

*rego*University 2017

Staying Connected to Users

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



- What is Feedback?
- Why is Feedback Important?
- Audience Participation
- Group Discussion
- Case Studies
- Methods of Collecting Feedback
- Staying Connected to Your Users

Agenda

Improving Feedback

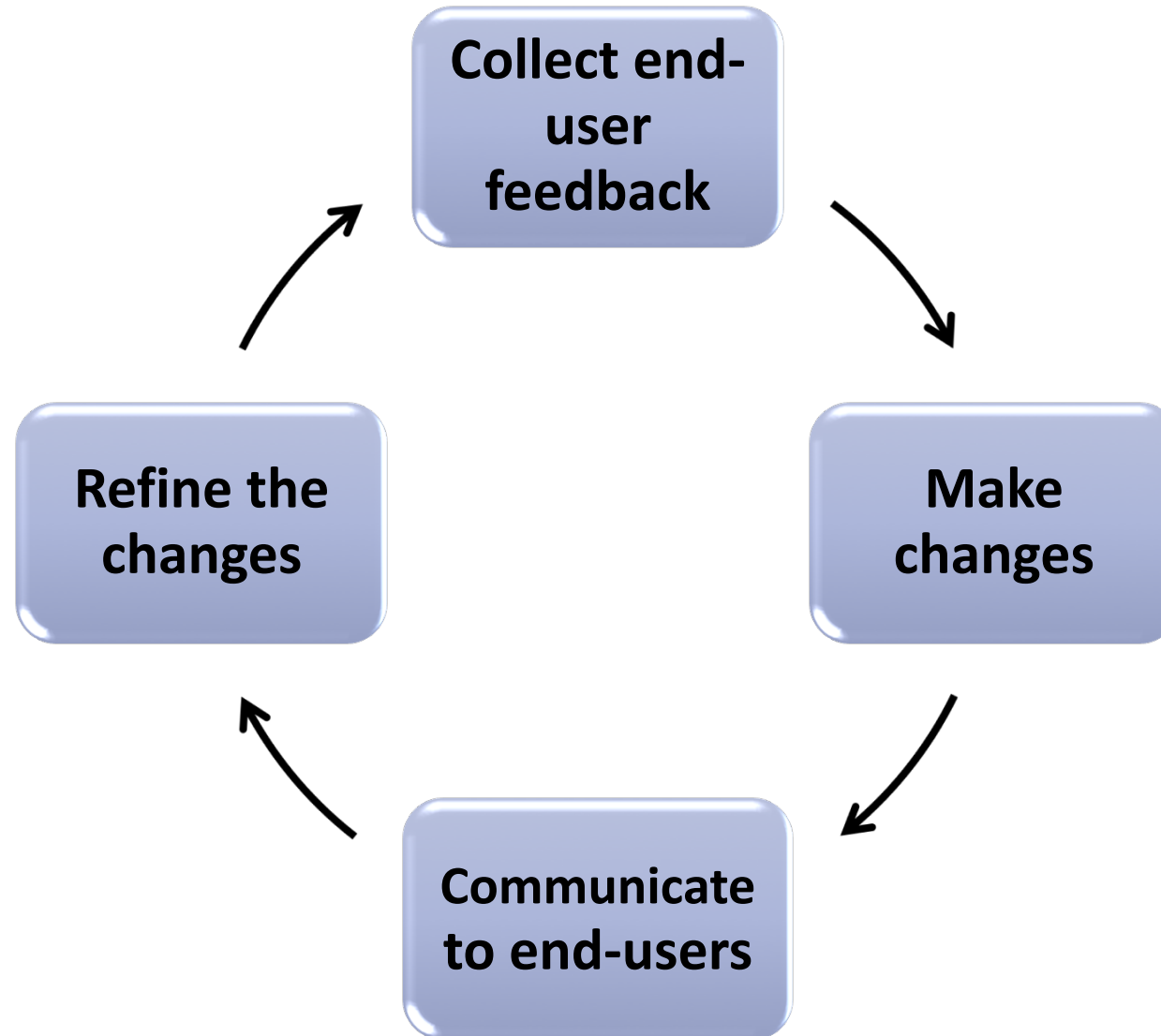


What Is Feedback?

- Information coming directly from end-users about how they feel about a product or a service.
- Open-loop: Response to end-user feedback is not provided directly to the submitter.
- Closed-loop: A response is provided on each piece of end-user feedback, and allows a company to “close the loop”.



Closed-Loop Feedback Process



Why Is Feedback Important?

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Why Is Feedback Important?

- It is truly the Voice of the Customer.
- Comments and complaints are an important resource for improving and addressing the needs and wants of the end-user.
- Feedback guides and informs decision-making and influences the product roadmap.
- Understanding interactions with CA PPM is invaluable and drives innovation.
- Ultimately, closing the loop can lead to increased CA PPM adoption, happier users, improved perception of the process and tool, and more successful projects.

Audience Participation

- Who **RECEIVES** feedback on CA PPM today?



Audience Participation

- Who **ELICITS** feedback on CA PPM today?



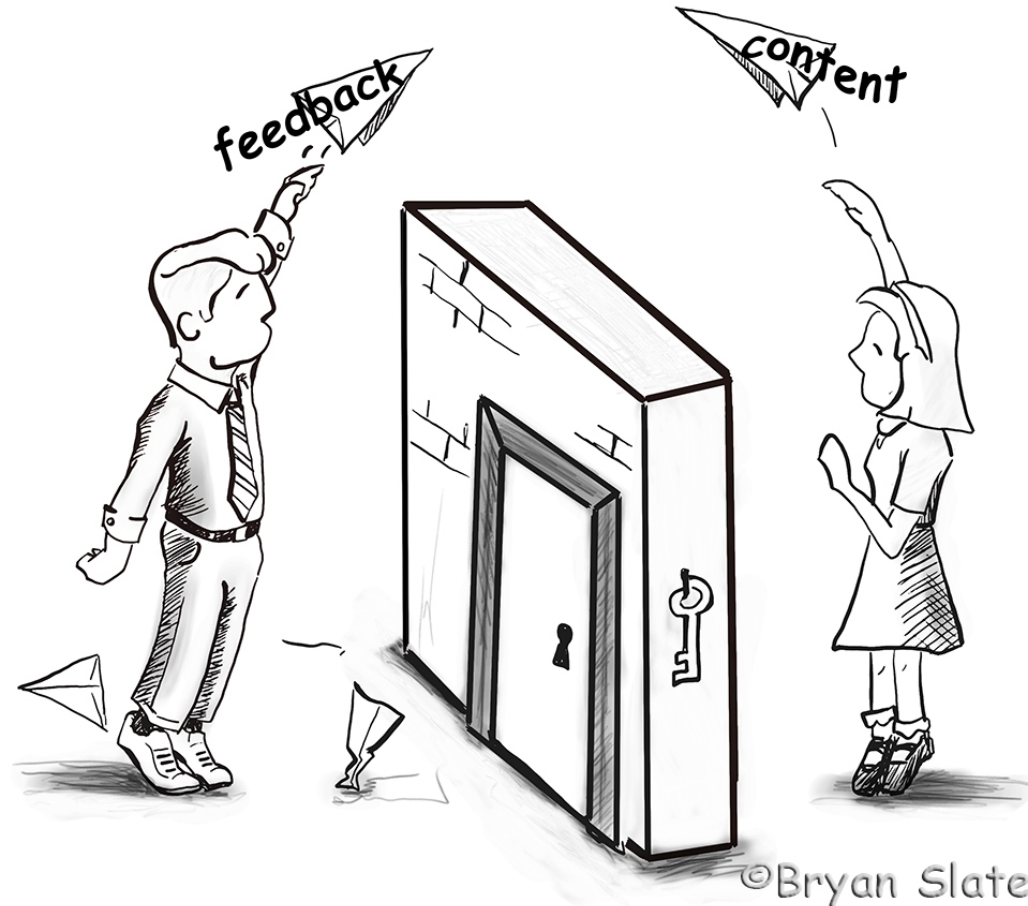
Audience Participation

- Who **ACTS** on that feedback?
- Why or why not?



Group Discussion

- What are some of the things you currently do to close the feedback loop with your users?



Case Studies

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Company Case Study #1 (UHG-remove name)

- **Overview** – 30,000 users, heavily invested in training.
- **Intranet Site**
 - Hub for CA PPM updates, assistance, etc. Culture of using this for multiple tools.
 - Strong sense of community, post-a-question, answer-a-question, moderator assisted
- **“Suggestion Box”**
 - Anyone can get their voice heard and submit a suggestion, request, enhancement where it then gets reviewed, prioritized, and responded to.

Company Case Study #1 (UHG-remove name)

- **Open Office Hours**

- A CA PPM expert is in a room to answer questions, provide guidance, etc.
- Recurring more often during training and after roll-out, tapered once dust settled.

- **Virtual Open Office Hours**

- For those not near an office or due to timing unable to make it to an open office hour session, virtual recurring WebEx sessions were held
- First come, first serve

Company Case Study #2 (M&T-remove name)

- **Overview** – ~1500 users, heavily invested in training.
- Combination of Instructor-Led and Self-Paced Training, along with Proactive Mentoring.
- Training
 - Periodic Instructor-Led Training Delivery, targeted not only at new users, but also at upskilling existing users
 - Vast library of self-paced learning assets
 - CA PA for on demand support
- **Proactive Mentoring**
 - Utilize Rego Adoption Metrics to proactively identify people/groups who need help
 - Identified users not updating schedules, updating resource allocations, entering time
 - Have a sit-down and walk through any issues they're experiencing
 - Make sure they're comfortable with what they are doing

Methods Of Collecting Feedback

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Methods Of Collecting Feedback



Methods Of Collecting Feedback

- **Email** – Probably the most popular method for giving/receiving feedback.
- **Survey** – Helpful, but can be costly and may not produce actionable results.
- **End-User Interviews/Meetings** – Sit down with end-users, CA PPM Champions, Managers and discuss what they want from the tool, how they use it, where they run into issues.
- **Helpdesk Tickets** – What are the top 5-10 types of tickets on CA PPM? What can you do to eliminate those 5-10 most popular ticket types?

Methods Of Collecting Feedback

- **Observe Users in Their Environment** – When, how, why are they using CA PPM at the times they're using it.
- **Water-cooler/Social Listening** – What are people saying about CA PPM? What complaints are posted on company intranet sites?
- **Adoption Metrics** – Do you have adoption metrics implemented? Are they positive, so-so, or just plain terrible?
- **Watch a User Try to Perform the Tasks in Your Documentation** – This can be a humbling experience, but I guarantee you'll find areas to improve either in the tool or the training documentation.

Staying Connected To Your Users

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Staying Connected To Your Users

- **Communicate Changes to End-Users** – This is critical to maintain adoption end-users by showing that you are continuously investing in the tool.
- **Preview** – Communicate a preview of upcoming changes so end-users don't feel out of the loop.
- **Provide Release Notes** – Users want to know what changed and how it will impact them.
- **Contact Your Users Periodically** – Contact your users periodically with a friendly email asking if they have any questions or feedback.

Staying Connected To Your Users

- **Establish Regular Communication Through Bi-weekly Tips** – Provide the user little bits of knowledge in a consumable fashion. Provide a link to an established knowledge base if they want to learn more.
- **Proactive Mentoring**
 - Use Rego Adoption Metrics to proactively identify people/groups who need help
 - Have a sit-down and walk through any issues they're experiencing
 - Make sure they're comfortable with what they are doing

Questions?



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- 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)
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