Adoption and Perception | Strategies

Your Guides: Jacob Cancelliere and Rob Greca

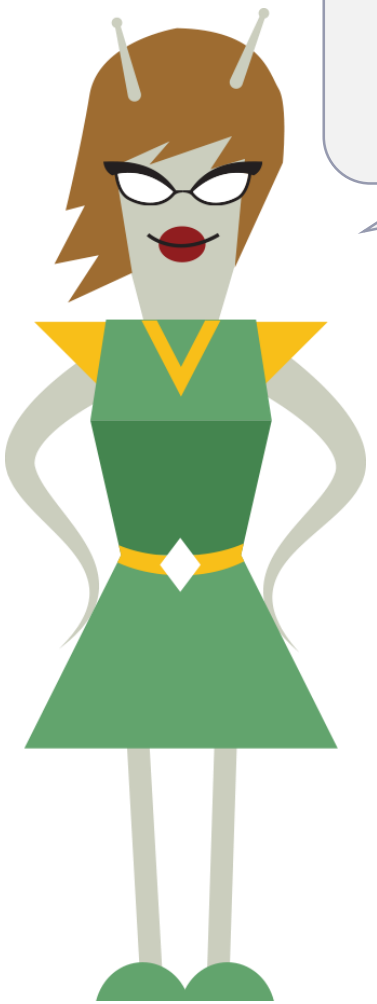
Introductions

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

Agenda

- 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
- Q&A

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 Had to Defend the value of you PPM SW in the last year
2. Data is frequently missing, or is not updated on time
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

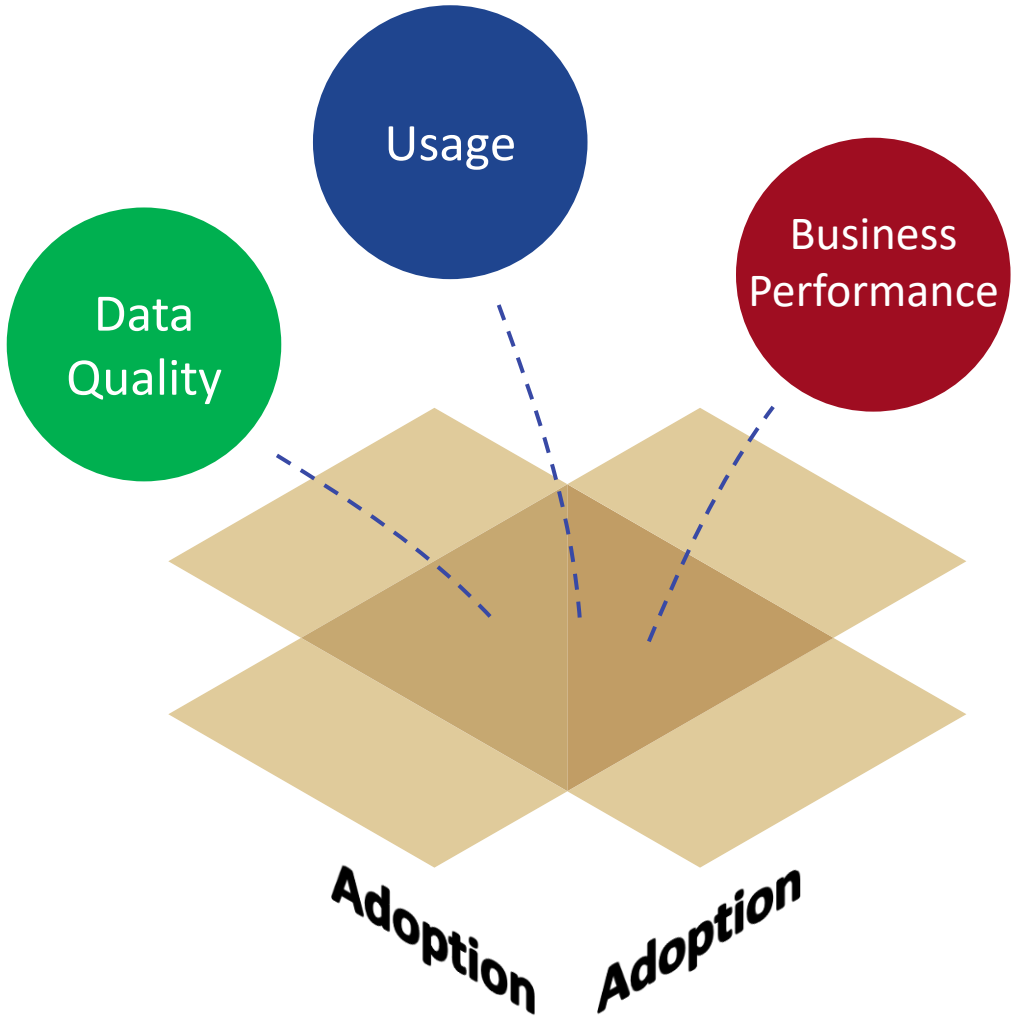
Open Mic

- Are you struggling with Adoption of Clarity?
- Do you see some clear signs of poor adoption?

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
  - User Satisfaction



Where Is Your Organization?

Problems that Cause Low Value Perception

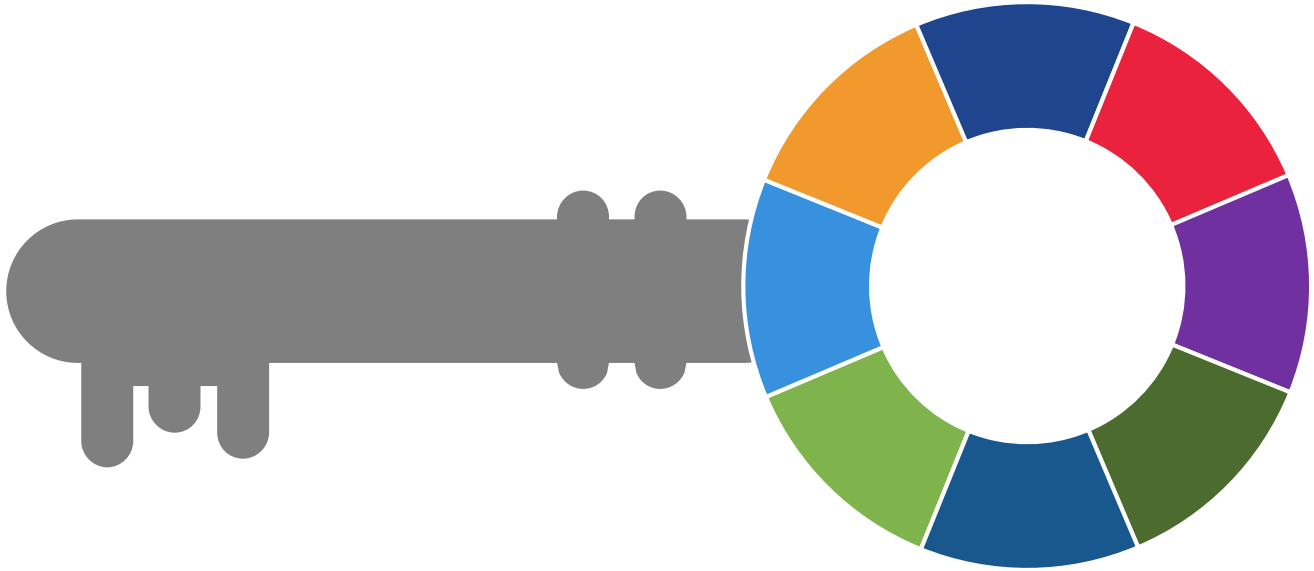
- Spreadsheet Rich Environment Driving Decisions
- Users See No Value in CA PPM
- Executives Never Log Into CA PPM
- CA PPM is slow and upgrades are expensive/painful

- CA PPM Data Drives Decisions
- Meetings driven from live views
- Users Believe CA PPM Helps them Perform Their Job
- Executives Use CA PPM Constantly
- Disruption Free Releases/Upgrades

Where Do You Fit ?

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.

Open Mic

- What level is adoption at in your organization?
- Does upper management support CA PPM?
  - Is your implementation push or pull? (bottom up or top down)

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

Performance

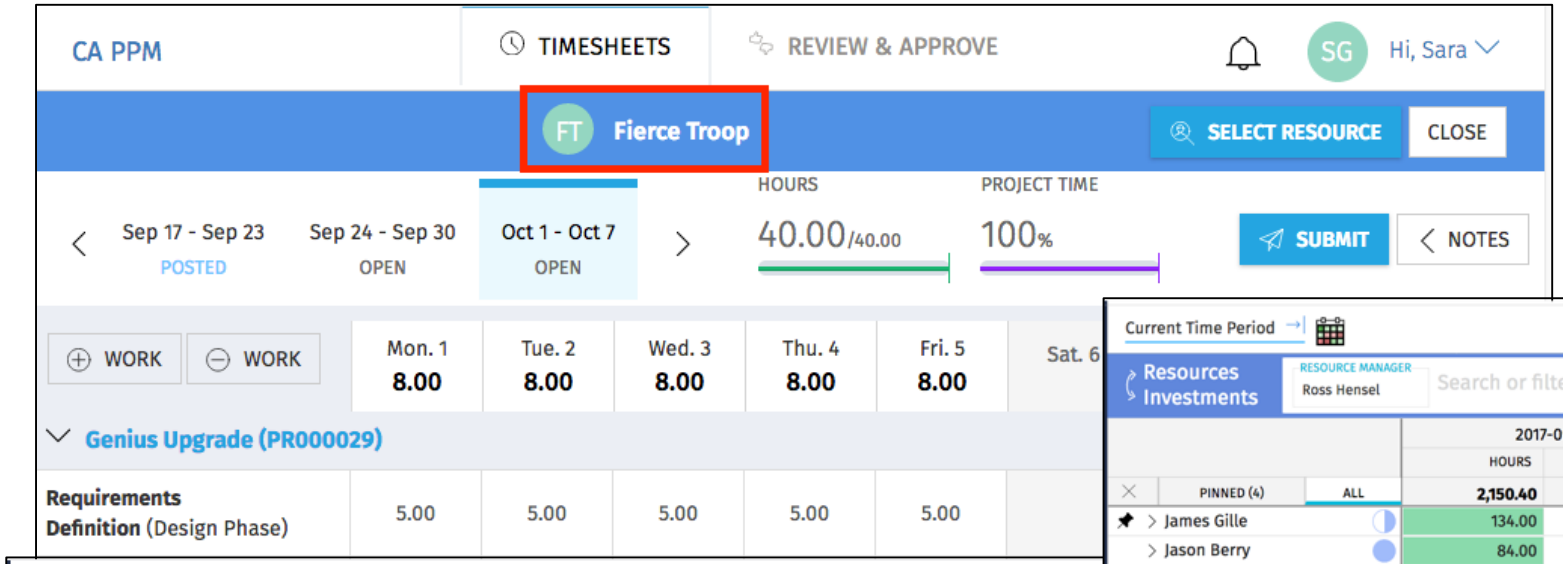
Clever ways to reduce clicks to sub objects, One click banner!

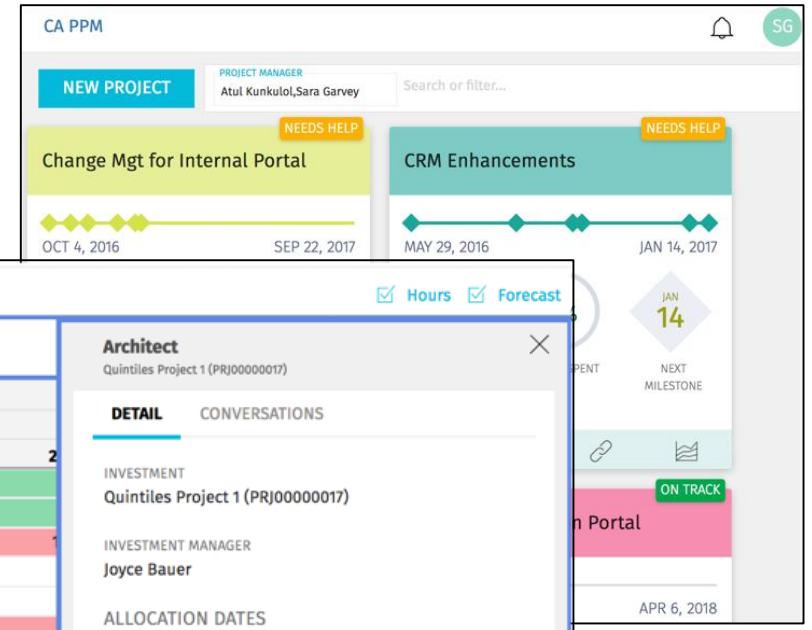
Invest in Training / Mentoring

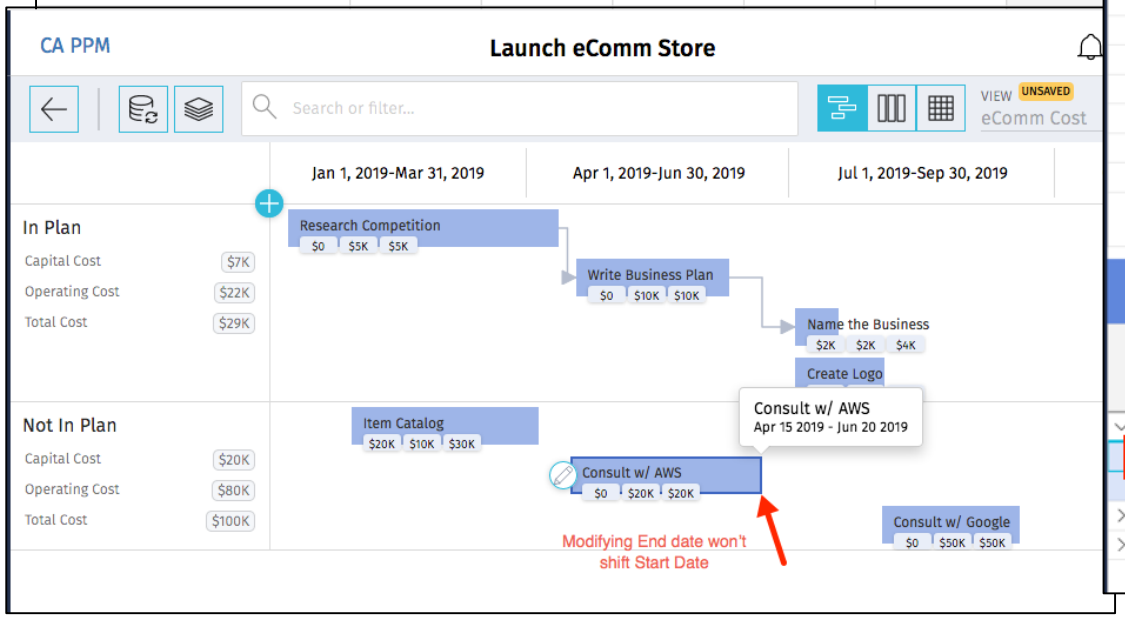
I wish I could remember how to set the capitalization percentage. I never remember how to do that, and I don't know where to look or who to call.

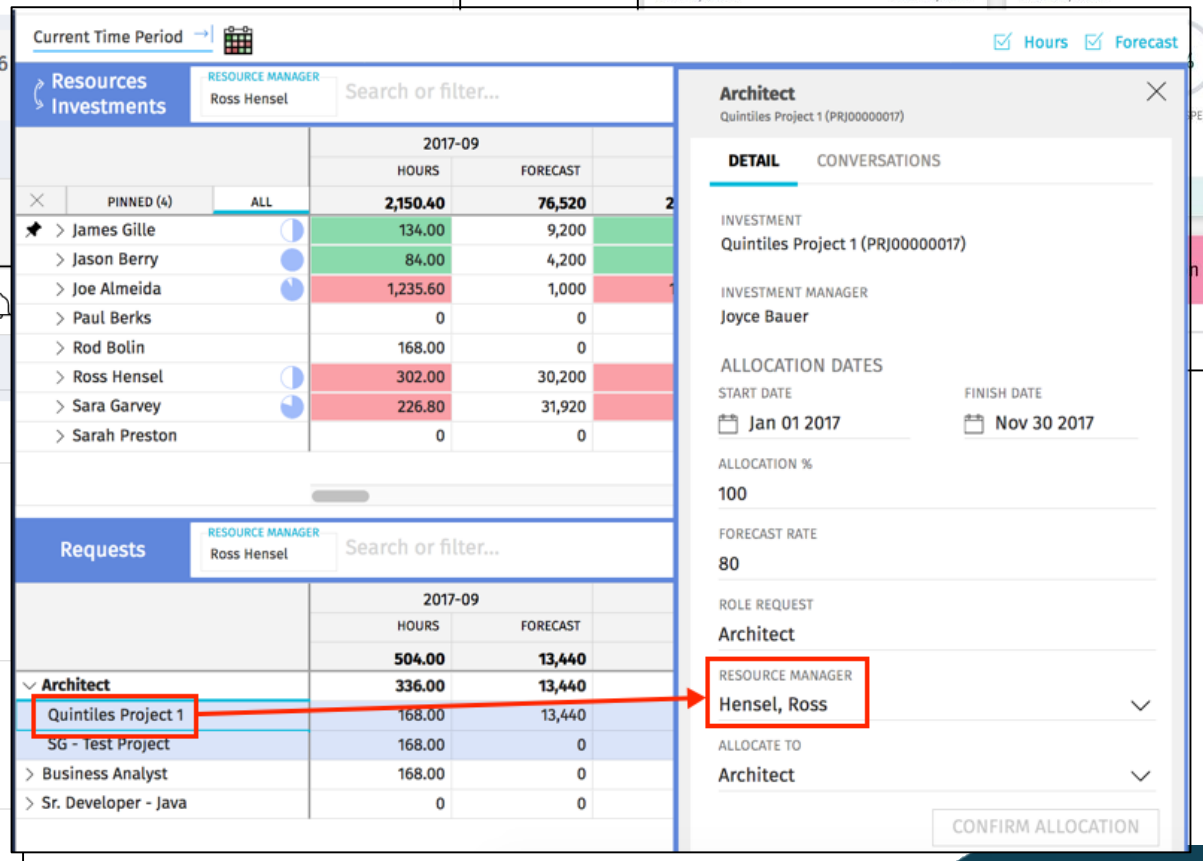
- Hands-On Training is the BEST
  - What is left behind after training (Quick Reference Guides, Manuals, Presentations, CAPA) will not influence adoption – the time spent performing exercises with an instructor/mentor will
- Train Internal SMEs
  - Ensure you have internal SMEs that are invested in the 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.

Optimal Tool Configuration – New UX



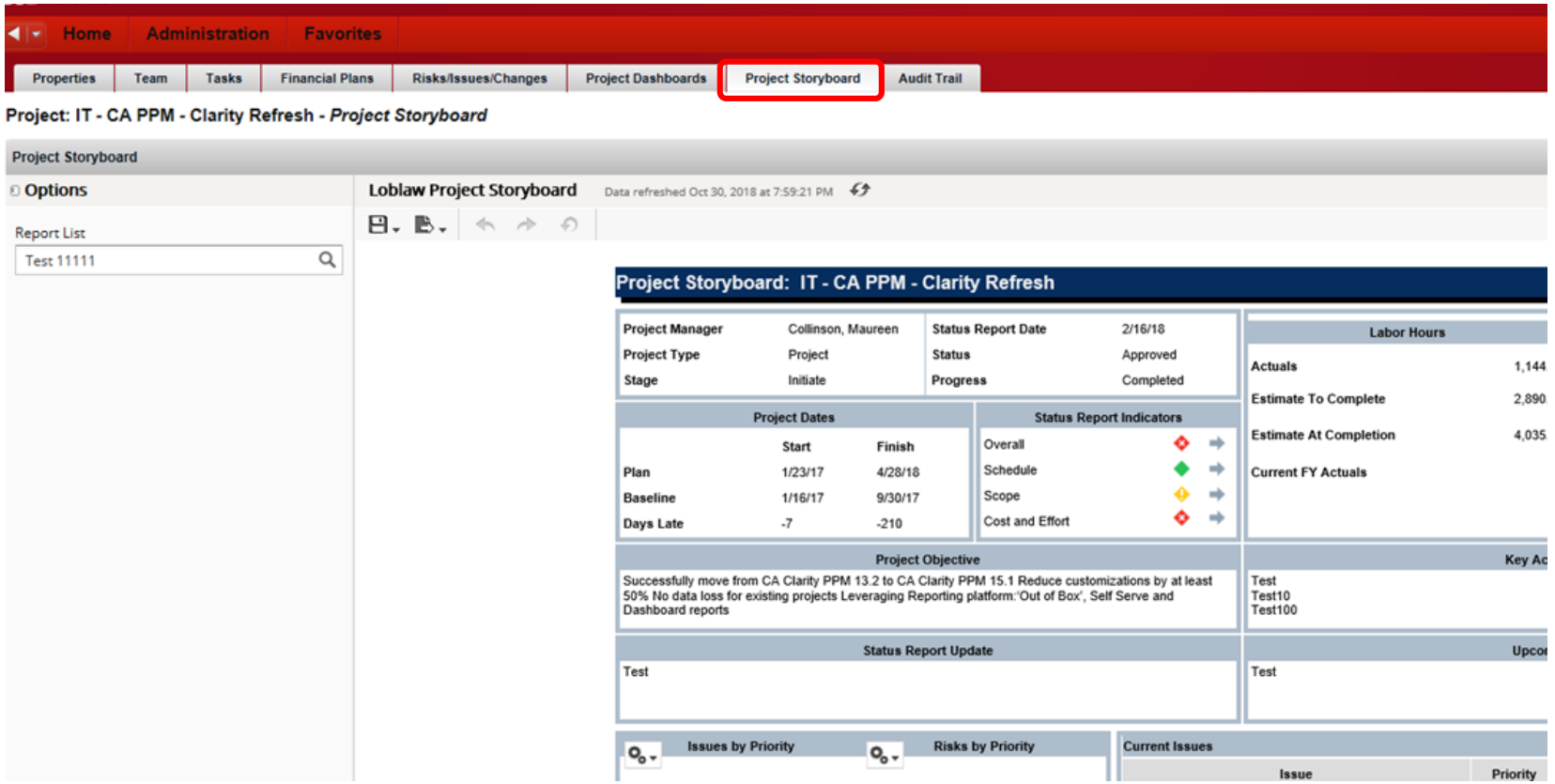






Tool Configuration - Classic

Less Tabs, Less Fields, Less Pages, and add Reporting within the Project!!



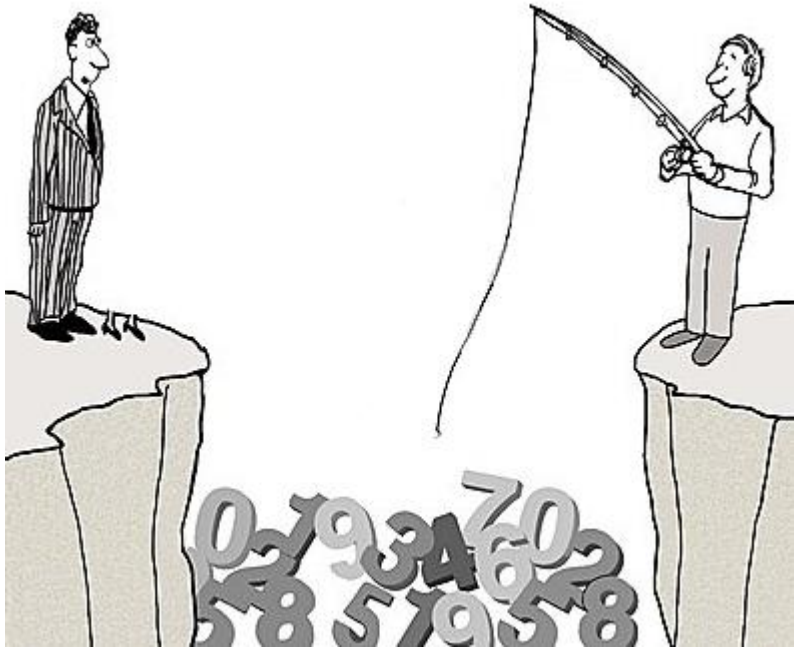
Optimal Tool Configuration - Classic

- 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
    - Actions
- One Click to Value – Drill on 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



Questions?

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- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
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- Click on **I agree** and **Submit**

Let us know how we can improve!
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Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com