

Implementation and Workforce Adoption Guide

The information in this document will help with the implementation and rollout of the WorkMax platform to your company.



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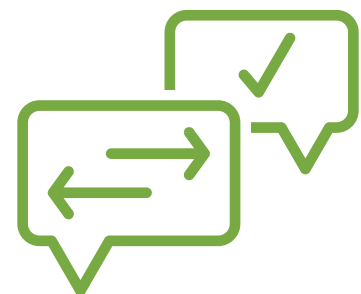
WorkMax Commitment

Our team is committed to your success and will do everything we can to successfully implement the WorkMax platform with your business.



Companies Implemented

Our implementation experts have successfully implemented WorkMax software with thousands of companies.



Accommodating

Each company has unique systems and we will work with you to get efficient workflows setup in WorkMax to work with your current systems.



Training and Support

We have multiple training resources including articles and videos. If you're not finding what you need, don't hesitate to reach out to us.



Long Term Success

We will be with you every step of the implementation process and occasionally reach out to make sure WorkMax is continuing to be a successful solution for your business.

4 Reasons

Companies don't receive the expected return on investment from the digital tools they implement.

1. Lack of commitment from company leaders to see the adoption through
2. Insufficient explanation of the technology's benefits
3. Incomplete training
4. Lack of integration with legacy systems

2017 McKinsey & Company report

Keys to Success

A clearly defined plan and a solid understanding of any unique challenges for your organization and how to overcome them are essential to a successful implementation of the WorkMax platform.

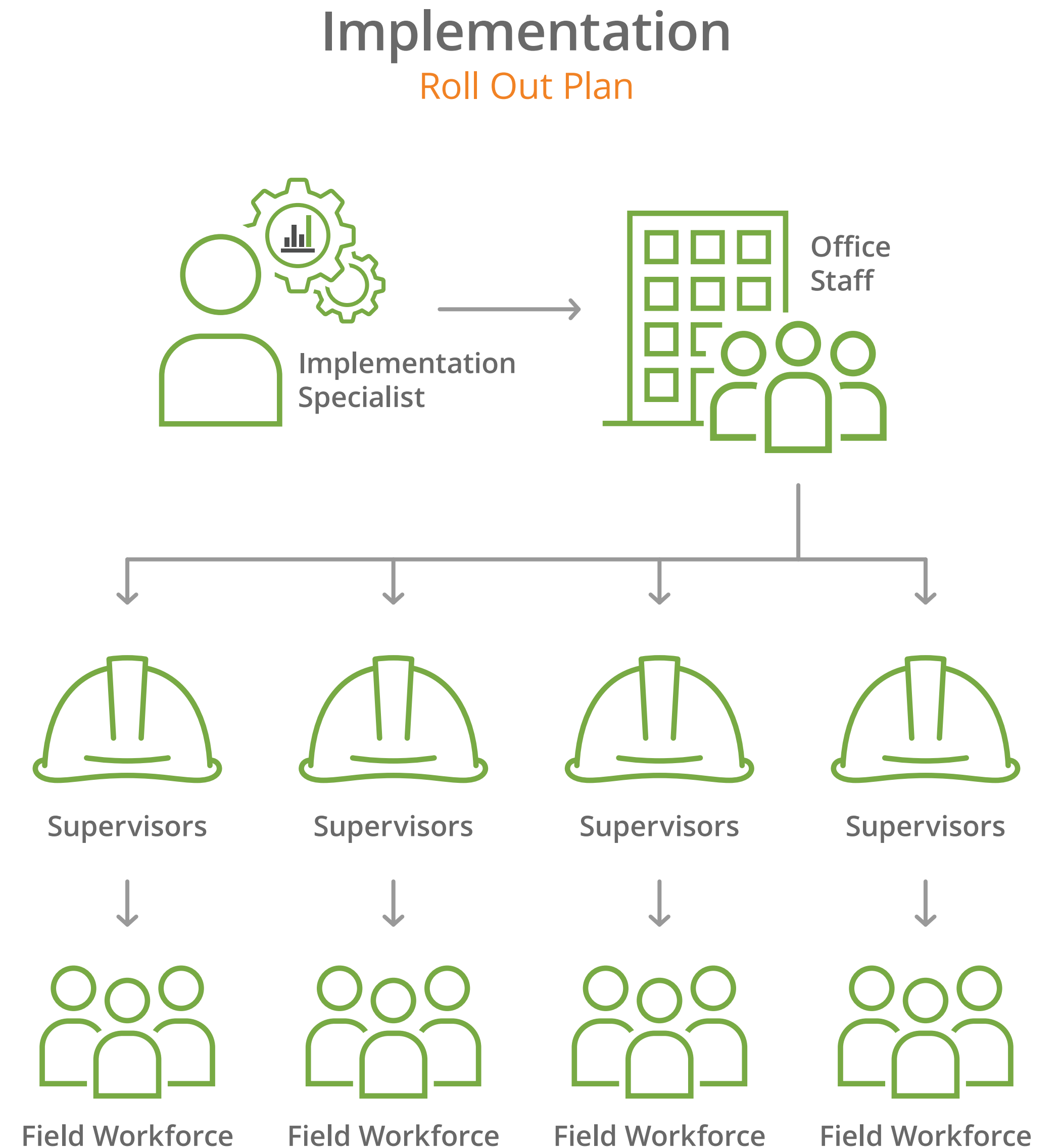
Plan Overview

Step 1: Determine an Effective Strategy

Step 2: Rollout Schedule

Step 3: Overcome Challenges and Excuses

Step 4: Clear Concise Communication



Step 1:

Determine an Effective Strategy

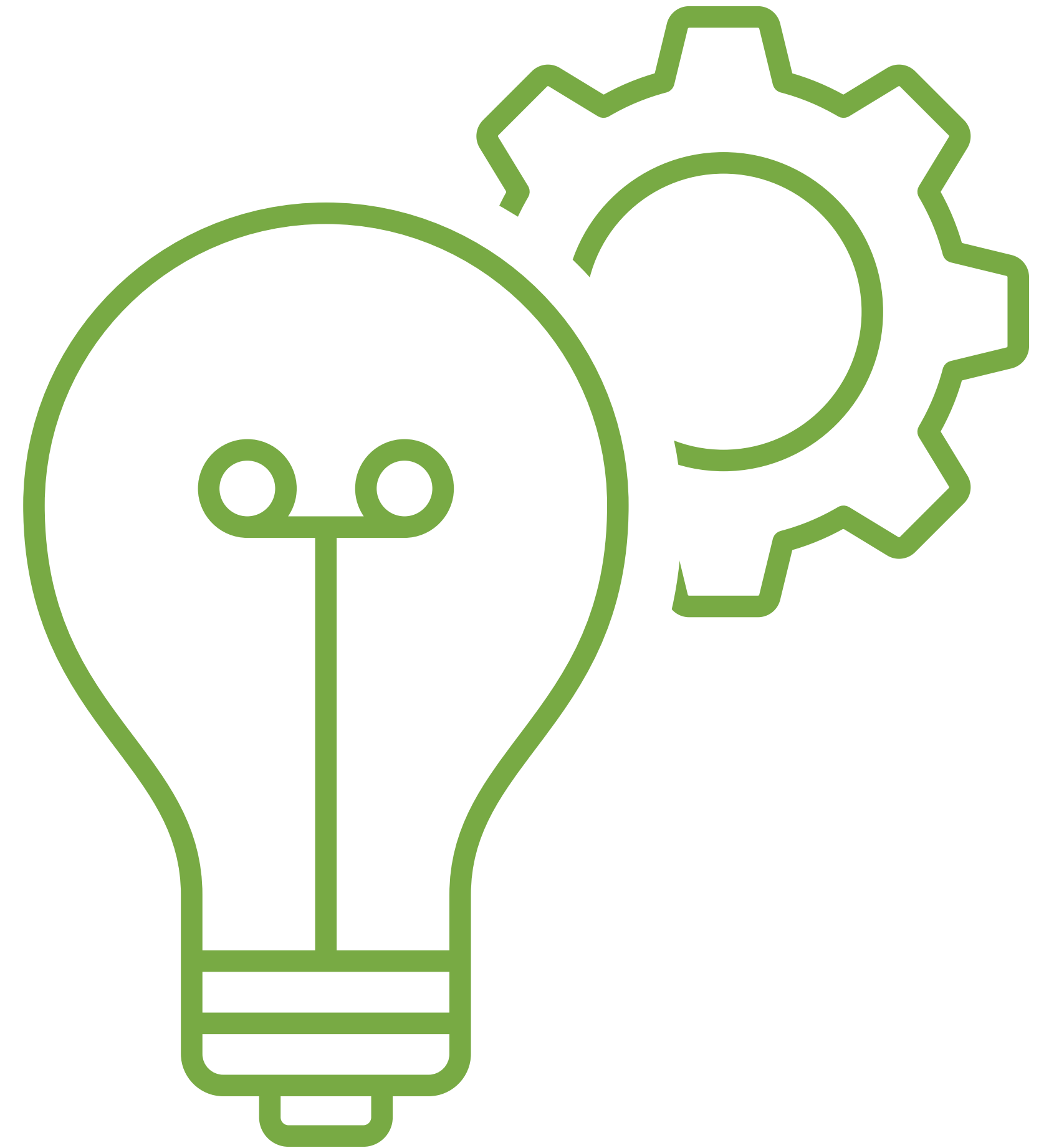
To have a smooth and successful rollout of the WorkMax platform, we recommend starting with a group or division of employees who are more technologically sound, led by a superintendent and/or foreman who are also technical forward thinkers and are willing participants. We also suggest starting with small groups and working from the top down. For example, start with project managers, then foreman/supervisors, and continue the rollout to their individual teams. These leaders can help train and answer questions their teams may have.

Top Down Training Benefits

- Reduce resistance to change
- Encourages user feedback and involvement
- Increase understanding
- Improve teamwork

We have seen situations where a company's logic may have been this: "Let's start with the group who is most vocally opposed or who will likely struggle with the technology the most — and if they can do it — then it will work for everyone." *We do not support this theory.*

Negativity breeds negativity. If the very first person that tries WorkMax struggles and complains about the software, then others will agree and spread that same attitude.



Step 2:

Rollout Schedule

Phase 1 Office Staff

- Account setup and plan workflows
- Create training materials for field employees
- Test and collect one to two weeks worth of data and complete your first payroll
- Make necessary adjustments to Control Center setup and App workflow

Phase 2 Supervisors

- Continue testing workflow to determine functionality with field workers
- Make necessary adjustments to Control Center and App
- Test training materials and make necessary adjustments
- Process one to two weeks of payroll with both groups

Phase 3 Field Workforce

- Continue with rollout
- Key leaders helping with device training and issues
- Weekly contact from rollout specialist to work through adjustments needed
- Report progress back to key company leaders

Step 3:

Overcome Challenges and Excuses

Have a Field Champion

Select a leader in the field whom you feel would be a strong advocate for both the company and the employees.

Field Champion Should:

- Already have some authority and be a respected leader among the field employees
- Learn the system first and assist in training and motivating
- Help us identify the end-user concerns and develop strong solutions to increase employee cooperation and adoption



Prepare for Excuses

Common challenges/excuses we hear from field employees:

- Forgetting to punch in and out
- Syncing is too slow or cumbersome
- I'm not tech savvy
- Selecting the wrong Jobs or cost codes (lack of training)
- Complaining about having to use it, saying it is restrictive and an invasion of privacy
- Complaining that the app doesn't work and/or blaming the app for not correctly recording their Clock IN and OUT times

Discuss these and other potential challenges with your leadership team and determine, ahead of time, how you will approach and resolve these issues if and when they arise.



Podcast on the Importance of Having a Field Champion

Scan or Click QR Code

Step 4:

Clear Concise Communication

It is crucial that everyone in leadership positions within your company have a clear understanding in regards to your plan and expectations of implementing the WorkMax platform.

If the person(s) implementing WorkMax do not have the support from all key leaders (owners/foreman/project managers etc.) your employees will observe that and use it as an excuse not to use the WorkMax app.

Proper Messaging

It is key to set the right expectation about WorkMax to your employees. The following is an sample messaging statement that you will want your employees to understand:

“Our implementation of WorkMax is truly all about developing more effective business strategies. Our desire as a company is to increase accuracy and efficiency which will result in higher customer satisfaction, winning more bids and being more competitive in our industry.”

Messaging Do's and Don'ts

- ✓ Our business needs this for better and more accurate bidding. With more accurate bidding, we can be more competitive in our industry, winning more bids which creates stability for our business and employees.
- ✓ Processing payroll and PO's is quicker and more accurate helping us avoid accounting errors.
- ✓ Safety for employees – we can protect our employees, in the event they are injured on the job site, by verifying the employee was at the job site and not somewhere else.

- ✗ This will help us to track our employees better.
- ✗ We can now crack down on buddy punching and employee theft.
- ✗ This is going to keep field employees honest.

Even though all of this may be true, this will send the wrong message to your employees and cause some resistance to the change.

Set Expectations

Clearly communicating what is expected of your employees is a critical element in the success of rolling out WorkMax (even if you think it's obvious). Create a list of these expectations for reference. When issues arise it will help you remember and enforce the expectations. Below are examples of clear communication:

- Review your time at the end of the day and complete a full sync to send your time to the office
- Clock into each new task throughout the day allocating time as you go and Clock out at the end of the day

Tips for Encouraging Workforce Acceptance

Be Fully Committed

Having a “backup” plan in place will add to resistance or failure of implementation. The most common “backup” plan that we have seen other companies try is requiring paper time tracking while implementing WorkMax. If there is a crutch to fall back on, your employees won’t fully adopt the new software and adoption will take longer.

“Having a backup plan undermines your likelihood of success... Alternatives makes you work less hard to achieve your goal”

-Forbes, October, 2016

Once you have made your decision, move full steam ahead with the implementation. Set the expectation with your team and make the decision that “failure is not an option.”

Reward & Incentives

The success of your implementation is quickly enhanced when there is additional motivation in place. Here are some ideas other companies have used to encourage employees to quickly adjust to going digital:

- Offer incentives, bonuses, or additional PTO when employees accurately complete all tasks for a full pay period
- Public recognition using certificates or advancement opportunities when they complete x, y and z
- Set the expectation of one to two pay periods to learn and use the system. Where possible, avoid cutting additional pay checks within the same pay period after that point, let employees know you will happily adjust their paychecks for any changes or edits, but those adjustments will be corrected in the next pay period

You know your employees well and know what motivates them the best. Discussing this ahead of time and having the support and encouragement from all management and owners will be tremendously valuable.

Determined for Success

Having a clear implementation plan and an unshakable determination for success will help your team see this project through to the end. You will find as you remain immovable in your determination to see this through, they will soon follow your lead and support your expectations. Once your employees make this new change a habit, they will wonder how they ever functioned without it!

Key Takeaways

Start structuring your plan today and remember the following points:

- Be unified as an organization and get each leader on board.
- Discuss the challenges and concerns that you may foresee with employees and stay consistent in how you handle them.
- Make a clear list of expectations to present to your employees (shift rules, who to contact when they have questions, incentives, etc.)
- Send the proper message to your employees and ensure they understand the purpose and benefits of using WorkMax.
- Have a reward system and consequences in place ahead of time and follow through.
- Fully commit to “no backup plans” Be 100% dedicated to making this work.

We are Here to Help

We understand this transition may have challenges. Every company experiences obstacles at varying degrees and we hope these ideas and tips for success will aid in your implementation and rollout of your WorkMax platform. Remember you are not alone in this implementation. It is our mission and purpose to help you successfully implement WorkMax.

If you have questions or need assistance, please reach out to one of our team members.

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