

NETSTOCK

**Ensure a successful
onboarding process
and increase user
adoption**

Increasing user adoption requires a change management mindset.

Change management is selecting a specific approach to preparing, supporting, and helping individuals, teams, and organizations when making organizational change.

The primary objective of change management is identifying the best

- Method
- Processes
- Tools to implement

...to ensure the right people within the business can help manage the transition and achieve the desired return on investment through the change process. Having the proper procedures in place will encourage greater adoption in a timely and cost-effective manner.

The need for change is driven by an opportunity to solve a problem.

The first building block to embracing a change management mindset is understanding **how** implementing new supply chain planning software like Netstock will impact your team, your operations, and overall productivity in each department.

Implementing Netstock and updating your operational processes is not enough to achieve optimal user adoption. When change occurs, you need to:

- **Place your people at the heart of the change.** It's normal for people to resist change, and the sooner you get your people on board, the sooner you will see actionable results.
- **Implement change at a team level.** Teams that work together will help drive change. Implementing change at an individual level is restrictive and creates siloed working, leading to confusion and misunderstanding amongst team members.

In working with many customers, we have discovered that the key to effective change management is to get **all** stakeholders involved as early in the process as possible.

Having your top leadership involved is vital so they can lead by example and:

- Demonstrate a positive attitude towards the change process.
- Encourage open communications and update the team on the progress.
- Offer support and advice to the team members driving the process.

However, getting bottom-up support is just as important as top-down support.

Customer story

Tarsus Distribution successfully implemented Netstock across seven teams.

With Exco mandating the implementation of Netstock as the chosen forecasting tool for the company, the project manager had a direct reporting line to Exco, and this process was their recipe for success.

[Read the full story here](#)

The impact of change

Any change within a business will impact your people and your customers.

John Kotter, Professor at Harvard Business School and a world-renowned change expert, developed an eight-step change model.

[Watch video here](#)

Obstacles businesses face when implementing supply chain planning software:

- Not enough 'buy-in' and commitment from executive leadership and key team members.
- A lack of communication.
- A lack of or inadequately defined goals and objectives for the project.
- A poor project management process.
- Fear of change due to the reliance on spreadsheets.
- Concerns with data cleansing and validity or reliability.
- Inefficient training.
- Not adopting a change management mindset.

\ Seven steps to successful change management with Netstock

1. Appoint the right people

Selecting the right team will be the difference between success and failure. Our onboarding team has worked with thousands of customers, and without a doubt, the biggest hurdle is not selecting the right people.

We have compiled a detailed description of the roles and responsibilities that each team member needs to adhere to to make Netstock a success.

2. Create awareness of when change will happen and why

Nothing is more unsettling for a team than being **told** that something is about to change without giving a logical reason.

Provide the answers to the '**why**' behind the change so your team has a clear understanding of the following:

- What to expect from the implementation & onboarding processes.
- The benefits of the project for the business and the teams involved.
- The timelines for the project.
- Who may be impacted, and for how long.

3. Create the desire to be part of the change

Explain why the current process isn't working and describe the benefits of the Netstock solution and how critical their support is to make the project successful.

Implementing Netstock will enhance the team's productivity by:

- **Freeing up time** to focus on other areas of their function.
- **Providing supply chain visibility** and clarity that they have never had before to make quicker decisions.
- **Being confident** when responding to market changes and accurately adjusting forecasts, safety stock, and lead times where necessary.
- **Increasing supplier visibility** and knowing which suppliers are not performing and which stock items are being affected.
- **Providing excellent customer service** by meeting demand on time and in full.

4. Provide the knowledge and training to make the change

The Netstock onboarding includes our instructor-led training [ILT] program consisting of six online sessions. The Custodian must oversee these sessions to ensure all primary users attend the online sessions and complete the assigned learning tasks.

5. Involve all departments

Remember that even though your Sales department, for example, may not be involved in the inventory policy settings or ordering function, they must understand the process and what's involved. Ensuring each department understands the different processes goes a long way to promoting good usage and adoption.

6. Reinforce the reason, goals, and desired outcomes

Be realistic about the goals. Take a look at what other projects are going on in the business at the same time that may affect your plans for the Netstock project. Regularly review the timelines and adjust where necessary.

7. Share your results by comparing before and after KPIs

Ensure you note your progress and the improvements you experience and share these with all your stakeholders. It's vital that they see the benefits and how they contribute to the overall success. With Netstock, time-saving is a significant benefit, so be sure you know how much time your current processes take before you start the project.



Once we got our internal housekeeping and data right, the actual Netstock implementation was smooth sailing. We appointed production champions in each region, who ensured that the change management at the user level went smoothly, and once the users saw how much easier Netstock made their jobs, they were quick to embrace it.

Dustin Stringfellow, Group Procurement Executive, Bidvest Waltons, South Africa

[Read more here](#)

\ Steps to take before the Netstock project begins

1. Preparation

The person in the business that decided to invest in Netstock should be the one to appoint change agents in your business that can take on the Custodian and Executive sponsor roles.

Below is a list of responsibilities for each role so you can select members that have the capacity to fulfill each role.

The individuals chosen must be:

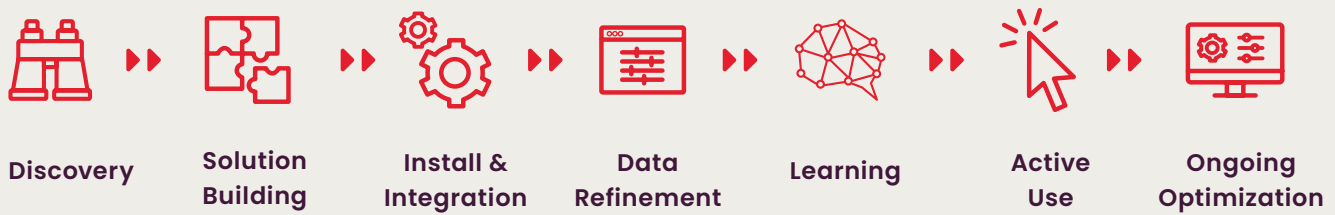
1. Fully aligned, optimistic, and excited about the Netstock project
2. Have a good understanding of the business and its processes
3. On board with what is expected of them
4. Excellent communicators
5. Able to motivate and encourage teams
6. Observant and have good decision-making skills

Remember, behavior breeds behavior, if change agents are negative, this will infiltrate the team, and the project will fail.

2. Define your approach

Together with your change management team and your Netstock Customer Success person, define your approach using our Onboarding steps. This will encourage buy-in from the team from the beginning.

Netstock onboarding process



3. Action and implementation

Once your approach has been defined, you will need to implement that with all relevant team members. Communication is key. Don't only rely on email communication – get together with your team regularly throughout the project to ensure everyone is on track and aligned.

4. Measure outcomes

- We recommend that your users take the Netstock Certification assessment before the training commences. This will identify the team's current understanding of inventory planning. They can retake the exam post-training to see their improvements.
- Ask for ongoing feedback from your users and take note of their input.
- Through the Netstock ILTs and the allocated online assignments, you can identify the gaps and manage any resistance you find.
- Implement actions that will help pave the way to better user adoption.
- Celebrate successes across the business.



Besides the rich functionality of the product, we found every interaction with Netstock staff exemplary and what a support experience should be. – **Tim Edmondson, Managing Director, Edgar Edmonson, Australia**

[Read more here](#)

Roles and responsibilities

Executive Sponsor

The overall responsibility of the Executive Sponsor is to identify and communicate the benefits of the project, ensuring they align with strategic objectives, build support for the change internally and make sure the right people are assigned to the project. Among the essential keys to success is appointing an individual from your internal team to be the Netstock project champion.

Detailed responsibilities

- Provide the main reasons and goals you want to achieve by investing in Netstock.
- Appoint a Project Champion/Custodian (see Custodian responsibilities below).
- Understand and monitor the progress of the Netstock **onboarding process**.
- Participate in the discovery, policy review, and project completion meetings with Netstock.
- Support all actions needed to obtain, correct and maintain the inventory data.
- Define and review the inventory policy to ensure it supports the company's inventory strategy.
- Monitor (or have the custodian monitor) and report on the adherence of Planners to the Netstock recommended order quantity.
- Advise Netstock if the Custodian changes – to ensure new personnel receive appropriate training.
- Support any internal process changes that arise during and because of the implementation and onboarding process.



Besides the robust features of the product, I have found Netstock's e-learning platform (SIMON) and online training materials to be far superior to any other software application that I have dealt with in the past. You can see that Netstock has put in a lot of time and effort to create well-documented tutorials, on-demand webinars, and other online resources. This has helped us a great deal, especially when new staff members join, as they can quickly upskill. – **Taylan Sevimli, Business Development Manager, Tayse Rugs, USA**

[Read more here](#)

Project Champion/Custodian

The Custodian, aka Project Champion, is appointed by the Executive Sponsor and must be given the authority to drive the adoption and effective use of Netstock with all the impacted stakeholders.

They should be the change manager, project manager, and super-user of the app. They are responsible for all aspects of the onboarding process and will serve as the single point of contact to drive effective communication and collaboration between your internal team and your dedicated Netstock onboarding team.

If the project champion is only appointed for the onboarding stage, another Custodian must be selected to manage the continued adoption of Netstock.

Detailed responsibilities

- Effectively communicate with staff to break through resistance to change.
- Overcome data availability, accuracy, and missing data challenges to ensure data quality is set and maintained.
- Complete and ensure that all users complete the Netstock training.
- Ensure the attendance of the required staff at scheduled Netstock meetings.
- Review and set the inventory policy together with the Executive Sponsor.
- Establish data quality, forecast, policy, risk, and KPI monitoring and review processes for the business.
- Set up and remove users as required within the app and provide the appropriate user profile rights.
- Monitor and encourage user engagement and proper use of the app.
- Refine checklists and processes for each team member or role to complete.

Inventory Planner/Buyer

The Inventory Planners or Buyers are responsible for forecasting and planning the right amount of inventory to meet the business's targets and goals. To do this, they must trust the Netstock data and recommendations and be capable of reviewing by exception and critically analyzing the information provided by the app.

They are responsible for identifying and correcting (or alerting those responsible for updating) any problems with inventory data, policies, or forecasts, to ensure the order recommendations meet the business requirements. The Custodian and Executive Sponsor must grant them the proper authority to do so in a timely manner.

Detailed responsibilities

Complete the recommended training program, which includes the following:

- Instructor-led training.
- Learning paths and certification courses.
- Embedded training videos and in-app tours.
- Attend review meetings offered during the implementation of Netstock.
- Review the dashboard KPI reports regularly to manage inventory exceptions.
- Strive to achieve dashboard target objectives set with the Custodian and Executive Sponsor.
- Review under and over-forecast items and modify forecasts and/or policy, as required.
- Engage with sales and production teams to better understand fluctuations in demand and planning constraints.
- Run the recommended order reports, and review and adjust the recommended order quantities if necessary.

- Expedite and defer orders, as required.
- Use the data quality reports to identify data problems and facilitate regular maintenance in both Netstock and the host system.



We thought we would get the login with a quick training session and then be left to find our way. On the contrary, it was an extensive onboarding process with the online training focusing on product features, functionality, inventory management theory, and best practices. – **Steve Copland, Director, Tempcon Instrumentation, UK**

[Read more here](#)

Netstock and our Customer Success teams are heavily invested in ensuring your Netstock project is successful. After all, your success = our success!

Trusted by thousands of businesses globally



NETSTOCK

About Netstock:

Netstock is a leading supply chain planning software trusted by 2,200 customers globally to optimize their planning. Netstock's cloud-based solutions enable businesses to be agile, responsive, and profitable. Each solution integrates with leading ERPs and leverages enhanced analytics so you can quickly respond to market change and make the best supply chain planning decisions for your business.

For more information: <https://www.netstock.com/>