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# Maturing TBM: Apptio Adoption and Engagement Best Practices

**Your Guides:**  
Hollie Potts & Rob DeLeo

- 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

5



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





- 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?

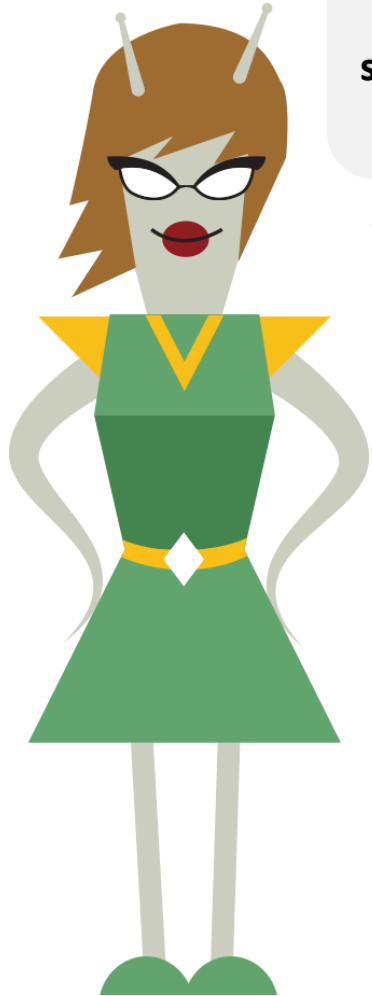
Bottom Line

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



# The Perception of Adoption

# The Perception Of Adoption...



Isn't it great! We had everyone get their data in this month! I'm so glad people are finally using the tool!



Ugh! I had to go enter all my data into that tool today. You know, I only do it to stay off the naughty list. At least I don't need to log in again until next month.

# 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

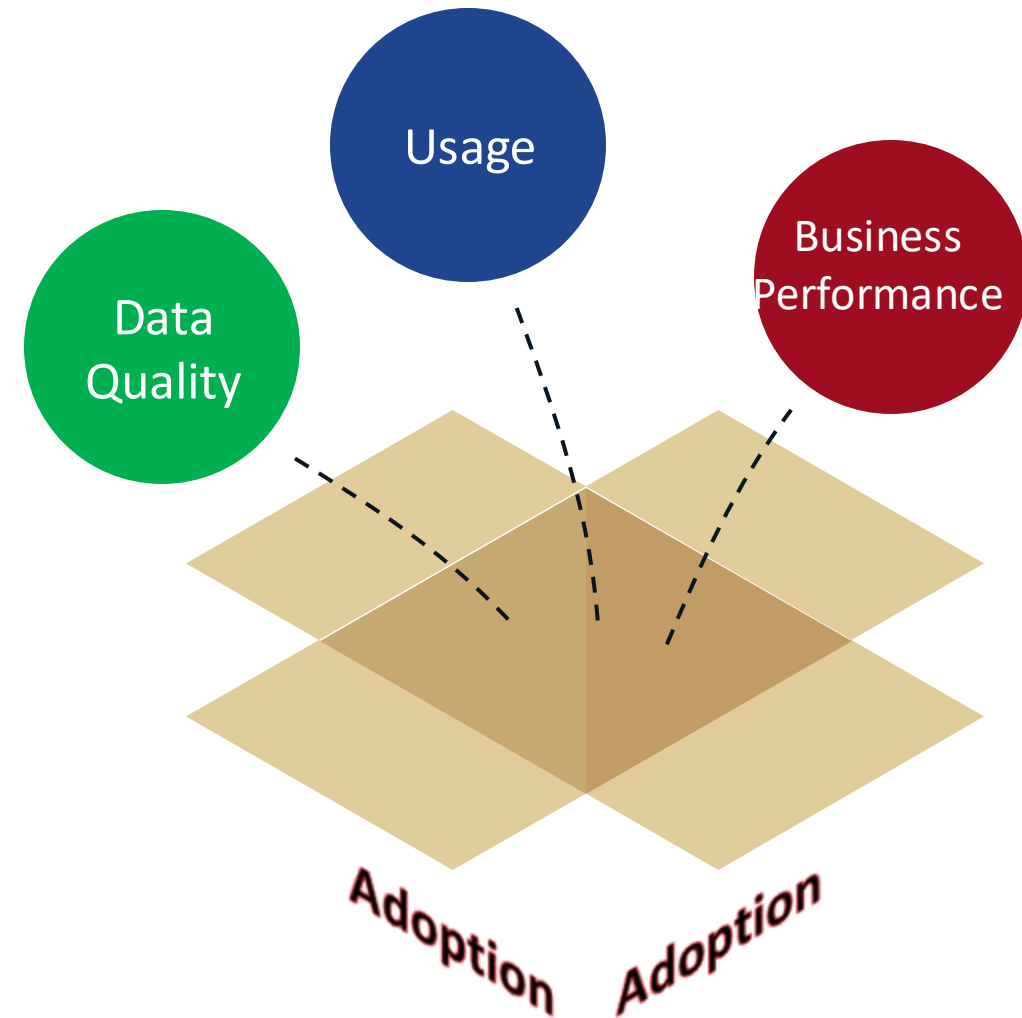
the  
top5



# 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



# Where Is Your Organization?



# Open Mic



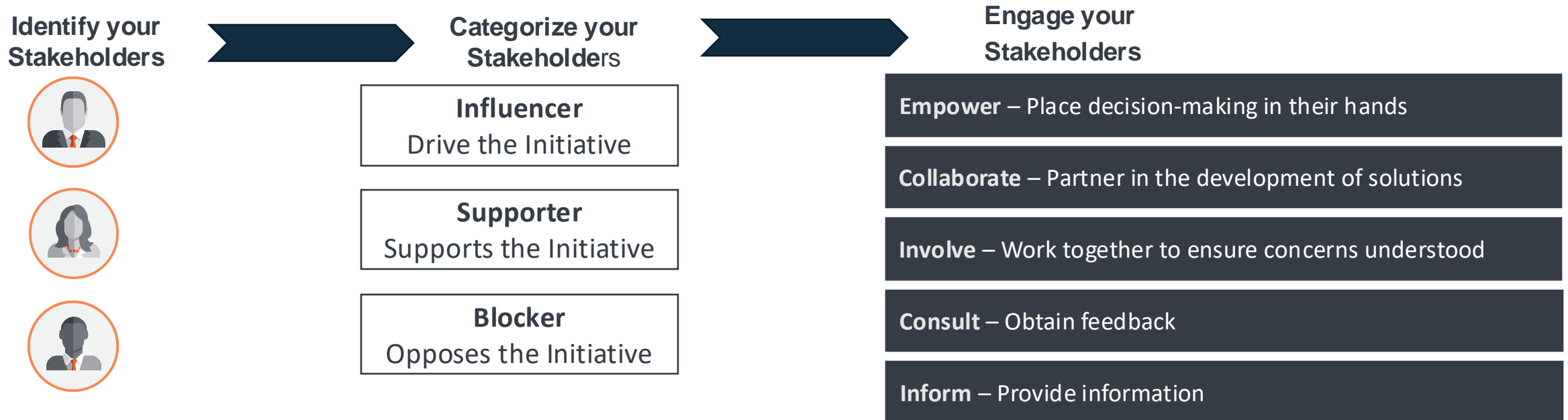
- How well has Apptio been adopted within your organization?
- What factors do you think have contributed to this?



# 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.



# 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.

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



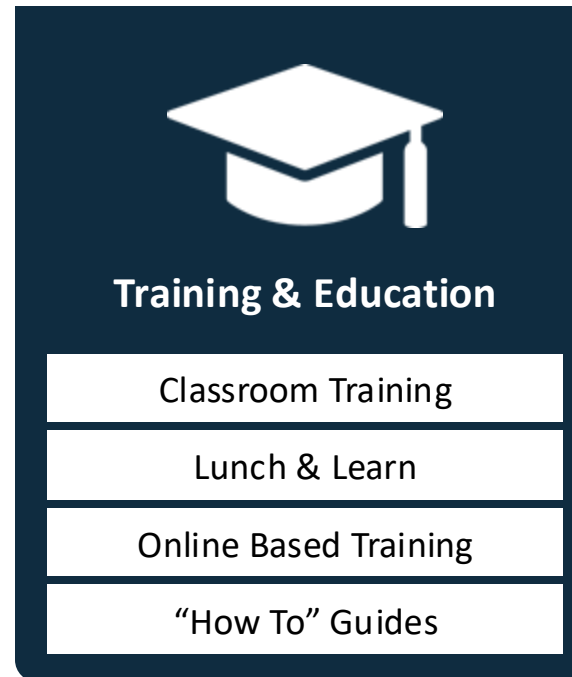
# 3 Elements of TBM User Adoption

There are 3 key elements that the TBM Practice should utilise to drive user adoption.

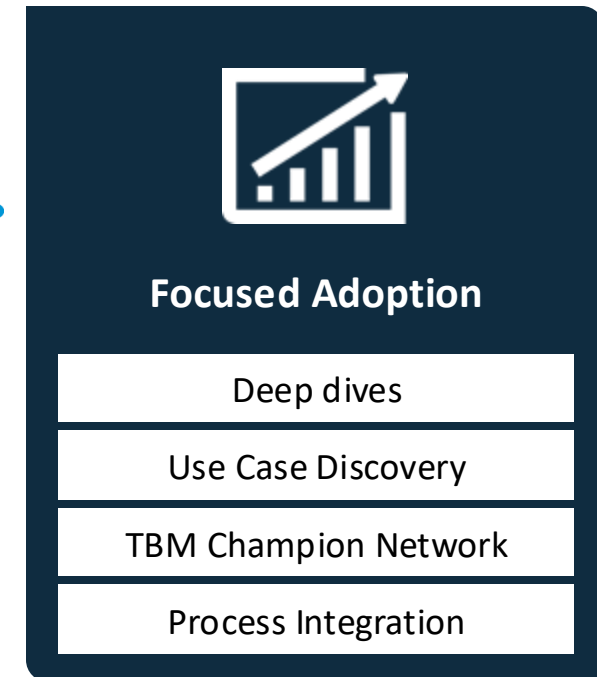
**Awareness:** Identify outcomes and priorities of interest



**Education:** Identify the preferred method of learning



**Adoption:** Identify the value drivers



# 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



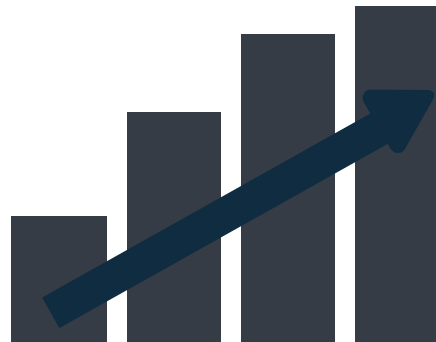
# Rewards and Recognition

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*



A Training Plan consists of the following key elements:

- 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

- 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

- 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.

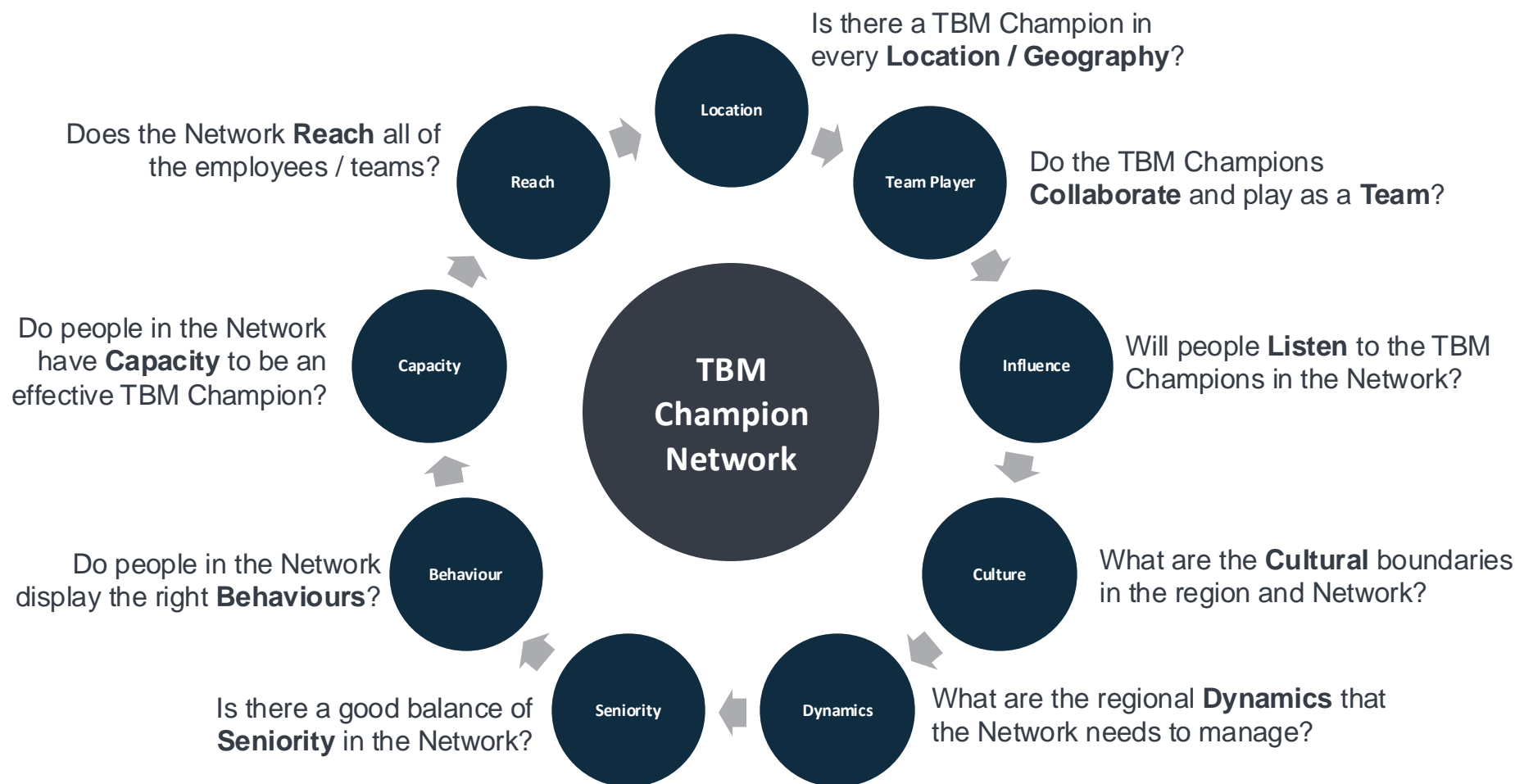
Invest the time and effort to establish and upskill a TBM Champion network and leverage them to:

- 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:



# Open Mic

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- What has worked in your organization to drive adoption?
- What hasn't worked?



## Step 1

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



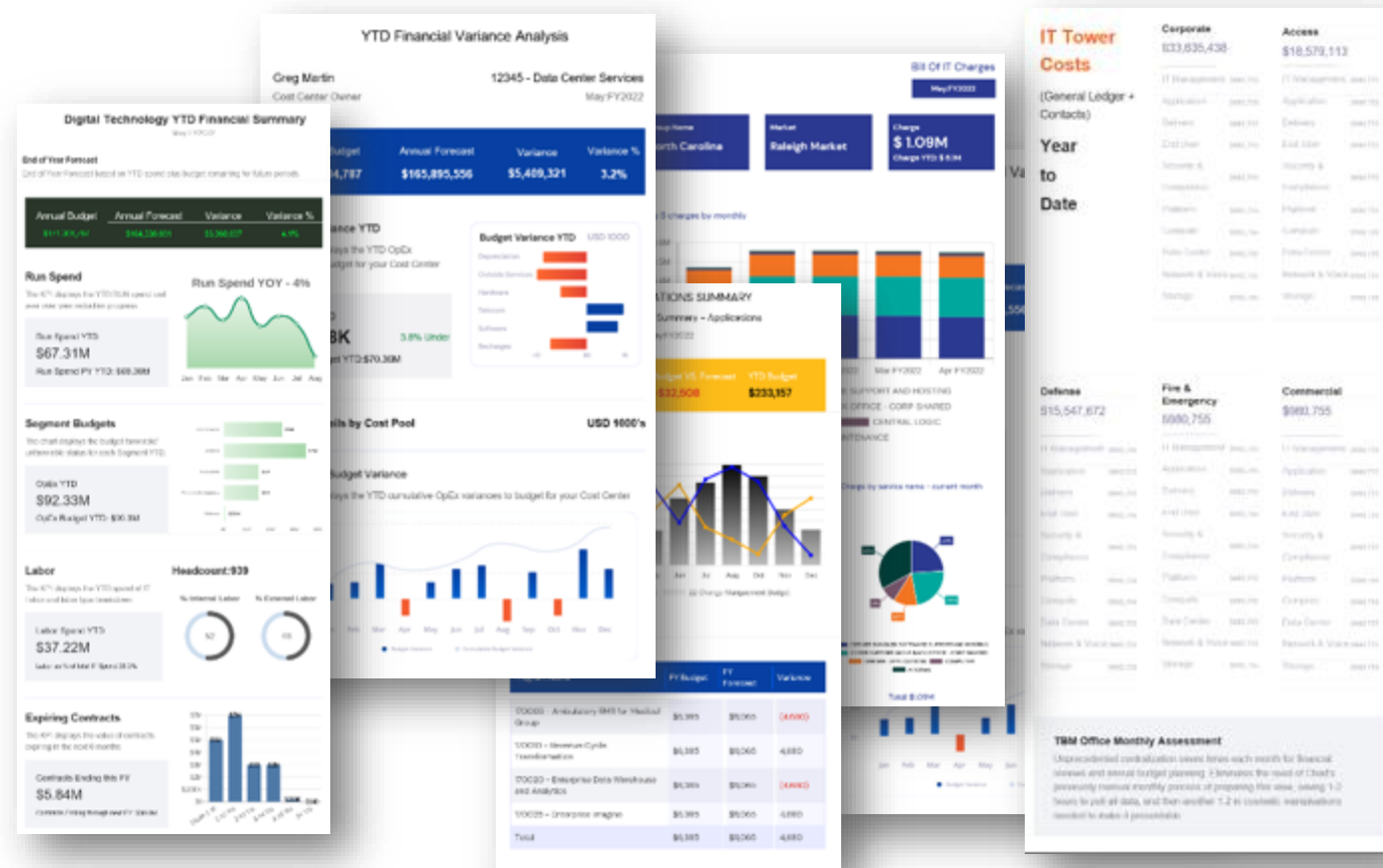
## Step 2

## 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

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

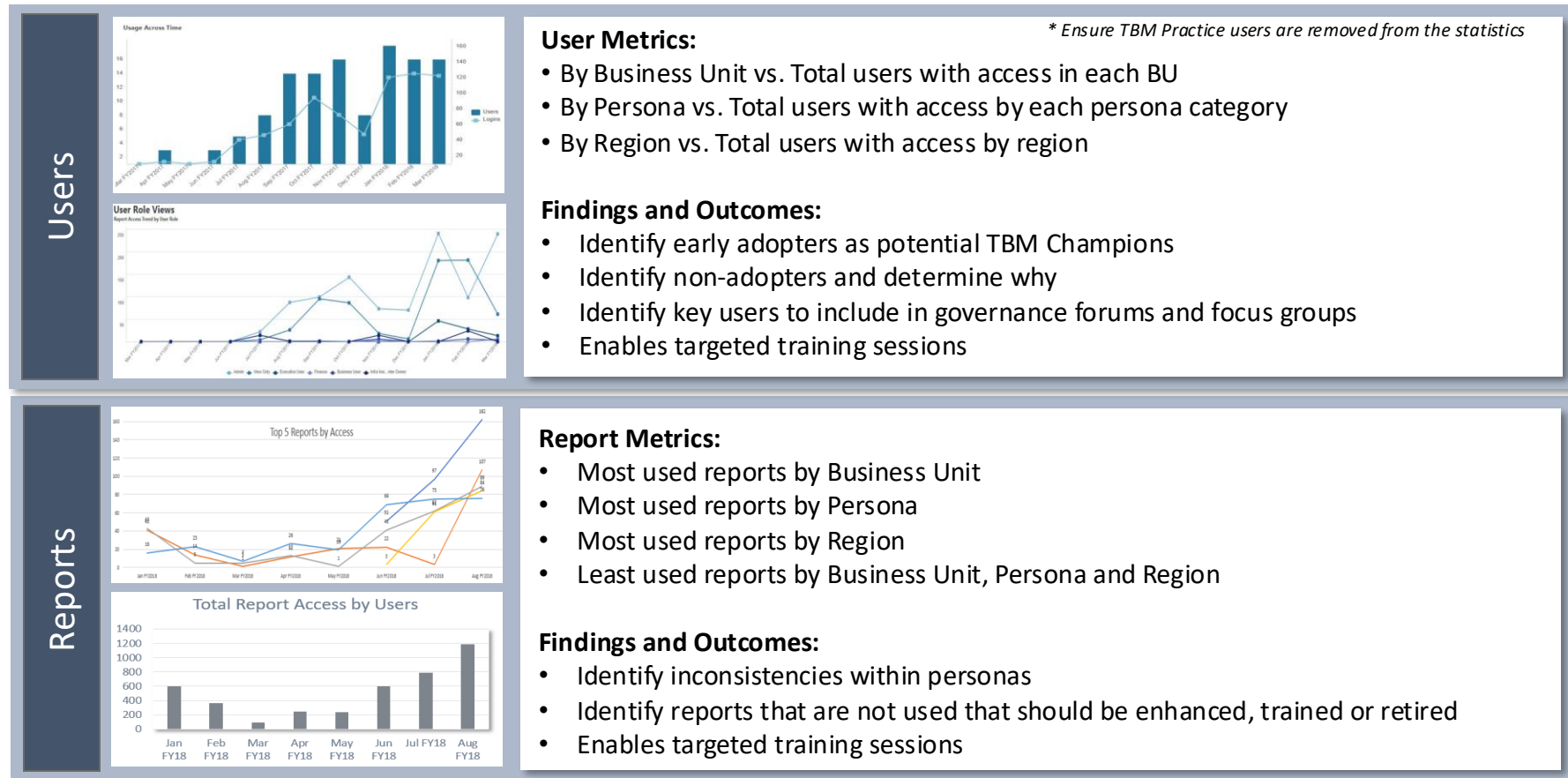
# Metrics and Measurement

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:	<i>What direct measures are used to solicit feedback from stakeholders? e.g. surveys, interviews &amp; direct feedback</i>		
Indirect Measures:	<b>Adoption</b> How <b>quickly</b> employees / customers begin using or taking on new technology and processes	<b>Utilization</b> How <b>many</b> employees / customers are actually using the new technology and processes	<b>Proficiency</b> How <b>effective</b> employees / customers are when using the new technology and processes
Sample Measurement Sources:	<ul style="list-style-type: none"> <li>❑ % utilization at key milestone dates</li> <li>❑ # of business days from launch of initiative to target level of utilization</li> </ul>	<ul style="list-style-type: none"> <li>❑ # users have accessed the new system</li> <li>❑ # of times a report is accessed</li> <li>❑ % of employees participating the change solution</li> </ul>	<ul style="list-style-type: none"> <li>❑ # of errors or complaints in a process</li> <li>❑ % reduction in time to perform key processes</li> </ul>

# 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.



# Take away

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- 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





# Surveys

Please take a few moments to fill out the class survey.  
Your feedback is extremely important for future events.



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