Case Study: How to Maximize Your User Adoption Experience

Session ID#: 10287

How to Maximize Your User Adoption Experience as Part of Successful Project Management

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APRIL 12-16, 2015
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REMINDER

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Agenda

- Who We Are
- Keys to BI Project Success
- Case Study
- Best Practices in User Adoption

Who We Are

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Introduction

- Christine Hubley
- Dallas, TX
- Consultant for US-Analytics
    - Focus on BI: OBIEE, BICS
    - Hyperion Planning and Essbase
- 5+ years of technology consulting experience
    - BI and Data Analytics Developer
    - Project Manager
    - Business Analyst

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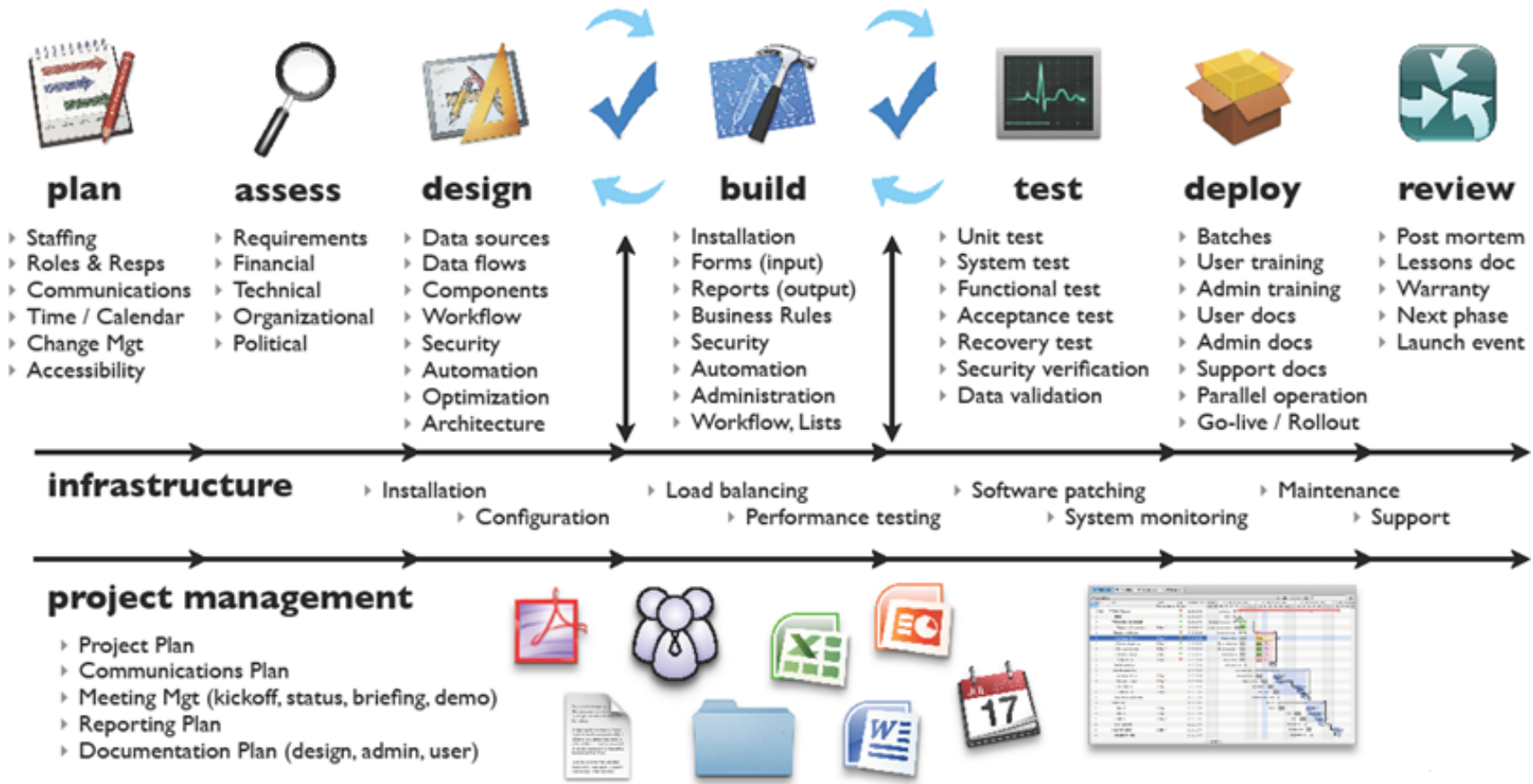FOR THE ORACLE COMMUNITY

- Full-service consulting firm focused solely on helping clients establish and maintain long-term EPM and BI initiatives
- Oracle Gold Partner specialized in Oracle/Hyperion for more than 15 years
- 500+ clients and 1,000+ successful engagements nationwide
- Ensure end-to-end coverage of technology investments
  - Process and advisory
  - Infrastructure
  - Implementations
  - Upgrades and migrations
  - Training
  - Managed services

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Keys to BI Project Success

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Project Management

plan	assess	design	build	test	deploy	review
▸ Staffing	▸ Requirements	▸ Data sources	▸ Installation	▸ Unit test	▸ Batches	▸ Post mortem
▸ Roles & Resps	▸ Financial	▸ Data flows	▸ Forms (input)	▸ System test	▸ User training	▸ Lessons doc
▸ Communications	▸ Technical	▸ Components	▸ Reports (output)	▸ Functional test	▸ Admin training	▸ Warranty
▸ Time / Calendar	▸ Organizational	▸ Workflow	▸ Business Rules	▸ Acceptance test	▸ User docs	▸ Next phase
▸ Change Mgt	▸ Political	▸ Security	▸ Security	▸ Recovery test	▸ Admin docs	▸ Launch event
▸ Accessibility		▸ Automation	▸ Automation	▸ Security verification	▸ Support docs	
		▸ Optimization	▸ Administration	▸ Data validation	▸ Parallel operation	
		▸ Architecture	▸ Workflow, Lists		▸ Go-live / Rollout	

infrastructure
- ▸ Installation
- ▸ Configuration
- ▸ Load balancing
- ▸ Performance testing
- ▸ Software patching
- ▸ System monitoring
- ▸ Maintenance
- ▸ Support

project management
- ▸ Project Plan
- ▸ Communications Plan
- ▸ Meeting Mgt (kickoff, status, briefing, demo)
- ▸ Reporting Plan
- ▸ Documentation Plan (design, admin, user)

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Project Management

- Good project management is critical to project success
- A successful project is one where you come in on time and on budget, you built the right thing, and it's being used
- PMs need to manage multiple parts, including:
    - Time
    - Money
    - Resources
    - Client expectations
    - Team dynamic
   - User experience
- Will it be used?

BI Project Success Rate

- Over half of the BI projects undertaken are considered failures
  - According to Gartner estimates, that's approximately $7 billion wasted in 2014
- When a project fails, users are stuck using the old process
- Why won't users make the switch?
- Change is hard and needs to be proactively managed

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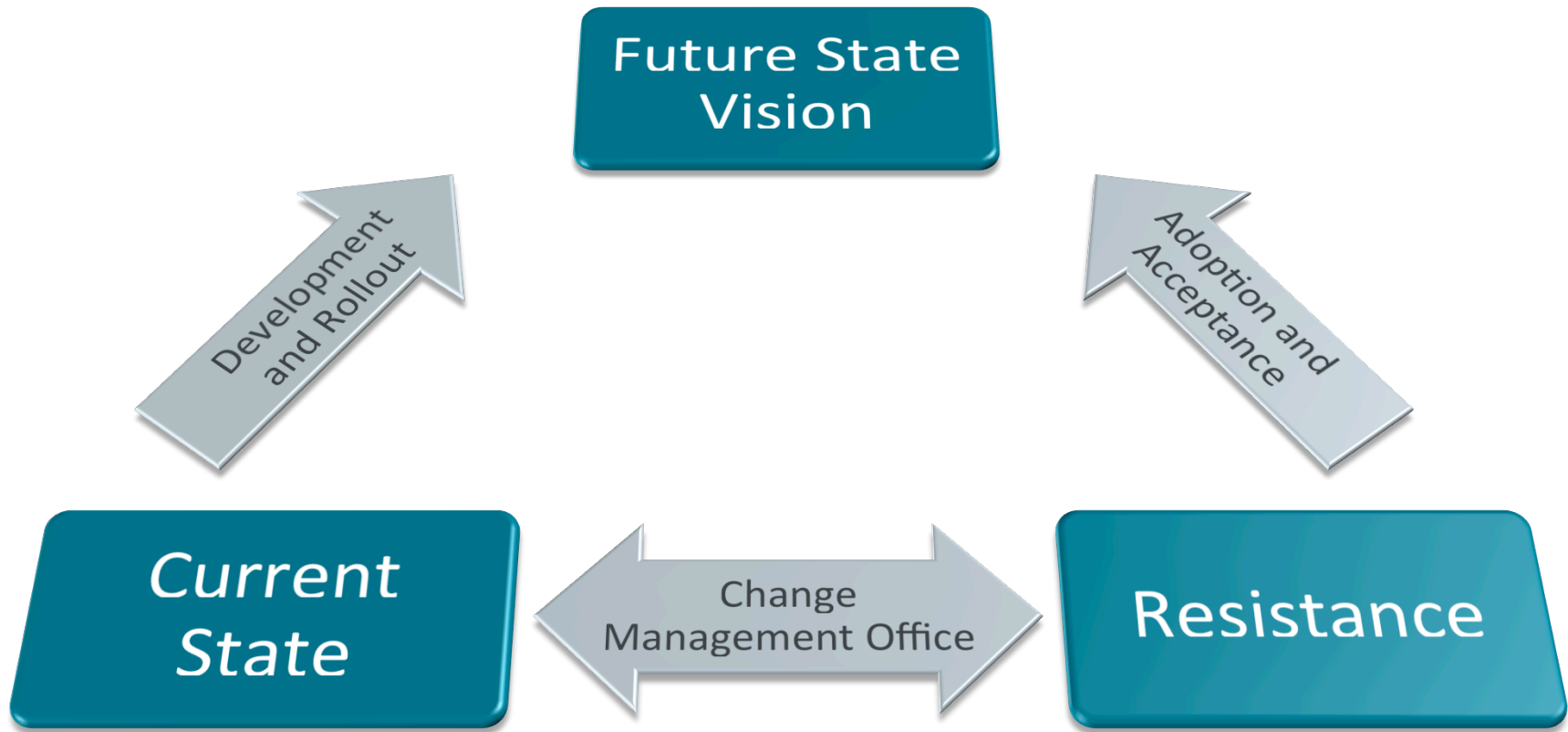
Change Management

Change Management

Leading Practices

- Activities should be continued during all stages of a project

- As early as drafting Project Charter for key stakeholders

- Requirements gathering should broaden to key participants

- Active listening by CMO — communication goes both ways

- Key participants need involvement at project checkpoints

Example Activities

- Custom newsletters

- Town hall meetings

- Consistent, simple messaging

- Regular checkpoints

- Hands-on approach

- Targeted business unit visits

- Process customizations

- Custom training

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Case Study

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Case Study: Business Challenge

- Grocery chain client
- OBIEE 11.1.1.6.X
- Exalytics
- A new BI application was built
- IT team was under pressure to shut down the old system
  - Maintaining two systems was costing them time and money
- Business users were not using new, in progress dashboard
- Physically separate work locations hindered open communication
- Both IT and the business users were overwhelmed with other unrelated but important company projects

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Case Study: Results

- User adoption success:
  - Number of users increased from 3-5 to 70
  - Time spent on new application for each user increased
  - User satisfaction has increased
  - Entire groups of new users (such as the marketing department) are exploring how they can use the application
  - Client is looking to expand functionality to replace even more of their old system
  - Current manual processes were reduced significantly

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Best Practices in User Adoption

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User Adoption DON'Ts

- Make assumptions
  - IT assumed users knew where to find the application, who to ask for access, and how to use it
  - IT assumed the application was a perfect fit and that old requirements didn't need to be revisited

- Separate development from user adoption
  - IT worked in a different building and did not make physical or virtual contact with users during development
  - IT did not communicate application failures, when data was missing, or new releases

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User Adoption DON'Ts

- Stop supporting the users
  - Without training, communication, or check-up visits, the users went back to the old application which they already knew how to use

- Develop only to a few users
  - IT only met with a small selection of high-level users to generate requirements
  - Users from different roles and departments can have different needs for the application; what works for one group may not work for another

User Adoption Cycle

Communication/
Availability

1

Training/
Resources

Forward
Momentum

6

2

5

3

Trust

User
Ownership

4

Application
Usability
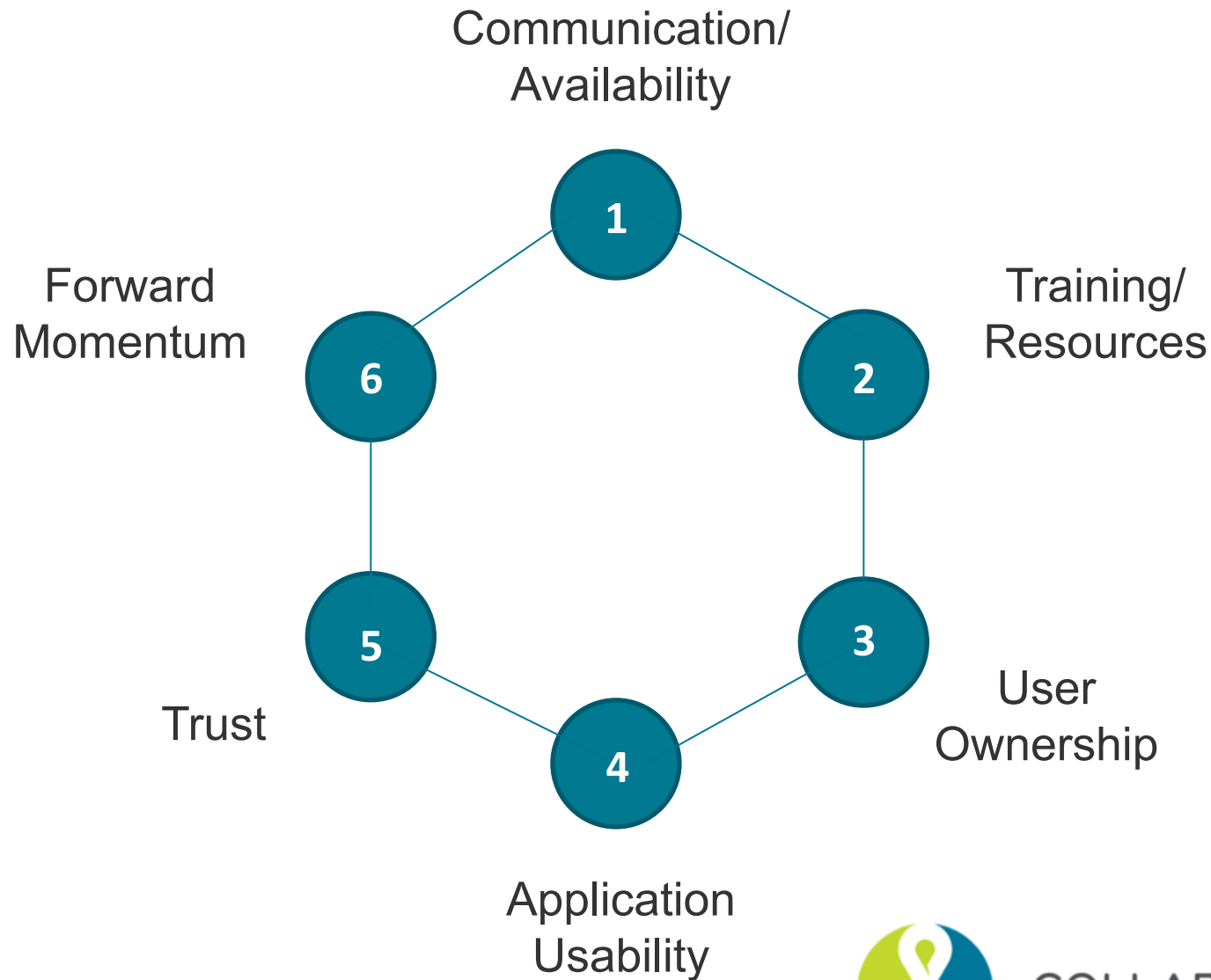
User Adoption DOs

- Communicate and be available
    - Good communication is vital
    - Important information such as outages, issues, progress, and answers to questions needs to be frequently communicated to the users
    - Users need to feel like they can communicate openly and receive a prompt response
    - Make all forms of contact available and clearly indicate whom they should contact
    - Users should have multiple ways to communicate with you — only communicating via email is not acceptable

User Adoption DOs

- Provide training and resources
    - Ideally, each user should be trained by a live person
    - In-person trainings give a better opportunity for users to ask questions and provide feedback that could further improve application usability
    - If users are unable to attend training, you should have a well written training guide for them to reference that is easily accessible and up to date
    - Contact information for the trainer should be sent to all users
    - If your user group is large, power users can be great resources in training their teams

User Adoption DOs

- Encourage user ownership / key stakeholders
    - Users who feel a sense of ownership are less likely to abandon the application
    - Involve the users in key decisions, requirements, and report design
    - Involving the users builds trust and improves application usability
    - Involving a wide range of users helps prevent an application that is only developed for a specific type of individual
- Example
    - We scheduled group meetings with all power users to…
        — Present team progress on issues and requirements
        — Raise key issues
        — Gather feedback and additional requirements
    - Inviting all power users helped them reach a consensus and saved the delivery team a lot of rework

User Adoption DOs

- Consider application usability
  - The new application needs to be more user-friendly and useful than the old one
  - Ask yourself and others:
    - Does it follow user requirements?
    - Is it fast enough?
    - Is the data accurate?
    - Is it easily accessible to all who need access?
    - Is it flexible enough to allow users to self-serve certain reports?

User Adoption DOs

- Build trust
  - Users need to trust 3 key components of the project:
    - **The delivery team** – this is achieved through good communication, face time, good listening skills, and demonstrating a commitment to the users
    - **The data** – this can be achieved with user verification and constant vigilance and retesting; good data is crucial to the success of the application
    - **Application logic** – column calculations should be triple checked for accuracy, and users should have a good understanding of what each report piece means to prevent misunderstandings

User Adoption DOs

- Build forward momentum
  - The AGILE methodology is useful to keep the requirements / development / feedback cycle going
  - Your core users can spread the word of the application's usability and help increase your user numbers
  - Regularly scheduling and staying on top of feedback sessions helps keep your application at the forefront of users' minds; the feedback will also ensure your application does not quickly become outdated
- Example
  - Our weekly meetings helped to remind users that our application was getting closer to their exact needs and was not going away
  - The meetings also provided a good opportunity to exercise our other user adoption dos such as application usability, building trust, and increasing the sense of user ownership

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Thank You

Questions?

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