

## CUSTOMER STORY

# 5 Steps to Driving Enterprise-wide Software Adoption: How Zapier Embraced Productboard



## Meet Shira Bauman:

Senior Manager of Product Operations at Zapier, Shira has a Master's degree in Human-Computer Interaction from Carnegie Mellon University. With extensive experience in user design and user research, Shira is an ace at identifying and adopting the right software.

"When you're rolling out any new tool in a large organization, you want to take a very experimental and iterative approach. Product operations has taught me: you don't want to try everything all at once!"

If you'd like to learn about Zapier's wins with Productboard, you can read more [here](#).

### STEP #1

#### Partner with an industry expert: learn their strategies, share your needs, iterate.

Shira recommends choosing a vendor with a deep playbook of best practices to reference, but the empathy to tailor solutions based on your organizational needs.

"Samantha Chikmoroff on Productboard's [Pro Services](#) team had great onboarding brainstorm with me, where I could [run technical ideas by her] and ask 'does this make sense,' or, 'what have you seen work for other customers?' Sam also helped me catch up on all the new functionality Productboard had released over the last four years since I started using the platform at my previous company."

### STEP #2

#### Document from day one to build an evergreen internal training guide.

To ensure current and future staff can easily learn the software you're adopting, Shira recommends documenting exchanges with your vendor partners — asking to record calls, noting their best practices, even creating FAQs — to organize the material later on in a comprehensive training guide.



**Samantha Chikmoroff**

Team Lead, Commercial Services  
at Productboard



### STEP #3

#### Start small: pilot, iterate, then scale.

Based on years of experience in user research and product operations, Shira advises that it can be chaotic to invite lots of users to a blank space.

Instead, she recommends working with your vendor partners to “put the right guardrails in place” and beta test with small groups to see what helps them work most effectively.

“At Productboard, I worked with Professional Services to get their help building our [Features Hierarchy](#) and setting up [Insights](#) automation. Then, we scheduled a call with a few Zapier product managers who wanted to beta test. We got their feedback, had them play around in the system to find out what worked and what didn’t for their needs.”

Shira and her partners at Productboard iterated from there and soon found a winning recipe for Zapier’s user interface and product management strategy. That’s when they rolled out larger trainings, which Sam led and managed.

“She was able to speak to what other companies are doing [with Productboard] and to answer technical questions, too!”

### STEP #5

#### Keep the learning process going post-onboarding: hold group office hours.

Shira also thinks it’s best to offer consistent opportunities for new software users to ask questions.

That’s why Zapier continues to hold internal office hours for anyone using Productboard — even after a successful round of trainings with Shira’s vendor partners on the project.

“We already have a Slack channel for anyone to ask questions about Productboard, but these office hours are a chance for people to pose more detailed questions and learn from each other.”

These days at Zapier, Shira is thrilled to see just how well her onboarding strategy paid off.

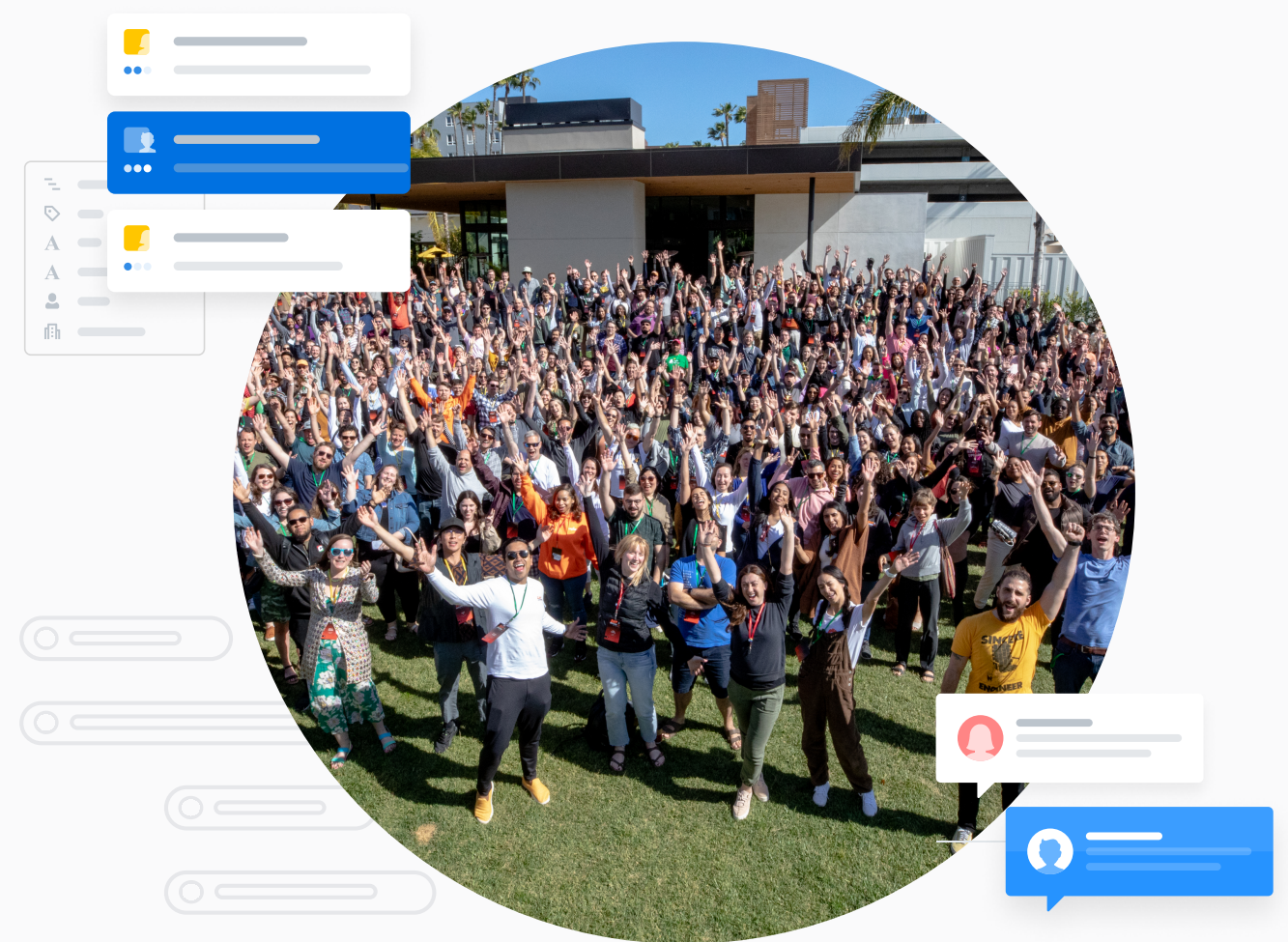
“Now, everyone understands there’s one unified location [in Productboard] where all customer and stakeholder feedback lives. Additionally, teams have clear expectations on how data should be used and triaged. And, with our transparent roadmaps, everyone knows what a given team is working on — that Productboard is the place to look and work.”

### STEP #4

#### Take the dread out of change management: automate tasks for new software.

Zapier lives and breathes automation, but even if it didn’t, Shira thinks it’s always wise to take the worry out of change management. To ease any software adoption process, she advises automating repetitive tasks linked to working with the new system.

“We’re using [Zapier](#) to automate work so that it’s easy for the Sales team’s notes to end up as Productboard Insights. We’re also automating any Slack feedback into Productboard, as well as feedback from the different collections gathered by Product. And, from there, we’re automating Slack reminders for product managers to fill out their weekly updates in the [Productboard Portal](#).”



#### Streamline your approach to product management.

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#### By the Numbers:

**97%** of Zapier makers are active in Productboard

**200** contributors across Zapier consistently view roadmaps