regoUniversity

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Staying Connected to Users

Your Guides:

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Agenda

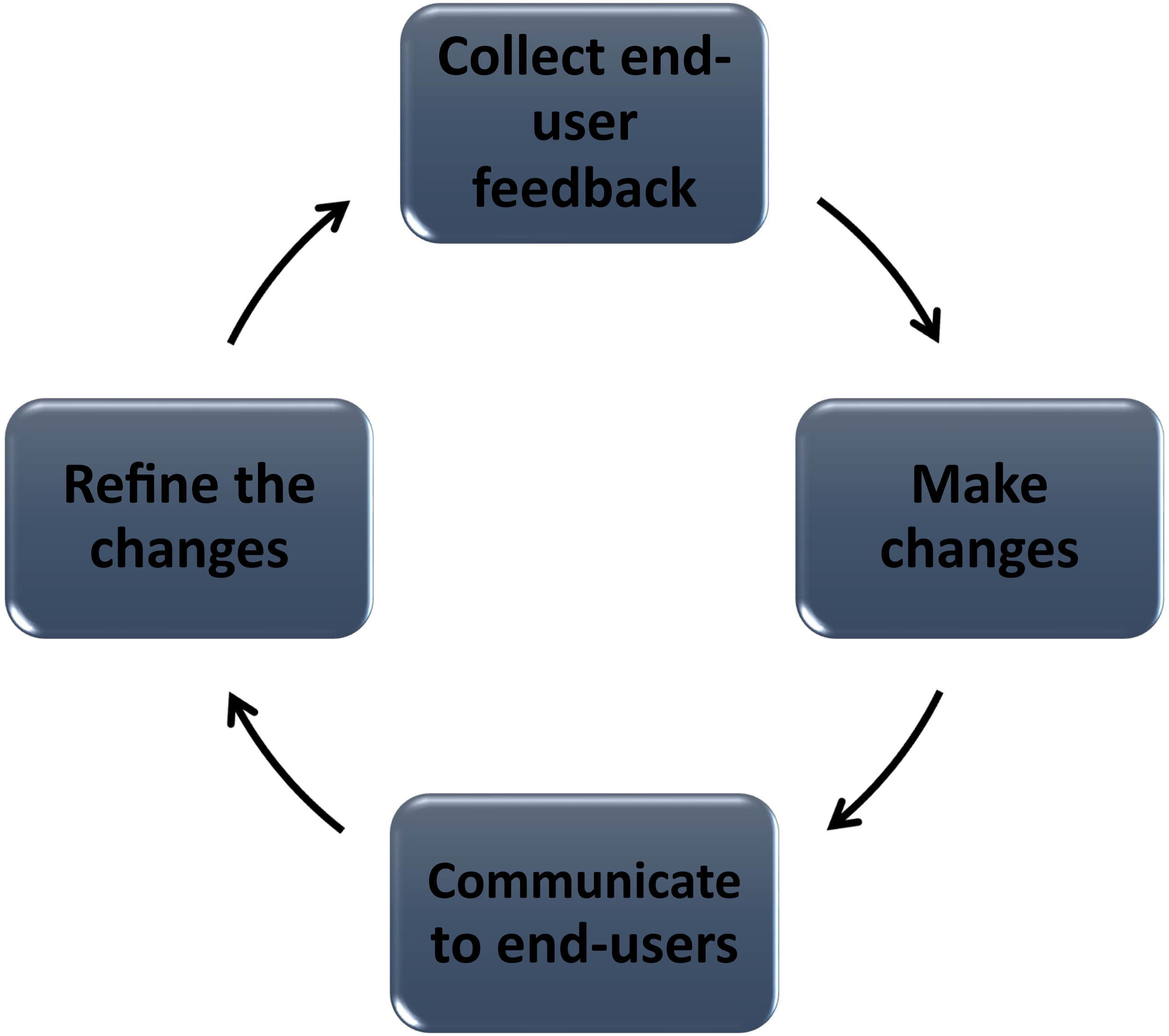
- What is Feedback?
- Why is Feedback Important?
- Audience Participation
- Group Discussion
- Methods of Collecting Feedback
- Case Studies
- Staying Connected to Your Users

Improving Feedback

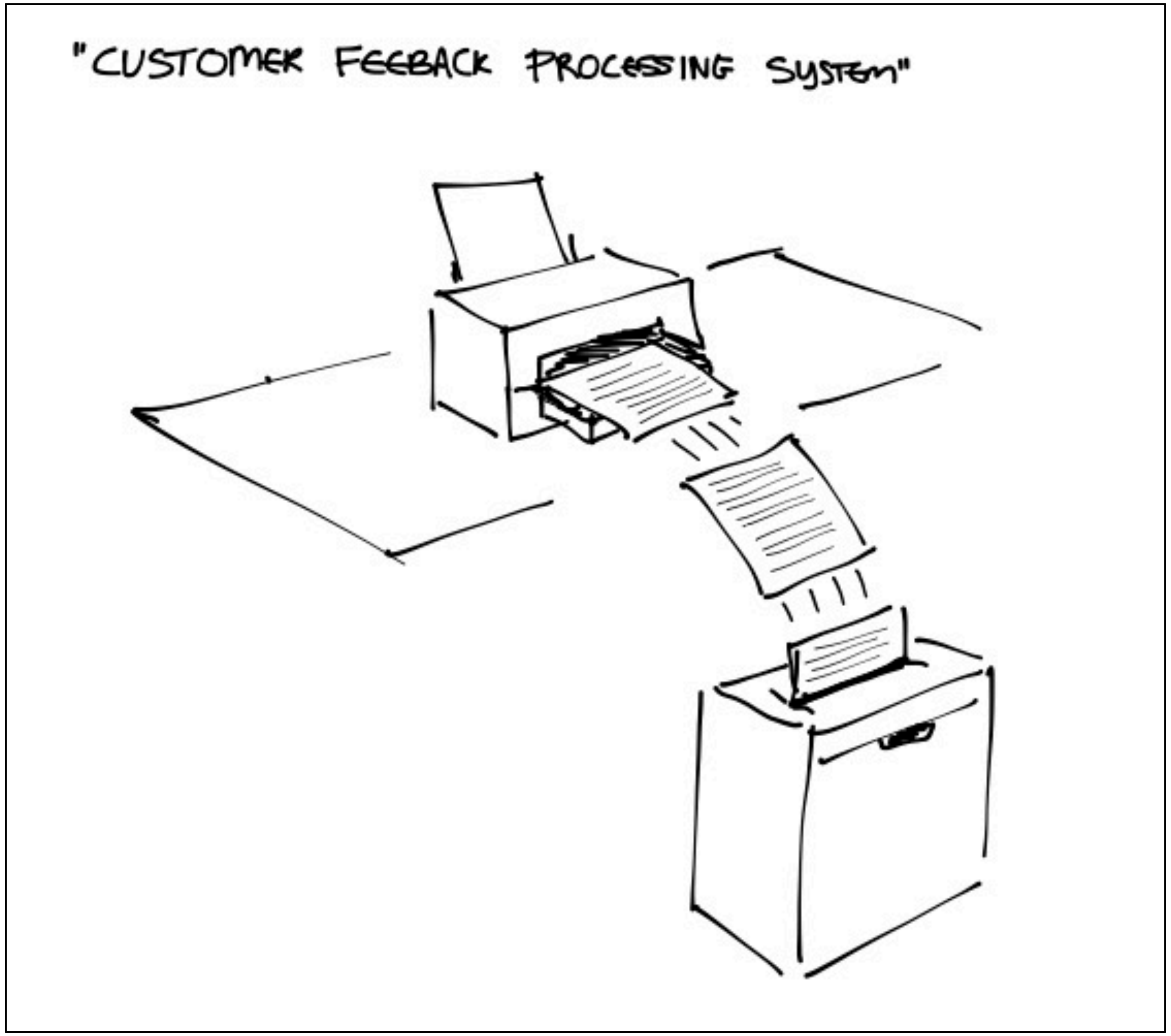
What Is Feedback?

- Information coming directly from end-users about how they feel about a product or a service.
- Open-loop: Response to end-user feedback is not provided directly to the submitter.
- Closed-loop: A response is provided on each piece of end-user feedback, and allows a company to "close the loop".

Closed-Loop Feedback Process



Why Is Feedback Important?



Why Is Feedback Important?

- It is truly the Voice of the Customer.
- Comments and complaints are an important resource for improving and addressing the needs and wants of the end-user.
- Feedback guides and informs decision-making and influences the product roadmap.
- Understanding interactions with Clarity is invaluable and drives innovation.
- Ultimately, closing the loop can lead to increased Clarity adoption, happier users, improved perception of the process and tool, and more successful projects.

Audience Participation

- Who **RECEIVES** feedback on Clarity today?

Audience Participation

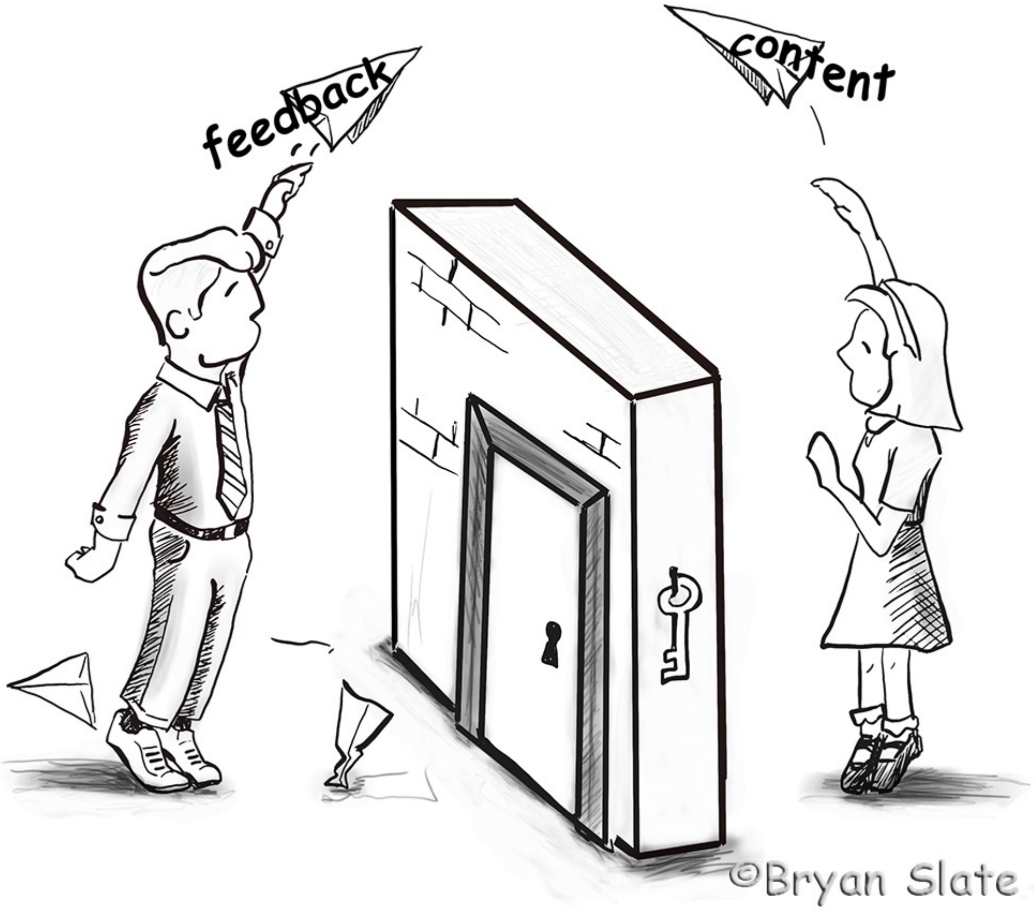
- Who **ELLICITS** feedback on Clarity today?

Audience Participation

- Who **ACTS** on that feedback?
- Why or why not?

Group Discussion

- What are some of the things you currently do to close the feedback loop with your users?



Methods Of Collecting Feedback

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Methods Of Collecting Feedback

- **Email** – Probably the most popular method for giving/receiving feedback
- **Slack or Teams Channel** - Create a Chat Group just for feedback
- **Survey** – Helpful, but can be costly and may not produce actionable results
- **End-User Interviews/Meetings** – Sit down with end-users, Clarity Champions, Managers and discuss what they want from the tool, how they use it, where they run into issues
- **Helpdesk Tickets** – What are the top 5-10 types of tickets on Clarity? What can you do to eliminate those 5-10 most popular ticket types?

Methods Of Collecting Feedback

- **Observe Users in Their Environment** – When, how, why are they using Clarity at the times they're using it.
- **Water-cooler/Social Listening** – What are people saying about Clarity?
- **Adoption Metrics** – Do you have adoption metrics implemented? Are they positive, so-so, or just plain terrible?
- **Watch a User Try to Perform the Tasks in Your Documentation** – This can be a humbling experience, but I guarantee you'll find areas to improve either in the tool or the training documentation.

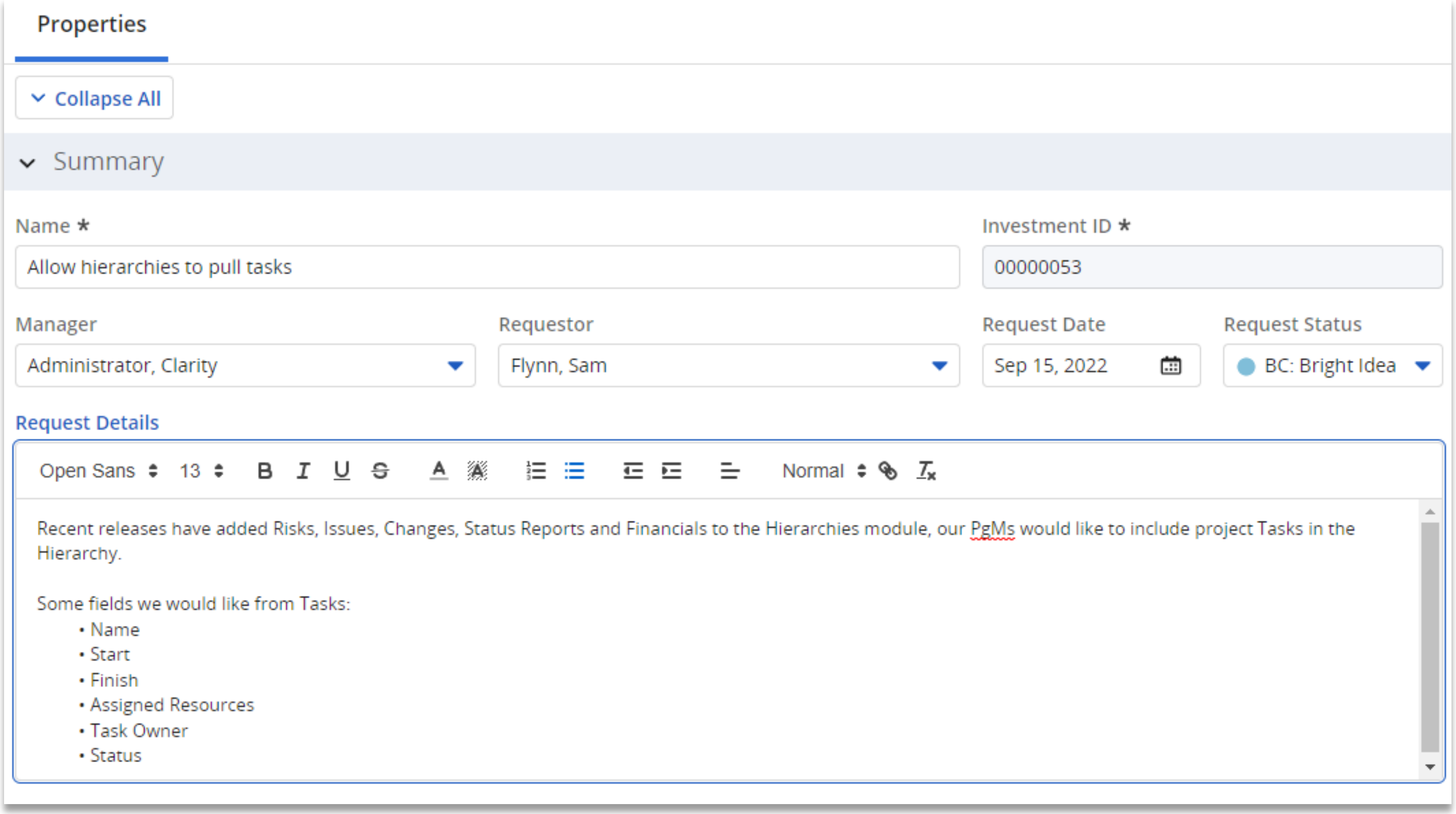
Case Studies

Company Case Study #1 (Ross)

- Enhancement Capture in Clarity
  - Soliciting feedback on the product is often tedious and time consuming. This method provides your power users a way to enter requests directly into the system for triaging.
  - A custom investment for users to submit requests, manage the priority and track the progress of Clarity enhancement requests across the organization.
- Three-fer!
  - Provides a way for users to track the status of the request without reaching out to the Clarity team.
  - Provides a platform for the Clarity team to manage the backlog of enhancements to the product.
  - Pull these enhancements into a roadmap and quickly build a product roadmap for
- Increase the overall happiness and effectiveness of your Clarity users.

Company Case Study #1 (Ross)

- Keep it simple
  - Allow the requestor to enter details and upload an attachment if necessary
  - The Clarity team should follow-up to get more details if necessary
- Use board view to track Bright Ideas, Backlog and Approved items.



Company Case Study #2 (Taunya)

- **Overview** – ~1500 users, heavily invested in training.
- Combination of Instructor-Led and Self-Paced Training, along with Office Hours.
- **Training**
  - Periodic Instructor-Led Training Delivery, targeted not only at new users, but also for existing users
  - Refresher classes; basics are reviewed, but honed for the more experienced user
  - Sharepoint site – all training materials (recordings, presentations, QRGs, etc) are organized and easy to find and download
- **Office hours and Mentoring**
  - Twice a week virtual office hours with the Clarity Experts—all questions welcomed
  - Adoption is key! For users that are not updating their schedules/entering time, have a sit-down and walk through any issues they are experiencing
  - Identify if further training is needed or if there is a Clarity enhancement that can help!

Staying Connected To Your Users

Staying Connected To Your Users

- **Communicate Changes to End-Users** – This is critical to maintain adoption end-users by showing that you are continuously investing in the tool.
- **Preview** – Communicate a preview of upcoming changes so end-users don't feel out of the loop.
- **Provide Release Notes** – Users want to know what changed and how it will impact them.
- **Contact Your Users Periodically** – Contact your users periodically with a friendly email asking if they have any questions or feedback.

Staying Connected To Your Users

- **Establish Regular Communication Through Bi-weekly Tips** – Provide the user little bits of knowledge in a consumable fashion. Provide a link to an established knowledge base if they want to learn more.
- **Proactive Mentoring**
  - Use Rego Adoption Metrics to proactively identify people/groups who need help
  - Have a sit-down and walk through any issues they're experiencing
  - Make sure they're comfortable with what they are doing

Questions?

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