

# Zipline

## **Field Enablement for Technology Rollouts**

A step-by-step guide to ensure execution during new technology implementations in stores

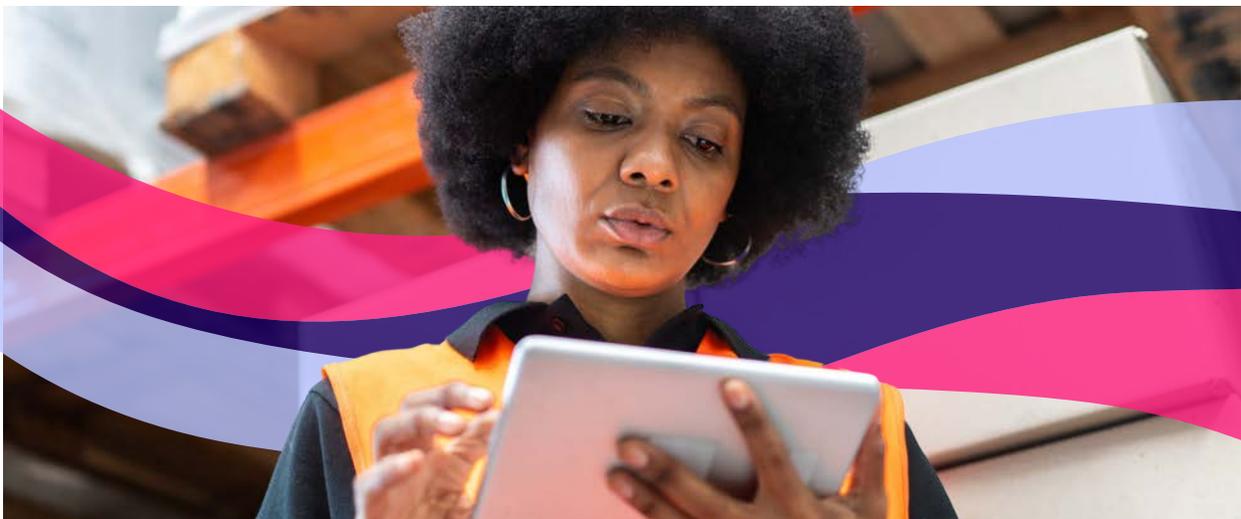


## What to Expect When You're Expecting New Technology

When it comes to retail, maintaining the status quo is a death sentence. Survival depends on agility. And for most retailers, that means investing a ton of time, effort, and money into new technology implementations.

The reasons behind retailers' investments are plain to see. Historic supply chain issues, labor shortages, and the ongoing Covid-19 health crisis are currently pushing store operations to the limit. In order to maintain a safe, memorable, and engaging customer experience, retailers must look towards the future. And the future is better technology.

No retailer should take changes in technology lightly. It's a huge investment. By the time a company has committed to implementing a new technology, they've already sunk significant money into countless hours of research, selection, vetting, and selling it to the C-suite.



But there's one more piece to the puzzle — the “last mile” piece — that's as important as all the other steps combined: rolling the new technology out to stores. All new technology requires store teams to do something, whether it's learning how to use a new hand-held device or physically setting up new cash registers. If they don't properly execute those tasks, the new technology won't reach its full potential and could even cause problems that detract from the customer experience.

How do you ensure proper execution? By mapping out every step of the process and thinking about what the store teams need to know or do at each step. Then, you work with store comms to develop a communication campaign that will make it happen.

## Step One: Always start with the “why”

Retail environments are highly susceptible to the “us vs. them” mentality. Most corporate headquarters are geographically removed from their sales outlets, and that distance is often a metaphor for a psychological divide, where top-down edicts can evoke defensiveness and lead to the belief that “corporate” doesn’t know anything about working in a store. Headquarters, meanwhile, fears lack of adoption, decreased productivity, and any number of other less-than-stellar outcomes that would prevent leaders’ techno-dreams from being realized in-store.

The best way to avoid that problem is to start by simply communicating the vision for the technology and the impact it's meant to have. At the corporate level, teams identify the benefits of any proposed technology (why it's good for the company, store employees, and the customer experience) long before making an actual purchase.

Sometimes, however, corporate forgets to tell all that to stores. And that sets the scene for store employees to see the new technology as just another disruption to getting things done. That, in turn, leaves the folks at headquarters scratching their heads and wondering why the stores don't understand what a game-changer this amazing new technology will be!

Providing the history and context behind the selection of new technology not only keeps its imminent arrival top-of-mind for employees, but also builds a case for buy-in and helps create a feeling of collaboration rather than dictation. It's even better if HQ gives store operators a chance to communicate their thoughts and questions back to headquarters before the date of the rollout. Two-way communication soothes fears, creates a sense of ownership, and allows for fewer hiccups when launch day arrives.

### Questions to ask:

- How will this new technology help support the company in achieving its brand goals?
- What's at risk if the implementation doesn't go as planned?
- What's the financial upside (for an individual store and for the company as a whole) if the implementation is successful?
- How will the new technology make store employees' lives easier?
- How will the new technology improve the customer experience in stores?

### Now, communicate it!

A successful technology rollout requires every store employee to execute in the same way. And the key to moving tens of thousands of people in a single, unified company direction is to engage and inspire them as much as possible.

So when thinking about how to communicate “the why” behind your rollout, lean on communications methods that inspire emotion. Instead of a dry “FAQ” printable document, consider:

- A video featuring real-life testimonials from customers
- A personal letter from the CEO (or other C-suite leader) expressing appreciation for store teams
- Bite-sized video clips that articulate current pain points and how the new technology will solve for them
- A collection of quotes from recognizable store leaders expressing their excitement for the launch



## Step Two: Gather necessary details of the roll-out process

After communicating the vision and purpose for new technology, it's time to help store teams tackle meticulous planning: laying out each step of the process, anticipating any complications, and then creating a communications campaign accordingly.

When preparing for a store technology rollout, have the answers to the questions below ahead of time. Provide this information to your Store Communications team, and they'll be able to incorporate it into their communication to stores.

### Questions to ask about TIMING:

- When is the implementation set to happen? What's the "go-live" date?
- How is HQ taking steps to ensure go-live happens in the least disruptive way possible?
- Are there any pilots or tests occurring before the fleet-wide rollout? How will the learnings from these tests be incorporated into the broader implementation?

### Questions to ask about DELIVERY:

- What new hardware/devices are arriving?
- When will the technology land in stores?
- Will it arrive in one box or multiple shipments?
- Where will it be stored until installation?
- Does it need to be secured, or can it sit in the stockroom with backstock?
- How will store teams check to ensure all pieces have arrived? What will they do if any pieces are missing?

### Questions to ask about EXECUTION:

- Who will be in charge of getting the new tech online? Will it be store staff, or technical experts/vendors deployed for the implementation?
- Will stores receive training on the new technology prior to go-live? How long will the training take?
- How many hours are teams allocated for training? How should these hours be entered/coded on the store schedule?
- Will teams need to gain mall/center approval (for additional hours or in the event the installation will cause a late open/early close)?
- Who will be the store teams' go-to resource during the rollout? How should they contact them? When and how should they reach out to these resources for support?



### Questions to ask about CLOSEOUT:

- If your new technology is a replacement or an upgrade, what should stores do with their old equipment?
- Does it need to be shipped somewhere? If so, how will stores receive packaging and a label to ship it back?
- Can it be donated or recycled, or does it need to be destroyed? If so, what are the names/locations of facilities where secure donation or destruction can happen?

### Now, communicate it!

You can't effectively hold store teams accountable to expectations you never set. A successful implementation happens when employees have a crystal clear understanding of what's expected of them.

When communicating the tactical steps store teams need to take to successfully launch new technology, it helps to be real specific (go ahead and spell it out!) and show what good looks like. Lean on communications methods that leave little room for misinterpretation, like:

- Step-by-step videos or GIFs that show employees how to unpack and install the new hardware (if applicable)
- A printable "go-live" checklist to post at the Manager's workstation and/or POS
- An easy "from-to" reference document that outlines processes in the stores' current technology, and how each process will change upon implementation of the new technology.



## Step three: Prep for “Plan B” (And C... and D...)

No matter how thoroughly you prepare, you won't think of everything. Making it simple for store teams to find answers, to learn from each others' struggles, and to stay connected with those who can troubleshoot or provide coaching is critical to success.

Sometimes unforeseen issues are global - they impact all stores (or at least, a large proportion of them). Maybe shipments are delayed, or hardware arrives and key pieces are missing. Whatever the issue, it helps to have a feedback mechanism in place to catch these types of problems as soon as they happen.

Consider leveraging a task management or store auditing system to collect this type of information up front, as it will be easy to spot large-scale trends quickly and take action accordingly.

### Examples of questions to ask:

- Did your store receive the shipment as planned? Did it arrive late/early?
- Did the installation vendor contact you as planned?
- How long did the installation take?
- Are all systems operating as planned after the installation?

Other times, issues might be more localized. For these types of issues, HQ should proactively put processes and platforms in place to help stores help themselves. Peer-to-peer troubleshooting is not only a great way to mitigate confusion in the field, but it also builds camaraderie and accountability.

### Examples of peer-to-peer communication resources:

- A group or thread on an internal social app dedicated to the technology rollout. Promote this space as a place to share wins as well as ask questions. Consider “seeding” the group with highly engaged employees who can help spur conversation.
- Live or pre-recorded video calls hosted by store employees, walking their peers through their favorite tips and tricks. Hosts can then answer peer questions in real time.

Finally, don't forget to queue up a simple store survey after the rollout is complete. Not only will you gain valuable insight into how future rollout campaigns can improve, but your store teams will also feel heard. Welcoming feedback on the overall rollout experience - good or bad! - can go a long way in establishing goodwill between HQ and stores.

## When an “update” is really a radical leap forward

Making minor updates to existing technology or adding technology similar to what employees already own (like tablets to use on the sales floor) might not require much more communication than letting employees know when new devices arrive and what to do with them.

Radical leaps across the digital horizon, however, require a lot more work. When the new technology you're rolling out will drastically change the way store teams do their jobs, ongoing training and support is essential. According to TrainingIndustry.com, effective training includes “coaching, job shadowing, role-play, game-based learning, classroom training or e-learning,” allowing employees to navigate complex new technologies in multiple ways before integrating them into the day-to-day workings of a brick-and-mortar store. At the very least, employees should have access to a beta version to play around with before things go live.

If your budget doesn't have room for that kind of “best practice” training, make the most of your communications campaign.



## How Zipline can help

Retailers everywhere have to improve their digital and in-store capabilities in order to keep pace with rapidly changing customer expectations. But slapping upgrades on top of a crumbling workforce infrastructure will surely end in failure. In order to ensure their investments in new technology are worthwhile, retailers need to first lay the proper foundation to enable the employees who bring those technologies to life.

### **In other words: to upgrade your technology, start by enabling your field teams.**

Zipline is the field enablement platform we wished we had when we worked in stores. It quiets the noise and prioritizes the work for field teams. It puts everything in one place and gives employees the context they need to get their jobs done. Zipline gives you the agility you need to have more control over your business. It allows you to pivot quickly, roll out strategic initiatives and ensure your whole company is aligned.

### **Best practices and a best-in-class solution - all rolled into one.**

Choosing Zipline means you'll join a community of world renowned brands, learn strategies from the best executors in the world, and participate in customer-only events and roundtables. We have a 5/5 Implementation Happiness rating, a NPS of 71 (versus an average of 41 for most SaaS companies), and comprehensive product training is rolled into your implementation (no need to pull in an expensive outside firm).

### **At the intersection of engagement and execution.**

Task Management platforms drive better execution, but they feel rigid and punitive. Communications platforms are fun and engaging, but they lack accountability. By bringing everything together, our platform connects the stuff your stores need to know with the stuff they need to do. Your teams know how their work supports the larger picture and have context that enables them to be better store leaders. This knowledge, in turn, drives a higher rate of engagement and execution. Everyone knows what good looks like.

### **A true one-stop-shop for store teams.**

With an open-API and pre-built integrations with the leading systems field teams rely on every day to get their work done - like Dayforce, Adobe, Docebo, Medallia, and more - Zipline is a one-stop shop for frontline teams. And integrating multiple systems into a single platform doesn't just save employee time, it also enables us to synthesize data from multiple tools into holistic, actionable insights that help drive the business forward.

If you'd like to learn more about how Zipline can ensure your technology upgrades are executed correctly, and on time, reach out today.

**Zipline**