

A photograph of three hikers walking away from the camera on a dirt trail. The hiker in the foreground is wearing a yellow jacket and a red backpack. The middle hiker is wearing a grey shirt and an orange backpack. The hiker in the background is wearing a dark shirt and a dark backpack. The background shows a valley with a lake and mountains under a cloudy sky. A semi-transparent geometric pattern of white lines is overlaid on the image.

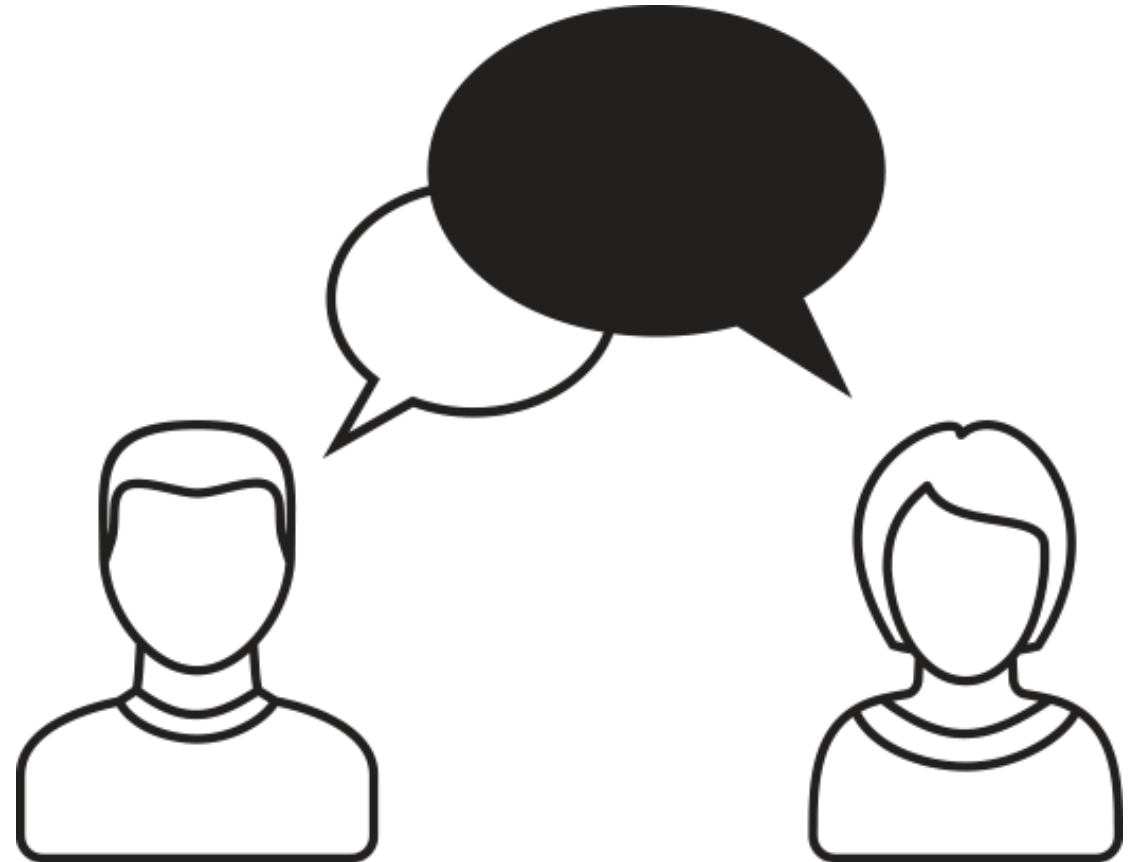
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Leveraging User Personas For Supporting CA PPM

Your Guide: Mark Feher

Introductions

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



Overview

- It's easy to focus on the “cool” new features of the latest release and overlook the impact on specific End Users, and how they actually use new features and modules.
- Focusing on what Users need and want may not be easy, but it will lead to greater engagement, strong adoption and increase value of CA PPM.
- This session will discuss how to leverage User Personas in configuring CA PPM.

Outline

- What is a Persona?
- How do I capture and record personas?
- What are my Objectives/expected outcomes from applying Personas?
- How do I apply Personas in CA PPM?

What is a Persona?

- Persona (From User centered-design approach)
 - A user persona is a representation of a hypothesized group of users synthesized from data collected from observations/interviews with users or from business process or procedural documentation.
- Traditional methods in User-centered design try to consider only one Persona at a time, but for this purpose we need more than one.
- Take 5 minutes to discuss
 - What might be included in describing a Persona?
 - What are some example personas associated with CA PPM?



Open Mic

- Report back discussion on defining Persona's and example persona roles associated with the PPM Tool.

Examples - Elements of a Persona and Roles

- What are the Elements? (Adapting from “User-centered Design”)
 - Audience - Who will use the Persona
 - CA PPM Configuration Team
 - PMO’s
 - Business Process and procedure developers
 - ...
 - Purpose - Target activity(ies) or Objectives
 - Identify CA PPM Security/Access needs
 - Identify who can see what
 - Identify Processes or workflows that may need support
 - ...
 - Context - Circumstances around the situation
 - What higher level processes are involved
 - Where are the actual people physically located?
 - What are the expected inputs to this activity and outputs from the activity
 - ..

- Persona Examples
 - Project Managers
 - Application Managers/Administrators
 - Service Managers
 - Resource Mangers
 - Team Members
 - Governing Bodies
 -



How do I capture and record personas?

- There are many ways to do this!
- Let's Take a few minutes to discuss
 - Specific examples of what you might need to capture
 - How might you capture/record the information?

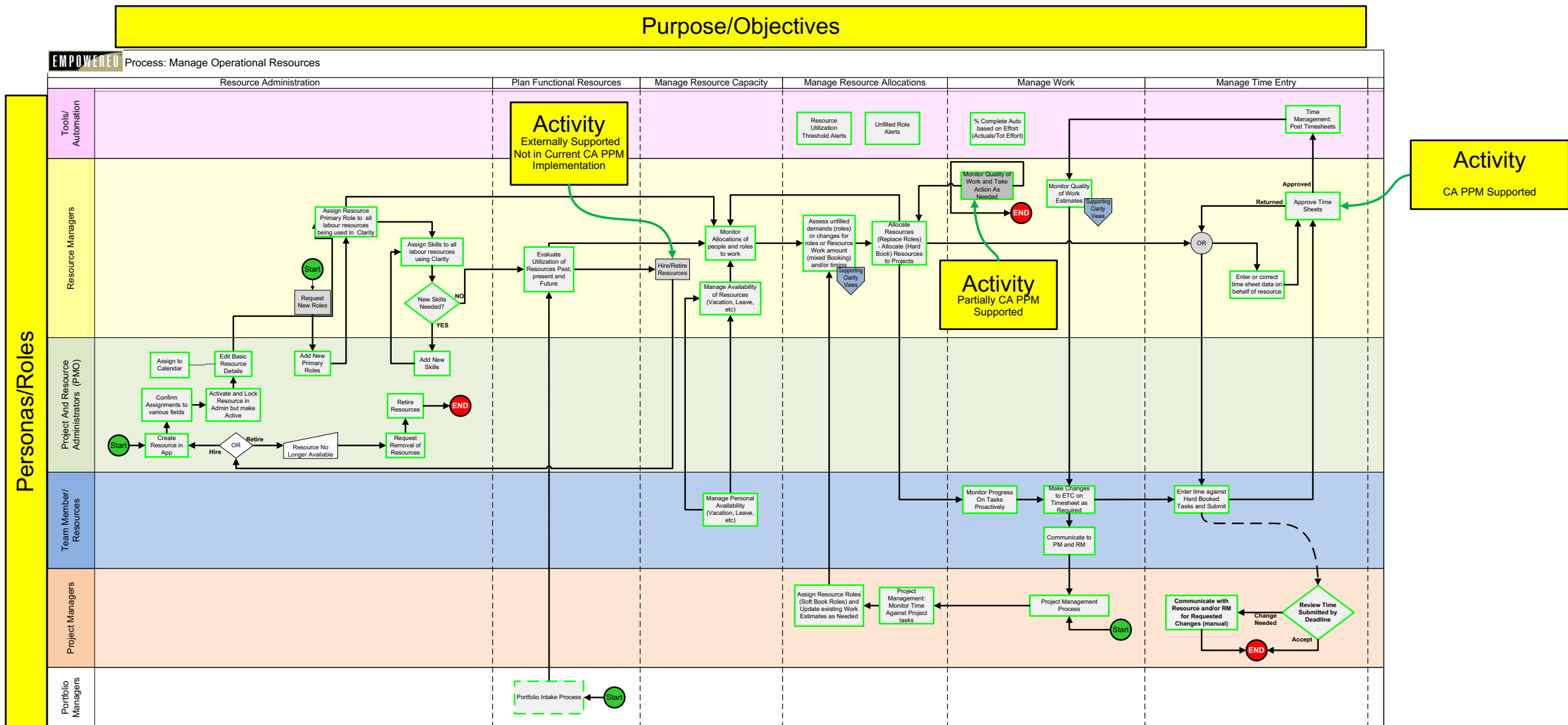


Capturing Personas - An example Approach

Swim Lane Process Flow document Approach

- Purpose
 - Manage Operational Resources
 - Administrator Resources
 - Plan for Resource Needs
 - Manage Resource Capacity
 - Manage Resource Assignments
 - Manage Resource Work and Quality
- Important Context
 - Parallel with
 - Manage Projects
 - Manage non-project activities
 - Manage Finances
 - ...
- Personas Involved
 - Resource Managers
 - Project and Resource Administrators
 - Team Members (Resources)
 - Project/Activity Managers
 - Portfolio Managers
 - **Automation (Tools as a role)**
- Activities Involved
 - What activities
 - Input/output
 - Where and how the activity is supported

Capturing Personas - An example Approach



Objectives from using Personas?

- Discuss example workflow model
 - pros/cons
 - Level of detail needed
 - Scope of each workflow document
 - ...
- Other example approaches to share from class?



Objectives from using Personas?

- Examples
 - Improve the User Experience
 - See what they need to see
 - Do what they need to do
 - Make what they do as easy as possible while achieve objectives
 - Ensure Governance is Maintained
 - Others?...



How to apply Personas for CA PPM Configuration?

- Input to tools design/configuration
 - Automated Workflows
 - Approvals, Action Items, Notifications, ...
 - Action/drop downs visibility and use
 - Task/Activity based supporting views
 - Quick links to get to common views quicker
 - Visibility of Tabs or view by Persona
 - Auto populate data for new instances
 - Use Page filters for multi portlet pages in support of objectives of use
 - Security/Access design
 - Group Security
 - Role-Based Security
 - Securing access to specific fields
 - Ease of Navigation
 - Navigation and visibility of pages, tabs, menu items
- Input to User Training
- Input to Operating procedures, quick help guides, ...
- Other examples?



Wrap Up

- Did we achieve our objectives today?
 - What is a Persona?
 - How do I capture and record personas?
 - What are my Objectives/expected outcomes from applying Personas?
 - How do I apply Personas in CA PPM?
- Important note
 - Don't forget to include CA PPM Administration as a Objective/Activity to support and do the workflows for!

Bottom line – there is no one way to approach the use of Personas

BUT – Using Personas is a key tool for soliciting CA PPM Configuration Requirements to Ensure the Business Value Propositions are achieved and the user experience is the best it can be.

Questions?



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Let Rego be your guide.

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