals should he set
to get there?



Why Is Change So Hard?

You & Your Team Need To

Outlast the Suck



3 STEP PROCESS TO LAUNCHING NEW TECHNOLOGY

3 Step Process

Planning

Launching

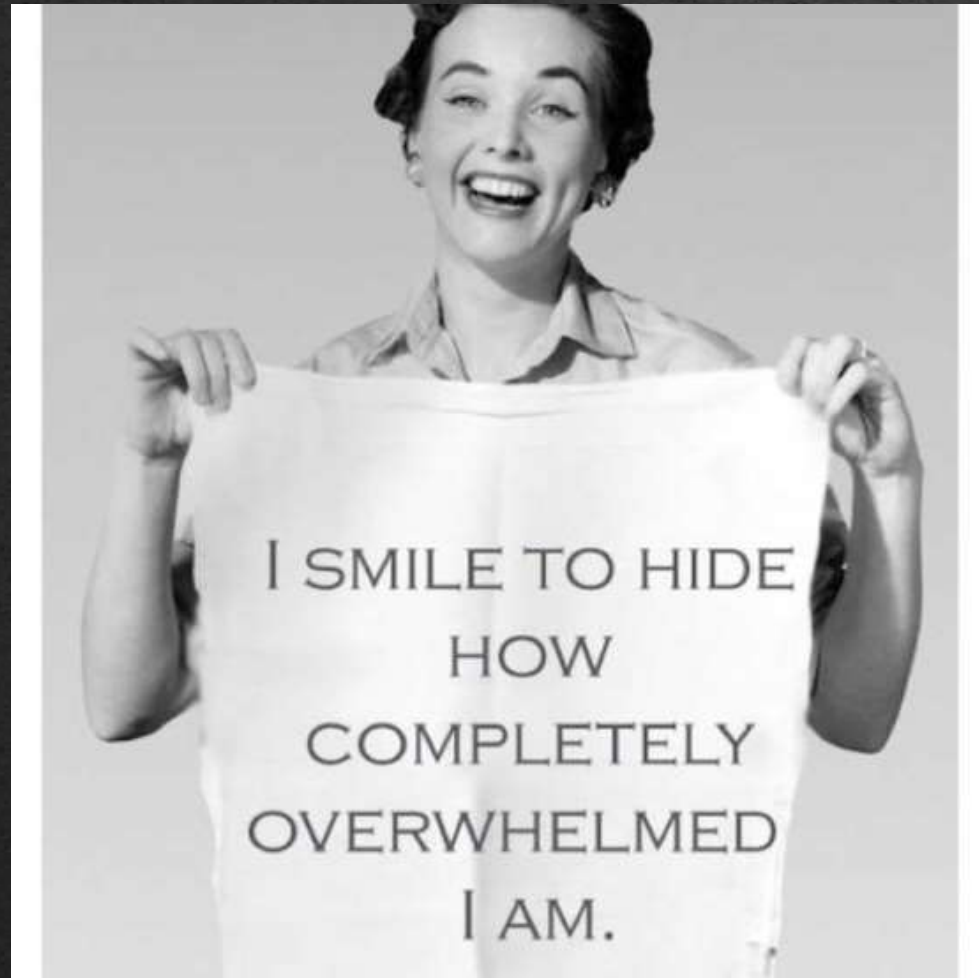
Accountability

3 Step Process: Planning



- Build a "Special Team"
- Pick a SME (System Matter Expert)
- Develop a launch plan
 - Announcement
 - Training
 - Training Period
 - Full Launch
 - Check ins
 - Retraining
 - Results
- Details, Details, Details
- Sell the Value

3 Step Process: Planning



3 Step Process: Planning



3 Step Process: Launching



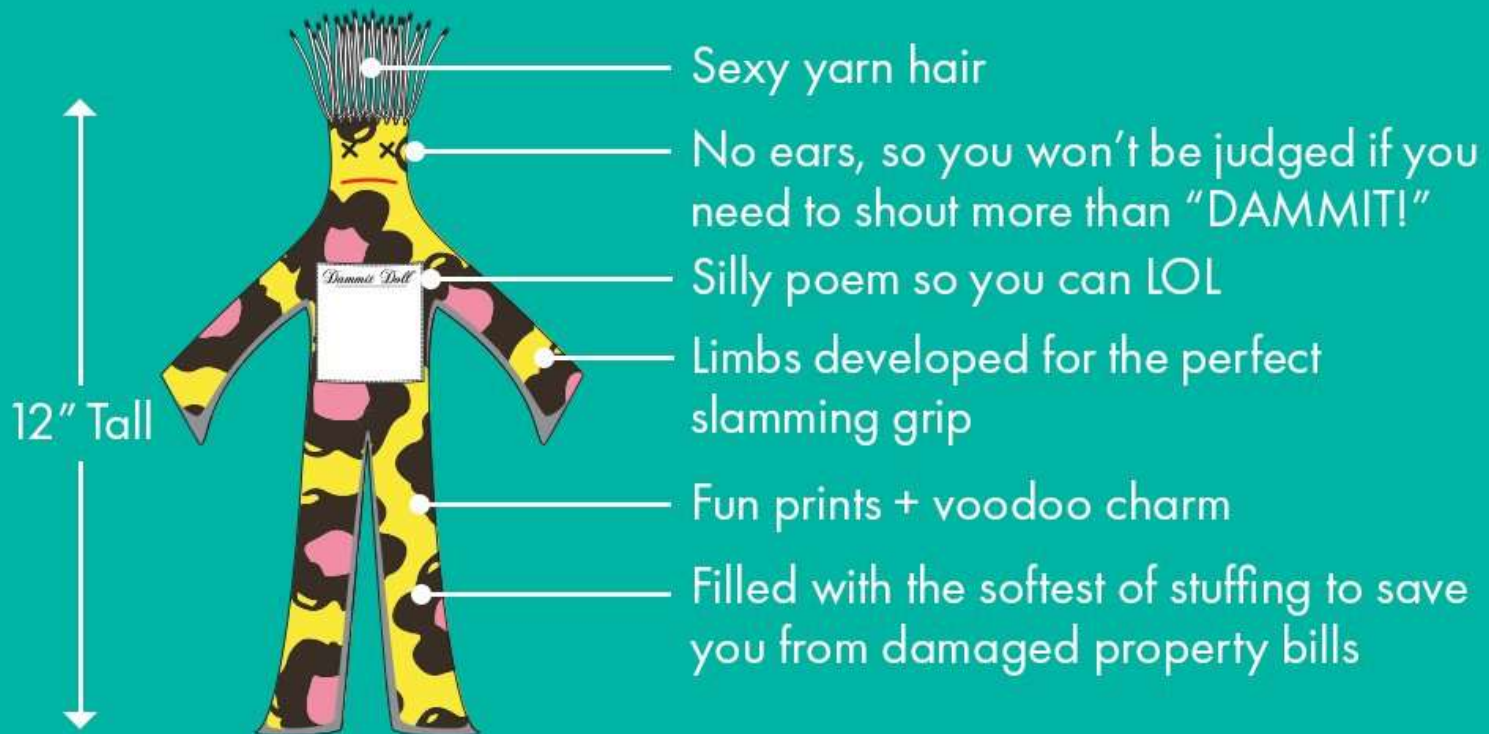
- Have a Launch Party (not a meeting)
- Sell the Why
- Explain the How
- Share an Incentive Plan
- Build Trust That This Will Work
- Review all the Support You Will Provide

3 Step Process: Launching



3 Step Process: Launching

THE ANATOMY of a DAMMIT DOLL



3 Step Process: Accountability



- Assign Responsibility for Tracking
- Weekly Team Check Ins
 - Success
 - Lessons
 - Reporting
 - Incentives
 - Next Steps
- Work through issues
- Address underperformers separately

3 Step Process: Accountability



3 Step Process: Accountability

**IF YOU WANT TO
BE TAKEN
SERIOUSLY,
BE CONSISTENT.**



COMMON EXCUSES

Excuses

YOU CAN HAVE

RESULTS

- OR -

EXCUSES

NOT BOTH.

Excuses

- Too Busy = Not a Priority
- Duplicate Entry = All of insurance is duplicate entry
- MY clients don't like X = They are YOUR clients
- It didn't work for me = Did you tell anyone?
- I wouldn't like this personally = This is for our clients
- But what you don't understand.... = Personalizing the issue
- One client didn't like it = 1 out of thousands, we are ok
- It takes me longer = Effective & Efficient Test

Excuses

FUD

FEAR, UNCERTAINTY AND DOUBT



RECAP

Recap

- For most people change is difficult
- Set reasonable, management expectation
- Have a plan
- Launch it in a fun way
- Appoint someone to be responsible
- Share success
- Identify true challenges vs. excuses

Questions?



