regoUniversity 2021
VIRTUAL

Strategies | Adoption And Perception

Your Guides:

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Agenda

1. Introduction and Perception Of Adoption

2. Top 5 Signs That You May Have Low Adoption

3. What is Adoption

4. Keys to Success – What We Have Seen

5. Q&A

Christi Rice

Snr. Functional Clarity Consultant & Strategic Advisor
Rego Consulting

- With Rego Consulting for over 7 years
  - Built, trained, and deployed Clarity to over 25 companies and government entities

- Clarity Practitioner for 10+ years using & managing the system as:
  - Portfolio Manager
  - PMO Director
  - Project Manager

Erich Kissel

Sr. Solutions Architect,
Rego Consulting

Project Portfolio Management (PPM) thought-leader and systems architect / group manager who has delivered solutions that put people at the center of process ecosystems via adoption-centric design, and proven value delivery methodologies.

This has included the enablement of executive success through customer-facing consulting and internal IT leadership roles, mainly focused on SaaS PPM, Agile (SAFe), ITIL, and Organizational Change Management (OCM) outcomes-based initiatives.

Additionally, a contributing author of the book *Realize PPM* (2020), an active blogger, professional Twitter account manager and has presented / actively participate in many industry events, including Global PMI, Gartner Summit and Magic Quadrant white papers, etc.

The Perception Of Adoption…

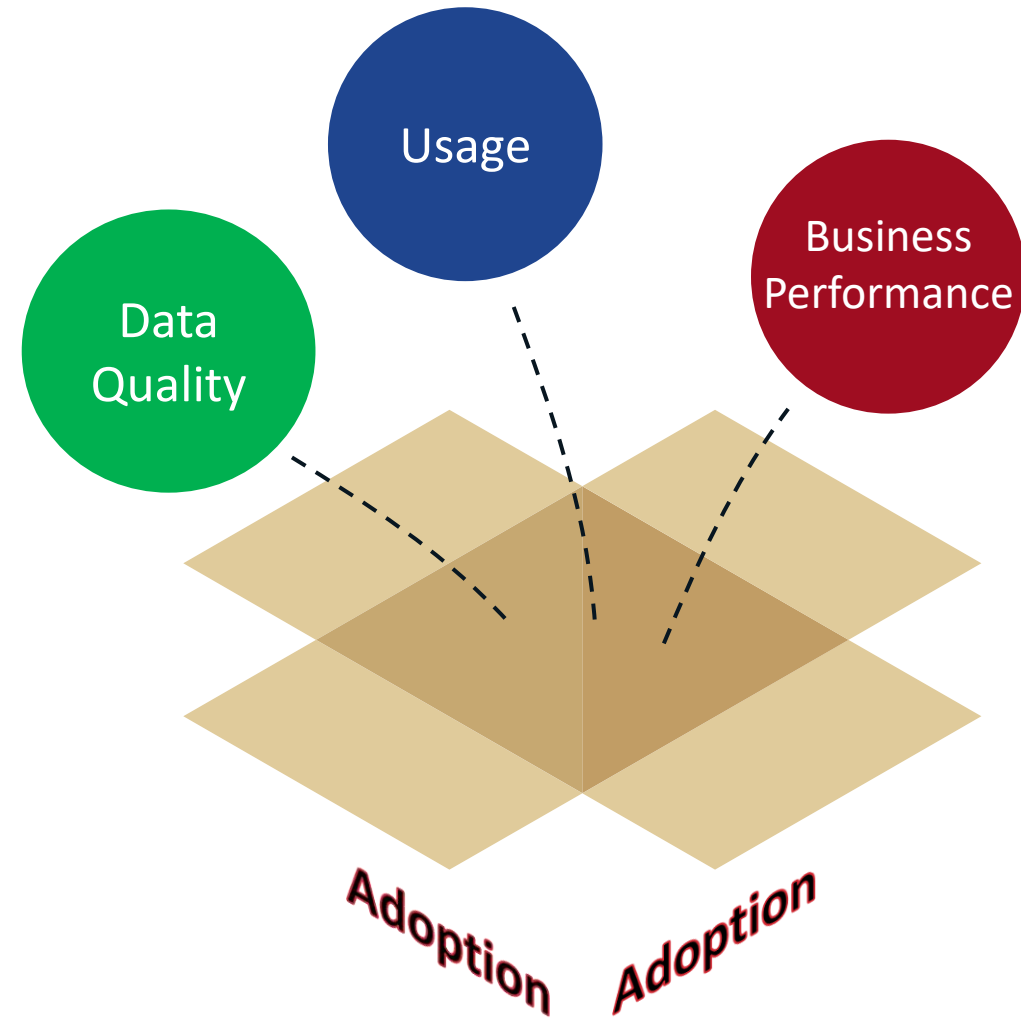# Top 5 Signs That You May Have Low/Poor Adoption

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

the top5

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.

  - Decisions are made based on information in the PPM tool

- Adoption is measured by

  - Data Quality

  - Usage

  - Business Performance

  - User Satisfaction

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 Clarity
- Executives Never Log Into Clarity
- Clarity is slow and upgrades are expensive/painful
  .

Low Value Perception

Fair

Good

Great

- Clarity Data Drives Decisions
- Meetings driven from live views
- Users Believe Clarity Helps them Perform Their Job
- Executives Use Clarity Constantly
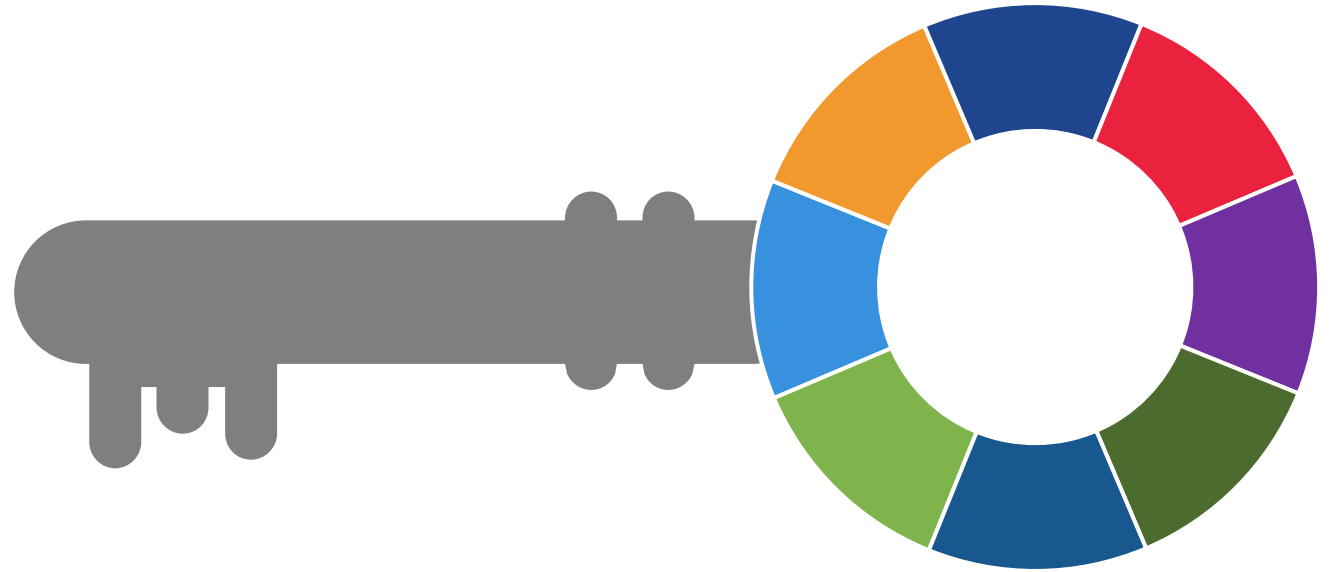- Disruption Free Releases/Upgrades

Where Do You Fit ?

Keys to Success

Keys to Success

- Executive Support

- Organizational Change Management

- Performance and Configuration

- Management Operating System

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.

Organizational Change Management

I don't know why I have to put all this information in here, seems like a waste of time.

Process
- Define the "why" and an outcome based roadmap.
- Do not automate poor processes.
- Use automation of a function as an opportunity mature leading practices and enhancement opportunities.

Effective Communication Campaign
- 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.

Training Strategy
- Hands-on (even remotely) will influence adoption the most, then leverage artifacts (reference guides, presentations, recordings, CAPA . . .)
- Build SMEs to advocate (internal is highly beneficial from a cross-training and culture perspective).
- Create options for engagement, taking into account type, timing, complexity, personas and possible detractors.

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" – process drives security and views.
- Optimal Tool Configuration:
  - Menus
  - Object Screens
  - Drill on Portlets
- Alerts, Notifications and Exception Reporting
- Upgrade to latest versions as to leverage Modern UX features . . .
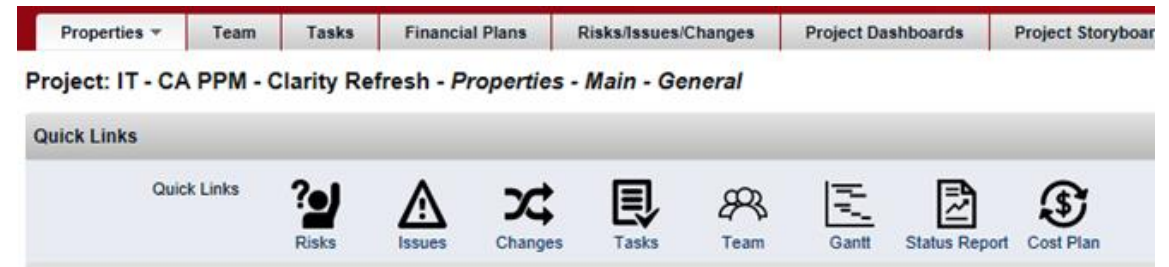
Management Operating System

I must define and visualize a Management Operating System (MOS): rhythm, context, flow and detailed steps.

Why it matters

- Adoption / simplification of process and tool with people at the center of the ecosystem (*input to PPM investments*).
- Insights and foresights to optimize leadership decisions and quantitative PMO maturity (*outputs of PPM investments*).
- **Maturity** and PPM investment roadmap as to deliver and report highest ROI.
- "'What":
  - Discover how value pulls input
  - Make the connections between people, process, and tools
  - Context for operating rhythms
  - **Many organizations implement and get by – until they don't**

What it is – Things you can deliver to your organizations

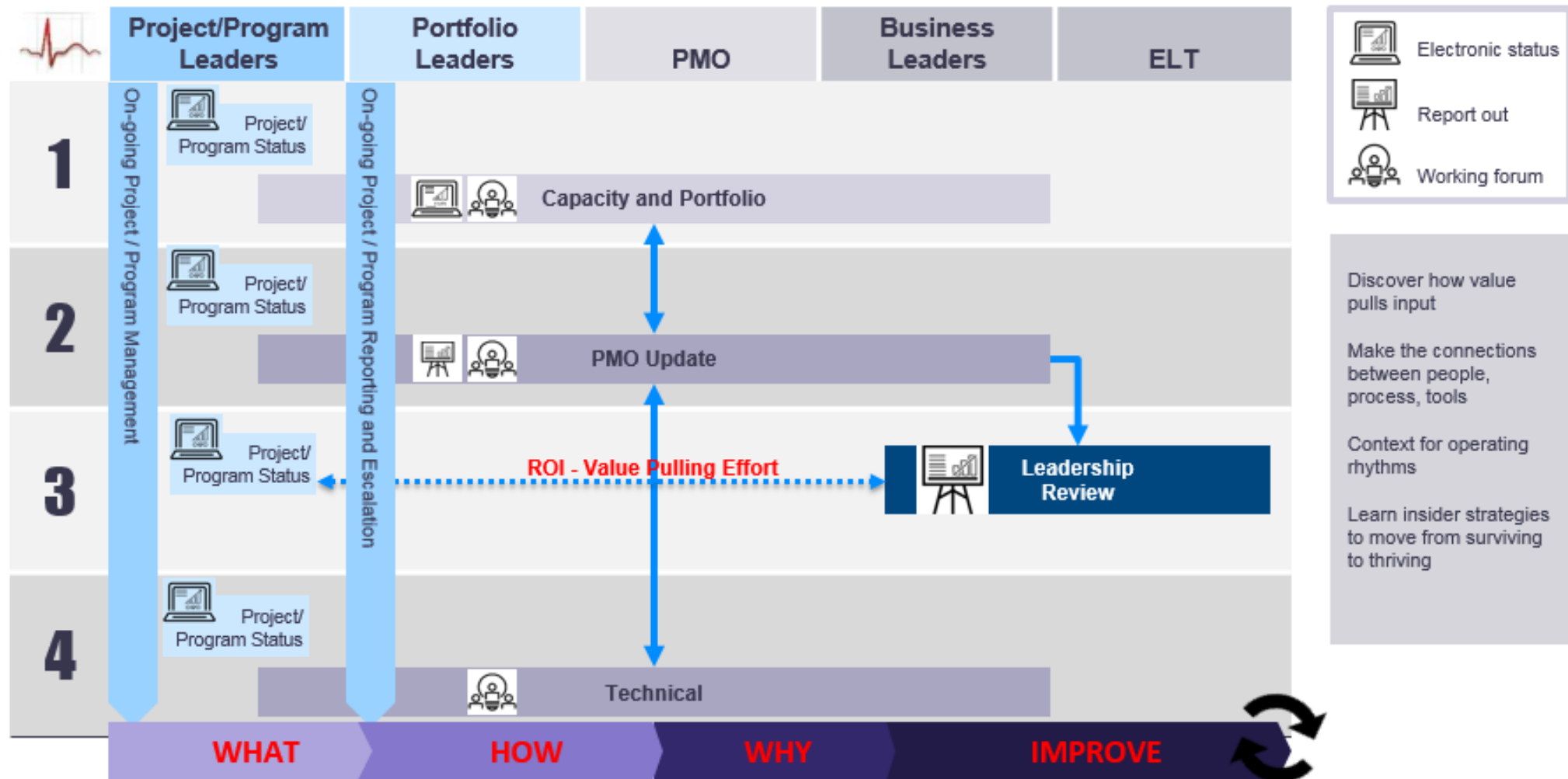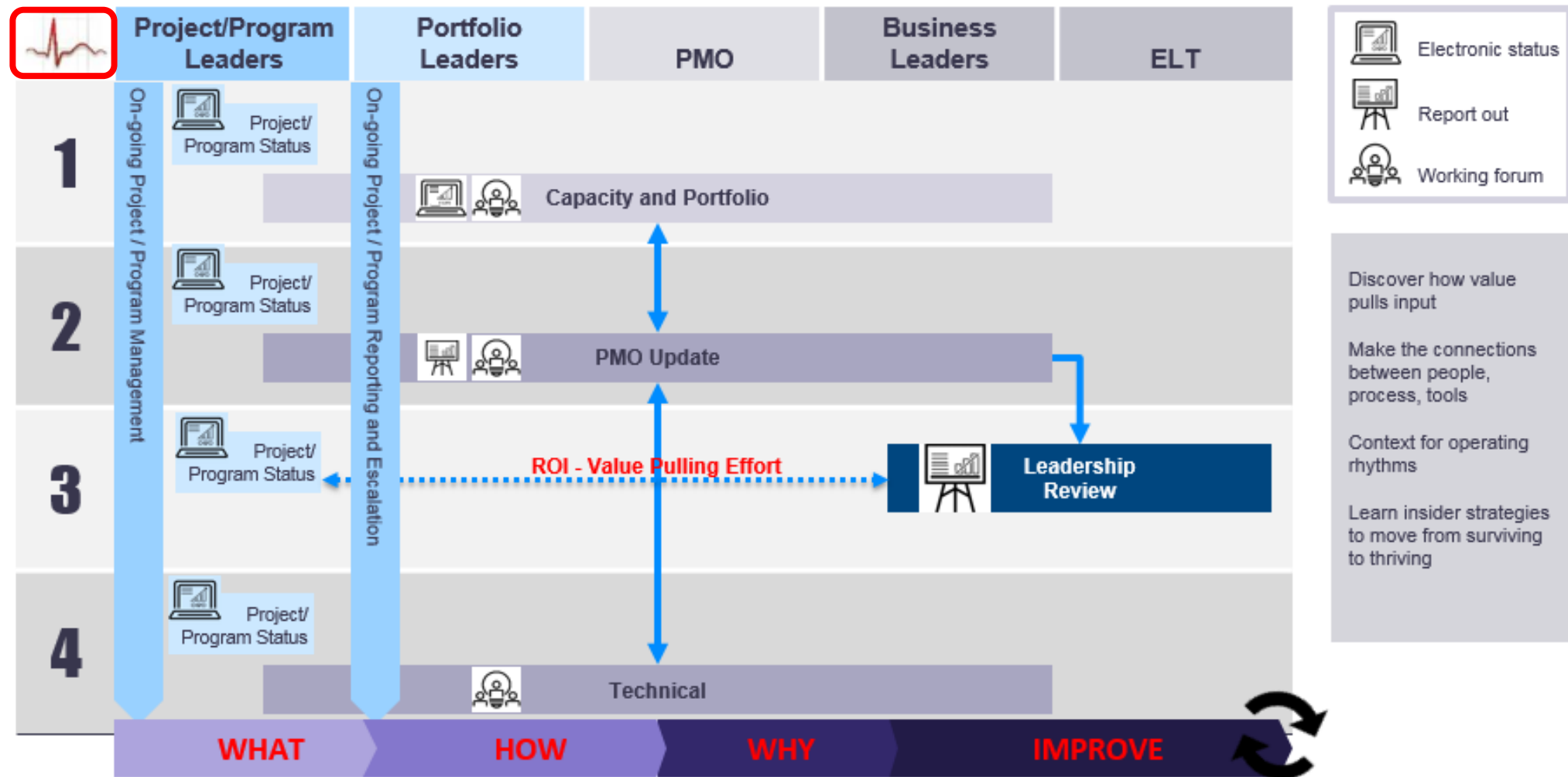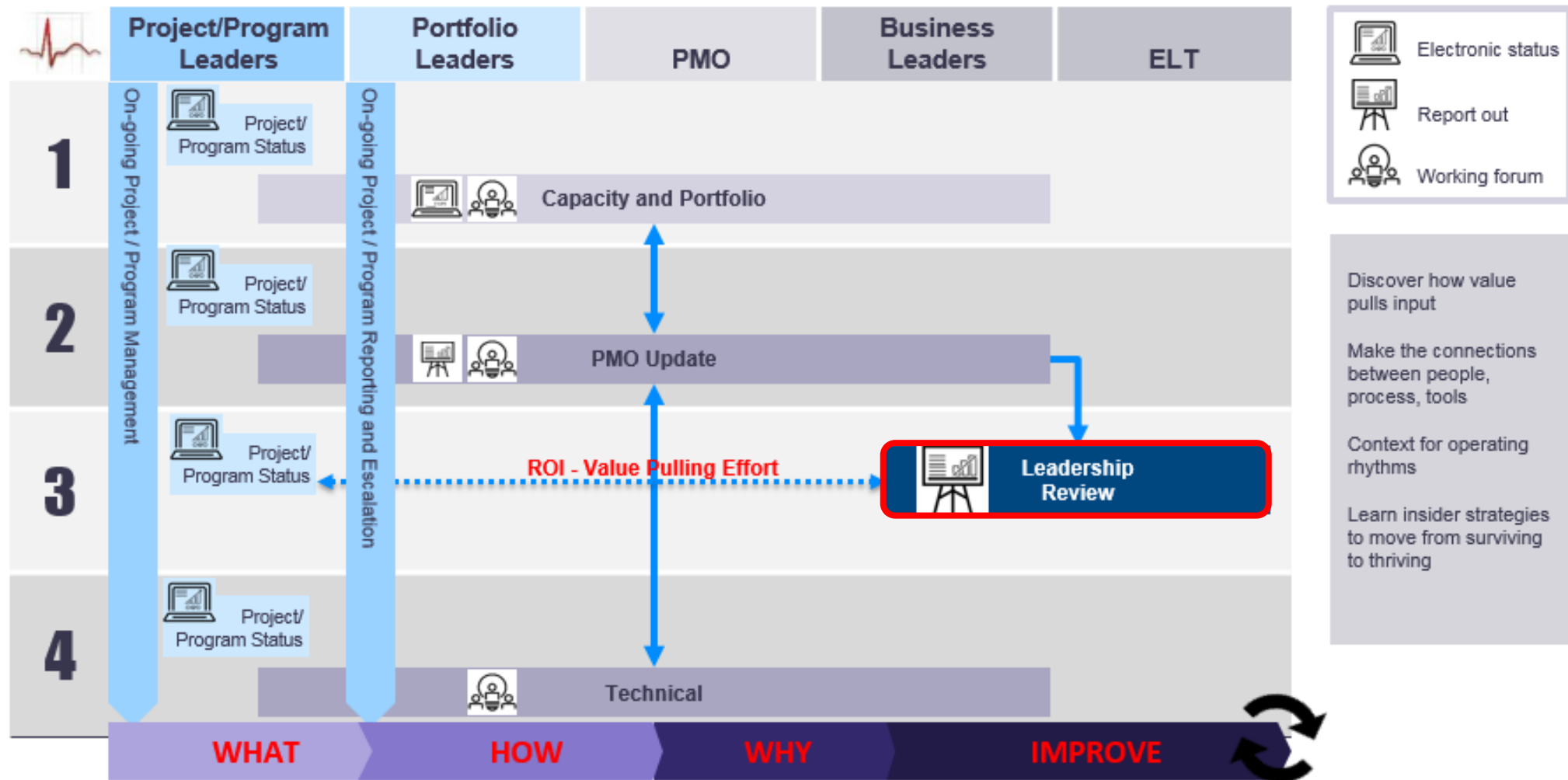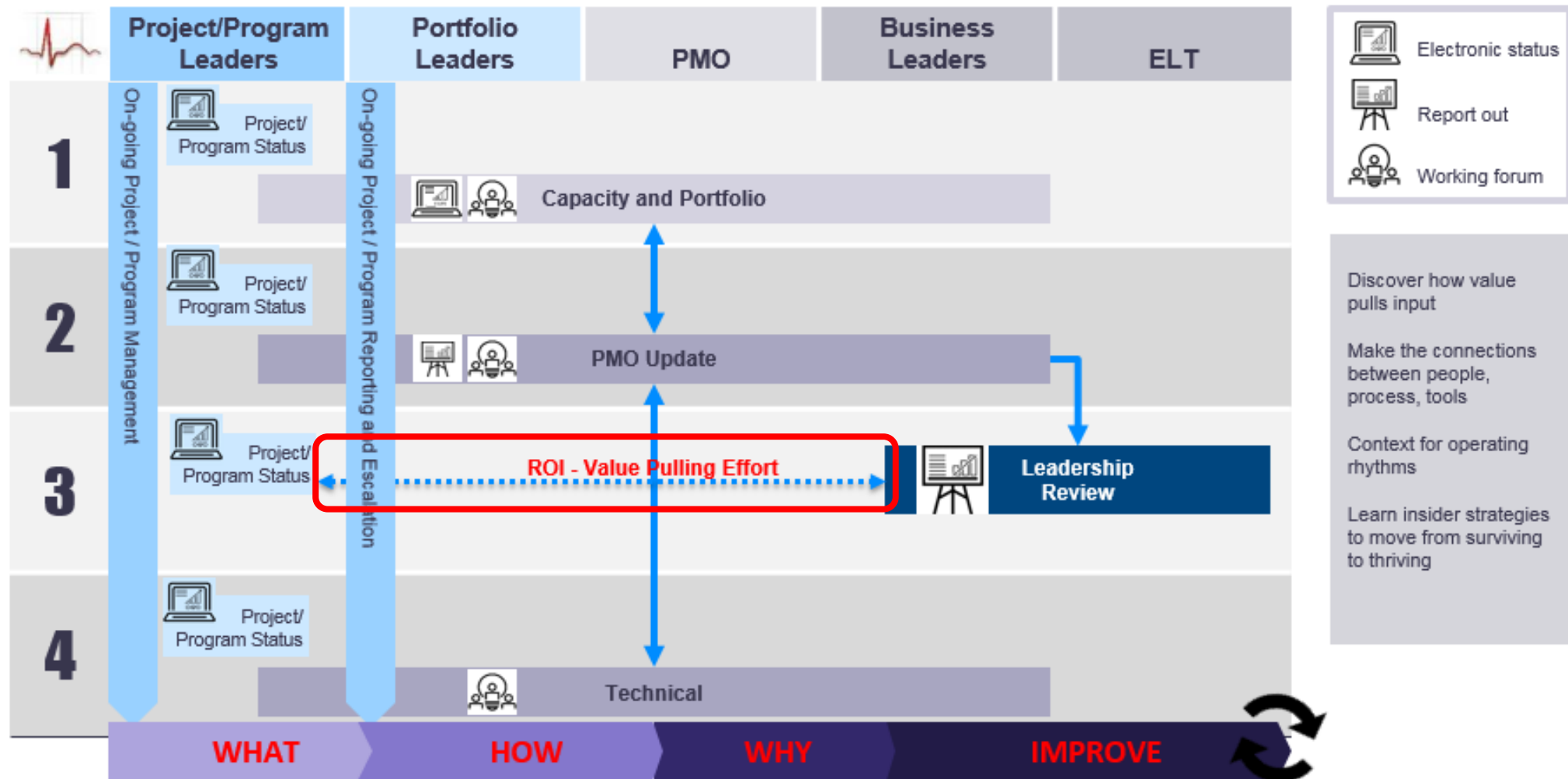| Define	Design	Optimize
•Overview and Operating Principles •PPM Ecosystem Definitions and Outcomes •Capability and Investment Priority	•Contextualized Process Rhythms, Flows, Steps and Policies •Usability and Persona Based Experience via Security •Integrations	•Roadmap •Maturity ROI •Measuring Success

Simple Sample Operating Rhythm

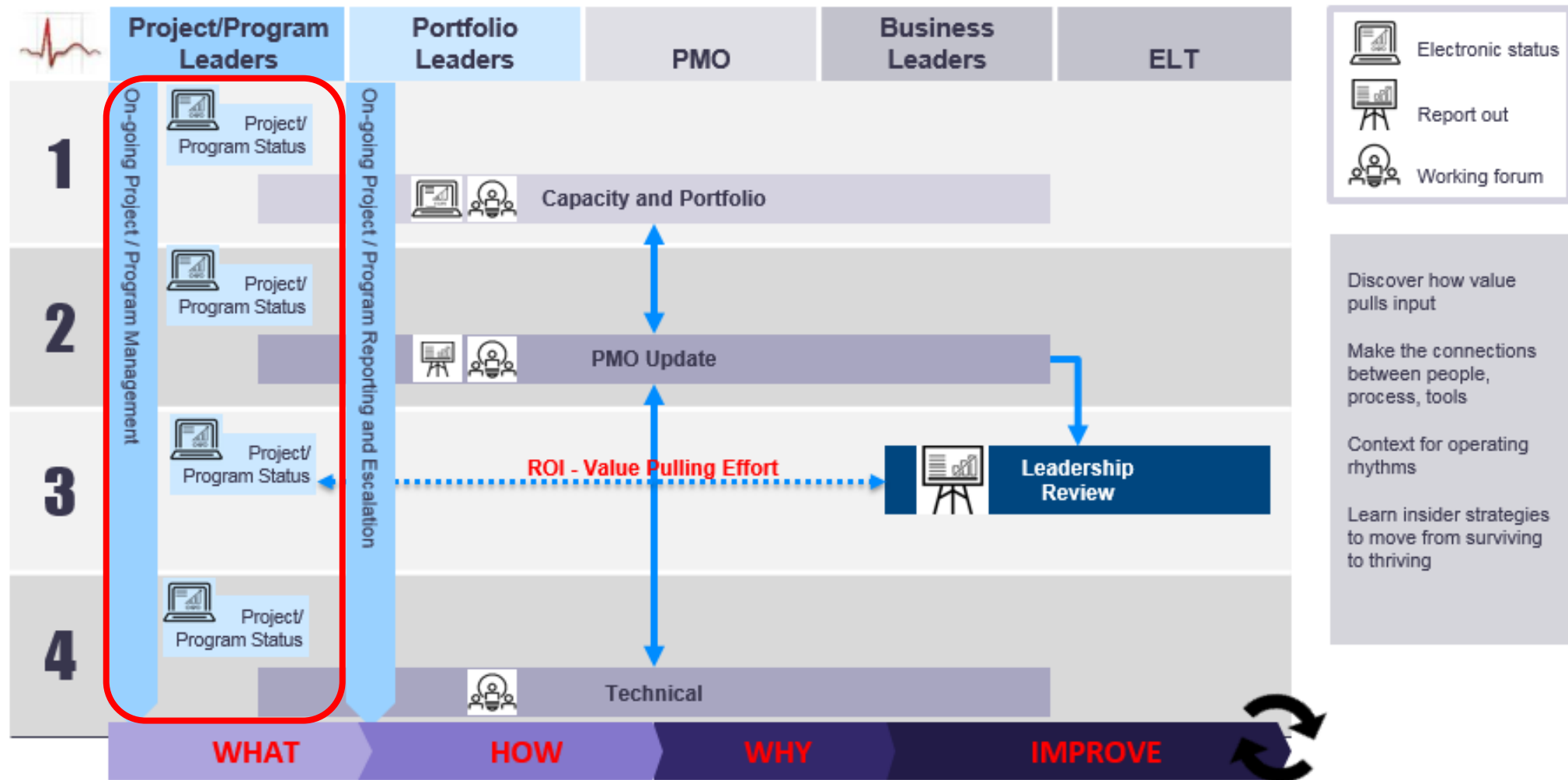# Simple Sample Operating Rhythm

Simple Sample Operating Rhythm

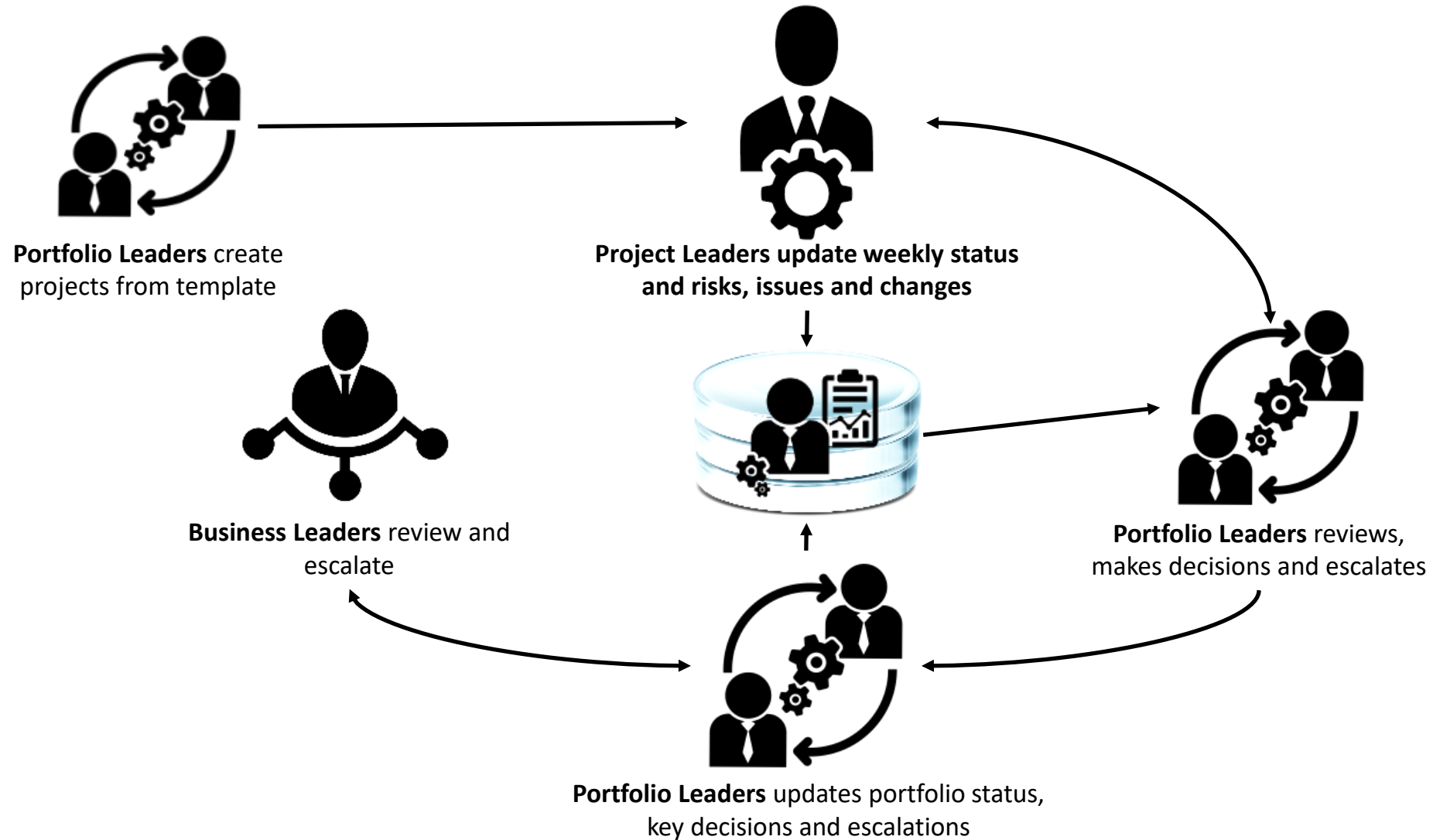# Simple Sample Operating Rhythm

Simple Sample Operating Rhythm

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"MOS is <u>People</u> doing Processes that Profit"

Simple Sample Process Flow

Portfolio Leaders create projects from template

Project Leaders update weekly status and risks, issues and changes

Business Leaders review and escalate

Portfolio Leaders reviews, makes decisions and escalates

Portfolio Leaders updates portfolio status, key decisions and escalations

Failure to adopt is expensive and undesirable –

which leads to

an equally impactful leadership response.

By leveraging a thoughtful approach, we can

build an adoption solution *for* PPM

– not just '...*and* PPM' –

that is **baked into the ecosystem**.

This, by comparison, is inexpensive –

and as the industry is proving

it is imperative to **value delivery**.

Swag Bag (Key Takeaways)

1 Identify adoption opportunities and leverage leading practice scales.

2 Use the keys to success.

3 Show process rhythms and details visually in multiple ways – when high level is understood / standardized, the details become consumable.

4 PPM practitioners can build an adoption solution themselves – *for PPM not just and PPM.*

5 Failure is expensive and intolerable.

Refence additional regoUniversity content around Vision, Change, Metrics and Compliance

Questions?

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