

THE 5D ADOPTION FRAMEWORK

Driving Measurable Change Across Technology & Process Workflows

Overview

Most organizations don't struggle because of poor tools — they struggle because they lack a repeatable system for adoption.

When leadership launches a new CRM, LMS, or enablement platform, the rollout often falls short of expectations. Teams get training but fail to change behaviors, data quality remains inconsistent, and the initial enthusiasm fades.

The 5D Strategy Framework changes that. It's a structured approach that moves from leadership intent to measurable execution, ensuring every initiative connects strategy, documentation, and reinforcement into one repeatable process.

This framework is built around a simple truth:

Adoption doesn't happen when people learn something once — it happens when they behavior changes.

The Learning Philosophy Behind It

Adult Learning Principles

Adoption is behavior change — and adults don't change behavior unless the learning feels relevant and actionable.

- Relevance first: Adults engage when training connects to their role and daily work.
- Immediate application: They retain knowledge only when they can use it right away.
- Bite-sized design: Smaller, process-specific tutorials outperform long-form courses.
- Contextual access: Resources should appear directly inside the systems where work happens.
- Reinforcement: True change requires repetition and reinforcement over time.

Why iorad Uses This Approach

iorad enables organizations to embed learning directly into work. Instead of long training decks or outdated PDFs, iorad creates guided walkthroughs that teach users inside the very tools they use every day.

This approach bridges the gap between knowing and doing, creating self-sustaining adoption that scales across departments, regions, and systems.

The 5D Framework Overview

Discover → Design → Document → Deploy → Drive

Each “D” represents a critical stage in the adoption journey — turning leadership goals into tangible, measurable success.

D1. Discover: Define the “Why” and “What Success Looks Like”

Discovery sets the foundation for every adoption initiative.

This is where we move beyond surface-level requests (“We need more training”) and uncover the true business outcomes behind them.

Your goal is to align leadership, measure reality, and identify what will truly define success.

Key Objectives

- Identify leadership intent and business priorities.
- Establish KPIs that will measure real adoption impact.
- Understand the current vs. desired future state.
- Pinpoint compelling events (why this matters now).
- Identify early champions or advocates within the organization.

Example questions to ask:

- “What outcomes would make this initiative a success?”
- “How will we measure success?”
- “What’s driving this project right now — what happens if we don’t act?”

iorad’s Role

Use iorad early to capture existing workflows. These tutorials become your “current state audit.”

When you replay them to leadership, it quickly shows where process gaps or inefficiencies exist — creating a shared sense of urgency for change.

Deliverables

- 1-page Objective Brief
- Baseline metrics and target KPIs
- Stakeholder map
- Hypothesis of where adoption challenges exist

D2. Design: Turn Objectives Into a Structured Program

Now that you know what success looks like, it’s time to design the adoption program that will make it happen.

The goal here is to move from intent to execution — defining a program that has milestones, owners, and accountability.

Key Objectives

- Write a Program Brief connecting leadership goals to measurable outcomes.
- Define the audience (start small, then scale).

- Choose a scope depth:
 - Core: Pilot group or MVP phase.
 - Standard: Cross-functional rollout.
 - Full: Enterprise-wide, multi-region launch.
- Map milestones and evaluation points.
- Create a RACI (Responsible / Accountable / Consulted / Informed) to align ownership.

iorad's Role

iorad enables rapid prototyping of what the program could look like.

You can capture and embed example tutorials that demonstrate the future-state workflows the team will adopt — making abstract plans feel real and attainable.

Deliverables

- Finalized Program Brief
- Scope and milestones
- Audience and pilot selection
- RACI ownership chart

D3. Document: Capture the Way Work Actually Gets Done

Documentation is where strategy turns into action.

This step converts tribal knowledge into structured, reusable content that lives inside your systems — not on forgotten slides.

The goal is to create a single source of truth for every workflow that drives adoption.

Key Objectives

- Identify the top 10–15 high-impact workflows.
- Partner with subject matter experts (SMEs) to record their exact process.
- Standardize tutorial naming conventions for searchability.
- Organize content by workflow theme or object (e.g., Opportunities, Renewals, Onboarding).
- Establish version control and audit cadence.

iorad's Role

- SMEs record their workflows once — iorad automatically creates a tutorial, screenshots, and step-by-step guidance.
- Reps and learners can replay the exact process, not just read about it.
- You can edit, annotate, and brand tutorials for internal or customer-facing use.

Pro Tips for Documentation

- Keep tutorials under 25 steps.
- Focus on “How do I do X in Y system?” questions.
- Capture the “happy path” first — edge cases come later.
- Group tutorials into thematic collections for easy navigation.

Deliverables

- Completed tutorial library
- Organized documentation hub
- Consistent naming and tagging
- SME collaboration process documented

D4. Deploy: Deliver Learning Where Work Happens

Even the best content fails if it’s hidden in a folder.

Deployment ensures that documentation is surfaced contextually — in the moment of need. Think of this as your distribution strategy. You’re bringing training to the learner, not the learner to training.

Learner Journey Model

1. First Exposure: Build awareness — what’s changing and why it matters.
2. Ramp & Practice: Provide hands-on tutorials or sandbox simulations.
3. Competency: Reinforce mastery through quick checks or role-play.
4. Reinforcement: Keep it alive with reminders, updates, and contextual help.

iorad’s Role

iorad makes deployment simple:

- Embed tutorials directly inside your enablement platform, LMS, or wiki.
- Add tutorial links to relevant pages in your CRM or internal portal.
- Send tutorials via chat channels (Slack, Teams, or email) for quick reference.

Example:

During a Salesforce adoption rollout, link the iorad tutorial for “How to Create a New Opportunity” directly inside the Opportunity tab. Reps never have to leave the system to learn the workflow.

Deliverables

- Role-based learning paths inside your LMS or enablement platform.
- Content placement map by system and audience.
- Reinforcement and communication plan.
- Hypercare support channel (for first 4–6 weeks post-launch).

D5. Drive: Reinforce, Measure, and Scale Adoption

The final stage is about sustaining momentum.

Adoption isn't achieved at launch — it's achieved when the new behavior becomes habit.

Key Objectives

- Reinforce behaviors through recurring communication and recognition.
- Track adoption metrics and connect them to business outcomes.
- Update documentation as systems evolve.
- Expand the program across new roles, regions, or products.

Reinforcement Strategies

- Weekly check-ins on adoption KPIs.
- Office hours or Q&A sessions recorded as new micro-tutorials.
- “Search-first” culture — answer every question with a tutorial link.
- Recognition for teams achieving top compliance or engagement.

iorad's Role

iorad provides the analytics and agility needed to sustain adoption:

- Track tutorial views, completion rates, and engagement.
- Update one tutorial — automatically refresh everywhere it's embedded.
- Use engagement data to guide which workflows to reinforce next.

Deliverables

- Adoption dashboard (usage + KPIs).
- Quarterly content refresh schedule.
- Reinforcement communication calendar.
- Expansion roadmap.

Templates and Tools

Program Brief Template

- Objective
- Why Now / Business Case
- Target Audience
- KPIs (Baseline → Target)
- Milestones & Success Gates
- Resource Links

Documentation Checklist

- Identify top 10 workflows
- Record SMEs with iorad
- Edit, organize, and tag tutorials
- Publish and embed

Deployment Checklist

- Embed tutorials into LMS / enablement platform
- Launch support channels
- Announce training and paths
- Monitor analytics weekly

Drive Checklist

- Track leading and lagging indicators
- Refresh outdated content
- Recognize wins
- Plan for expansion

Example: Salesforce Rollout

Scenario:

Lets say a sales and customer team use Salesforce differently across regions, resulting in poor data quality and inconsistent reporting. Leadership mandates an adoption program focused on process consistency and forecasting accuracy.

Using the 5D Framework:

- Discover: Audit workflows and identify data inconsistency as the key blocker.
- Design: Create a Standard scope program for AEs with clear metrics.
- Document: Capture critical Salesforce workflows (Create Opportunity, Update Stage, Log Notes) with iorad.
- Deploy: Embed tutorials directly in the CRM and distribute learning paths in the LMS.
- Drive: Track weekly compliance, host live office hours, and refresh tutorials monthly.

Result:

Within 90 days, data accuracy improves by 40%, rep onboarding time drops by half, and the enablement team can measure engagement with each workflow.

Governance

- Consistent naming: System – Action + Object
- Quarterly audits: Remove outdated tutorials.
- Central change log: Track updates by version and owner.
- Ownership model: Assign tutorial maintenance by department or role.

Getting Started (30-Day Implementation Plan)

- Week 1: Align on objectives, KPIs, pilot audience.
- Week 2: Capture top workflows with iorad.
- Week 3: Build and deploy tutorials in your LMS and enablement platform.
- Week 4: Review adoption data and prepare for scale.

Final Thoughts

The 5D Strategy Framework for Adoption bridges the gap between leadership goals and team behavior.

It turns adoption into a managed system — not a one-time event — using structure, documentation, and reinforcement to build habits that last.

With iorad, your teams don't just learn new tools.

They live them — faster, smarter, and consistently across every department.

Adoption doesn't happen by accident. It happens by design — and the 5D Framework is the blueprint.