

A photograph of three hikers (two women and one man) walking away from the camera on a dirt trail. They are wearing backpacks and outdoor gear. The background shows a valley with a lake and mountains under a cloudy sky. A semi-transparent geometric pattern of white lines and polygons is overlaid on the left side of the image.

*rego*University 2017

Adoption and Perception Strategies

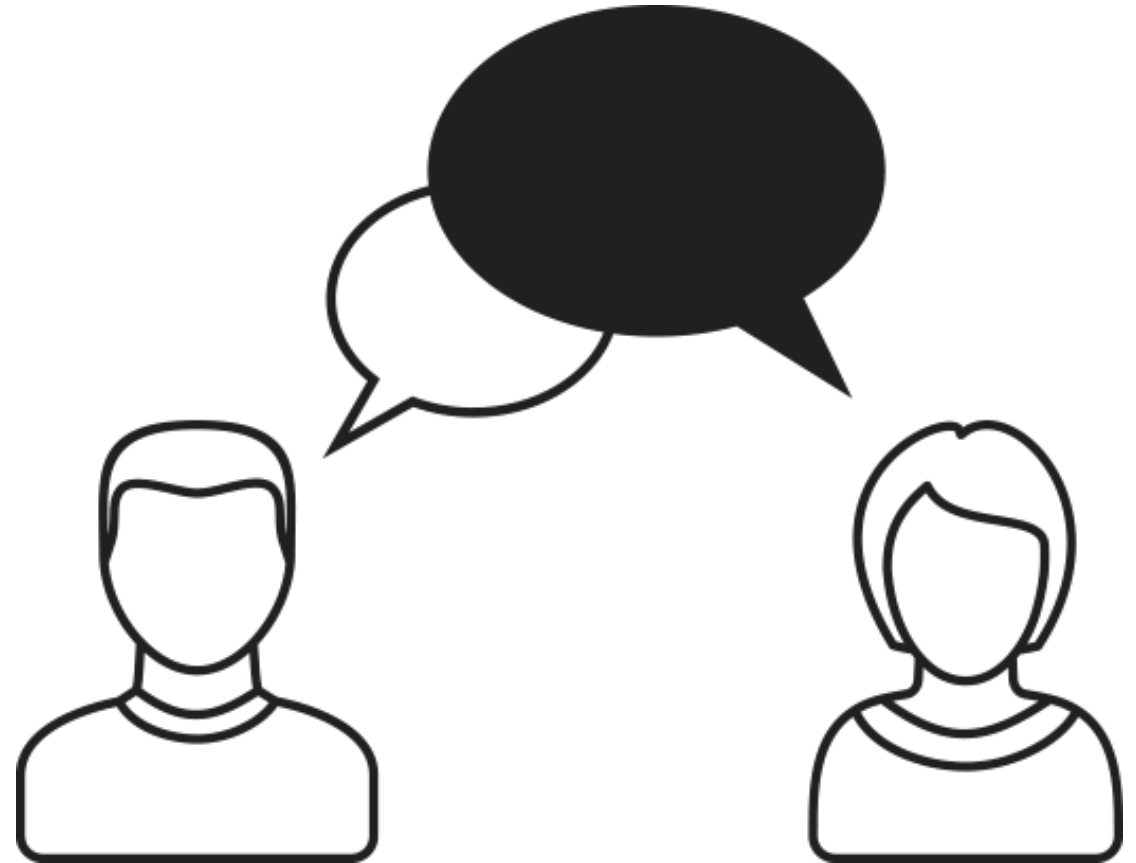
Your Guide: Ross Hensel, Jen Scarlato

Agenda

- Introductions
- The Perception Of Adoption
- Top 5 Signs That You May Have Low Adoption
- What is Adoption
- Survey – What is Your State of Adoption
- Keys to Success – What We Have Seen
- Open Mic – Facilitated Discussion
- Q&A

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- 4x3
- No graphics



The Perception Of Adoption...



Isn't it great! We had everyone get their data in this month! I'm so glad people are finally using the tool!



Ugh! I had to go enter all my data into that tool today. You know, I only do it to stay off the naughty list. At least I don't need to log in again until next month.

Top 5 Signs That You May Have Low/Poor Adoption

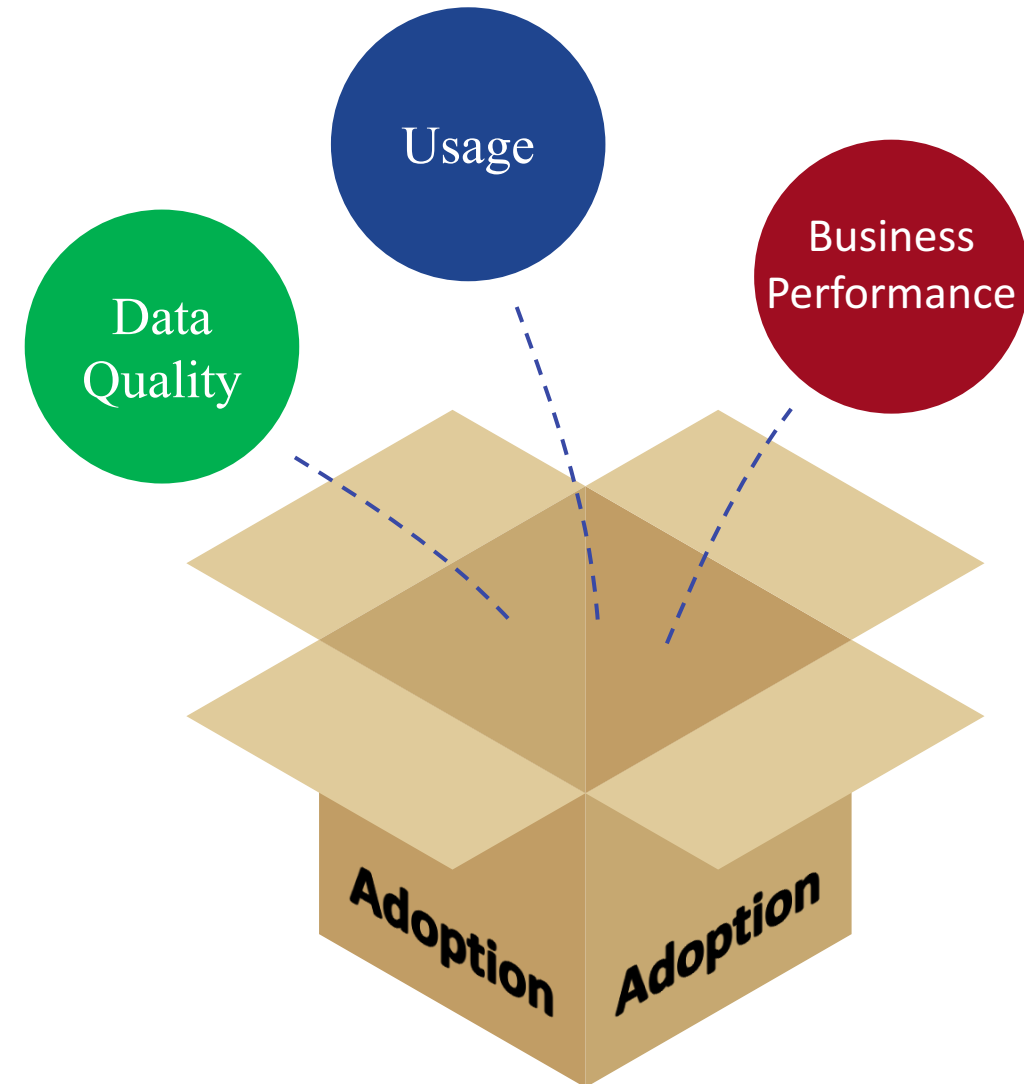
- 1 You Have Looked at the Possibility of Replacing CA PPM in the Last Year
- 2 Data is missing, or is not up to date
- 3 Users are still using spreadsheets, even though the tool has like functionality
- 4 Users don't understand why they have to put data into the tool.
- 5 Users find the system difficult to navigate and don't know where to go

the
top5

What is Adoption?

It is more than just making sure people are logging in.

- Good Adoption means:
 - End users leverage the PPM processes and tools you provide
 - End users comply fully with PPM processes, entering and maintaining all required data
 - End users understand the PPM processes and feel that the tools are of value to themselves as well as within the organization and to the business
- Adoption is measured by
 - Data Quality
 - Usage
 - Business Performance



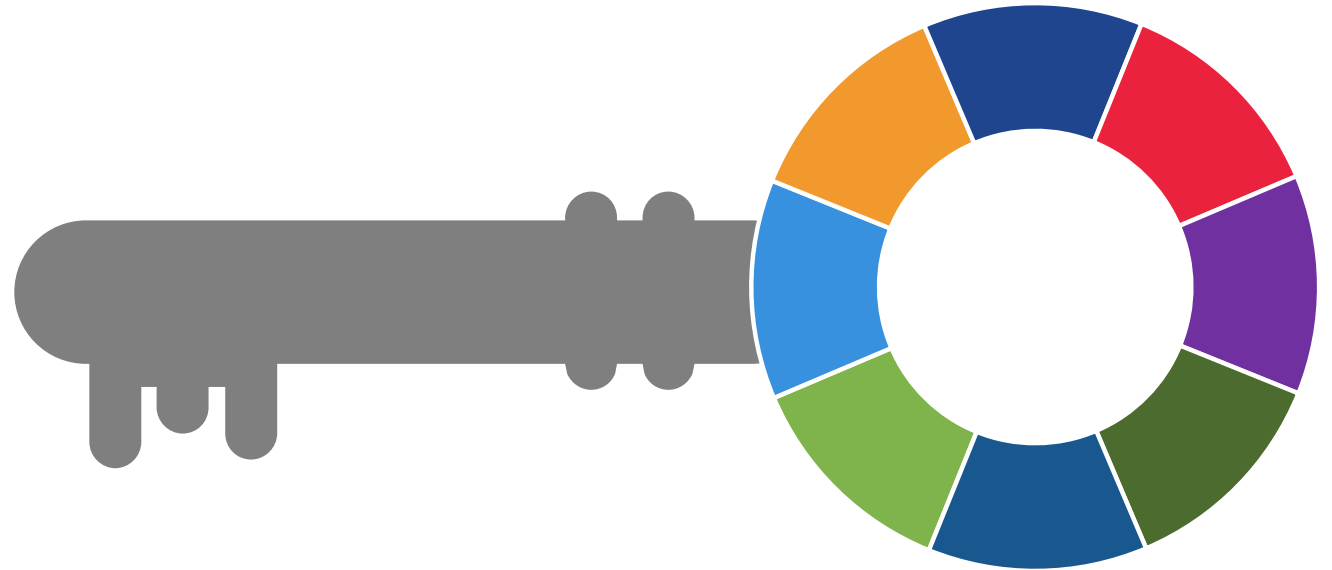
Where Is Your Organization?

7



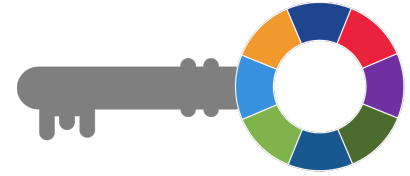
Keys to Success

- Executive Support
- Process and Basic Training
- Effective Information Campaign
- Performance
- Invest in Training / Mentoring
- Optimal Tool Configuration
- Leverage Alerts
- Cool Reporting

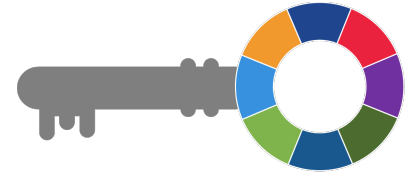


Executive Support

- Executives MUST Buy Into the Value Proposition – Big Picture
- Executives MUST be Vocal in Their Support
- Executives MUST use the data from CA PPM
- Executives need their own landing page to showcase what is important to them.



Process and Basic Training

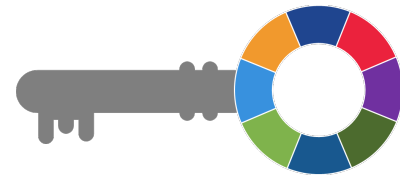


- Establish Best Practice Process – Before a Tool
 - Do not automate poor processes
 - Use automation of a function as an opportunity to
 - Leverage best practices
 - Take a fresh look at how things are done today
- Basic Project Management Training
 - Solve the problem of viewing CA PPM as administrative overhead
 - Avoid PMs with no formal training
 - Understand the “why”
 - Talk about the process
 - Talk about PM’ing outside the tool
 - Show how the tool can enable the process

Effective Information Campaign

I don't know why I have to put all this information in here, seems like a waste of time.

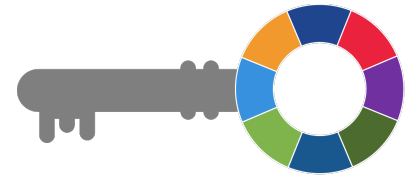
- Be Aware of the Problems You are Solving – You Must have a value proposition for End Users
- Publish a Vision for CA PPM's Future
- Establish Frequent Communication: Vision, Reminders, Success Stories



Performance

I have to go to 6 screens before I find what I want, and when I finally get to the page I need it takes 20 minutes to load.

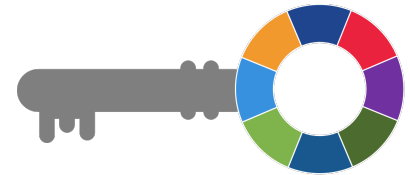
- People relate response time to usability
- “One Click to Value”
- CA PPM login and navigation
 - Slowed by any portlets on the general page (all tabs) – so be careful what is on the general page
- Returning data in portlets = Response Time
 - No page should take more than 5 seconds
 - Improve performance of portlets
 - Limit # of portlets on the page



Invest in Training / Mentoring

I wish I could remember how to set the capitalization percentage. I never remember how to do that, and I don't know where to look or who to call.

- Hands-On Training is the BEST
 - What is left behind after training (Quick Reference Guides, Manuals, Presentations, CAPA) will not influence adoption – the time spent performing exercises with an instructor/mentor will
- Train Internal SMEs
 - Ensure you have internal SMEs that are invested in the tool and can spend the time needed to get people to embrace the automation
- Frequent Workshops or In Person Mentoring
 - Hold regular brownbag sessions on specific topics
 - Follow-up regularly with users to see how things are going.
- Accessibility of Answers
 - Readily available training material, guides, videos, etc.



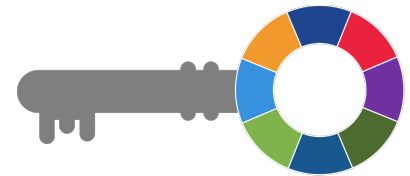
Tool Configuration

There are so many things I don't need to see, and I the tool doesn't have the one view I am looking for.

- CA PPM is a powerful tool and has a rich feature set. However sometimes this can be overwhelming if your maturity is not yet there. To help streamline the experience, don't be afraid to take advantage of the configuration options that allow you to:
 - Remove/Hide Links and Data attributes that are not used
 - Hide OOB Portlets that you are not using
 - Use security to give the user a streamlined view of their interests
- Additionally, while the tool is feature rich, sometimes a view of specific data isn't there. Utilize the configuration capabilities to
 - Create portlets where there are reporting gaps
 - Configure the system for critical business processes vs. trying to force the OOB functions to meet your business needs.

Optimal Tool Configuration

- Menus
 - Make the Menu Reflect Your Process
 - Modify the General Page
- Object Screens
 - Group Like Fields in Sections
 - Minimize the number of pages to update
 - Do not put data on 3 subpages where the user has to jump between multiple pages to see or edit the data they need to
 - Make Text Boxes Bigger
 - Make them large enough so users do not have to scroll
- One Click to Value



Optimal Tool Configuration, cont.

- Object Screens
- Group Like Fields in Sections
 - Minimize the number of pages to update
 - Do not put data on 3 subpages where the user has to jump between multiple pages to see or edit the data they need to (unless required for security reasons)
 - Make Text Boxes Bigger
 - Make them large enough that users do not have to scroll
 - Drop Downs
 - Actions

Optimal Tool Configuration, cont.

Before

General	
Managed By	PMO (Indicates which group the Project Manager belongs to.)
Project Name	10 Nevada - Add Wireless Network
Project ID	387030
Description	Add wireless network to the Conference room
Project Identifier	Discretionary
Size	
Application	N/A
Oracle Project Number	
Service Desk Parent Ticket No.	185589
Project Manager	Blazejeski, Mark
IS Scope	Multi-Domain
Risk	
Project Status	Queued
Active	<input checked="" type="checkbox"/> (To deactivate project, first disable Financial.)
Template	<input type="checkbox"/> (Project must not have time entries or be financially enabled to be marked as a template.)
Eclipsys Portfolio	Facilities
Eclipsys Programs	
Program	<input type="checkbox"/> (Project must not have tasks, staff members or be financially enabled to be converted to a program.)
Intake Date	12/17/2010
Requestor	Matulich, Kevin
Requestor Phone Number	516-719-1012
Client Sponsor	Stallone, Robert
OCIO Sponsor	Mitch Jacobs
Facility	NHP
Department	Administration - Site

After

General	
Project ID	387030
Project Name	10 Nevada - Add Wireless Network
Project Identifier	Discretionary
Project Status	Queued
Intake Date	12/17/2010
Active	<input checked="" type="checkbox"/> (To deactivate project, first disable Financial.)
Sponsorship	
Managed By	PMO
Requestor	Matulich, Kevin
Requestor Phone Number	516-719-1012
Project Manager	Blazejeski, Mark
Client Sponsor	Stallone, Robert
OCIO Sponsor	Mitch Jacobs
Classification	
Size	[--Select--]
Application	N/A
Oracle Project Number	
Department	Administration - Site
Service Desk Parent Ticket No.	185589
IS Scope	Multi-Domain
Eclipsys Portfolio	Facilities
Eclipsys Programs	[--Select--]
Facility	NHP
PFS Log	<input type="checkbox"/>
Description	
Description	Add wireless network to the Conference room

Optimal Tool Configuration, cont.

- CA has TONs of stuff
 - Often overwhelming
 - Get rid of stuff
 - Do not be afraid
- Do not delete – just inactivate and remove
- Removal examples
 - Fields
 - Groups
 - Tabs
 - Portlets

Leverage Alerts

I wish the system could alert me when I have a task that is about to be late before it happens.

- We want people to use CA PPM to manage by exception and make it easy to find those exceptions instead of having to fish them out of the system.
- Email notifications
 - Late Timesheet
 - Late Status
 - Notify of Mixed booking
- Exception portlets to tell them what they should do – use portlets to guide them
 - Late tasks
 - Mixed bookings
 - Unfilled roles



I see you're still fishing for that key piece of data!

Cool Reporting



Open Mic – Thoughts on Adoption

- What have you done to improve adoption?
- What are things you struggle with users adopting? What are the major complaints?
- Any drastic tactics – moving information out of CA PPM? SharePoint, Excel, IT Design Tools, etc.?

Cool Reporting - Examples

*rego*University 2017

Let Rego be your guide.



Product Management Level

Budget	Actuals	Forecast	Variance
\$7,325,600	\$592,640	\$133,289,067	\$(125,963,467)
Projects Completed	Projects Started	Contractors (FTEs)	Employees (FTEs)
2	112	16	194

Project Manager

Available: 26 Selected: 0

Search list...

Administrator, System | admin

Alvarez, Corine | corineAlvarez

Angelo, Michael | michaelAngelo

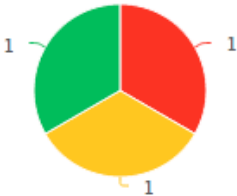
☒ Select All
 ☐ Deselect All
 ☐ Invert

Apply

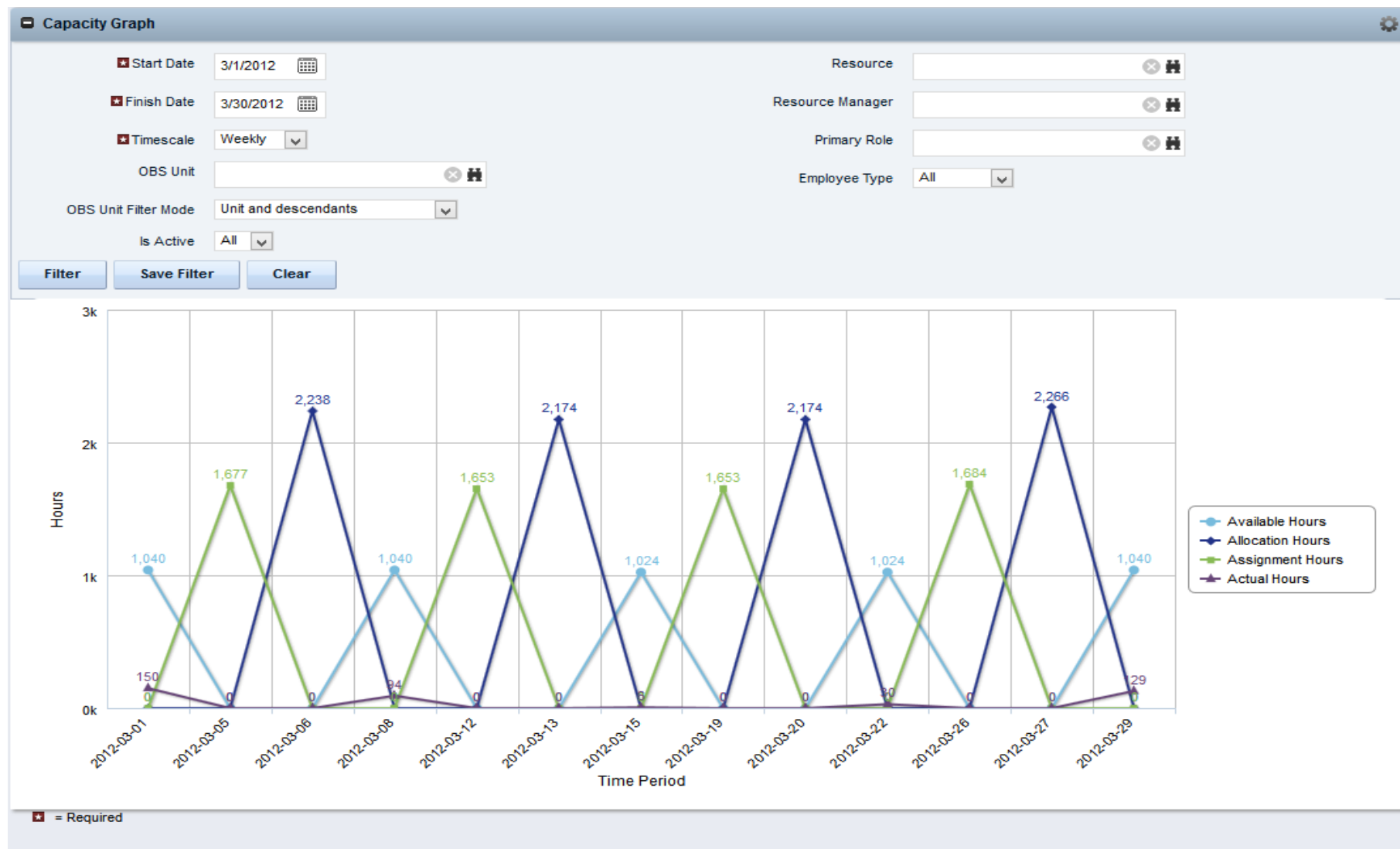
#	Project Name	Project Type	Status	Schedule	Alignment	Risk	Issues	CRs	Resource Allocations	Planned Cost
1	Critical Care Vent - home version	Corporate Services							67,756	11,302,752.91
2	XPL Translations	Corporate Services							33,796	4,261,090.00
3	Meeting Reservation Portal	Corporate Services							18,720	834,950.00
4	Mobile Time and Approvals	Clinical Services							12,740	179,960.00
5	Office Upgrade	Corporate Services							12,528	646,260.00
6	System Upgrade Release 14	Corporate Services							12,528	646,260.00
7	eBusiness Mobile Network	Corporate Services							12,528	646,820.00
8	Mobile Advertising	Corporate Services							12,380	264,400.00
9	Application Security Audit	Corporate Services							7,748	500,000.00
10	Client Services Datamart	Corporate Services							6,981	218,800.00

Product Team Level

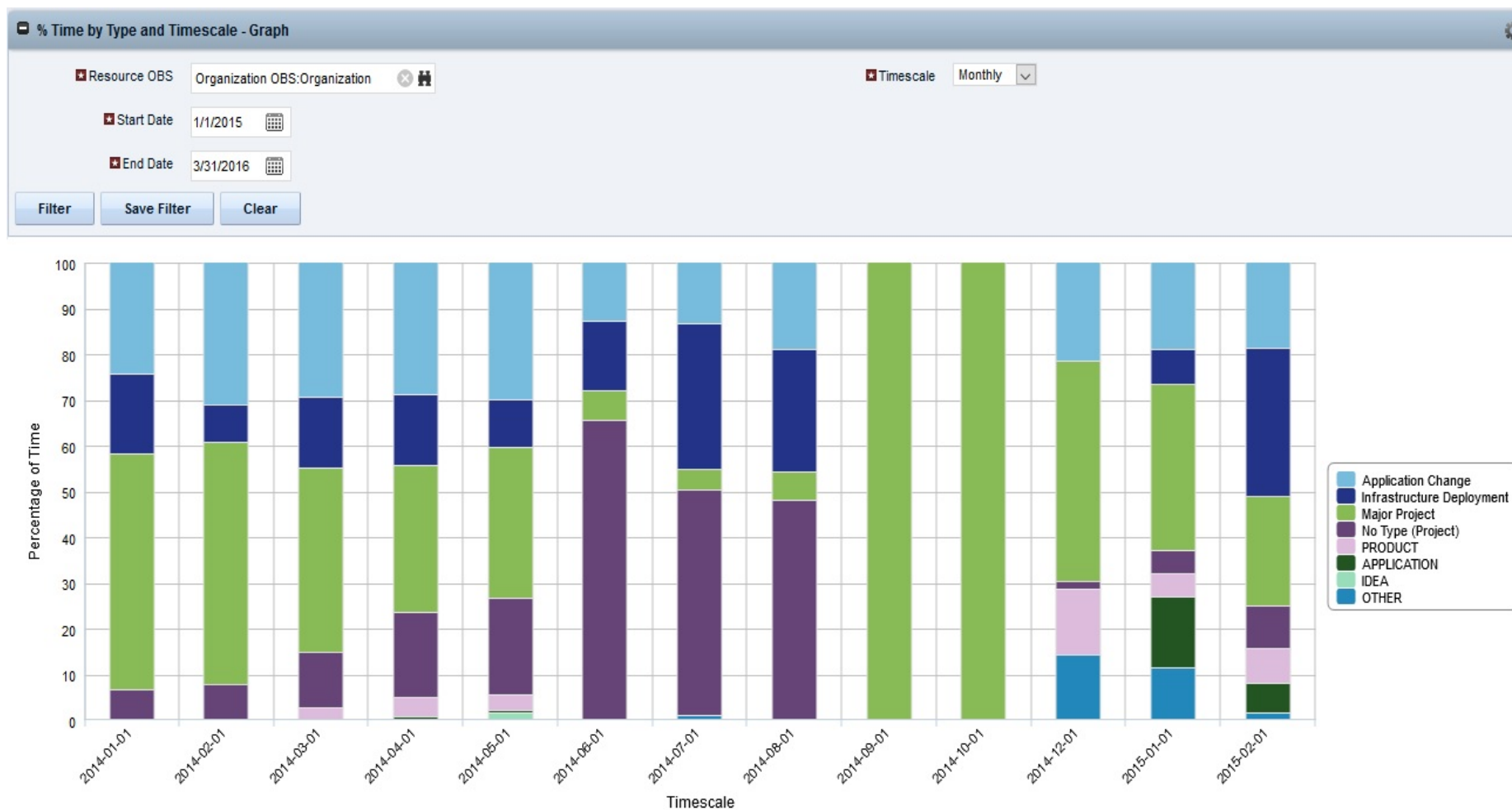
25

Project Manager	Malone, Paula	Status Report Date	11/20/15	Labor Hours		Financial Performance	
Project Type	Corporate Services	Status	Unapproved	Baseline	7,748.30	Planned Benefit	0.00
Stage	Planning	Progress	Started	Actuals	0.00	Planned Cost	500,000.00
Project Dates		Status Report Indicators		Estimate To Complete	7,748.30	Actual Cost	0.00
	Start	Finish	Overall	Estimate At Completion	7,748.30	Estimate At Completion	1,143,124.85
Plan	10/5/15	9/1/16	Schedule	EAC to Baseline Variance	0.00	EAC to Planned Variance	1,143,124.85
Baseline	10/5/15	9/1/16	Scope	Remaining Allocation	7,748.30	Planned ROI	-100.00
Days Late	0	0	Cost and Effort	Allocation to ETC Variance	0.07	Planned Breakeven	
Project Objective				Key Accomplishments			
Review security for all applications.							
Status Report Update				Upcoming Activities			
Issues by Priority		Risks by Priority		Current Issues			
				More Issues...			
				Issue	Priority	Status	Target Resolution
				Scope boundaries unclear	High	Work in Progress	11/4/15
				Skill Shortage	Medium	Work in Progress	12/2/15
				Security training	Low	Work in Progress	11/16/15

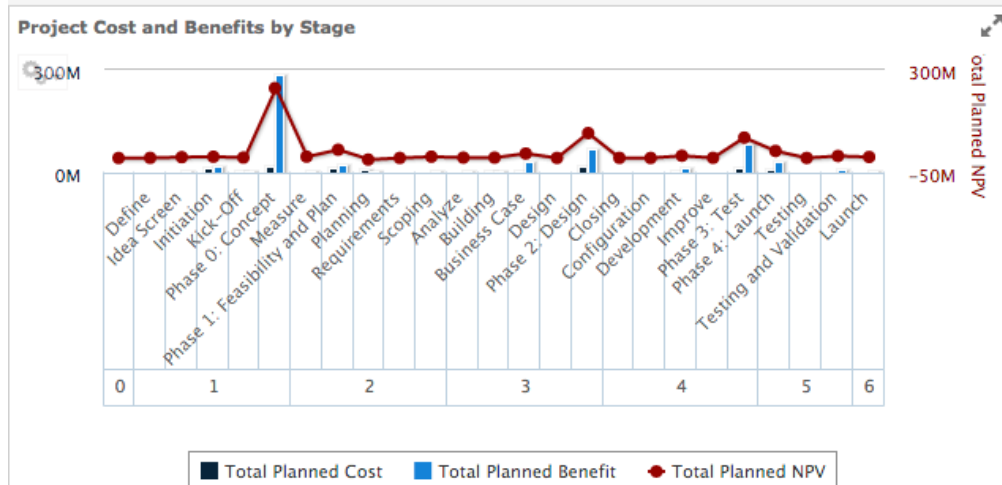
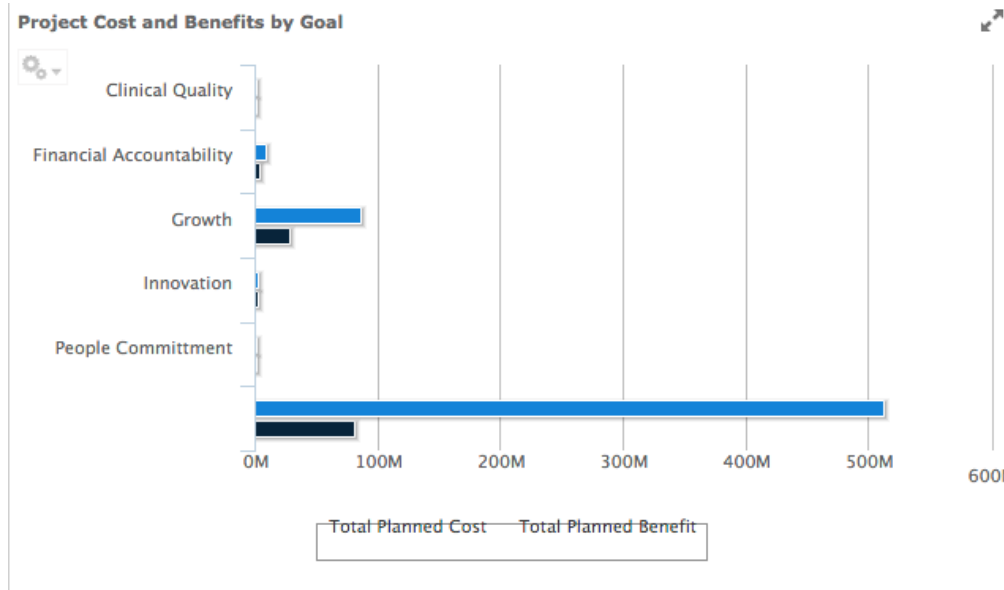
Allocation – Availability – Actual



Time by Type



Projects Cost and Benefit



Projects by Goal Report

Page 1 of 5

Project Name	Business Alignment	Risk	Total Planned Cost	Total Planned Benefit
2016 Winter Franchise Manager Release			6,805,400.00	0.00
Aurascope XA - Project		50	1,019,520.00	9,300,000.00
Brightlight 3000 - Project		50	829,520.00	5,800,000.00
Magnidia 4000 - Project		50	639,520.00	2,030,000.00
PET Rx - Project		45	639,520.00	1,825,000.00
Sonara XT - Project		0	639,520.00	2,200,000.00
Visidium 2000 - Project		50	639,520.00	2,050,000.00
Diagnostic ECG - Project		18	639,520.00	3,675,000.00
MRI 3000 - Project		18	639,520.00	1,750,000.00
Fluoroscopic Imaging 1000 - Project		50	639,520.00	3,900,000.00
Nuclear Cardiology 2200 - Project		65	639,520.00	1,950,000.00
Echo Cardiology 3000 - Project		50	559,520.00	1,230,000.00
Molecular Imaging 4000 - Project		50	639,520.00	3,300,000.00
Molecular Imaging 6000 - Project		50	639,520.00	1,285,000.00
Atropia Retina Scan - Project		55	639,520.00	15,840,000.00
Ultrasound V4500 - Project		23	639,520.00	1,330,000.00
Nuclear Cardiology Integrated Software		14	13,939,523.91	22,300,000.00
MRI Open View		23	15,090,574.57	264,570,000.00
Ultrasound V5010 Project		27	14,179,200.00	38,200,000.00
Defibrillator Improvements		91	9,032,663.47	34,500,000.00
Centricity		64	2,150,260.00	32,848,994.56
Discover HD		62	2,049,460.00	20,000,000.00
Anesthesia Delivery		64	2,253,300.00	32,848,994.56
New Product - Stage 5	79	27	638,410.00	3,050,000.00
Data Warehouse Upgrade		41	578,245.97	700,000.00
Security Compliance		32	519,825.73	851,000.00

Project Story Board

Task Name: Task

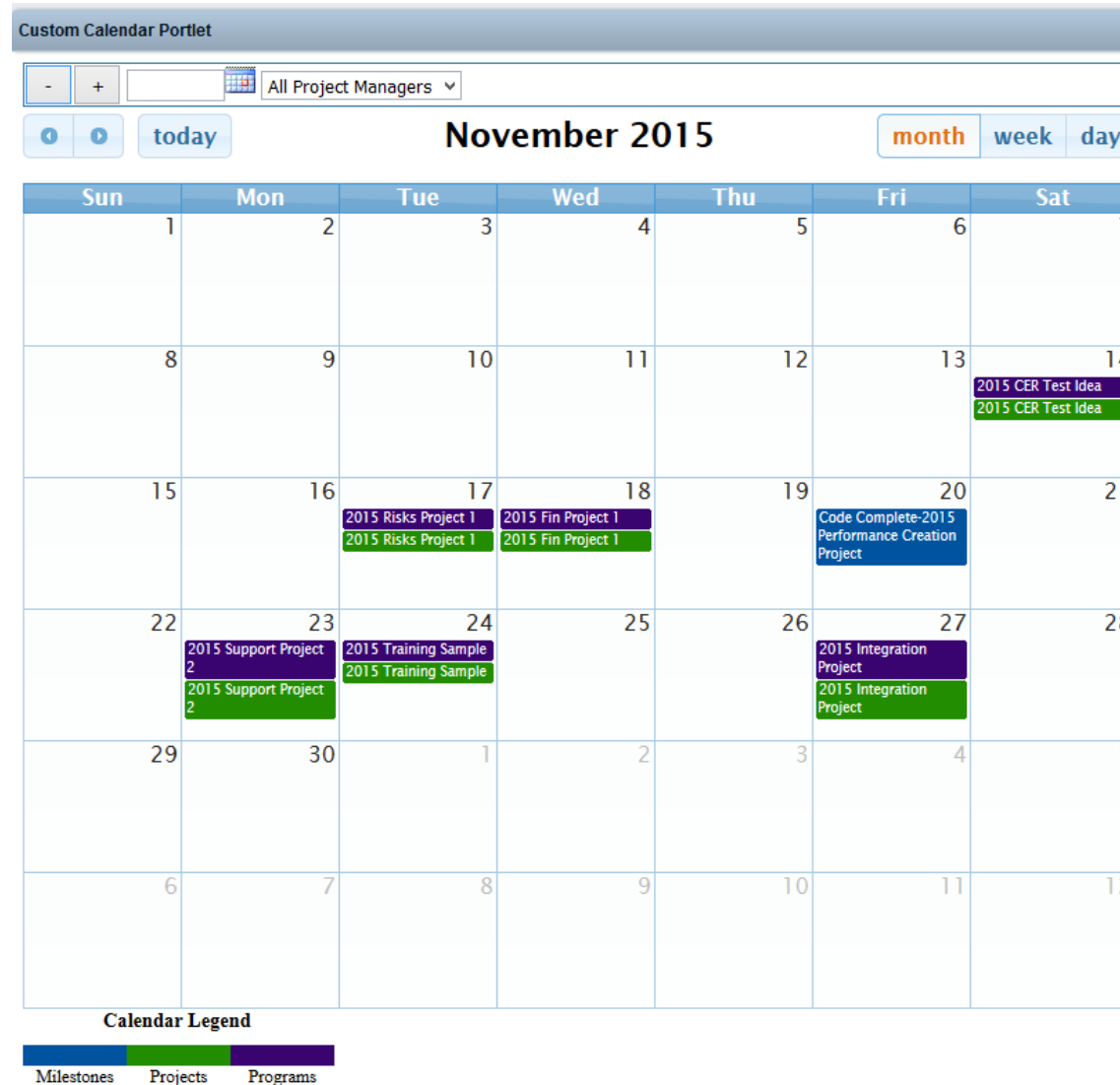
Resource Name: Resource

New Task

Not Set	Initiation	Planning																																																																																					
<div><div>Planning</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody></tbody></table></div>	Resource	ETC	Actuals	<div><div>Identify Stakeholders</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody><tr><td>Jones, Bruce</td><td>0</td><td>0</td></tr><tr><td>Tester, Tommy</td><td>4</td><td>0</td></tr></tbody></table></div>	Resource	ETC	Actuals	Jones, Bruce	0	0	Tester, Tommy	4	0	<div><div>Business Requirements Document (BRD)</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody><tr><td>Jones, Bruce</td><td>0</td><td>0</td></tr></tbody></table></div> <div><div>Stakeholder Analysis</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody><tr><td>Garrick, Jay</td><td>0</td><td>2</td></tr><tr><td>Woman, Wonder</td><td>0</td><td>2</td></tr><tr><td>Wright, Frank</td><td>0</td><td>0</td></tr><tr><td>Admin, Rego</td><td>0</td><td>0</td></tr><tr><td>Administrator, Niku</td><td>0</td><td>0</td></tr><tr><td>Administrator, Process</td><td>0</td><td>0</td></tr><tr><td>Alfred, Al</td><td>0</td><td>0</td></tr><tr><td>Allen, Barry</td><td>0</td><td>0</td></tr><tr><td>Almeida, Joe</td><td>0</td><td>0</td></tr><tr><td>America, Captain</td><td>0</td><td>0</td></tr><tr><td>Armstrong, Ken</td><td>0</td><td>0</td></tr><tr><td>Arya, Vishal</td><td>0</td><td>0</td></tr><tr><td>Attia, Jasmin</td><td>0</td><td>0</td></tr><tr><td>Banner, Bruce</td><td>0</td><td>0</td></tr><tr><td>Barton, Clint</td><td>0</td><td>0</td></tr><tr><td>Sam, Uncle</td><td>0</td><td>4</td></tr><tr><td>Tester, Tommy</td><td>4</td><td>0</td></tr></tbody></table></div>	Resource	ETC	Actuals	Jones, Bruce	0	0	Resource	ETC	Actuals	Garrick, Jay	0	2	Woman, Wonder	0	2	Wright, Frank	0	0	Admin, Rego	0	0	Administrator, Niku	0	0	Administrator, Process	0	0	Alfred, Al	0	0	Allen, Barry	0	0	Almeida, Joe	0	0	America, Captain	0	0	Armstrong, Ken	0	0	Arya, Vishal	0	0	Attia, Jasmin	0	0	Banner, Bruce	0	0	Barton, Clint	0	0	Sam, Uncle	0	4	Tester, Tommy	4	0	<div><div>Communications Management Plan</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody><tr><td>Tester, Tommy</td><td>4</td><td>0</td></tr></tbody></table></div> <div><div>Advanced Capabilities Enablement</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody></tbody></table></div> <div><div>Requirements</div><table><thead><tr><th>Resource</th><th>ETC</th><th>Actuals</th></tr></thead><tbody></tbody></table></div>	Resource	ETC	Actuals	Tester, Tommy	4	0	Resource	ETC	Actuals	Resource	ETC	Actuals
Resource	ETC	Actuals																																																																																					
Resource	ETC	Actuals																																																																																					
Jones, Bruce	0	0																																																																																					
Tester, Tommy	4	0																																																																																					
Resource	ETC	Actuals																																																																																					
Jones, Bruce	0	0																																																																																					
Resource	ETC	Actuals																																																																																					
Garrick, Jay	0	2																																																																																					
Woman, Wonder	0	2																																																																																					
Wright, Frank	0	0																																																																																					
Admin, Rego	0	0																																																																																					
Administrator, Niku	0	0																																																																																					
Administrator, Process	0	0																																																																																					
Alfred, Al	0	0																																																																																					
Allen, Barry	0	0																																																																																					
Almeida, Joe	0	0																																																																																					
America, Captain	0	0																																																																																					
Armstrong, Ken	0	0																																																																																					
Arya, Vishal	0	0																																																																																					
Attia, Jasmin	0	0																																																																																					
Banner, Bruce	0	0																																																																																					
Barton, Clint	0	0																																																																																					
Sam, Uncle	0	4																																																																																					
Tester, Tommy	4	0																																																																																					
Resource	ETC	Actuals																																																																																					
Tester, Tommy	4	0																																																																																					
Resource	ETC	Actuals																																																																																					
Resource	ETC	Actuals																																																																																					

Rego Calendar Portlet

30



Questions?



*rego*University 2017

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com