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NASHVILLE · 2022

Adoption and Perception | Strategies

Your Guides:

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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...

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
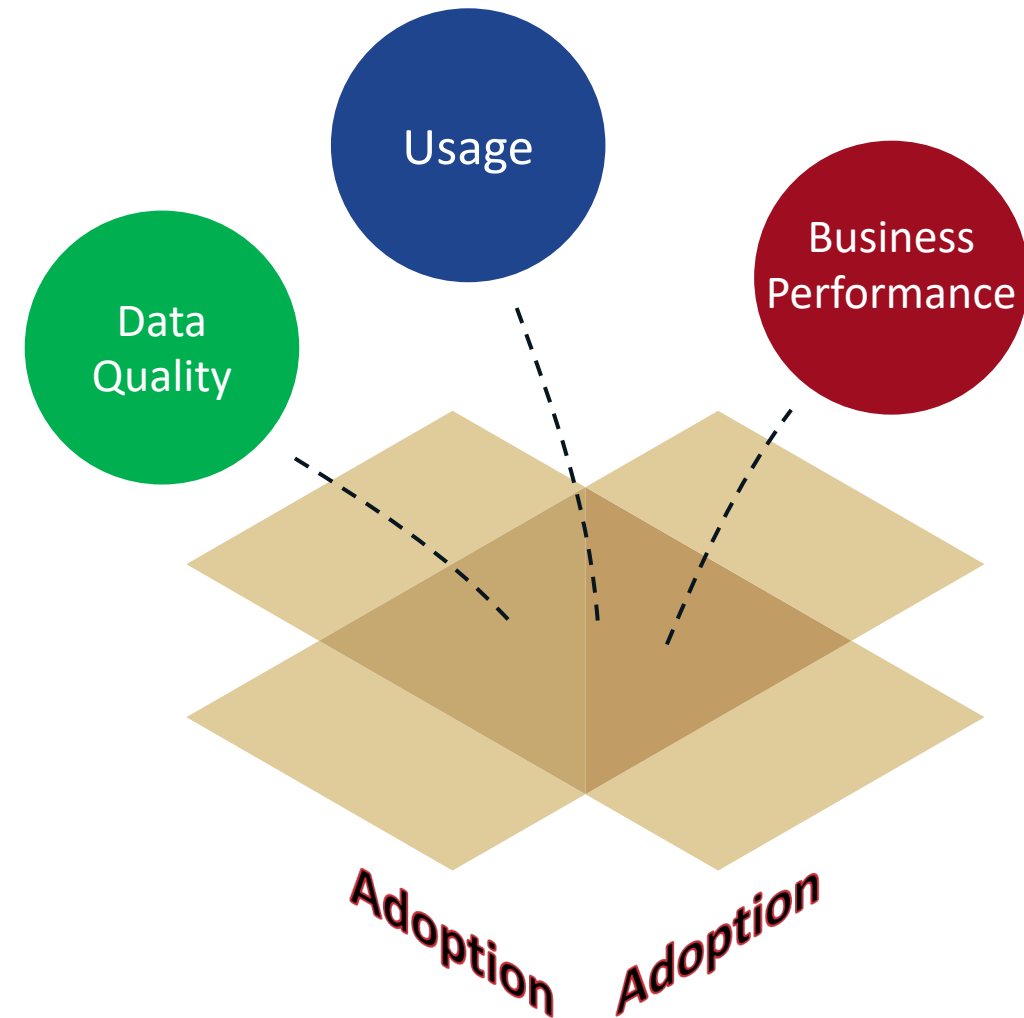
Open Mic

- Are you struggling with Adoption of Clarity?

- Do you see some clear signs of poor adoption?

- Do you have a formal Change Management role?

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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

Where Is Your Organization?

Problems that Cause Low Value Perception

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

Fair

Good

Low Value Perception

Great

- Clarity Data Drives Decisions
- Meetings driven from live views
- Users Believe Clarity Helps them Perform Their Job
- Executives Use Clarity 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
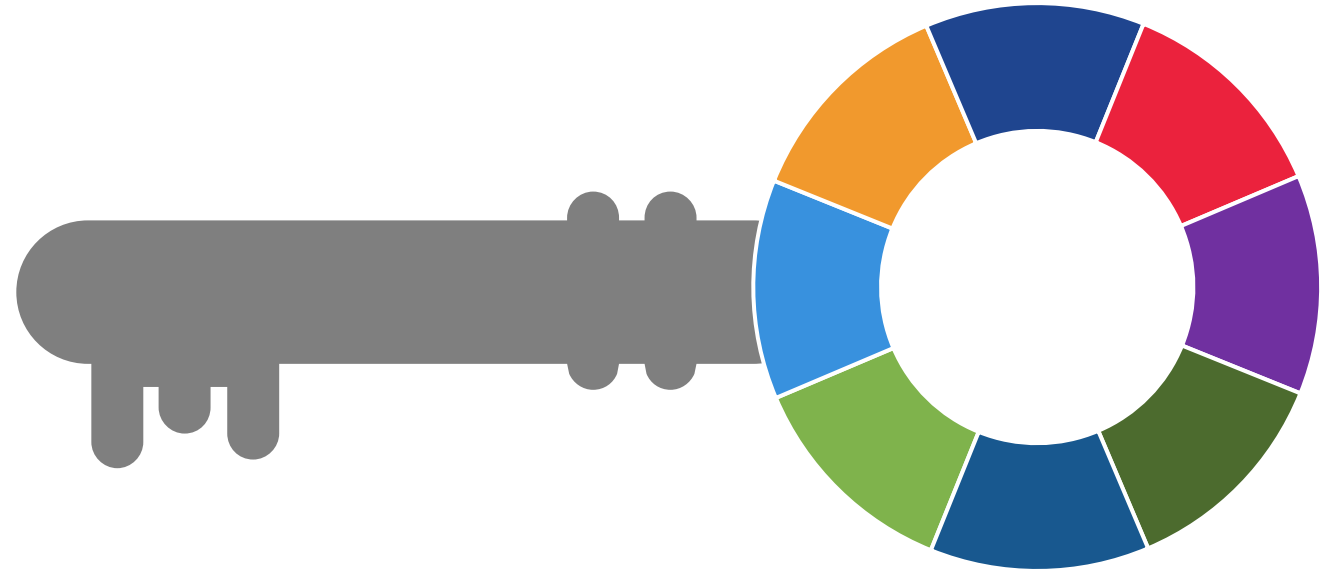
Executive Support
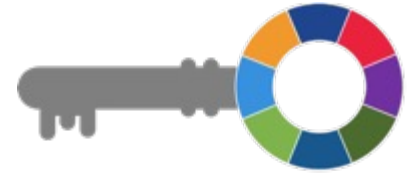
- Executives MUST Buy Into the Value Proposition – Big Picture

- Executives MUST be Vocal in Their Support

- Executives MUST use the data from Clarity

- 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 Clarity?
  - Is your implementation push or pull? (bottom up or top down)

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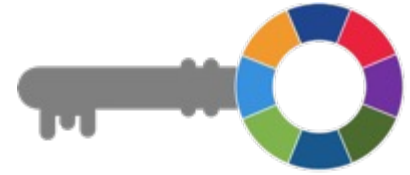
- Establish Best Practice Process – Before a Tool
  - Do not automate poor processes
  - Use automation of a function as an opportunity to
    - Leverage best practices
    - Take a fresh look at how things are done today

- Basic Project Management Training
  - Solve the problem of viewing Clarity 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.
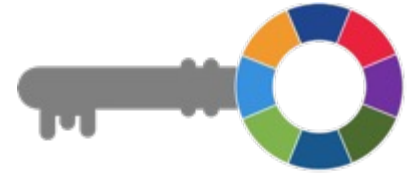
- Be Aware of the Problems You are Solving – You Must have a value proposition for End Users

- Publish a Vision for Clarity'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.
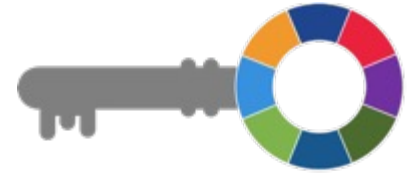
- People relate response time to usability

- "One Click to Value"

- Leverage "current user" in Views

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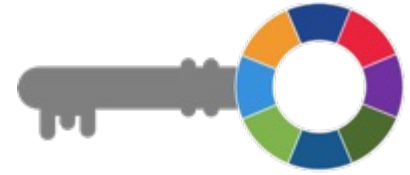
- Hands-On Training is the BEST
  - What is left behind after training (Quick Reference Guides, Manuals, Presentations, CAPA) will not influence adoption – the time spent performing exercises with an instructor/mentor will

- 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.

Optimal Tool Configuration

I review reports in meetings to make decisions, then I take notes and I have to go back later to update Clarity. It seems like a lot of work.
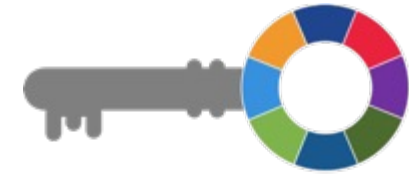
- Use the Modern UX to refresh ways of working
  - Move from a model where people track work offline and then enter it into Clarity later, to a model where Clarity **is** the agenda

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 Clarity 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
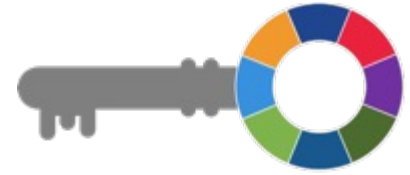
Leverage Rego's Action Item Responder
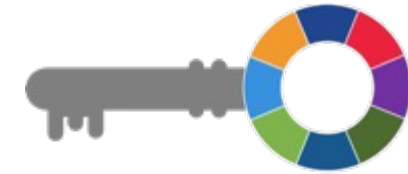
I wish I could respond to approval requests in my inbox or on my phone

Example Timesheet Submission

Example Idea Submission

Dear Leo Dsouza,

The **Idea** below has been submitted for your approval.
You may mark this Idea **Approved**, **Rejected** or **Incomplete** with the buttons below.
A new email will be generated where you can add notes. Click send on that email to submit.

Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	$30,000	$10,000	Infrastructure
Description							
In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.							
Objective							
If we keep the important stuff safe it will allow us to survive longer.							

Approve **Reject** **Incomplete**

If you have questions or comments regarding this notification, please contact CA PPM Support.

Thank you!
CA PPM Admin

Example Budget Submission
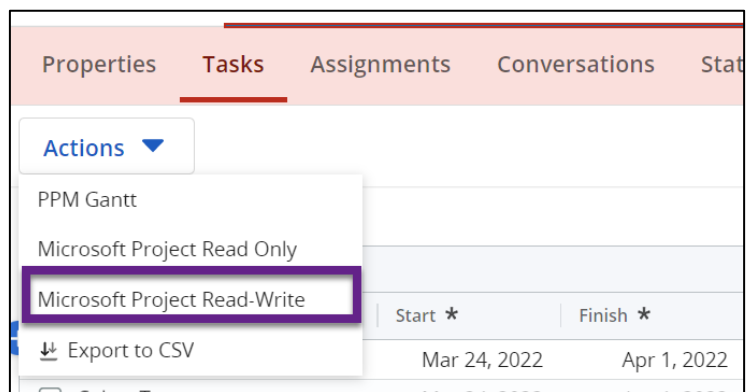
Enable Schedulers

I wish I could keep using my same scheduling tool.
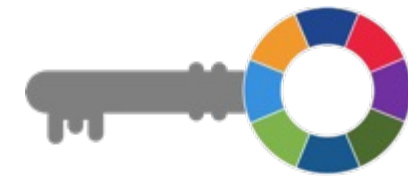
No need to reinvent the wheel. Connect Clarity with schedulers like Microsoft Project or Smartsheet

This project was initiated with 3 tasks.

All tasks were imported to the sheet on creation.

Rego Best Practices – Adoption Tips

- Plan a Hypercare period
  - Release team supports end users
  - Open office hours
  - Lunch and Learn
- Plan post-launch surveys
- Shadow end users and identify opportunities
- Enable Process SMEs
- Give localized SMEs limited Admin access - blueprints, views, etc
- Map functionality to users and use cases
- Be sure to operationalize changes
  - Communicate Standards
  - Communicate Timing
  - Process SMEs provide support

Questions?

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Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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