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THE MERIT PERSPECTIVE

Where technology becomes value

The people side of technology transformation

EXECUTIVE PERSPECTIVE

The business case needs a people plan

Technology can create a new capability. Value depends on how that capability changes the work.

Organizations fund technology projects to improve a business outcome: better service, faster work, lower cost, stronger control or a different customer experience. Yet a deployment plan often describes the system more clearly than it describes what people must do differently. When those two plans diverge, the project can reach its technical milestones while the intended operating change remains incomplete.

Merit approaches change management as part of delivery. We assess impacts and risks before deciding how much support the project needs. We then connect ownership, communications, learning and support to the implementation plan. After launch, we review whether people can perform the work, whether the new routine is being used and where additional help is justified.

This overview explains that approach and gives leaders a way to choose the steps and deliverables that fit their project. It also examines research on transformation outcomes. The evidence supports attention to people, leadership and organizational capabilities, but it does not establish that every shortfall has a people-only cause. Technical quality, process design and business assumptions remain part of the diagnosis.

Technology + adoption = value

Putting the approach to work

01 Start with the work and the intended outcome, not a standard list of change activities.

02 Size support to impact, complexity and disruption risk. High value alone does not dictate a large team.

03 Keep ownership, readiness checks and a route to help at every support level.

04 Use evidence after launch to focus effort where adoption is falling short.

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READING THIS OVERVIEW

A guide to technology adoption

Use the evidence to frame the issue, then use the delivery guide to choose the work your project needs.

The research 04

The adoption approach 07

Tailoring the support 11

Preparing and sustaining use 19

Working with Merit 31

Sources and interpretation 36

For a project sponsor
Begin with value, risk and the scope decisions. Use the worked examples to challenge whether the proposed support fits the need.

For a project or change lead
Use the workstream guidance and practical questions to identify owners, evidence and handoffs. Adapt the activities rather than copying the whole guide.

EVIDENCE / OUTCOMES AND VALUE

Value realization is not a binary outcome

Some transformations deliver benefits without delivering the benefits that justified the investment.

BCG's 2020 research distinguishes full value realization, partial value and limited value. These categories matter. Calling all remaining transformations "failures" erases the commercially important middle: investment produces results, but not enough, not quickly enough, or not for long enough. The findings are based on executive assessments rather than independently audited outcomes.

Merit's implication: define success in operating terms before implementation. Specify the behaviors, proficiency and workflow changes required to realize each benefit, then track whether those changes persist after launch. This is our application of the evidence, not a tested result of the study.

BCG 2020

30% Met or exceeded target value and achieved sustainable change

44% Created some value but missed targets, with limited lasting change

26% Delivered limited value and no sustainable change

Study context. 70 BCG client transformations plus an external survey of 825 senior executives. Outcomes reflect executive assessments, not independently audited results. These categories should not be compressed into a single failure rate. [R1]

EVIDENCE / DEFINING SUCCESS

Delivery and sustained performance are different tests

Studies use different definitions and populations. Their percentages are not interchangeable.

Sustaining a change

In McKinsey's 2018 survey, 16% of digital-transformation participants described their efforts as very or completely successful both at improving performance and at equipping the organization to sustain change. A further 7% reported performance improvement that was not sustained. [R2]

The study associated better outcomes with leadership, capability building, employee empowerment, upgraded tools and communication. It does not establish that any one intervention caused success, or that all unsuccessful transformations failed for people-related reasons.

Capturing the expected value

A 2012 McKinsey/Oxford analysis reported that large IT projects, on average, delivered 56% less value than predicted. The same analysis reported average budget and schedule overruns of 45% and 7%, respectively. Large projects were defined as having initial budgets above $15 million. [R3]

This is historical evidence, not a contemporary forecast. Its underlying database exceeded 5,400 IT projects; the published headline does not establish that every project in that database was a large project. Nor does the analysis attribute the value shortfall exclusively to adoption.

Merit's implication. Track technical delivery, people readiness, effective use and business outcomes as connected but distinct commitments. A launch date or a completed training session is not evidence that the intended operating benefit has arrived.

EVIDENCE / PEOPLE AND ORGANIZATION

The conditions around use shape the result

The evidence supports investment in people and organization alongside technology, not a people-only explanation.

In 2022, EY and Oxford's Saïd Business School examined transformation experiences across 23 countries and 16 sectors. The research points to human conditions and leadership practices associated with better outcomes. Its sample deliberately balanced successful and underperforming experiences, so it cannot establish a population failure rate. Its modeled scenarios are not observed returns from buying change-management services. [R4]

A 2003 longitudinal study of eight hospitals tracked monthly technology use and performance over three years. Actual usage was positively associated with financial and quality outcomes after allowing for time lags and other factors. The study is observational and sector-specific, but it directly examines use rather than treating technology investment as the outcome. [R5]

Firm-level research published in 2002 found complementarities among IT, workplace organization and workforce skills. A related 2000 research synthesis explains why organizational investments and time lags complicate the relationship between technology spending and business performance. These findings support a combined investment logic—not a claim that technology quality no longer matters. [R6, R7]

For Merit, the practical lesson is to investigate friction before labeling it resistance. Can people make time to learn? Is the new process workable? Do managers understand their responsibilities? Can people practice, surface problems and get useful answers? These are questions to test alongside technical quality and realistic benefit assumptions.

Historical evidence, current questions

The studies cited here span different years, sectors and methods. They help frame a management problem. They do not provide a current universal failure benchmark or prove that a single intervention causes value realization. Full source notes appear at the end of this report.

THE VALUE CASE

The adoption-to-value connection

A technology investment becomes useful when the organization can put its capabilities to work in a way that advances a business objective.

Implementation establishes a capability. Adoption concerns what people do with it: whether they complete the intended tasks, follow the changed process and use the resulting information in their decisions. A system can be available while work continues through old tools, duplicate records or informal workarounds. In that situation, technical delivery and business progress can tell different stories. The change plan needs to make the connection explicit rather than assume that launch will create it.

Merit's proposition, Technology + Adoption = Value, expresses that connection. It is not a mathematical promise. Effective use can support the intended benefit, but the quality of the solution, process design, data, operating conditions and commercial assumptions also matter. Change management cannot compensate indefinitely for a tool that does not meet the business need. Its contribution is to prepare people for changed work, make obstacles visible and coordinate a response with the people who can resolve them. That is why adoption belongs in the investment conversation before deployment, not only in the support conversation afterward.

Treat effective use as part of the route to value, while testing the other assumptions on which that value depends.

Putting the approach to work

01 Name the business outcome the investment is intended to improve.

02 Describe the work people must do differently for that outcome to become possible.

03 List the non-adoption conditions that could still prevent the benefit.

04 Assign an owner to test each important assumption.

THE VALUE CASE

What effective use looks like

An adoption measure is useful only when it reflects the behavior needed for the business outcome, not merely activity in a system.

Start with a specific task or decision. Who performs it, how often does the need arise, and what does successful completion look like? A login may show access, but it does not establish that a person can complete the new workflow. Attendance may show exposure to training, but not independent performance. The appropriate evidence depends on the work: a completed transaction, a correctly handled exception, a timely approval or a decision that uses the new information.

Build a short chain from the capability to the changed behavior, then to the operating result and intended business outcome. For example, a shared request tool might enable a consistent intake process; teams would need to record and route requests correctly before the organization could assess any improvement in handling time. This is an illustrative logic chain, not a claim that the tool will produce that result. Define where evidence is available and where an assumption remains. A business owner should agree the chain so that the adoption team is not left to invent the meaning of success after launch.

The behavior-to-value chain

01	02	03	04
Situation	**Role and task**	**Effective use**	**Business result**
What event creates the need for the work?	Who does what differently?	What evidence shows correct completion?	Which outcome should that behavior influence?

Keep the behavioral measure separate from the operating result. Record where the connection is still an assumption.

UNDERSTANDING THE CHANGE

The work behind the feature list

People experience technology change through the tasks, decisions and handoffs that make up their working day.

A release description explains what the system will do. An impact assessment must explain what will be different for the people using it and for those who depend on their work. Walk through a real task from its trigger to its completion. Note the information required, decisions made, handoffs, approvals and exceptions. Then compare that path with the intended future process. This exposes changes that a feature demonstration can miss, such as a manager becoming responsible for an approval or a team losing access to a familiar report.

Include conditions outside the ideal workflow. Consider intermittent users, shift workers, people away during training and colleagues who receive the output without using the tool themselves. Check what happens when data is incomplete or the usual approver is unavailable. These details determine the communications, practice and help people need. They can also reveal design issues that belong with the process or technology team rather than the change team. Record those issues in the delivery process so that a training document does not quietly become the workaround for an unresolved design decision.

The useful unit of change is often a task, handoff or decision, not a software feature.

Putting the approach to work

01 Choose one important workflow and map its current and future steps.

02 Mark every changed action, decision, responsibility and handoff.

03 Test at least one exception and one less frequent user scenario.

04 Route design problems to the accountable owner instead of disguising them as learning needs.

UNDERSTANDING THE CHANGE

An impact assessment people can use

The assessment should translate differences in work into decisions about preparation, support and ownership.

Group people by the change they will experience, not only by their place on an organization chart. Two roles in the same department may need different preparation; the same role in two locations may face different processes or constraints. For each group, describe the current task, the future task, the significance of the difference and the conditions that could make the transition difficult. Use interviews, demonstrations and workflow reviews to test the description with people who know the work.

Keep the assessment actionable. Every material impact should lead to a response, an owner and a way to check whether the response worked. A new decision responsibility may require manager alignment and practice, while a changed screen may need only a concise guide. Mark uncertain impacts and the date by which they must be resolved. Revisit the assessment when design, timing or rollout scope changes; an early version is not a permanent description of the project. The output should help delivery teams decide what to do next, rather than simply document that stakeholder analysis occurred.

One illustrative impact record

Role and workflow	Requestor submitting an internal service request
Changed work	Select a category before submitting the request
Potential barrier	Category descriptions do not match familiar language
Response and owner	Process owner tests examples and approves a short guide
Readiness evidence	Representative users complete the task and handle exceptions

Hypothetical example. Add current work, risk, local constraints, due points and unresolved questions to the working register.

PROPORTIONAL SUPPORT

Risk sets the minimum support

The apparent size of a change does not tell you how much disruption the business can safely absorb.

A small change to a critical task may deserve more preparation than a broad change to a low-consequence activity. Ask what could happen if a person misunderstands the change, cannot complete the task or reverts to the previous process. Consider effects on service continuity, important controls, information handling and downstream work. The people accountable for those areas should help assess the risk and define the safeguards. This is an operating decision, not a score the change team should settle in isolation.

Risk establishes a floor beneath which support should not fall. That floor may require task demonstration, a controlled rollout, explicit escalation or additional launch coverage even when few people are affected. The overall support level should then reflect the breadth and complexity of the change, the organization's capacity and the remaining uncertainty. Do not average away a serious consequence because other dimensions look simple. Where the potential consequence exceeds the project team's authority or expertise, involve the relevant business, control or specialist owner before accepting the proposed response.

Scale to the consequences of unsuccessful adoption as well as the number of people affected.

Putting the approach to work

01 Identify the critical tasks that must continue through the transition.

02 Describe the consequence of an error, delay or workaround for each.

03 Agree the minimum preparation and support with the accountable risk owner.

04 Make unresolved high-consequence risks visible in the launch decision.

PROPORTIONAL SUPPORT

Choosing the right change effort

Use value, complexity, disruption risk and stakeholder impacts to select the work required, rather than assigning a tier and accepting a fixed package.

First, assess the inputs together. Value identifies the business outcome and the consequence of delayed benefit. Complexity describes changing workflows, dependencies and deployment conditions. Disruption risk establishes the consequences of unsuccessful adoption. Stakeholder impacts show which roles must change, how substantially and under what local constraints. Apply the risk floor before choosing a provisional low, medium or high support level. High value alone does not require a large team, while a small change can still carry serious risk.

Next, select the actual deliverables and capacity needed. Explain what will be simplified, what will be added and why. Consider existing business capability, materials and support channels before adding new structures. Agree the scope jointly with business and delivery owners, then reassess it when design, risk or readiness evidence changes. The tiers are an illustrative planning aid, not a validated automatic diagnostic. Capacity may come from the client, qualified partners or Merit; the level describes the work, not a requirement to buy consulting.

A visible path from need to scope

01	02	03	04	05
Assess inputs	**Set the risk floor**	**Choose a tier**	**Select the work**	**Reassess**

Inputs: value, complexity, disruption risk and stakeholder impacts. The tier is provisional. Agree actual deliverables, owners and capacity, then revisit the scope when evidence changes.

A CONNECTED DELIVERY METHOD

One connected change process

Assess and align, prepare and enable, and launch and sustain provide a practical structure without turning change into a sequence of disconnected handoffs.

In assess and align, establish what will change, who is affected and the support needed. The important decision is whether the proposed approach and ownership fit the project's impacts and risks. In prepare and enable, translate that understanding into communication, learning, support and readiness activity. The decision is whether the business has credible evidence that people can begin the new work under the planned conditions. In launch and sustain, use live experience to address gaps and establish continuing ownership.

These phases overlap. Communications begin before launch and continue afterward. Training and support preparation often run in parallel. Findings from a pilot, design review or live issue can require the team to revisit an earlier assessment. The phase structure should make those feedback loops easier, not prevent them. Align the change plan with technology and business milestones so that a delayed design decision, changed release or unresolved dependency has visible consequences for preparation. Progress is not simply the number of documents completed; it is the quality of the decisions and evidence those documents support.

Three phases, three decisions

01

Assess and align

Does the scope and ownership fit the need?

02

Prepare and enable

Can people begin the changed work under planned conditions?

03

Launch and sustain

Where does live adoption need help?

The workstreams continue across phases. Findings from design, practice or live use can send the team back to an earlier decision.

PROPORTIONAL SUPPORT

Low support for a simple change

Illustrative scenario, not a client case: a small team changes how it submits routine internal service requests within a familiar tool.

The intended value is more consistent request information. One group changes a simple task, dependencies are limited and a temporary error would have low consequences. The assessment finds no higher-risk requirement. Low support is a reasonable starting point, subject to confirmation by the business owner. The selected outputs below retain the essential checks without creating a separate change team.

Simplify preparation to one focused message and a short demonstration or guide. Use the existing help channel with a named escalation contact; do not create dedicated launch coverage. Check adoption after users have had an opportunity to submit requests. Reassess if the change reveals wider workflow impacts, repeated failed submissions or a more serious disruption risk than first understood.

Phase	Selected deliverables
Assess and align	Quick impact review; Named business owner; Simple change checklist
Prepare and enable	Focused communications; Quick guide or short demo; Basic readiness check
Launch and sustain	Launch reminder; Existing help channel; Adoption check-in

Putting the approach to work

01 Simplify: one audience and a familiar task need focused preparation.

02 Retain: named help ownership and escalation are essential.

03 Reassess: wider impacts, persistent difficulty or higher consequence.

PROPORTIONAL SUPPORT

Medium support across workflows

Illustrative scenario, not a client case: several departments adopt a shared request process with new classification, approval and handoff responsibilities.

The intended value is more consistent coordination across teams. Several roles change, the process contains dependencies and poor adoption could create meaningful delays. The proposed medium-support scope adds named change coordination, role-specific preparation and targeted launch help. Managers and process owners must agree the new responsibilities before messages and materials can be finalized.

Add audience-specific communications and practical learning for each changed role rather than send everyone the same guide. Offer targeted office hours or prepared super-user help where the assessment justifies them; do not assume a permanent support team or a large program structure. Reassess if cross-team exceptions remain unresolved, readiness differs materially between groups or support demand exceeds the available capacity.

Phase	Selected deliverables
Assess and align	Stakeholder & impact assessment; Change plan & ownership; Risk & success measures
Prepare and enable	Audience-specific comms plan; Role-based training plan; Support & readiness plan
Launch and sustain	Coordinated rollout; Targeted launch support; Adoption tracking & follow-up

Putting the approach to work

01 Add: role-based preparation addresses different decisions and handoffs.

02 Limit: launch help targets demonstrated need, not every team equally.

03 Reassess: unresolved exceptions, uneven readiness or insufficient capacity.

PROPORTIONAL SUPPORT

High support for a complex rollout

Illustrative scenario, not a client case: a multi-location organization introduces a new work-order system across shift teams and interdependent operational roles.

The intended value depends on consistent execution across locations. Complexity is high because roles, handoffs and deployment waves interact. Disruption could affect service continuity, so risk establishes a higher minimum level of preparation and support. A dedicated change lead coordinates capacity, with local owners providing evidence that their teams can perform the critical work.

Add detailed impacts, repeatable playbooks and readiness decisions for each wave. Provide dedicated launch capacity where risk and workload justify it, with specialist escalation and explicit exit criteria. Reuse common materials rather than produce a separate program for every location. Reassess or change the rollout plan when a critical task cannot be demonstrated, a prerequisite is missing or the next wave differs materially from the one already deployed.

Phase	Selected deliverables
Assess and align	Detailed impact & stakeholder assessment; Integrated change strategy & resources; Risk, readiness & value measures
Prepare and enable	Leader & stakeholder engagement; Training & support readiness; Deployment playbooks & readiness reviews
Launch and sustain	Change support through deployment; Dedicated launch support as needed; Adoption, value & sustainment reviews

Putting the approach to work

01 Add: wave-level evidence and coordinated escalation address operating risk.

02 Simplify: reuse common assets and permit justified local adaptation.

03 Reassess: critical gaps, missing prerequisites or materially different conditions.

A CONNECTED DELIVERY METHOD

How the workstreams scale

All five workstreams remain relevant at every support level. The depth, coordination and delivery capacity change with the assessed need.

Alignment establishes impacts, ownership and the plan. Communication explains the change and required action. Training prepares people for changed tasks. Support provides help in live work. Adoption connects playbooks, measurement and sustainment. A low-support project may combine these responsibilities in a small team; complex work may require dedicated capacity. The workstreams are not five mandatory departments.

The comparison below shows how communications, training and support can scale. Alignment and adoption checks remain present throughout. These are illustrative scopes: material production, training delivery and ongoing support ownership must be agreed for each engagement. Coordinating a workstream does not automatically mean that Merit produces or delivers every component.

Workstream	Low support	Medium support	High support
Comms	Focused messages and launch reminders	Audience-specific plans and leader messages	Coordinated engagement across groups and waves
Training	Quick guide or short demonstration	Role-based learning and practical job aids	Structured preparation and readiness reviews
Support	Existing help channel and named escalation	Targeted launch help and adoption follow-up	Dedicated launch capacity as needed, then handover

Putting the approach to work

01 Confirm a named owner for each workstream.

02 Agree production, approval, delivery and maintenance responsibilities.

03 Keep feedback flowing between the workstreams.

A CONNECTED DELIVERY METHOD

Selecting the work, not just the tier

A support tier is a starting point. The scope becomes useful when the team selects the baseline work and justifies each additional activity.

Every project needs an understanding of impacts, a business owner and a proportionate plan. Start with the baseline functions below, then decide how much depth and capacity each requires. The function remains even when its form is simple.

Add work when it addresses an identified need. Preserve safeguards required by risk. Agree the reason, owner and evidence for important scope decisions with business and delivery owners, then revisit them after material changes. This is joint scoping, not an automatically validated diagnostic.

Activity	Baseline function	Add when justified
Communication	Explain change and action	Different audiences or waves need coordinated messages
Learning	Prepare people for the task	Unfamiliar or consequential work needs practice and checks
Support	Known help route and escalation	Risk or demand requires extra launch coverage
Readiness	Check essential prerequisites	Critical work needs demonstrated capability and explicit acceptance
Adoption	Check use and assign follow-up	Complex deployment needs segmented measures and recurring reviews

Putting the approach to work

01 For each addition, name the need it addresses.

02 For each simplification, confirm that no required safeguard disappears.

03 Define what evidence would change the scope.

ASSESS AND ALIGN

Leadership with clear responsibilities

Visible sponsorship matters most when it is connected to decisions, resources and the everyday management of changed work.

A sponsor should be able to explain the business purpose, resolve cross-functional priorities and make decisions within their authority. Managers translate that purpose into local work: what will change, how people will prepare and what will be expected after launch. Business process owners establish the operating rules and accept continuing accountability. A change lead can coordinate these contributions, but cannot substitute for them. Naming all of these people as stakeholders is less useful than specifying what each must do and when.

Check alignment through practical questions. Can leaders describe the same intended outcome? Do managers know which activities may need time away from normal work? Is someone authorized to settle disagreements about the future process? Do local owners know how to raise a constraint that threatens readiness? Equip them with concise information and clear escalation routes, then listen to what their teams report. Local variation is not automatically resistance; it may reveal a legitimate difference in working conditions. The program needs a way to distinguish necessary adaptation from an unsupported departure from the agreed process.

Different roles, connected decisions

01

Sponsor

Resolve cross-team decisions and resource conflicts.

02

Managers

Make time for preparation and reinforce changed work.

03

Process owners

Resolve operating questions and agree justified variations.

The change lead coordinates the work and makes gaps visible. Accountable business owners retain the decisions within their authority.

PREPARE AND ENABLE

Communication that leads to action

People need the right explanation at the point when they can use it, through a channel they are able and likely to access.

An effective communication plan connects audience, purpose, timing, sender and action. Begin with what a group needs to know or do at a particular stage. Early messages may explain the reason for the change and what is still being decided. Later messages should make preparation and launch actions specific. Be candid about uncertainty, especially when dates or process decisions are not final. A confident message that becomes inaccurate can create avoidable rework and make future instructions harder to trust.

Choose channels around working conditions rather than convenience for the project team. Some audiences can use an email and a linked guide; others need a manager briefing, an accessible format or communication during an existing team routine. Give managers the context to answer predictable questions and a route for issues they cannot resolve. Coordinate messages with learning, access and support so that the requested action is possible when the message arrives. Review understanding through questions and observed behavior, not only distribution statistics. Sending a message establishes that it was sent, not that the audience understood it.

Each communication should have a clear audience, an honest message and a feasible next action.

Putting the approach to work

01 Write the action the audience should take before drafting the message.

02 Check that the action is possible when the communication will arrive.

03 Choose a sender and channel suited to the audience's working conditions.

04 Include where to ask questions and how unresolved questions will be answered.

PREPARE AND ENABLE

Closing the feedback loop

Engagement becomes useful when feedback reaches someone who can interpret it, act on it and explain the response.

Provide a manageable route for questions before and after launch. A listening session, manager conversation, survey or support channel can all produce useful information, but collection alone does not constitute a response. Group the input by issue and affected task. Distinguish uncertainty about the change from a learning gap, a process disagreement, an access problem or a product defect. These require different owners and interventions. Repeatedly explaining a process will not resolve a genuine ambiguity in the process itself.

Make the feedback cycle visible without promising that every request will be accepted.

Tell people what has been heard, what will change, what will not change and why. Where an answer is pending, identify the owner and the next update point. Use common questions to improve communications and practical materials, while preserving a route for issues that need an individual response. Avoid collecting personal information that is not needed to solve the problem, and use reporting practices appropriate to the organization. The goal is a trustworthy problem-solving mechanism, not simply a higher volume of survey responses.

Every feedback channel needs a triage process, an accountable response and a way to tell people what happened.

Putting the approach to work

01 Define who reviews incoming questions and how they are categorized.

02 Route each issue to the owner capable of resolving its underlying cause.

03 Publish useful answers and changes without exposing unnecessary personal details.

04 Track unresolved items and provide the next update point.

PREPARE AND ENABLE

Learning for the changed task

The learning requirement is what a person must be able to do, not the amount of content available about the technology.

Use the impact assessment to define learning objectives by role. Focus on the tasks, decisions and exceptions that matter in live work. A brief demonstration may be enough for a familiar, low-risk task. A more consequential or unfamiliar workflow may require guided practice, realistic scenarios and a check of independent performance. The method should fit the task and audience rather than default to the same course for everyone. Include people who perform the work infrequently; they may need a reliable job aid more than a large one-time training event.

Plan the conditions for learning as carefully as the content. Users may need access, a safe practice environment, realistic data and time away from normal responsibilities. Training should be close enough to use to remain practical, while leaving time to resolve problems it uncovers. Coordinate these dependencies with delivery teams and managers. Attendance and completion records can help manage coverage, but they should not be treated as proof of readiness. Where the task warrants it, ask people to demonstrate the work and use the results to target additional preparation.

Choose the smallest learning intervention that credibly prepares each role for its changed work and risk.

Putting the approach to work

01 Define a task-based objective for each affected role.

02 Choose demonstration, practice or performance checks according to need and consequence.

03 Confirm access, realistic examples and protected time before scheduling learning.

04 Plan a route for late joiners, absentees and infrequent users.

PREPARE AND ENABLE

Quality and ownership of materials

Useful materials must reflect the current process and reach users in a form they can find, understand and maintain.

Agree who writes, reviews, approves, publishes and maintains each learning or support item. These may be different people across the business, technology provider, training team and change team. A change lead can coordinate requirements and quality reviews without being responsible for producing every asset or delivering every session. Set those responsibilities in the engagement scope rather than leaving them to be inferred from a plan heading. Confirm that the people assigned have the expertise, access and time to perform the work.

Quality review should test practical use, not just presentation. Check that steps match the released solution, terminology matches the user's work and examples represent likely situations. Include the relevant exceptions, help route and any limits on what the user should do without assistance. Ask a representative user to follow the material where feasible. Keep a clear current version and remove or flag obsolete guidance through the organization's normal controls. When design changes close to launch, assess the impact on materials, delivery and readiness rather than quietly publishing inconsistent instructions.

Specify the production and maintenance responsibilities, then review materials against the actual task and released solution.

Putting the approach to work

01 Record the producer, reviewer, approver, publisher and maintenance owner.

02 Check instructions against the intended release and agreed process.

03 Test whether an affected user can find and follow the material.

04 Define how revisions reach users and how outdated versions are handled.

PREPARE AND ENABLE

Help in the flow of work

Support is the practical bridge between being introduced to a new process and being able to use it in real conditions.

Design support around the problems users may encounter and the people authorized to resolve them. Some questions need a quick guide or a trained colleague. Others require a service desk, a process owner or a technical specialist. Give users a clear first route and provide escalation behind it, so they do not have to diagnose the organization's responsibilities before asking for help. Check that the route is available during the times and in the locations where the changed work occurs.

Scale coverage to the impacts and risk. A low-support change can use an existing help channel with a named escalation contact; it does not assume a dedicated change-support team. More demanding transitions may justify targeted or dedicated launch capacity. In every case, establish how issues are recorded, prioritized and transferred, and what happens when the first responder cannot resolve them. Review patterns in demand to improve materials and identify process or technology defects. Agree ongoing support ownership and the conditions for reducing temporary coverage before launch, while there is still time to prepare the receiving team.

A support path people can use

01

First response

A known help route fits real shifts and locations.

02

Specialist escalation

Named owners handle issues beyond first-line authority.

03

Resolution

Users receive an answer and a route back to work.

04

Feedback

Recurring issues improve materials, process or solution.

Prepare support teams before launch. Reduce temporary coverage only when normal owners can handle the work and remaining issues have accepted owners.

PREPARE AND ENABLE

Readiness as a business decision

Readiness is a judgment about whether the business can begin the new work under defined conditions, not simply a percentage of activities completed.

Define readiness criteria while there is time to act on the findings. Consider whether users have access, understand the required change, can perform important tasks and know how to get help. Check that managers, process owners and support teams are prepared for their responsibilities. Match the strength of the evidence to the consequence of failure. A low-risk task may justify a simple confirmation; a critical workflow may require demonstrated performance and explicit acceptance by the accountable owner.

Review evidence by the groups and workflows that matter rather than rely on an overall average. A largely prepared population can still conceal an unready critical team. For every gap, identify the consequence, corrective action, owner and decision needed. The launch authority should understand what remains unresolved and whether the proposed mitigation is acceptable. Possible responses include targeted preparation, a narrowed deployment, a different sequence or a delay, subject to the project's governance. A readiness review is valuable when it changes the decision or the preparation, not when it merely turns an incomplete checklist green.

Make readiness a documented business decision based on relevant evidence and visible unresolved risk.

Putting the approach to work

01 Set criteria and evidence requirements before the final launch review.

02 Review important roles, workflows and locations separately where needed.

03 Assign each gap a consequence, mitigation, owner and decision date.

04 Record who accepts remaining risk and under what conditions.

LAUNCH AND SUSTAIN

A playbook for rollout

A deployment playbook turns the plan into a repeatable set of actions, responsibilities and decision points for the people carrying out the transition.

The playbook should tell a delivery or local team what must happen before, during and after deployment. Connect communications, access, learning, readiness checks and support with the technology and business schedule. Name the owners, dependencies and escalation routes for essential actions. Include the local information a team needs to operate the plan, rather than reproducing every background document. A concise playbook with reliable links can be more useful than a long manual that becomes difficult to update.

Separate the elements that must remain consistent from those that can be adapted.

Common process controls, key messages and decision authority may need a single standard, while timing and delivery channels may vary by location. Use experience from early deployment to improve the next version, but check whether the later group's circumstances are genuinely comparable. Record approved changes and make sure the responsible teams receive the current version. For each wave, identify who confirms readiness and who can change the plan if a prerequisite is missing or a serious issue emerges.

A useful playbook makes coordinated action easier while preserving the decisions and local checks that still matter.

Putting the approach to work

01 List essential actions before, during and after each deployment.

02 Attach owners, dependencies, evidence and escalation to those actions.

03 Distinguish mandatory standards from permitted local adaptations.

04 Update the playbook after each wave and confirm the next team has the current version.

LAUNCH AND SUSTAIN

Launch as a period of learning

Live use provides evidence that preparation alone cannot supply, so the launch response needs to connect user experience with decisions and corrective action.

Establish a review rhythm appropriate to the pace and risk of the rollout. Bring together support issues, user questions, operational observations and adoption evidence. Distinguish problems that prevent work from those that can be handled through normal follow-up. The team needs authority to route issues, obtain decisions and communicate practical updates, not merely maintain a list. Keep the connection to technology and process owners active so that a problem is not repeatedly passed between teams without a clear resolution path.

Expect the response to change as the situation becomes clearer. An early pattern of confusion may call for a better job aid or manager briefing. Repeated failures in one task may require a process or product correction. A low volume of questions is not automatically reassuring if users are avoiding the new process or have not yet encountered the task. Look for evidence of completed work as well as demand for help. As performance stabilizes, reduce temporary coordination in line with agreed criteria and transfer remaining issues deliberately rather than allowing extra support to end without acknowledgment.

Use launch evidence to select and verify interventions, not simply to report activity.

Putting the approach to work

01 Agree a review rhythm and the evidence each owner will bring.

02 Prioritize problems by their effect on work and business risk.

03 Assign corrective actions to technology, process, learning or support owners as appropriate.

04 Check whether the intervention resolved the problem before closing it.

MEASUREMENT AND SUSTAINMENT

Four views of progress

These four views answer different questions and should inform one another without being collapsed into a single success score.

Delivery measures show whether planned activity occurred: messages issued, materials approved or sessions delivered. Readiness evidence shows whether people and the business are prepared to begin. Adoption measures show whether the intended work is actually being performed in the new way. Value measures show whether the relevant business outcomes are moving as intended. A project can be strong in one view and weak in another. Completing preparation does not establish adoption, and adoption does not by itself prove that the technology caused an improvement in business performance.

For each important measure, define the purpose, population, data source, frequency and owner. Establish a baseline where meaningful and explain limitations in the available data. Set any targets through the project's business and risk governance; they should not be presented as universal benchmarks. Consider when the task occurs and how long it takes for a related outcome to become observable. Review measures together to decide what needs attention. If an indicator does not support a decision or a useful question, reconsider the effort required to collect and report it.

Four views of progress

Delivery	Were the agreed delivery activities completed?
Readiness	Can people begin the changed work under planned conditions?
Adoption	Are the intended users performing the new routine correctly?
Value	Is the operating result moving toward the intended benefit?

For every measure, define the population, source, frequency, owner and limitation. Set project-specific decision triggers rather than importing a generic benchmark.

MEASUREMENT AND SUSTAINMENT

Diagnosing gaps in adoption

A gap in adoption is a signal to investigate, not a complete explanation of why people are not using the new way of working.

Start by checking the measure. Are the right people included, did they have an opportunity to perform the task, and does the data capture completion accurately? Then examine the work with the affected group. People may lack access, misunderstand an expectation, be unable to complete a step or face a process that conflicts with another requirement. They may also have found a genuine flaw. These possibilities demand different responses. Treating every gap as resistance or every problem as a training need can waste effort and leave the underlying issue untouched.

Compare quantitative evidence with questions, observations and support records. Segment the findings by role, workflow or location when that helps reveal a practical cause, while respecting the organization's information-handling requirements. Choose a targeted intervention and define what would indicate improvement. After the affected task has occurred again, review the result. If adoption improves but the expected operating outcome does not, revisit the value assumptions with the business owner. The purpose of measurement is to guide action and learning, not to make a dashboard appear consistently positive.

Match the intervention to a tested explanation of the gap, then check whether the work improved.

Putting the approach to work

01 Validate the measure, population and opportunity to use the new process.

02 Ask affected users to show where the task becomes difficult.

03 Test whether the cause is access, understanding, capability, process, technology or competing expectations.

04 Define a targeted response and review its effect after real use.

MEASUREMENT AND SUSTAINMENT

Ownership beyond the project

Sustainment depends on the business being able to operate, improve and teach the new way of working without indefinite project support.

Plan the handover early enough for receiving owners to prepare. Confirm who will maintain the process, manage support, update materials, onboard new colleagues and review adoption or business outcomes. Transfer the information those owners need: current guidance, known issues, open actions, measures, decision records and escalation routes. A document handover is insufficient if the receiving team lacks capacity, access or authority. Ask them to confirm that they can perform the responsibilities they are accepting and identify any conditions that remain unmet.

Set a review rhythm that reflects the work and the remaining uncertainty. A frequent task may reveal a gap quickly; a monthly or occasional task may require a later check. Use those reviews to address persistent workarounds, material changes to the process and needs of new or returning users. Temporary project support can end when agreed criteria are met and unresolved issues have accepted owners, not merely because a planned date has arrived. Sustainment is the transition from project-led intervention to ordinary management of performance, supported by evidence and clear accountability.

Finish with an accepted operating responsibility, not simply a completed set of project deliverables.

Putting the approach to work

01 Name the ongoing owners for process, support, materials, onboarding and measures.

02 Transfer current assets, known issues and open actions with explicit acceptance.

03 Confirm receiving teams have the capacity, access and authority to act.

04 Set review points and criteria for ending temporary project support.

WORKING WITH MERIT

One implementation plan connects technology and people

The technology partner, change team and business owners have different responsibilities and a shared delivery challenge.

Technology firms and system integrators lead solution design, configuration, integration, technical testing and deployment within their agreed scope. Business leaders own the operating outcomes and the decisions about how their teams will work. Merit contributes the specialist change-management workstream that connects those responsibilities to people readiness and adoption.

The coordination matters at specific points. An evolving design may change a role impact. A revised release date may affect training and staffing. A readiness review may reveal that the business cannot safely absorb a deployment as planned. These are program decisions, not issues to solve through a communications calendar alone.

A shared plan should identify the dependencies between technical delivery and change preparation, name the owners and set the evidence needed for decisions. It should also make handoffs explicit. The team that prepares job aids may differ from the team that produces training or operates the help desk. Agreeing these boundaries early helps avoid work that everyone assumes someone else will do.

Complementary responsibilities. Shared milestones.

Putting the approach to work

01 Name the technology, business and change owners for each major release.

02 Connect design decisions to impact assessments and preparation needs.

03 Review technical readiness and business readiness together without treating them as identical.

04 Agree who produces materials, delivers learning, runs support and owns sustainment.

AN EMERGING APPLICATION

AI adoption still happens in the work

AI is an emerging part of Merit's business. The core challenge remains helping people use technology effectively and responsibly.

An AI tool can change how a person starts a task, checks an answer, makes a decision or hands work to someone else. Adoption therefore requires more than access to the tool or awareness of its features. People need to understand the task boundary, the expected human judgment and the point at which an output should be questioned, checked or escalated.

The same change-management approach applies. Identify the affected workflow and roles. Understand the risks if people rely on the tool incorrectly or do not use it where intended.

Prepare role-specific examples, practice and support. Review behavior and work quality alongside usage so that apparent activity is not mistaken for productive adoption.

AI-specific technical, security, legal and governance decisions belong with qualified owners. Merit's change work should connect to those decisions, not replace them. If the rules for approved use are unclear, communications and training cannot create certainty that the operating model has not established.

A new tool needs a clear human responsibility.

Putting the approach to work

01 Define which task the AI supports and which decisions remain with people.

02 Give users examples of acceptable outputs and cases that need review.

03 Make approved-use boundaries and escalation routes understandable in the workflow.

04 Measure task quality and responsible use, not only logins or prompt volume.

WORKING WITH MERIT

The people leading the work

Experienced change leadership, connected to the realities of delivery.

Jonathan Dison

Owner and Senior Partner

Jonathan brings 25 years in change management and provides project quality oversight. His focus is on connecting the change effort to what the organization needs people to do differently.

Rob Holland

Senior Partner

Rob brings experience as a former EY partner and Waste Management executive, with leadership across large technology and change programs and a focus on adoption.

Merit works alongside client teams and technology partners. The scope can range from focused assessment and planning to sustained change leadership, with specialist capacity matched to the engagement.

SELECTED EXPERIENCE

Technology change across major organizations

Established in 2007, Merit brings technology-transformation experience across complex organizations.

The work behind the logos

Customer-service transformation

In a customer-service transformation, Merit embedded transformation leaders and led process redesign and change management across service and operations.

Enterprise cloud modernization

For enterprise cloud modernization, Merit established a unified program office and led process design, change management, training and communications across multiple initiatives.

Acquisition integration

In an acquisition integration, Merit coordinated change management, communications, onboarding and cross-functional work across enterprise functions.

Source: Merit company materials. Company-reported contributions, not independently validated impact estimates. Logos reflect experience, not endorsement. No program financial outcome is attributed to Merit alone.

THE NEXT CONVERSATION

The right starting point is your project

A focused discussion can clarify the change demand, the capacity you already have and the support worth adding.

You may already have a capable project team, business owner or internal change function. The first question is not whether to add a consulting team. It is whether the work required for adoption has a clear owner and enough capacity. Some projects need a short assessment and a simple checklist. Others need sustained coordination across leaders, roles, locations and deployment waves.

Merit can help assess that need, shape the plan and provide change-management support where it adds value. The scope should reflect the project's circumstances and the responsibilities of your own teams and implementation partners. It should also be revisited as the design, schedule and evidence change.

The Change Assessment and Adoption Value Calculator can support an initial conversation. Treat their outputs as provisional prompts for judgment, not a validated diagnostic, forecast or substitute for understanding the business. A useful result is a clearer choice about what to do next, who will own it and how you will know it is working.

What will people need to do differently?

Putting the approach to work

01 What outcome is the technology investment intended to support?

02 Which roles, workflows or locations will change?

03 What happens if adoption is delayed or the change causes disruption?

04 What change, training and support capacity already exists?

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SOURCES AND INTERPRETATION

Evidence notes

Research findings should travel with their definitions, dates and limitations.

[R1] Boston Consulting Group (2020)

Flipping the Odds of Digital Transformation Success

70 BCG client transformations plus external survey of 825 senior executives; 895 transformations in total. Executive assessments, not a randomized trial.

The three categories distinguish full, partial and limited value realization rather than one undifferentiated failure rate.

[R2] McKinsey & Company (2018)

Unlocking success in digital transformations

Online global survey January 16–26, 2018; 1,793 respondents, including 1,521 with digital-transformation experience in the preceding five years. Country responses weighted by global GDP.

Self-reported performance and sustainability; not technology-project delivery failure.

[R3] McKinsey & Company / University of Oxford research (2012)

Delivering large-scale IT projects on time, on budget, and on value

Historical analysis drawing on a database of more than 5,400 IT projects as of June 2012. Large projects defined as initial budgets above $15 million. The published analysis does not specify that every project in the database exceeded $15 million.

Historical benchmark, not a forecast for present-day projects.

[R4] EY / University of Oxford Saïd Business School (2022)

How do you harness the power of people to double transformation success?

935 senior leaders/direct reports and 1,127 workforce members, 23 countries, 16 sectors; plus 25 leader interviews. Quotas intentionally balanced successful and underperforming transformations.

The 28%/73% figures are model estimates, not experimental effects; cannot infer population failure prevalence from the quota sample.

SOURCES AND INTERPRETATION

Source notes and scope

[R5] Devaraj, S., and Kohli, R. (2003)

Performance Impacts of Information Technology: Is Actual Usage the Missing Link?

Monthly observations over three years from eight hospitals in one health system; usage measures and lagged financial/nonfinancial performance, with controls.

Longitudinal observational evidence; limited sector and organizational generalizability.

[R6] Bresnahan, T. F., Brynjolfsson, E., and Hitt, L. M. (2002)

Information Technology, Workplace Organization and the Demand for Skilled Labor: Firm-Level Evidence

Firm-level econometric analysis of IT, workplace organization, skill demand and productivity.

Evidence of complementary investments, not a universal implementation recipe or fixed change-budget percentage.

[R7] Brynjolfsson, E., and Hitt, L. M. (2000)

Beyond Computation: Information Technology, Organizational Transformation and Business Performance

Research synthesis combining firm-level evidence and organizational cases; not a single experiment.

Conceptual foundation for organizational complements and time lags.

Merit materials and editorial scope

The approach, company experience and leadership descriptions draw on Merit's existing website and its Transformation Imperative overview. This report adapts the delivery framework for a public audience. Examples and support tiers are illustrative, not fixed packages or a validated diagnostic. Material production, training delivery and support ownership depend on the agreed engagement.

The cover uses original AI-generated conceptual architecture. It is an editorial metaphor, not a photograph of a client site. Current website: merit.consulting.