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The Adoption Workshop.

A play: when a customer's use of the product weakens, Customer Success finds out why, runs one short workshop that trains to one to three actions tied to a business result, and checks that the customer is back. What it is, when to call one, how to diagnose, design, deliver and validate it, and the clock that keeps it honest. With the planner.

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CONTROL

Training is not the point.

A feature tour shows a customer where things are. An Adoption Workshop gets them using the product again, for a reason their business cares about. In 2018 I put it to my team as an equation: no adoption means no value, and no value means churn — the kind we control. This play is how you control it.

VERSION	DATE	AUTHORITY	NOTES
1.1.1	November 2026	Juan Carlos González II	Layout only: the evaluate, analyze, synthesize boxes made equal, each question set in italic on one line
1.1	November 2026	Juan Carlos González II	First public edition: the triggers generalized; the diagnosis set on three causes; the sixty-minute agenda, the link from each objective to a business result, the homework check-back and the thirty-day exit written out (new in this edition); the 1-3-7 standard as the clock
1.0	2017 – 2020	Juan Carlos González II	Run in 2017 and 2018 at a hospitality-software company in the Vista Equity portfolio — first as a proactive adoption checkpoint on the customer journey, then assigned automatically when seven days passed with no daily digest opened and no login; carried to the customer journey of a managed file transfer and network management software company in 2018; written into the partnership framework of a financial services software company in 2020

HOW TO USE THIS PLAY

Read pages 4–5 once, for what it is and when to call one. Pages 6–10 are the play in order: diagnose, design, deliver, keep the clock, validate. Page 11 is who does what at each touch tier; page 12 is how you know the play is working, and the checklist. Then open the planner: the Objectives tab is the page you send the customer before the workshop.

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WHAT AN ADOPTION WORKSHOP IS

Defined.

An Adoption Workshop is a strategic intervention for a customer whose use of the product is weakening: Customer Success diagnoses why, trains the customer to do one to three specific things tied to a result their business cares about, and stays with them until their use is back to normal and holding.

Three things in that sentence carry the weight. **Diagnoses why:** a drop in use is a symptom, and training the wrong thing to the wrong people is how a workshop becomes a wasted hour. **One to three specific things:** not a tour of everything new since onboarding, but a few actions the customer can do, and will be seen doing. **Back to normal and holding:** it ends when the signal that started it has recovered and stayed recovered — not when the meeting ends.

ON THE GRID

Strategic, reactive

Reactive, because a signal calls it: the customer has drifted, and we answer. Strategic, because what is at stake is not a feature but the value of the whole investment — the reason they bought, and the reason they will renew.

ON THE JOURNEY

Moment 21, milestone 07

On the Customer Journey it is moment 21 — "a signal shows adoption weakening" to "the customer is restored to adopted status" — touching milestone 07 of the Operating Model's twelve, adoption and health. Success delivers it; Support and Services assist.

WHAT IT IS NOT

A product demo

It is not a release tour, and it is not the Value Workshop thirty days after go-live — that one is proactive and confirms value early (moment 17). This one is called because something slipped, and it is aimed at the slip.

THE ONE SENTENCE

"Adoption Workshops are about training, enablement, and linking those to business results." Training, so the customer can do it. Enablement, so they can keep doing it without us. Business results, so they have a reason to.

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WHAT AN ADOPTION WORKSHOP IS

When to call one.

Call one when the customer's use of the product has slipped, or is about to. Any one of four triggers is enough; the first is a signal, the other three are moments when use is known to slip.

TRIGGER ONE

Use weakens

The usage signal drops below its normal. In 2018 the rule was seven days with no daily digest opened and no login, and the system assigned the workshop on its own. Choose the signal your product's value lives in.

TRIGGER TWO

The people change

A champion leaves, or the customer hires a team of new managers who "all need to be retrained." Run it as a train-the-trainer, so the customer can do it themselves next time.

TRIGGER THREE

A restart

A seasonal business reopens, a renovation ends, a pause is over. Offer the workshop before the first busy week: re-familiarize the team, and show what is new.

TRIGGER FOUR

A campaign

Leadership chooses a cohort — a segment, a product line, every account below a usage line — and every Success Manager offers the workshop to theirs.

A silent customer is a disengaged one. The Customer Health Score's adoption component should name this play when it turns, so nobody waits for the customer to say something.

WHEN THE TROUBLE IS REALLY…	RUN INSTEAD	WHY
They bought the wrong thing	The Business Review	An improper solution is a commercial conversation, not a training gap. Take it there with the account team.
Things are broken, cases piling up	The Success Initiative	An operating problem. Fix what is broken before training anyone on it.
One request about the product	The Feedback Cycle	A single problem with options; a workshop will not answer it.
A seasonal close or a planned pause	Wait, then trigger three	An operational pause is not a barrier. Note the restart date and schedule the workshop for it.

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THE PLAY

Diagnose: evaluate, analyze, synthesize.

Before you train anyone, find out why their use slipped. Three verbs, in the order I taught them in 2018: look at what is going on, work out what it means to them, and come up with a plan for how they get more value.

Evaluate
How are they using it?

→

Analyze
What does this mean to them?

→

Synthesize
A plan for more value

Evaluate from the data and from the customer: the signal, its normal, when it turned, who stopped and who did not. Then ask. **Analyze** in their terms: what decisions they are no longer making with the product, and what that costs them. **Synthesize** into one to three things to train on — page 7 — and the people who need to be in the room.

The three causes

Every loss of adoption I have seen traces to one of three causes, in the customer's own words. Name which one before you design anything; it decides whether this play is the right one.

CAUSE ONE · NOT THIS PLAY

Improper solution

"What you sold me, I did not need." No workshop fixes it. Take it to a Business Review with the account team, and be honest about the fit.

CAUSE TWO

Incomplete value

"I'm using it, but I don't see how it helps me." "I don't think it's worth what I'm spending." Train to the business decisions the product informs.

CAUSE THREE

Inconsistent adoption

"I'm paying for something I don't use." Train to the habit: the everyday, sticky features they will use every day, and the routine that keeps them there.

Check the context before you call it a barrier. A seasonal close, a renovation, a flood or a fire looks like weakening adoption in the data and is nothing of the kind.

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THE PLAY

Design: objectives tied to results.

The whole goal of the workshop is that the customer can actually do something. Write it down before you build anything, in one sentence that starts the same way every time: “After this workshop, the customer will be able to…”

DIGESTIBLE

Chunk it

Start at thirty thousand feet — the whole process and why it matters — then break it into its major parts. Train the common use case, not every exception. Lose the jargon.

RELEVANT

Their lens

You will deliver hundreds of trainings; for this customer it is the first. Every feature you show and story you tell is colored by how they will use it on an ordinary Tuesday.

ACTIONABLE

Observable

The words “know,” “learn” and “understand” never follow “will be able to.” Whatever follows must be something someone could witness, review, or check off as complete.

Every objective, linked to a result · NEW IN THIS EDITION

One to three objectives, no more. Each one is tied to a usage signal you can watch and a business result the customer cares about. If you cannot fill the third column, the objective is a feature, and the customer has no reason to keep doing it.

AFTER THIS WORKSHOP, THE CUSTOMER WILL BE ABLE TO…	USAGE SIGNAL	BUSINESS RESULT
Filter the weekly sales report by location and day part, and name the slowest shift	The general manager opens the report every week	Labor scheduled to demand; labor cost as a share of sales
Build the saved view of renewals due in ninety days, and assign each one an owner	The view is opened daily by the renewals team	No renewal reaches its last thirty days without an owner
Approve a pending request from the mobile app in under a minute	Approvals made in the app, not by email	Requests approved the same day; fewer stalled orders

THE OBJECTIVES ARE THE INVITATION

Send them to the customer before the workshop, with the usage signal shown plainly. A customer who has agreed what they will be able to do at the end shows up ready to do it — and brings the right people.

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THE PLAY

Deliver: sixty minutes.

Have a plan, set an agenda, be clear about your objectives, and stick to the agenda. One hour is enough for one to three objectives; the time goes to the customer doing the work, not to you showing it. · NEW IN THIS EDITION

TIME	SEGMENT	WHAT HAPPENS
0:00 – 0:10	Re-baseline	"The purpose of this meeting is ___. At the end of it, you'll be able to ___." Gain agreement on both. Then show the usage signal plainly, and ask what changed for them.
0:10 – 0:20	Diagnose	Confirm the cause with the customer, in their words. Return to the thirty-thousand-foot view: what they bought the product to do, and what it is doing for them today.
0:20 – 0:45	Train	The objectives, one at a time. Give the customer control of the screen, or have them talk you through the steps. Check their understanding after each part. Ask how they will use it on their own.
0:45 – 0:55	Practice and homework	They do each objective once more, without help. Then set the homework: one to three actions, each with an owner and a date, that put the objectives to work in their real business.
0:55 – 1:00	Next steps	Recap what was agreed. Book the check-back for seven days out, before anyone leaves the call.

BEFORE

Know the room

Know who you are training and what they do, so you teach them what they need for their jobs. If you lack context, use your discovery skills before the day, not during it.

WHO TEACHES

Delegate

You are not the right person to do the vast number of things. Bring the specialist — Support for a configuration, Services for a workflow — and run the hour yourself.

AFTER

The same day

Email the recap: the objectives, the homework with its owners and dates, the check-back time. Log the workshop where the whole company can see it.

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THE PLAY

The clock: 1-3-7, and the thirty-day exit.

The Adoption Workshop is reactive: a signal has fired, and the customer's drift continues while we wait. It runs on the standard I hold every client-facing team to, wherever a customer is waiting on us.

THE 1-3-7 STANDARD

ONE

The same day

Acknowledge the request. Call; if you reach voicemail, call back; then email a recap. Say when you will respond with next steps — a date, not "soon."

THREE

Within three days

A touchpoint that consolidates the feedback and makes it actionable: define the problem, recommend the solution, give the timeline. Then call to confirm they received it and accept it.

SEVEN

Within seven days

A major update, or the complete resolution or action plan. Where the real fix takes longer, the workaround and the options are delivered inside the seven days.

In this play

ONE	The day the signal fires: reach out, confirm the customer is still receiving what the product sends them, and offer the workshop.
THREE	Within three business days: the diagnosis written up as one to three objectives, sent to the customer, and the workshop booked.
SEVEN	Within seven calendar days: the workshop delivered. If the customer cannot meet in time, the objectives and the homework go to them in writing, and the workshop follows.

The exit · NEW IN THIS EDITION

The customer is restored when the signal that started the play is back at its normal and holds there for two measurement periods in a row — two weeks, for a weekly signal. That must happen within thirty days of the workshop. Thirty days is the ceiling, not the target.

DAY 0

Signal

Acknowledge it the same day.

BY DAY 3

Booked

Objectives sent; the date agreed.

BY DAY 7

Workshop

Delivered; homework set.

WORKSHOP + 30

Restored

Back to normal, and holding — or escalated.

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THE PLAY

Validate: the check-back.

It only does so much good for the customer to know about a feature. They need to use it. The check-back is where you find out whether they do. · NEW IN THIS EDITION

1
CHECK BACK

Seven days after the workshop, the Success Manager calls or shares a screen with the customer's lead. Fifteen minutes, homework first: each action, done or not done, shown rather than described.

2
VALIDATE THREE WAYS

In the conversation: they tell you how it went. In their system: you see the work. In the usage data: the signal is moving. All three, or it is not validated. Record each action on the Homework tab with the evidence.

3
RE-SET, ONCE

Homework not done is information, not failure. Ask what got in the way, make the action smaller, give it a new date inside the thirty days, and check back again. Re-set it once. A second miss is a signal of its own.

How it ends

RESTORED

Close it

The signal is back and holding. Send a short recap — what changed, what it is doing for them — log it, and hand the account back to the touch its tier earns. Watch the signal for ninety days.

NOT RESTORED AT THIRTY

Escalate

The workshop did not hold. Open a Success Initiative: one scoped, signed, time-boxed engagement, run to steady state. Never extend this play in silence.

THE DIAGNOSIS CHANGED

Hand it over

Somewhere along the way it became clear they bought the wrong thing. Stop training. Take it to a Business Review with the account team, and say so plainly.

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RUNNING IT

Who does what, at every tier.

Success delivers the workshop and properly delegates to the specialists. That was the line on every customer journey I wrote, and it holds: Success owns the hour, and brings in whoever can teach the part best.

FUNCTION	CODE	ITS PART IN THE WORKSHOP
Customer Success	R	Acknowledges the signal, diagnoses the cause, writes the objectives, runs the hour, sets the homework, holds the check-back, and decides how it ends.
Support	A	Teaches the configuration and troubleshooting parts; confirms nothing is broken before anyone is trained on it.
Services	A	Teaches workflows and re-configures where the setup itself is in the way; runs the train-the-trainer when the people have changed.
Account team	I	Informed of every workshop; takes the account into a Business Review when the cause is an improper solution.

The same play, at three tiers

DEDICATED

In person, or live

The full hour, stretched to ninety minutes where the room is large, delivered in person where it matters. When a team of new managers needs retraining, pair it with a business review.

SHARED

Thirty minutes, live

One objective, built from the training content you already have. There is a template; you decide what to use. The check-back is a short call.

DIGITAL

An email and a video

One action, one short video or help article, and an invitation to reply or call. Reach out first; don't wait to be asked. The usage signal tells you whether they did it, and is the check-back.

TRAIN THE TRAINER

When the trigger is new people, train the customer's trainer instead of the whole team: one person who can teach it, the materials to teach it with, and a check-back where they show you they did. The goal is the line from my 2018 lesson: the customer should be able to do this themselves.

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RUNNING IT

Is it working, and the checklist.

Adoption and retention are linked: if they are using the solution, we know they are getting value. Four measures say whether each workshop worked, and the planner's Book tab counts them. NEW IN THIS EDITION

THE CLOCK
1-3-7 kept
The share of workshops acknowledged the same day, booked within three, and delivered within seven.

THE HABIT
Homework done
The share of homework actions validated at the check-back — in conversation, in their system, and in the data.

THE RETURN
Restored in thirty
The share of workshops whose signal was back and holding within thirty days, and the median days it took.

THE HOLD
Held at ninety
The share of restored accounts whose signal has not weakened again ninety days later — and, over a year, how many renewed.

DIAGNOSE

- [ ] A trigger named, and the signal's normal written down
- [ ] A barrier, not a pause?
- [ ] The cause named: not an improper solution
- [ ] Acknowledged the same day

DESIGN

- [ ] One to three objectives; no "know, learn, understand"
- [ ] Each tied to a usage signal and a business result
- [ ] The objectives sent; the workshop booked within three days
- [ ] The right specialist, and the right people, invited

DELIVER

- [ ] Delivered within seven days
- [ ] The customer drove the screen
- [ ] One to three homework actions, with owners and dates
- [ ] The check-back booked; the recap sent the same day

VALIDATE

- [ ] Checked back at seven days, three ways
- [ ] Re-set once, if needed
- [ ] Restored and holding within thirty days — or escalated
- [ ] The signal watched for ninety

EVERY QUARTER

- [ ] The four measures read for the book
- [ ] The most common cause taken to Product and Services
- [ ] One trigger threshold argued with

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