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Maturing TBM: Apptio Adoption and Engagement Best Practices

Your Guides:

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Agenda

- The Perception of Apptio

- The Perception of Adoption

- Driving Adoption

- Measuring Success

Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

The Perception of Apptio

What is Apptio? We asked TBM Professionals

The Preferred tool for Technology Business Management

Helps Planning, Costing and Recovering IT Services

Aggregates Financial, Human Resources, Infrastructure and Operational Data around IT Data

We asked other stakeholders: What is Apptio?

- IT Finance Tool
- IT Costing Tool
- IT Accounting Tool
- IT Budgeting and Forecasting Tool
- IT Billing Tool
- Another glorified BI tool
- I can build this in Excel
- Extra work

Open Mic

- What is the perception of Apptio in your organization?

- How have you tried (successfully or not) to change the perception?

Your Definition Vs their Definitions

- Do they align?

Bottom Line

Your Tool – Your Definition – Your Brand – Your Show!
You work with them to agree on your definition

The Perception Of Adoption...

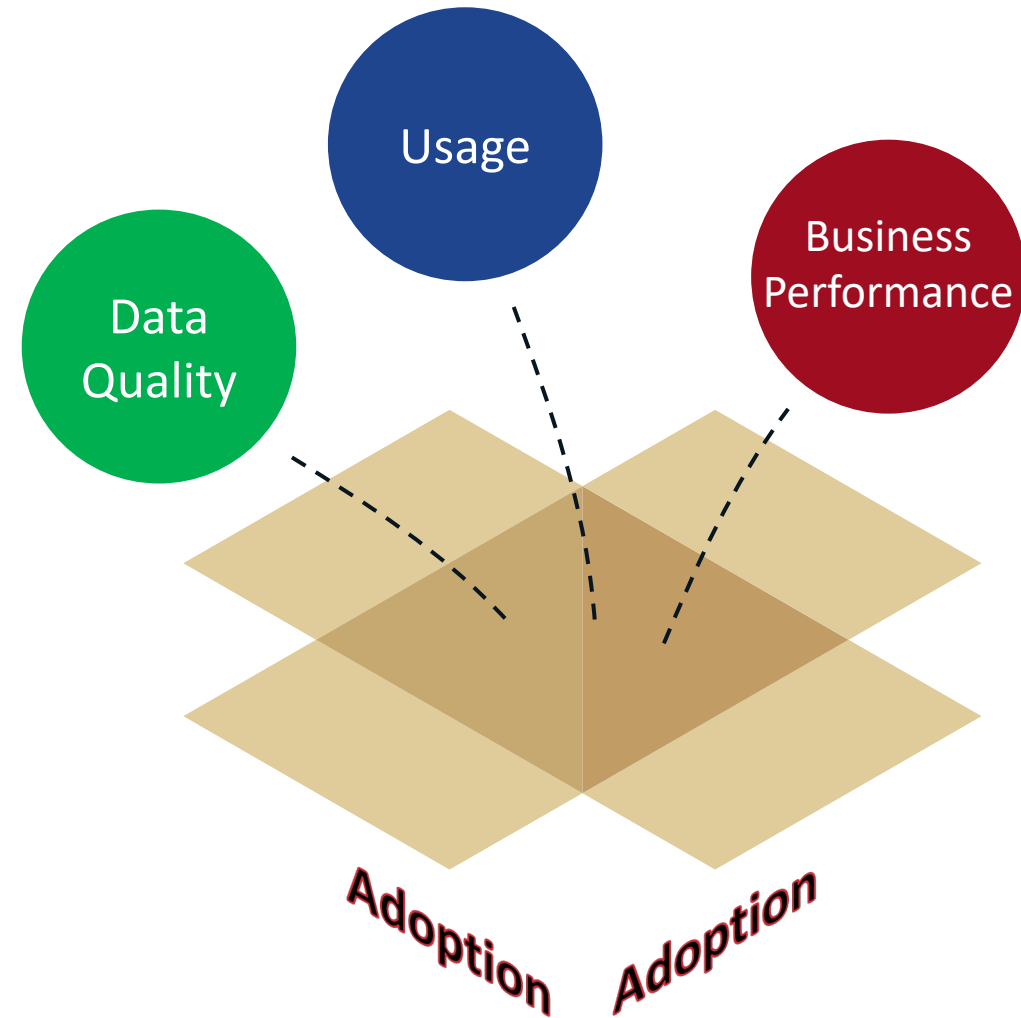# Top 5 Signs That You May Have Low/Poor Adoption

1 You Have Looked at the Possibility of Replacing Apptio 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

What is Adoption?

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

- Good Adoption means:

  - End users leverage the TBM processes and tools you provide

  - End users comply fully with TBM processes, entering and maintaining all required data

  - End users understand the TBM 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

Usage

Data Quality

Business Performance

Adoption   Adoption

Where Is Your Organization?

Problems that Cause Low Value Perception

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

Low Value Perception

Fair

Good

Great

- Apptio Data Drives Decisions
- Users Believe Apptio Helps them Perform Their Job
- Executives Use Apptio Constantly
- Disruption Free Releases/Upgrades

Where Do You Fit ?

Open Mic

- What well has Apptio been adopted within your organization?

- What factors do you think have contributed to this?

Driving Adoption

3 Steps to Drive Adoption

- A **Stakeholder** is "*A person such as an employee or customer who is involved with an organization and therefore has responsibilities towards it and an interest in its success*."

- A thorough understanding of your stakeholders enables you to effectively plan the change execution.

Identify your Stakeholders

Categorize your Stakeholders

Engage your Stakeholders

Influencer
Drive the Initiative

Supporter
Supports the Initiative

Blocker
Opposes the Initiative

Empower – Place decision-making in their hands

Collaborate – Partner in the development of solutions

Involve – Work together to ensure concerns understood

Consult – Obtain feedback

Inform – Provide information

Stakeholder Engagement Plan

A Stakeholder Engagement Plan is the next step in defining the most appropriate engagement strategy for each stakeholder. An engagement plan is typically formulated based on the identified stakeholders engagement type.

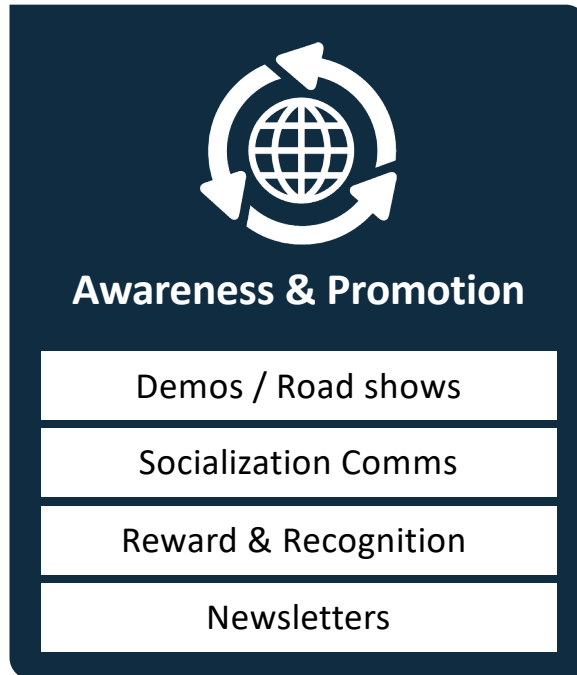|	
EMPOWER	Typically the executive sponsor, steering committee and advisory group members engaged through a formal cadence.
COLLABORATE	Shared accountability and responsibility, driving joint decisions and actions.
INVOLVE	Ad-hoc engagements, designed to collaborate, communicate or deliver tasks within a specific area or activity.
CONSULT	Limited engagement, however are expected to provide input and feedback should it be sought after.
INFORM	One way engagement, broadcasting information e.g. email, newsletters, etc. or made available for stakeholders to choose whether to engage e.g. intranet

Stakeholder
Engagement Plan

3 Elements of TBM User Adoption

- There are 3 key elements that the TBM Practice should utilise to drive user adoption.
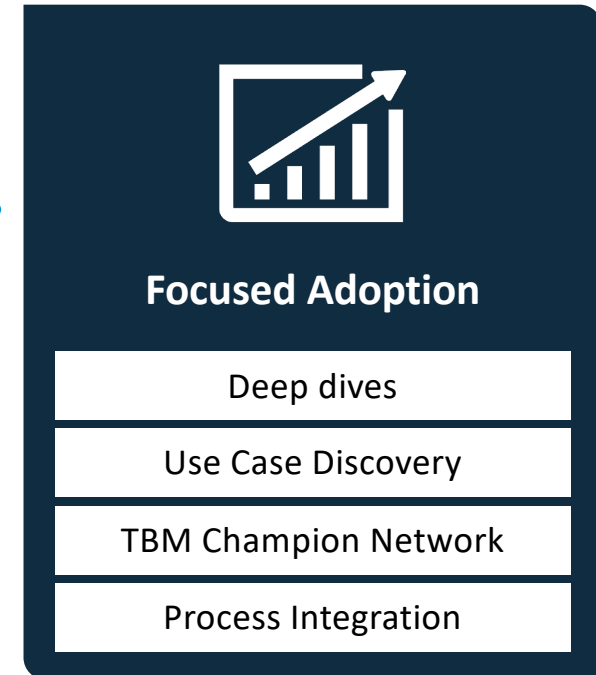
Awareness: Identify outcomes and priorities of interest

Education: Identify the preferred method of learning

Adoption: Identify the value drivers

Awareness & Promotion

| Demos / Road shows |
| Socialization Comms |
| Reward & Recognition |
| Newsletters |

Training & Education

| Classroom Training |
| Lunch & Learn |
| Online Based Training |
| "How To" Guides |

Focused Adoption

| Deep dives |
| Use Case Discovery |
| TBM Champion Network |
| Process Integration |

Communications Strategy

The communication strategy consists of who you are communicating to, the key messages, communication channels, as well as a timeline for how the change will be incrementally communicated

Develop a Communication Plan

- Set expectations on what they will be getting, when, and how
- Set expectations on the benefits and value
- Set expectations on the data quality and keep the focus on how this is better than what they have today

Drive the Communication Plan

- Leverage a top down communication approach (e.g. Exec Sponsor)
- Regular updates to target consumers
- Highlight the value, focus on a different benefit with each communication
- Highlight insights gained during implementations

Examples of communication channels:

- Sound bites and video clips
- Roadshows
- Lunch and Learn, brown bag sessions
- User Guides, Tips & Tricks, FAQs
- QRGs and cheat sheets
- Monthly newsletters

Rewards and Recognition

Where there is change, there is risk and where there is risk, there should be reward. A great initiative to increase adoption and to promote success is through a formal Rewards & Recognition program. Providing an incentive to encourage usage not only increases adoption but also accelerates the organization's ability to extract value from the TBM investment.

Two of the easiest and most effective forms of recognition is often a simple "Thank You" and / or Peer Recognition...

Keys to a successful Rewards & Recognition Program:

- Identify behaviors that should be rewarded
- Tie recognition to achieving milestones, i.e. target based approach
- Continuous communication; show people the distance they have come
- Keep it fresh – Ongoing identification of new performance measures
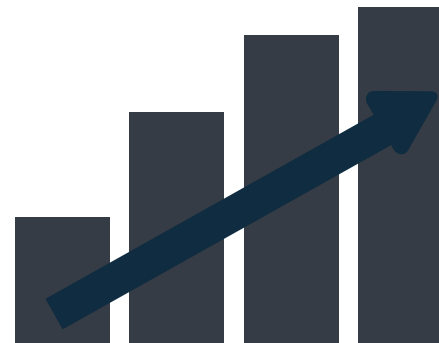
- *Early adopter incentives*
- *"You made the change"*
- *TBM "hero" of the quarter*
- *Good news / Success stories*
- *Recognize individuals and / or teams at CIO / CFO audiences*

Training Plan

A Training Plan's primary objective is to determine how to effectively develop the knowledge and skills of stakeholders so they can perform their roles efficiently and effectively once the change has been executed. It must address not only technical training, but also the processes to ensure there is an understanding of how the new technology fits within their job responsibilities.

A Training Plan consists of the following key elements:

Training Goals and Needs Analysis

- Define what the training will be designed to achieve

- Conduct a Training Needs Analysis (TNA) to understand the training needs of the various stakeholder groups

Training Approach & Content

- Formulate role or persona based training approach, it is not a "one size fits all"

- Identify and train based on use cases suited to the training audience to bring the training to life

- Focus on the "why", the "so what" and most importantly "what's in it for me" not just the "how"

- Ensure there is a call to action to build change momentum and adoption

Training Delivery & Logistics

- Organize training logistics in a timely manner (room and stakeholder availability)

- Trainer requirements (quantity, skills, timing)

- Development and approval of content – materials, online training, communications

- Track and report training effectiveness – completion of actions, training attendance rates
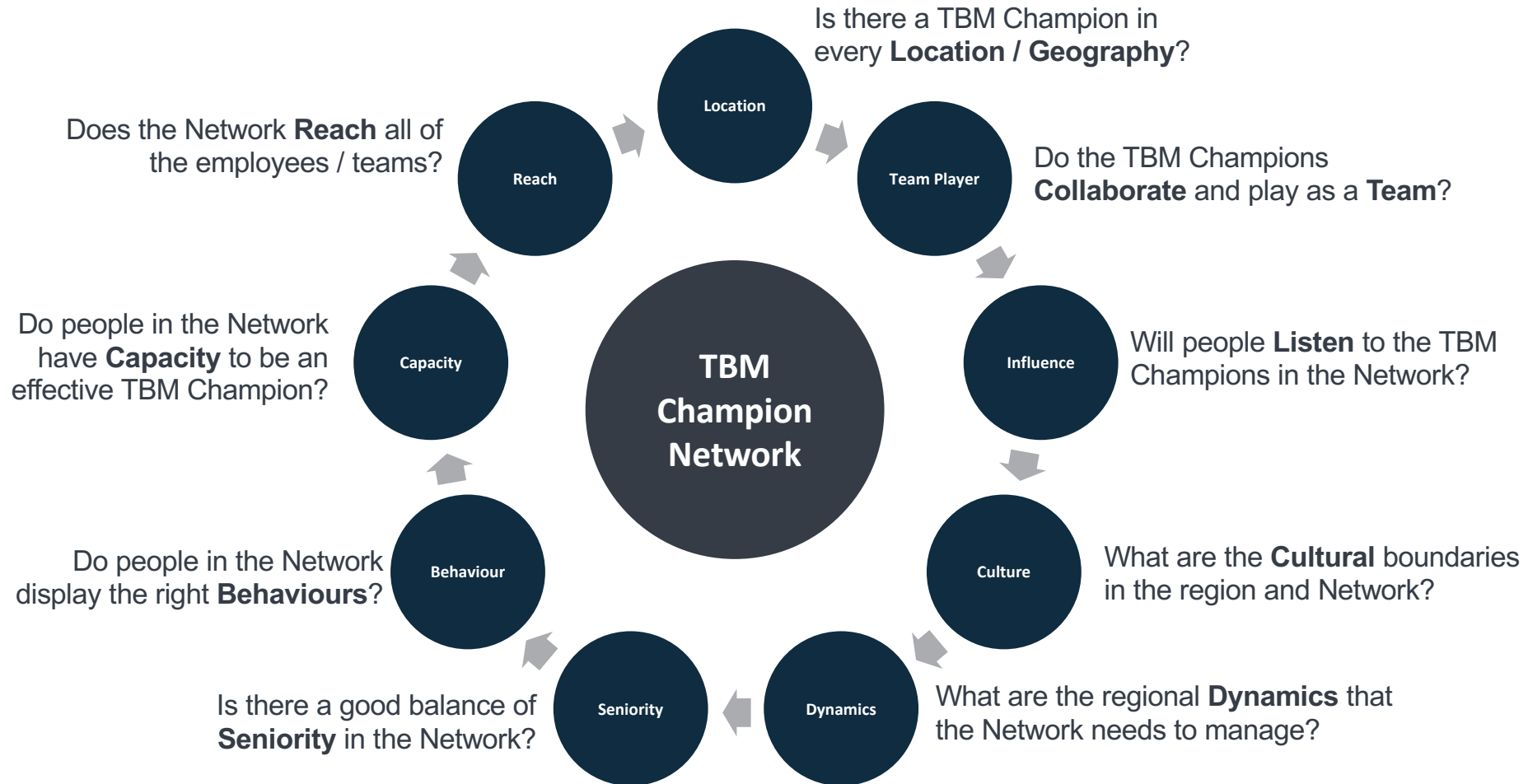
Champion Network

TBM Champions are critical to building and sustaining trust and communications across your stakeholder communities. It is also a very cost and resource effective way to reach and maintain interest in your stakeholders.

Invest the time and effort to establish and upskill a TBM Champion network and leverage them to:

- Role model new behaviors and lead peers through change

- Actively participate in change champion meetings and project related events to communicate messages and answer questions

- During conversations with employees impacted by change; listen, demonstrate empathy and help them to overcome resistance

- Listen for negative feedback, providing answers where appropriate to dispel them

- Support the facilitation of messaging being cascade to their respective groups

- Provide feedback to communications – does it pass the 'what's in it for me' test?

- Use them as "Subject Matter Experts" for their respective group when developing new changes

Establishing a TBM Champion Network

When establishing and selecting individuals for a TBM Champion network, consider:

Is there a TBM Champion in every **Location / Geography**?

Does the Network **Reach** all of the employees / teams?

Do the TBM Champions **Collaborate** and play as a **Team**?

Do people in the Network have **Capacity** to be an effective TBM Champion?

Will people **Listen** to the TBM Champions in the Network?

Do people in the Network display the right **Behaviours**?

What are the **Cultural** boundaries in the region and Network?

Is there a good balance of **Seniority** in the Network?

What are the regional **Dynamics** that the Network needs to manage?

Location

Reach

Team Player

Capacity

Influence

Behaviour

Culture

Seniority

Dynamics

TBM Champion Network

Open Mic

- What has worked in your organization to drive adoption?

- What hasn't worked?

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Send your stakeholders the relevant information they want from Apptio using tailored **email** templates

Step 1

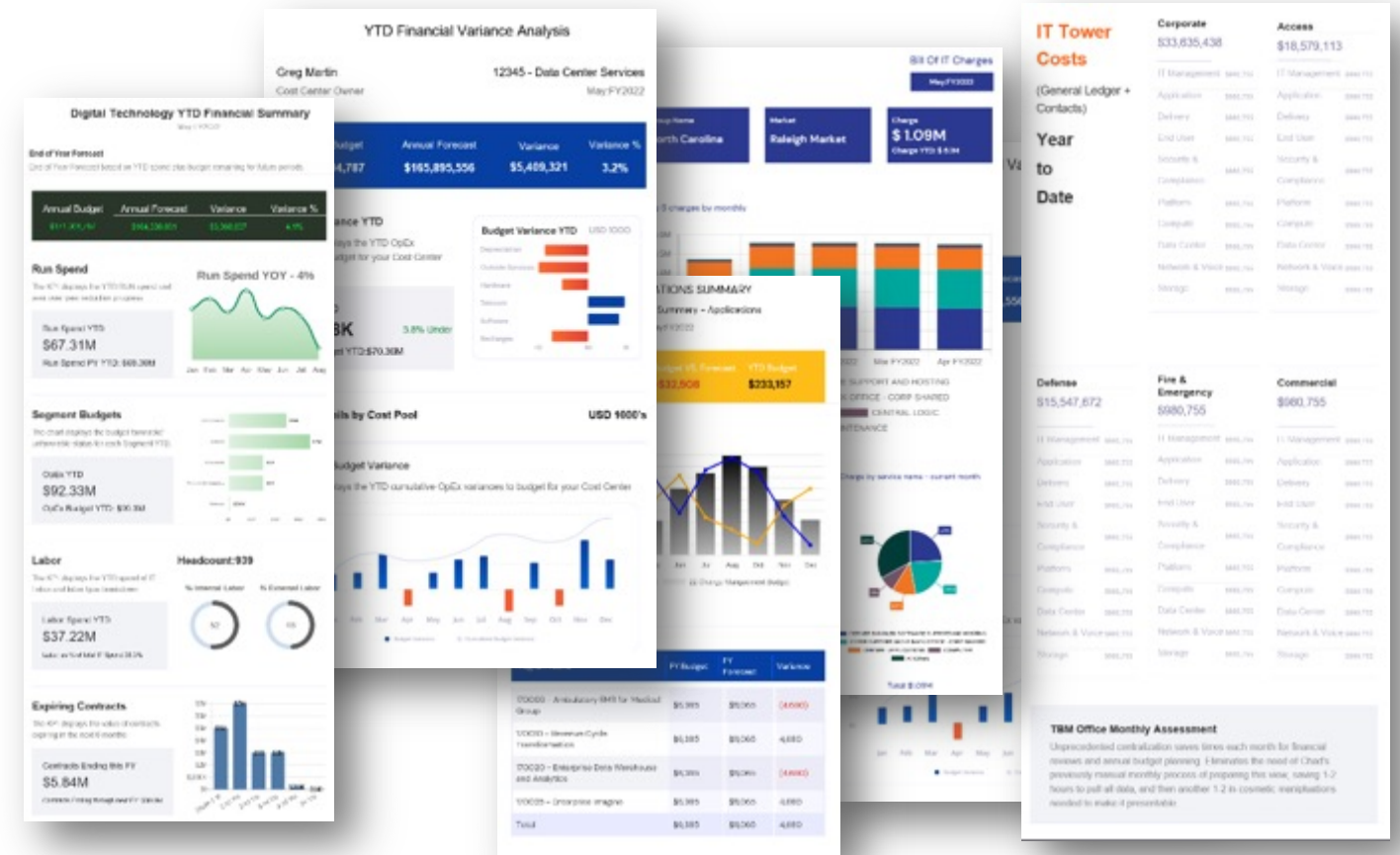Create a new report, or choose one from our library of templates to tailor

Step 2

Select groups of users to receive emails with data based on their roles

Step 3

Schedule reports for recurring and automated email delivery

Measuring Success

Open Mic

- Do you actively measure/track adoption?
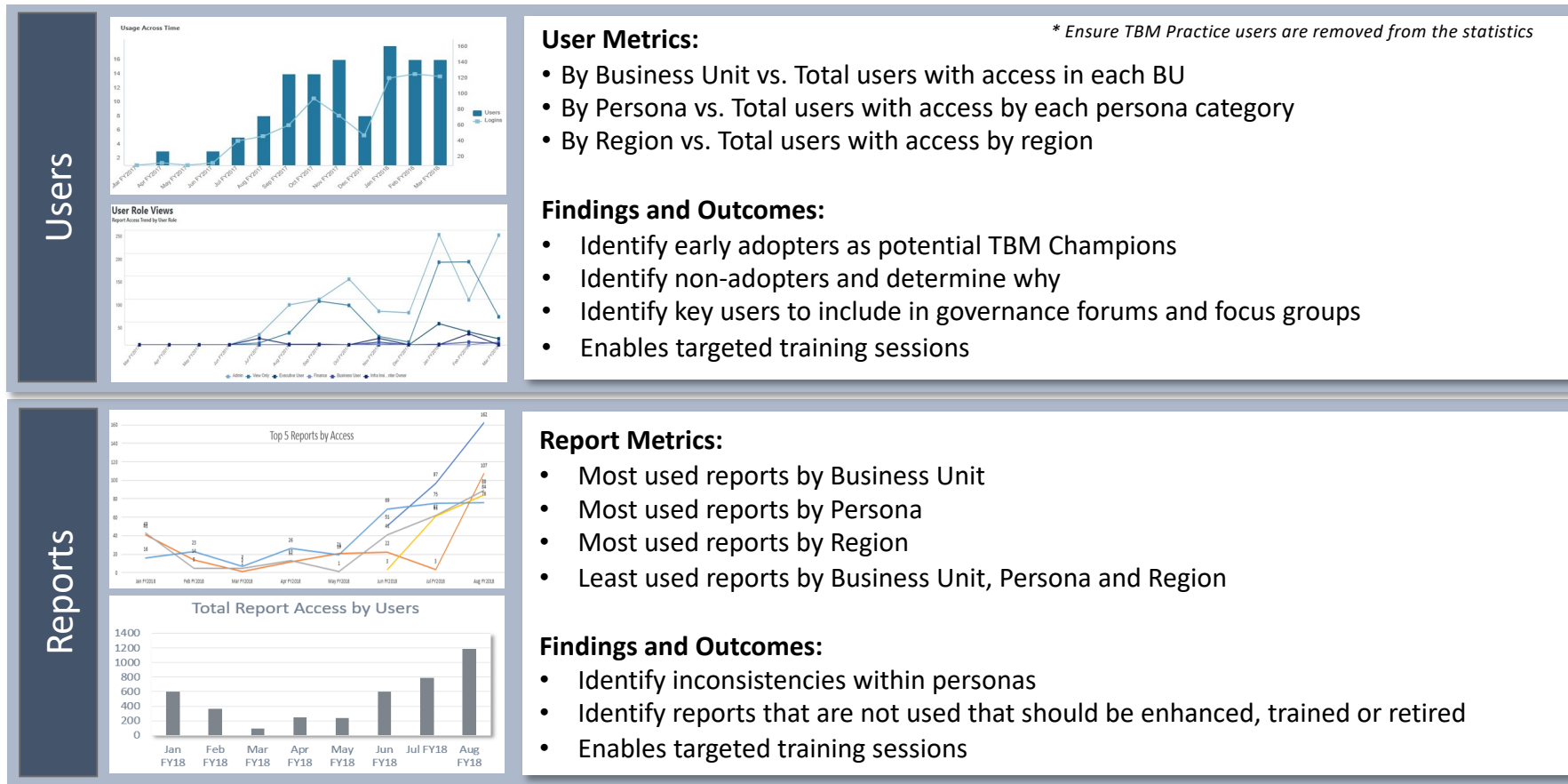- What metrics do you use?

Metrics and Measurement

Throughout the TBM journey, a structure should be put in place to measure the impact of the changes. By reporting on adoption, utilization and proficiency, it provides an excellent way to keep stakeholders informed of the ongoing health and success of the TBM program.

Direct Measures:	*What direct measures are used to solicit feedback from stakeholders? e.g. surveys, interviews & direct feedback*		
Indirect Measures:	**Adoption** How **quickly** employees / customers begin using or taking on new technology and processes	**Utilization** How **many** employees / customers are actually using the new technology and processes	**Proficiency** How **effective** employees / customers are when using the new technology and processes
Sample Measurement Sources:	❑ % utilization at key milestone dates ❑ # of business days from launch of initiative to target level of utilization	❑ # users have accessed the new system ❑ # of times a report is accessed ❑ % of employees participating the change solution	❑ # of errors or complaints in a process ❑ % reduction in time to perform key processes

Usage Metrics Scoreboard (Monthly)

Usage metrics are delivered through both User and Report statistics. This provides the TBM Practice a mechanism to present usage and adoption trends to the TBM Advisory Group, in order to drive Organizational Change and increase user adoption.

* Ensure TBM Practice users are removed from the statistics

User Metrics:
- By Business Unit vs. Total users with access in each BU
- By Persona vs. Total users with access by each persona category
- By Region vs. Total users with access by region

Findings and Outcomes:
- Identify early adopters as potential TBM Champions
- Identify non-adopters and determine why
- Identify key users to include in governance forums and focus groups
- Enables targeted training sessions

Report Metrics:
- Most used reports by Business Unit
- Most used reports by Persona
- Most used reports by Region
- Least used reports by Business Unit, Persona and Region

Findings and Outcomes:
- Identify inconsistencies within personas
- Identify reports that are not used that should be enhanced, trained or retired
- Enables targeted training sessions

Take a way

- The success of your TBM journey heavily relies on the level of adoption
- It's all about your stakeholders
- Adoption strategies must be adapted to stakeholder categories
- Communication, training, and inclusion are key drivers of adoption
- You need TBM champions
- Always measure progress to better position you for success

Questions?