Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

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
- Q&A

Introduction

Do you need to increase user adoption?

Participate in this interactive discussion on the best practices for energizing your user base and increasing CA PPM value perception.

The Perception Of Adoption…

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
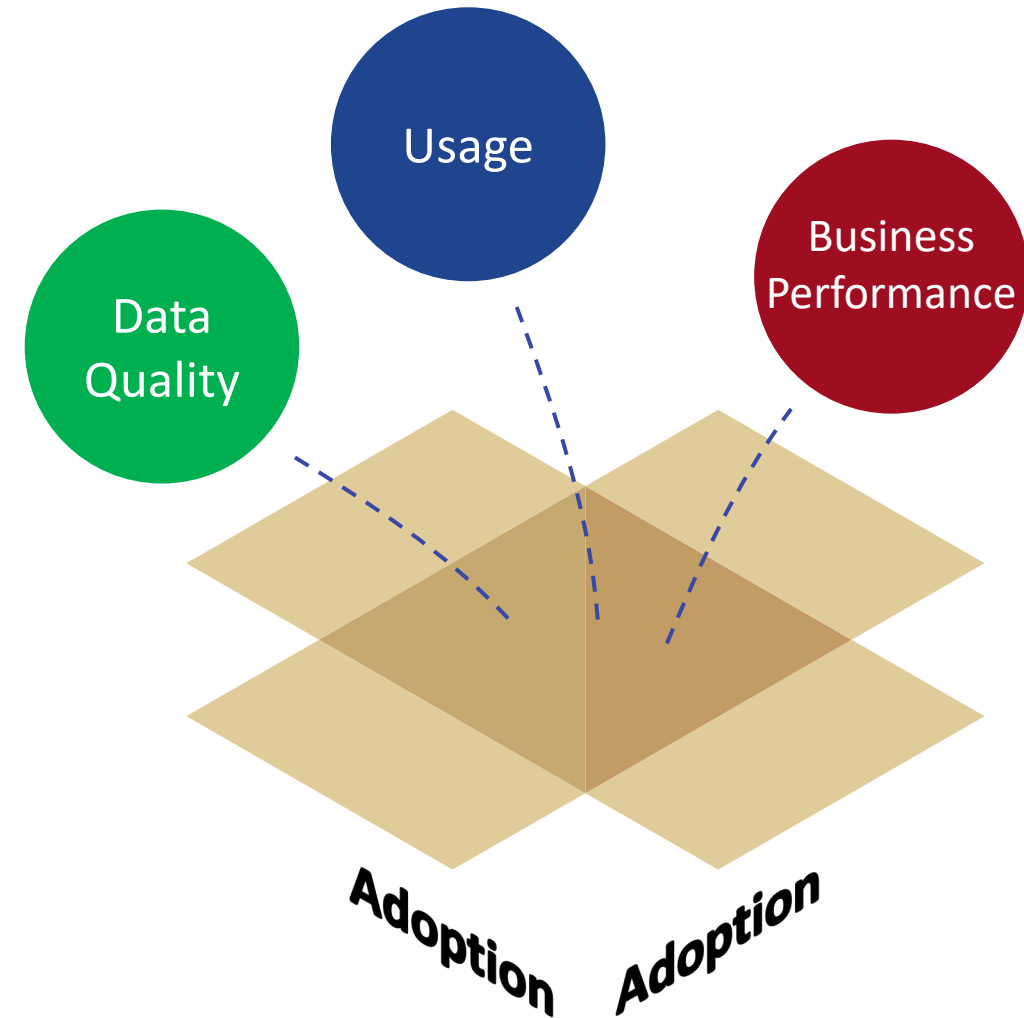
the top 5

Open Mic

- What is adoption to you?
- How do you fell CA PPM has been adopted in your organization?

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?

Fair

Good

Low Value Perception

Great

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
- Users Believe CA PPM Helps them Perform Their Job
- Executives Use CA PPM Constantly
- Disruption Free Releases/Upgrades
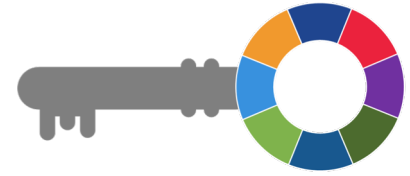
Where Do You Fit ?

Keys to Success

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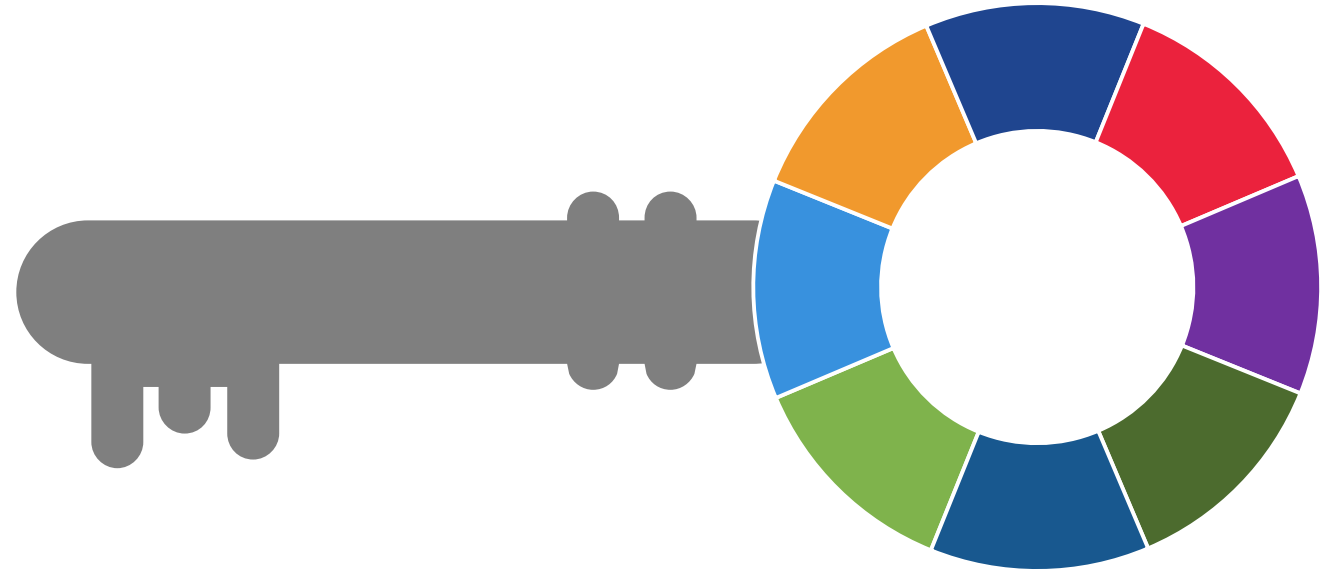
Executive Support

- 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?

- Has everyone bought in?

- Does upper management support CA PPM?

Process and Basic Training
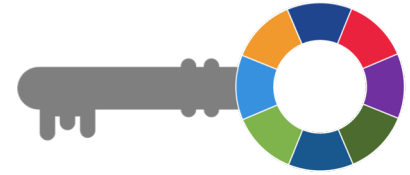
- Establish Best Practice Process – Before a Tool
  - Do not automate poor processes
  - Use automation of a function as an opportunity to
    - Leverage best practices
    - Take a fresh look at how things are done today

- 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.
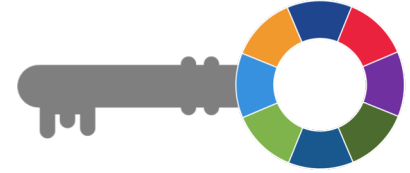
- Be Aware of the Problems You are Solving – You Must have a value proposition for End Users

- 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.
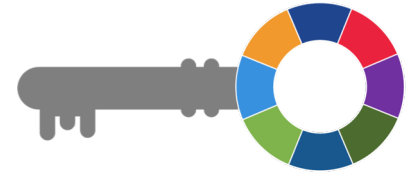
- People relate response time to usability

- "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.
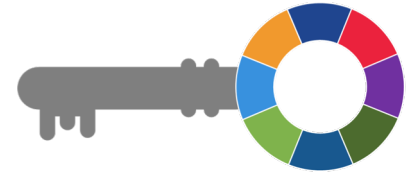
- Hands-On Training is the BEST
  - What is left behind after training (Quick Reference Guides, Manuals, Presentations, CAPA) will not influence adoption – the time spent performing exercises with an instructor/mentor will

- 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
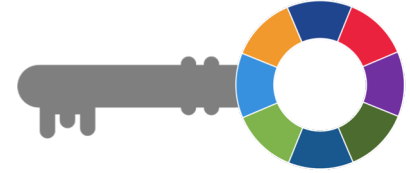 - Readily available training material, guides, videos, etc.

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.
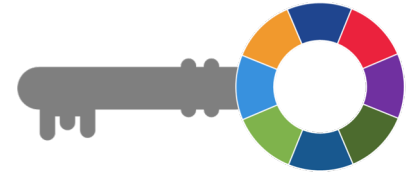
- New UX
- CA has TONs of stuff
  - Often overwhelming
  - Get rid of stuff
  - Do not be afraid

- Remove Things Not Used: Fields, Tabs, Portlets

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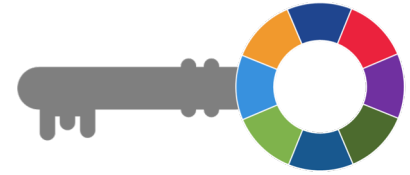
- We want people to use CA PPM to manage by exception and make it easy to find those exceptions instead of having to fish them out of the system
- Email notifications
  - Late Timesheet
  - Late Status
  - Notify of Mixed booking
- Exception portlets to tell them what they should do – use portlets to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

Cool Reporting

Is this data accurate? None of the data matches.

I have to go to too many places to pull it all together.

I can't find what I need

This data is old.

Why can't the data predict when I may have a problem before it is too late.

- Data must be meaningful

- Have views that recognize the person logged in to provide relevant data

- Group the portlets/views together within pages with multiple tabs all with the same types of portlets/views

- Create dashboard pages with summary portlets

- Use graphs as much as possible to convey points

Open Mic

- What have you done to increase adoption of CA PPM?

- How would you use some of the strategic presented here?

- What are the major complaints about adoption?

Questions?

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- Date Started = **Today's Date**
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