



regoUniversity

NASHVILLE • 2022

Tracking Adoption and Data Integrity

Your Guides:

Karen Lifsey and Michelle Marriam-Day

Introductions

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



Agenda

- Reliable Data Collection and Business Performance
 - Adoption Metrics and Customer Adoption
 - Data Quality, Data Integrity and Ensuring User Confidence
 - Business Performance

Application and System performance is also important in managing user perspectives but not addressed in this session

- System speed
- Workflow process monitoring
- Job schedules and completion
- User access

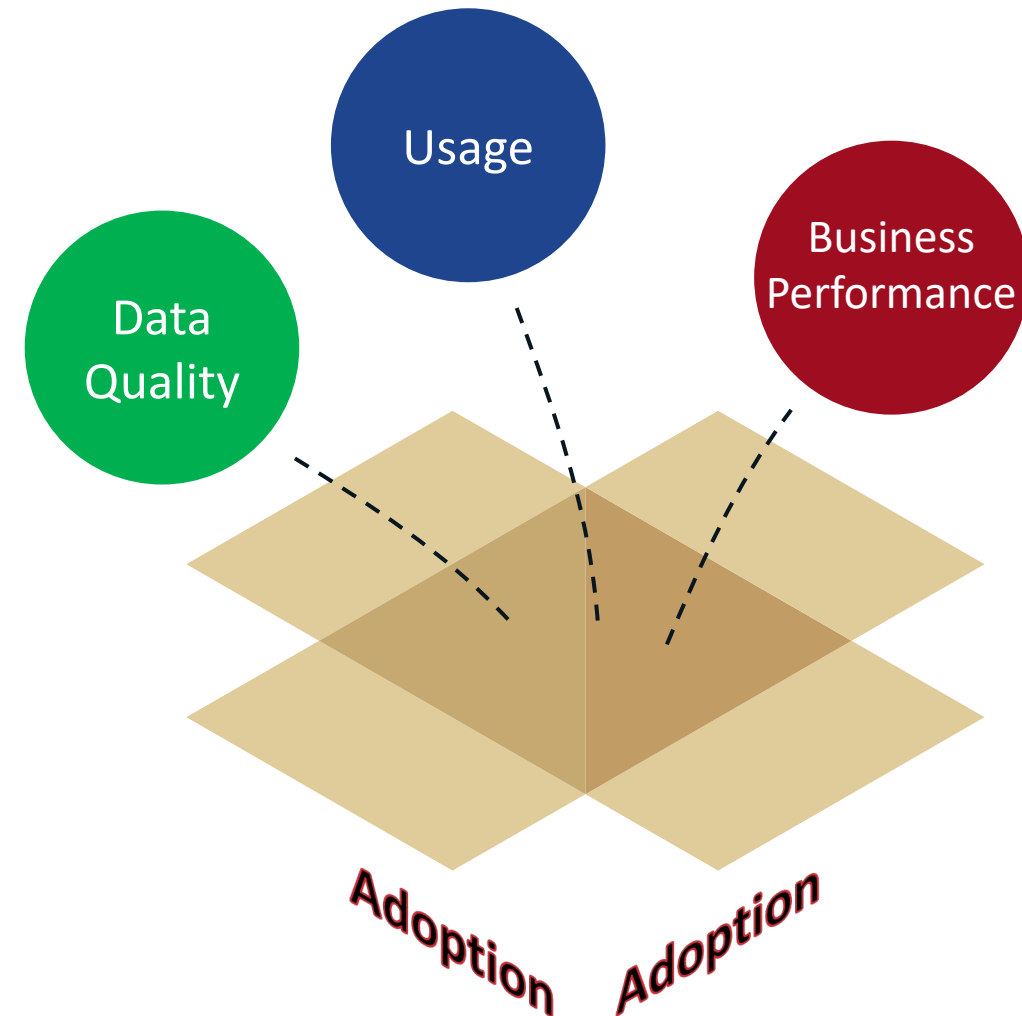
Adoption



What is Adoption?

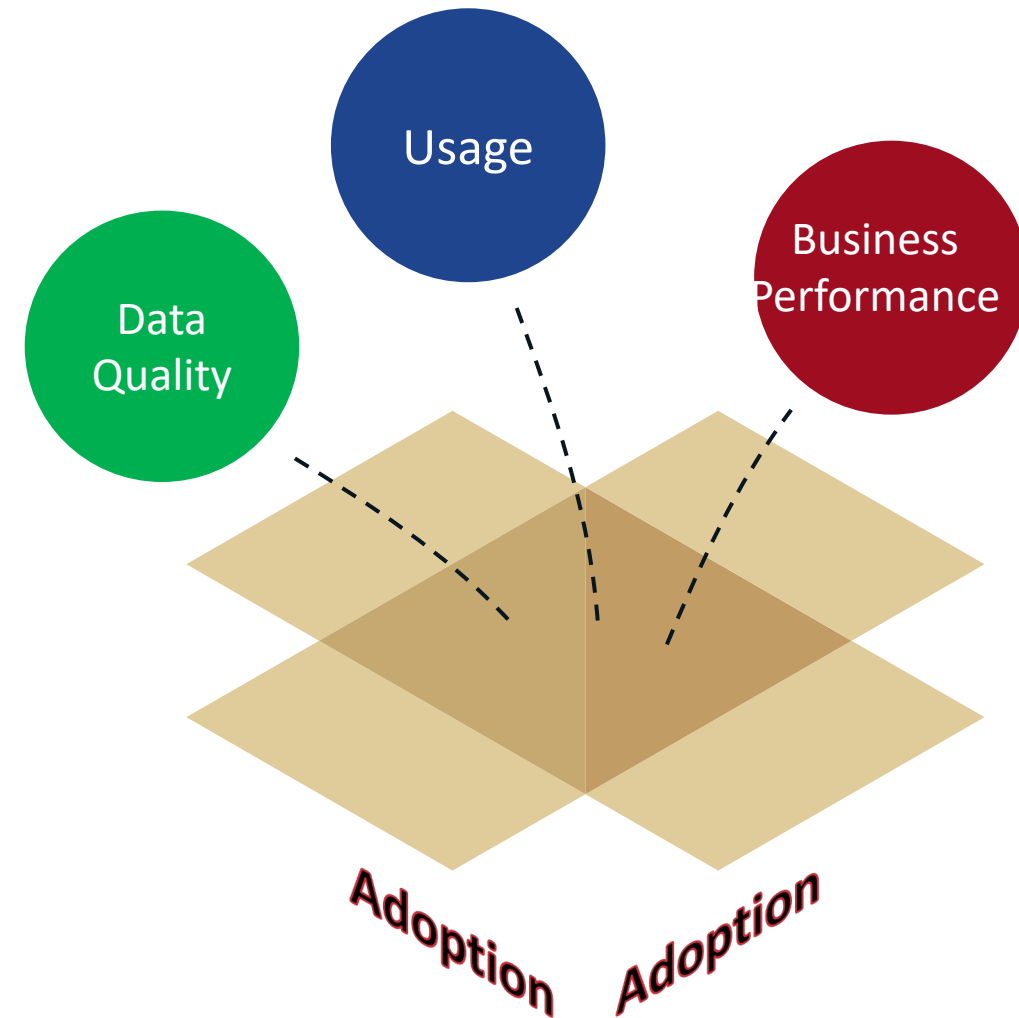
It is more than just making sure people are logging in.

- 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
 - Ensures end user enablement and performance improvements



Open Mic

- To ensure the application is aligned to your organization it is key to measure:
 - **Usage and Adoption**
 - Data Quality
 - Business Performance
- What data are you capturing to measure adoption?
 - Timesheet activity, Status Report Creation, Risk, Issue, Changes Leveraged
 - Anything else?



What Stories do Adoption Metric Tell

- Users understand what is expected and are properly using the tool.
- New processes or ways of working are being followed
- Users are moving to the tool in a timely/efficient manner
- Confirm acceptance/recognition of the value of the solution
- Identification of areas needing additional Training or Improved User Experience
 - Complexity limiting practical use

Example of Adoption Metrics

- Are Resources submitting timesheets
- Are PM completing Status reports
- Are RM tracking and balancing Allocations
- Are Financials being updated and managed
- Are Action Items being completed

Rego's Adoption Metrics – Systematic Monitoring and Review

- Provides a way to measure how well Clarity is being utilized based by monitoring key modules and metrics:
 - Project Management: Metadata, Configuration, Scheduling and Tracking (Status Reports, Baselines, etc)
 - Resource Management: Resource configuration, Assignments/Allocations, financial properties.
 - Financials: Transactions, Forecasting, Financial Plans, etc
- Rego's Adoption Metrics introduce a set of metrics defined for projects, and resources.
- Establish a base scoring model for each metric based on levels 0 to 5. Based on the maturity of an organization the metric scouring models can be revised.

Framework Levels

- The Adoption Metrics Framework is based on criteria built using a set of scoring levels that will drive maturity.
- Scoring Levels range from 0 to 5
 - 5 – data is of high quality, latest information available
 - 4 – repeatable consistent use with improved data
 - 3 – regular use with consistent data
 - 2 – regular use but inconsistent data
 - 1 – ad hoc or inconsistent use
 - 0 – minimal or no compliance
- Such scores and measurements can be kept within the application to provide live feedback, metrics and thresholds.

Portlet - Project Metrics Details

Audience: PMO, Project Managers

Description: This portlet displays numeric values for all of the project adoption metrics in a row format. This view can be filtered on Organizational Breakdown Structure, Project or Manager.

Supported Versions:

- v13.x, 14.x, 15.x, 16.x

Adoption Metrics: Project Metrics Detail																			
Project Adoption Metrics Detail																			
Project	Manager	Start Date	Finish Date	Overall Metric	Status Reporting Metric	Risk Adoption Metric	Issue Adoption Metric	Schedule Metric	Baseline Metric	Zero ETCs Metric	Past ETCs Metric	Milestone / Key Tasks Metric	Schedule Variance Metric	Effort Variance Metric	Budget Variance Metric	Data Quality Metric	Commitment Metric	Unfilled Roles Metric	
BI Architecture	Greer, Darren	8/27/12	3/3/27	2.93	1	1	2	2	5	5	5	2	5	5	0	3	0	5	
IT Portfolio Audit	Reynolds, Clayton	7/30/12	10/13/17	2.29	0	1	2	1	5	5	4	0	1	5	0	3	0	5	
2016 Infrastructure Project	Arya, Vishal	3/17/14	12/29/17	2.14	1	0	0	2	5	5	5	0	1	3	0	3	0	5	
Next Generation Personal Response System Implementation	Manager, Project	10/1/12	4/22/18	2.14	1	1	1	2	5	5	4	3	1	1	1	5	0	0	
2016 Support Project 2	Schmenk, Ann	4/2/14	3/22/19	2.07	0	0	5	2	5	5	4	0	1	1	1	0	0	5	
Continuous Improvements	Manager, Project	10/29/12	12/31/17	1.93	0	1	1	3	5	5	5	1	1	1	1	3	0	0	
Enterprise Data Services	Greer, Darren	2/15/13	3/2/15	1.93	0	1	1	0	5	5	0	0	1	3	1	5	0	5	
2016 Integration Project	Wachsmann, David	6/30/14	12/29/17	1.93	1	0	5	2	0	5	3	2	0	0	1	3	0	5	
Develop Transporters	Greer, Darren	10/29/12	2/3/17	1.86	0	1	1	0	5	5	0	0	1	4	1	3	0	5	
Training for Project Sponsorship	Manager, Project	2/17/13	7/14/16	1.86	0	1	2	0	5	0	5	0	1	1	1	5	0	5	
2016 Training Sample	Arya, Vishal	3/17/14	12/30/17	1.79	1	0	5	0	0	5	5	0	0	0	4	0	0	5	
2017 E-Commerce	Manager, Project	12/1/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Mutual Fund Authorization Project	Greer, Darren	9/16/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Finance Project	Manager, Project	12/1/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Idea	Arya, Vishal	12/1/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Support Project	Joshi, Navdeep	10/3/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Integration Project	Wuenstel, Chris	12/1/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Performance Creation Project	Scarlato, Jennifer	12/1/16	1/31/18	1.71	1	1	2	5	0	5	5	5	0	0	0	0	0	0	
2017 Software Implementation	Arya, Vishal	12/1/16	1/31/18	1.64	1	1	2	4	0	5	5	5	0	0	0	0	0	0	
2016 Fin Project 1	Arya, Vishal	3/17/14	10/13/17	1.57	0	0	5	2	0	5	4	0	0	0	1	0	0	5	

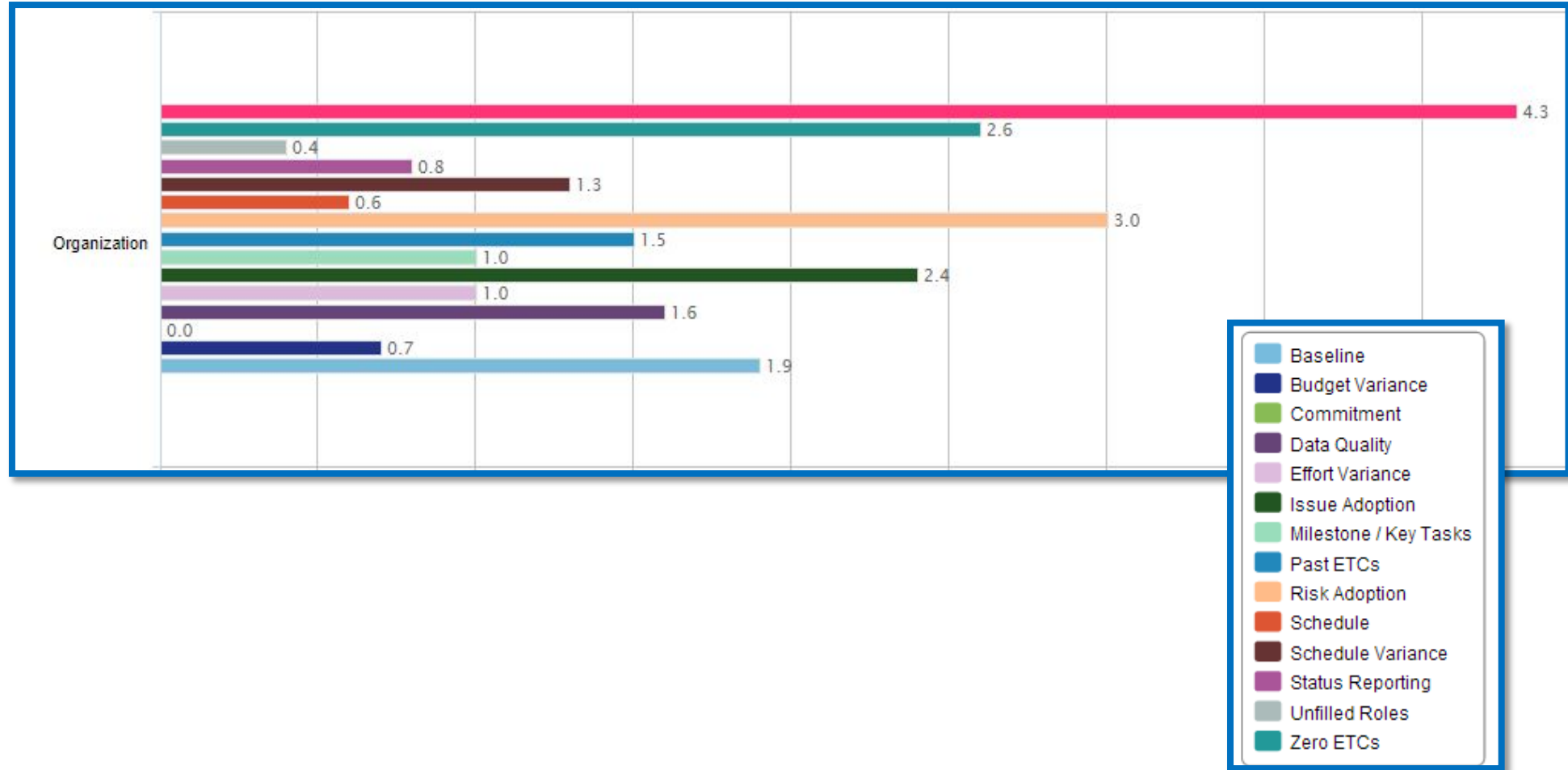
Portlet - Project Metrics by OBS

Audience: PMO, Project Managers

Description: This portlet displays all the metrics or a specific metrics in row graphical format based on filtering by the Organizational Breakdown Structure level and/or to a specific metric.

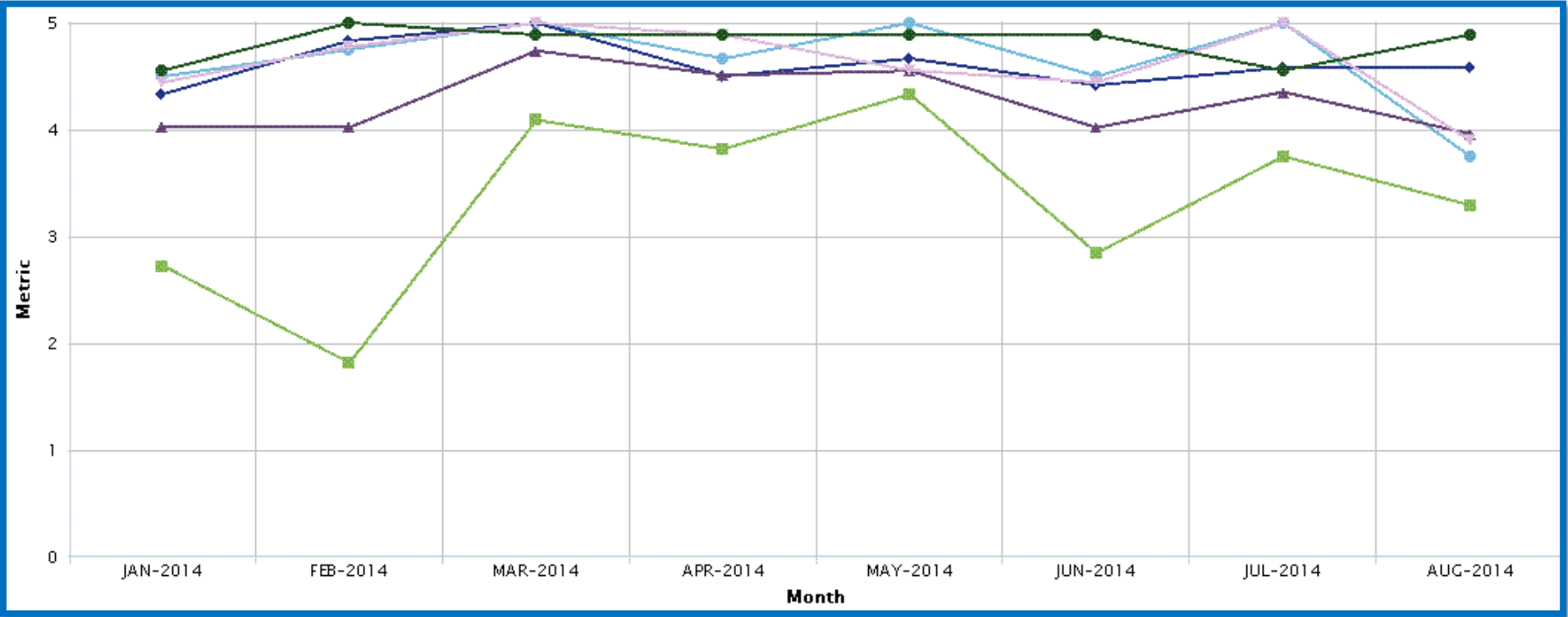
Supported Versions:

v13.x, 14.x, 15.x, 16.x



Adoption Metric Trending -Views

Project or Resource Trending view – pulls monthly trending snapshots for the full complement of metrics displayed in line graph form. This view can be filters by OBS or by a date range.



Data Integrity

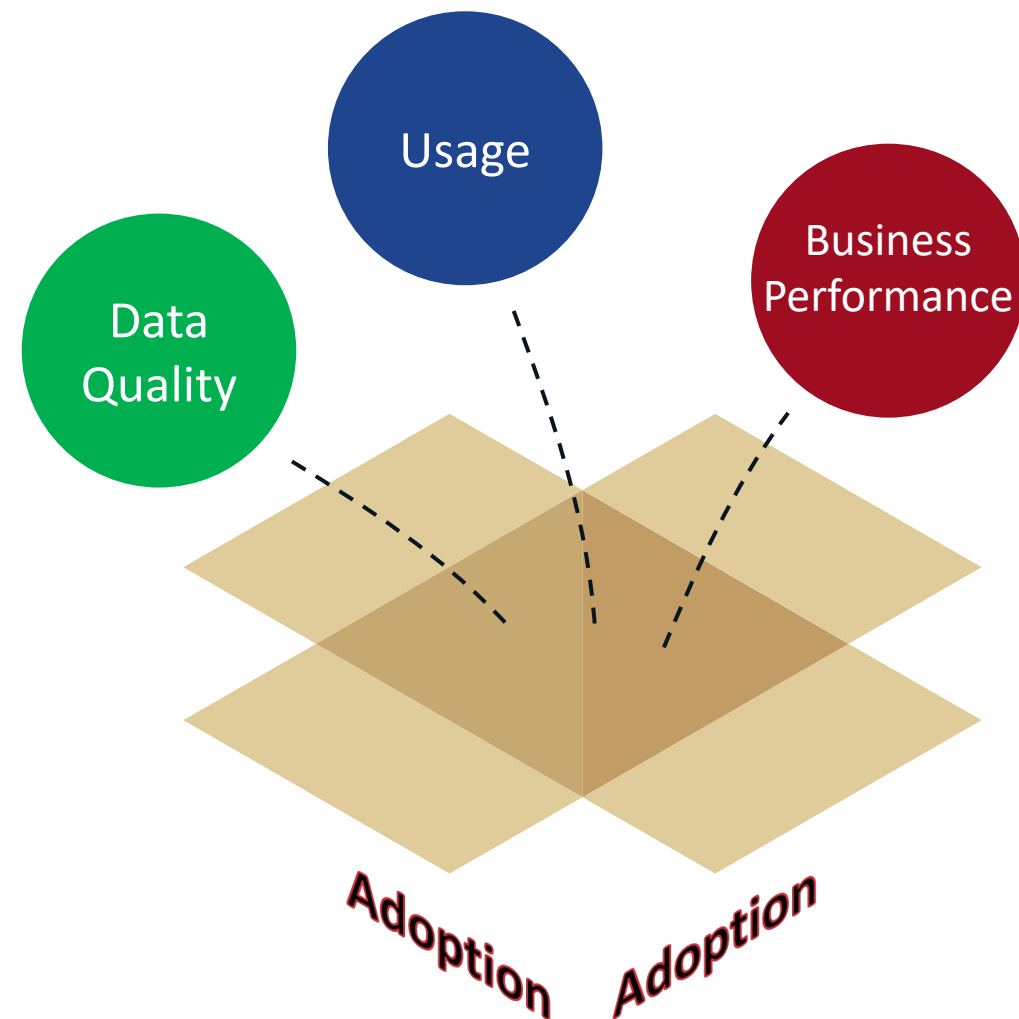


Importance of Data Integrity and Quality

- Data Integrity and Quality monitoring helps organizations:
 - Ensure data is being properly entered into the system
 - Ensures data is consistent, accurate and completely filled out
 - Can aid data security and governance by validating the processes followed to enter data into the system
 - Helps identify common pitfalls like duplication or lack of integrations
- Data Integrity and Quality go beyond metrics and KPIs. Incomplete data must be approached as incidents/failures.
- Well implemented protocols translate not only into better adoption, but also confidence in the application
 - Production of repeatable, reliable outputs (Portlets, Reports, Extracts)

Open Mic

- To ensure the application is aligned to your organization it is key to measure:
 - Usage and Adoption
 - **Data Quality**
 - Business Performance
- Are you measuring the integrity of your key data?
 - Attribute population, Outdated due dates, Stale data
 - Anything else?



Example of Data Integrity Metrics

- Active Resources not open for time entry
- Active Projects in a completed state
- Projects without status reports
- Missing rates for Resources
- Missing financial fields in Projects and/or Resources
- Projects with rate matrix associations
- Projects/Resources with OBS associations
- Incomplete timesheets
- And much more

Rego's Data Integrity

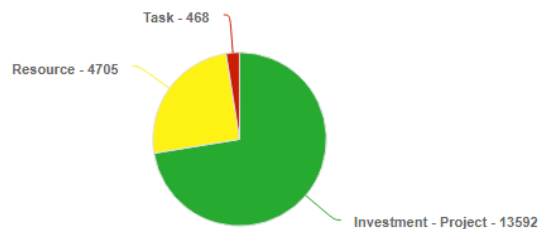
- Allows Organizations to configure rules that align with their business and categorize them by criticality, modules and
- Creates an “data exception” per violation, allowing organizations to automatically assign owners and ensure issue like tracking
- Provides metrics and trending on incidents and completion of the incidents

Data Exceptions Dashboard

Data Exceptions: Data Exceptions



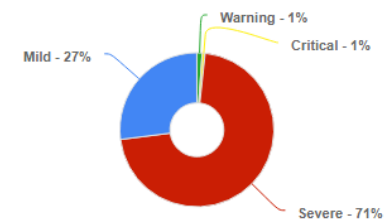
Exceptions by Category



Exceptions by Severity



Exceptions by Severity



Data Exceptions



Exception	Category	Owner	Name	Code	Severity	Exception Description
Tasks with ETC in past	Task	Doe, John	Non-Labour - Misc	TI00024987	◆	Task has ETC for Past Periods
Tasks with ETC in past	Task	Doe, John	Consulting - Fees - Capital	TI00016433	◆	Task has ETC for Past Periods
Tasks with ETC in past	Task	Doe, John	Consulting - Other - Capital	TI00021828	◆	Task has ETC for Past Periods
Tasks with ETC in past	Task	Doe, John	Non-Labour - Misc	TI00024977	◆	Task has ETC for Past Periods
Tasks with ETC in past	Task	Doe, John	SDM - Delivery	SAPADJ-001	◆	Task has ETC for Past Periods

Business Performance



Have the Business Goals been Achieved

- Have user's processes been improved?
 - Less manual
 - More timely
 - More accurate
- Are organizational outcomes more valuable?
- Is data used to make decisions?

Poll your management and end users to measure if objectives are being met.

Questions?



Thank You For Attending regoUniversity

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.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com