



Improving User Adoption

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GRC
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PERFORM WITH INTEGRITY

Agenda

User Adoption: Understand the Importance of High UA

Negative Perception: Act Quickly to Counteract

User Observations: Evidence Direct From the Source

Quick Wins: Standard Report Modifications

Quick Wins: Infocenter Configurations

Audience Questions and Discussion

User Adoption: Understand the Importance of High UA

- User Adoption measures the level of acceptance your users have with your application or system.
- Even a perfectly designed GRC methodology and application can be brought to it's knees by low or poor user adoption. If you build it, they might decide to not come.
- Surveys and internal user conferences/gatherings/events are great ways to assess current user adoption levels.
- What can be done to promote high user adoption? Manage Perception and perform User Observations.

Negative Perception

Taken from an actual conversation:

Them: MetricStream won't be able to accommodate our needs.

Me: Oh, you've worked with the application before?

Them: No, but I heard it won't work for us.

Me: ...

Negative Perception: Act Quickly to Counteract

- Perception is 9/10th of User Adoption – Good or Bad. If it is perceived as difficult, clunky, or inefficient, users will believe it is bad. And will tell anyone else that listens.
- Work quickly to identify where the rumors are starting, then validate if it is a training problem, use case problem, system issue, poorly designed report, too many clicks, etc.
- Develop programs to dispel negative perception and encourage positive perception. Meet frequently with end users to gather feedback and make them understand they are contributing to the success of the use case and application.
- Perform user observations to see how users are interacting with the application to understand where to focus change and resources.

User Observations

Taken from another actual conversation:

Developer: We're ready to add the new feature in the next release. It's been looked at by everyone on the team and gone through QA.

Me: Were any of the Business Analysts or Application Trainers involved in the development of or observed testing the feature?

Developer: No, but it completely meets all the requirements. It's not our fault if they don't understand how they should use the feature in the correct way.

Me: ...

User Observations: Evidence Direct From the Source

- Select a number of users to observe, and have them walk through their activities in MetricStream, describing the actions they take. Let them complete each individual activity before questions and suggestions.
- Gather all observations and look for common pain points: Inefficient navigation, interaction with delivered reports, searching for next step or action, etc.
- Develop training materials or quick reference guides to focus on more efficient ways of completing those tasks. Target specific observation examples and express gratitude to participants for helping solve those pain points.

Quick Wins: Standard Report Modifications

Does this report look familiar? Does it provide too much information? Is it missing information?

MetricStream

My Tasks: 20 [0 New, 0 Past due]

My Calendars

GRCIntelligence | Surveys | Audits | GRC Libraries | SMC | Create/Manage Plans | **Issues** | Compliance | UCF | Risks | Metrics | Manage Assessments | Setup Assessments | My Task | Loss Events | Confil

Overview | Issues | Actions | Respond To Issues

Detailed Issues

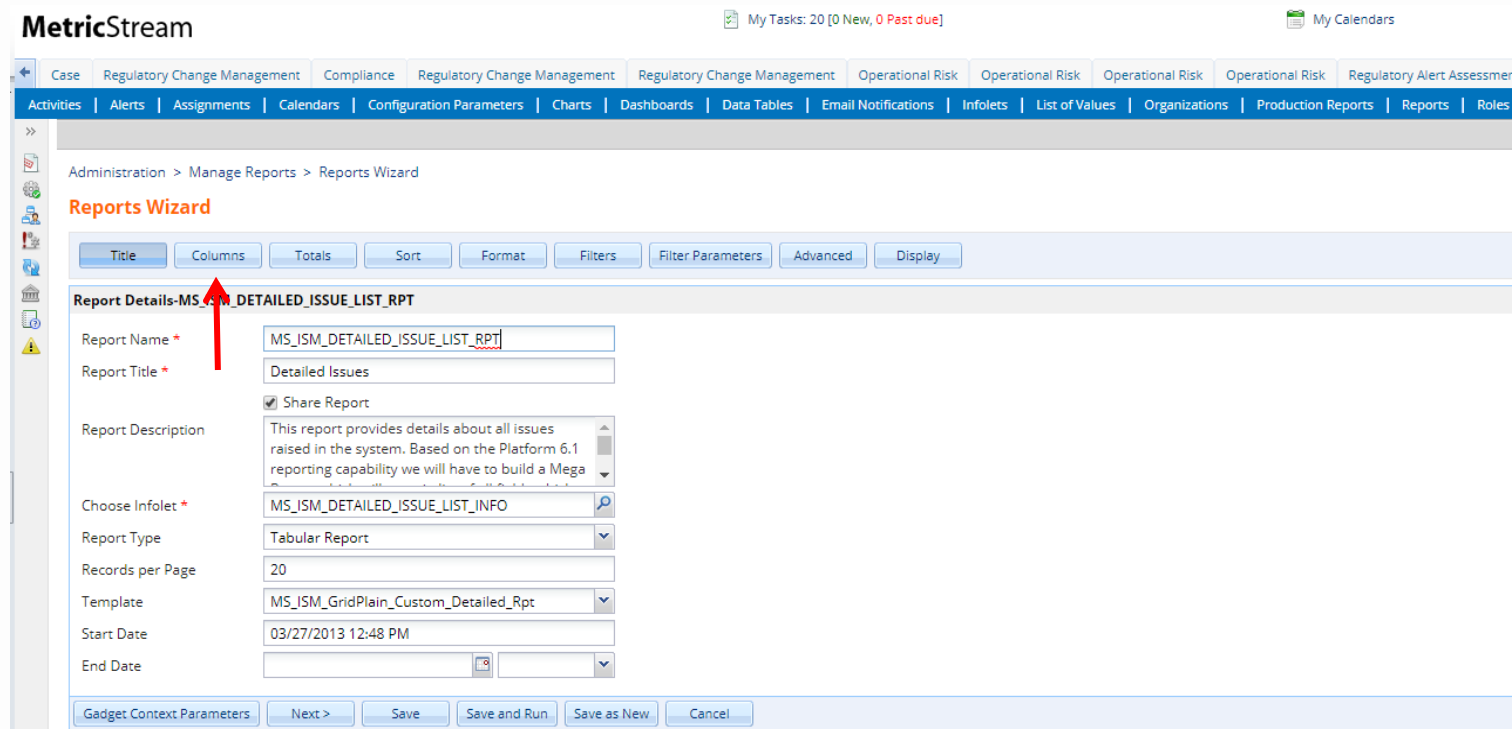
Issue Title ▲	Status	Owned By Organizati...	Issue Owner	Initial Approver Orga...	Initial Approver	Action Plan Approver...	Action Plan Appro...
Business Users did not complete the SAF...	Closed	LOB - Accounting	Andy Andre	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes
Business Users did not complete the SAF...	Open	LOB - Accounting	Andy Andre	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes
CRE Refis Could-Issue	Open	LOB - Accounting	Andy Andre				
Calendar Resolution Progress Review	Action Plan Developed	LOB - Shared Finance ...	Angel Aleena	LOB - Shared Finance ...	Angel Aleena	LOB - Shared Finance ...	Angel Aleena
Energy Legislation for Appropriations	Action Plan Implement...	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes
Energy Legislation for Awareness of Dysl...	Action Plan Implement...	LOB - Accounting	Garry Glen	LOB - Accounting	Garry Glen	LOB - Accounting	Garry Glen
Individual Appraiser License Renewal an...	Closed	LOB - Accounting	Andy Andre	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes
Progress Review on the Status	Action Plan Developed	LOB - Shared Finance ...	Angel Aleena	LOB - Shared Finance ...	Angel Aleena	LOB - Shared Finance ...	Angel Aleena
Regulatory update for 48 CFR Part 52	Action Plan Implement...	LOB - Accounting	Kelly Klarkson	LOB - Accounting	Kelly Klarkson	LOB - Accounting	Kelly Klarkson
Regulatory update for 48 CFR Parts 1812,...	Action Plan Implement...	LOB - Accounting	Andy Andre	LOB - Accounting	Andy Andre	LOB - Accounting	Andy Andre
Ripple Wins-Issue	Closed	LOB - Accounting	Andy Andre				
Support for Open Access Repositories	Pending Approval	LOB - Accounting	Andy Andre	LOB - Accounting	Kelly Klarkson	LOB - Accounting	Kelly Klarkson

Quick Wins: Standard Report Modifications

- SYSTEM1 is your best friend, and worst enemy. ALWAYS test in Dev, not in Prod.
- Log into MetricStream as SYSTEM1 and navigate to Administration > Reports. Search for %Detailed% in the search box. Select Edit Report for the MS_ISM_DETAILED_ISSUE_LIST_RPT. This will bring up the Report Wizard.
- This will allow you to make changes to the default report output without modifying any of the underlying Infolet SQL code. This will deliver the same information to all of your users without having to set up individual preferences which need to be loaded every time the report is run.
- You will see how you can add or remove columns and modify order in the next few slides.

Quick Wins: Standard Report Modifications

- Select Columns from the Reports Wizard



The screenshot displays the MetricStream Reports Wizard interface. At the top, the 'MetricStream' logo is on the left, and 'My Tasks: 20 [0 New, 0 Past due]' and 'My Calendars' are on the right. Below this is a navigation bar with tabs for 'Case', 'Regulatory Change Management', 'Compliance', 'Regulatory Change Management', 'Regulatory Change Management', 'Operational Risk', 'Operational Risk', 'Operational Risk', 'Operational Risk', and 'Regulatory Alert Assessment'. A secondary navigation bar includes 'Activities', 'Alerts', 'Assignments', 'Calendars', 'Configuration Parameters', 'Charts', 'Dashboards', 'Data Tables', 'Email Notifications', 'Infolets', 'List of Values', 'Organizations', 'Production Reports', 'Reports', and 'Roles'. The main content area shows the breadcrumb 'Administration > Manage Reports > Reports Wizard' and the title 'Reports Wizard'. Below the title is a row of tabs: 'Title', 'Columns', 'Totals', 'Sort', 'Format', 'Filters', 'Filter Parameters', 'Advanced', and 'Display'. The 'Columns' tab is selected and highlighted with a red arrow. The 'Report Details-MS_ISM_DETAILED_ISSUE_LIST_RPT' section contains the following fields: 'Report Name *' (MS_ISM_DETAILED_ISSUE_LIST_RPT), 'Report Title *' (Detailed Issues), 'Report Description' (This report provides details about all issues raised in the system. Based on the Platform 6.1 reporting capability we will have to build a Mega...), 'Choose Infolet *' (MS_ISM_DETAILED_ISSUE_LIST_INFO), 'Report Type' (Tabular Report), 'Records per Page' (20), 'Template' (MS_ISM_GridPlain_Custom_Detailed_Rpt), 'Start Date' (03/27/2013 12:48 PM), and 'End Date'. At the bottom, there are buttons for 'Gadget Context Parameters', 'Next >', 'Save', 'Save and Run', 'Save as New', and 'Cancel'.

Quick Wins: Standard Report Modifications

- Highlight the field you want to display and use the left arrow to move to Report Columns. Highlight the field you **don't want to display** and use the left arrow to remove it from the report output.

MetricStream My Tasks: 20 [0 New, 0 Past due] My Calc

Case Regulatory Change Management Compliance Regulatory Change Management Regulatory Change Management Operational Risk Operational Risk Operational Risk Operational Risk R

Activities | Alerts | Assignments Charts | Dashboards | Da List of Values | Organizations | Production Repo

Administration > Manage Re

Columns

Title Columns Totals Sort Format Filters Filter Parameters Advanced Display

Select Columns for display in the report-MS_ISM_DETAILED_ISSUE_LIST_RPT

Available Columns

- SUPPLIER
- AUDITABLE_ENTITY
- Products
- ISSUE_INITIATOR
- ISSUE_ID**
- OWNERORG
- APPROVERORG
- PROGRESS_STATUS

Report Columns

- Issue Title
- Status
- Owned By Organization
- Issue Owner
- Initial Approver Organization
- Initial Approver
- Action Plan Approver Organizat
- Action Plan Approver

< Previous Next > Save Save and Run Save as New Cancel

Quick Wins: Standard Report Modifications

- The added field will appear at the bottom of the list. Click to highlight it and use the up/down arrows to select report output position. Top is the first column displayed in the report.

The screenshot shows the MetricStream interface for configuring report columns. The breadcrumb trail is Administration > Manage Reports > Reports Wizard > Columns. The main title is 'Columns' and the report name is 'MS_ISM_DETAILED_ISSUE_LIST_RPT'. The 'Available Columns' list includes SUPPLIER, AUDITABLE_ENTITY, Products, ISSUE_INITIATOR, OWNERORG, APPROVERORG, PROGRESS_STATUS, and PID. The 'Report Columns' list includes Requirements, Risks, Standards, Core Objects, Asset Classes, Assets, Processes, and ISSUE_ID. The 'ISSUE_ID' field is highlighted in blue. A red circle highlights the up/down arrows on the right side of the 'Report Columns' list, and a red arrow points to the 'ISSUE_ID' field. The interface includes navigation buttons like '< Previous', 'Next >', 'Save', 'Save and Run', 'Save as New', and 'Cancel'.

All columns can be reordered by repeating this action.

Quick Wins: Standard Report Modifications

- Multiple fields can be selected for removal from the report using Control or Shift during selection. Click the left arrow to remove from the report.

MetricStream

My Tasks: 20 [0 New, 0 Past du

Administration > Manage Reports > Reports Wizard > Columns

Columns

Title Columns Totals Sort Format Filters Filter Parameters Advanced Display

Select Columns for display in the report-MS_ISM_DETAILED_ISSUE_LIST_RPT

Available Columns

- SUPPLIER
- AUDITABLE_ENTITY
- Products
- ISSUE_INITIATOR
- OWNERORG
- APPROVERORG
- PROGRESS_STATUS
- PID

Report Columns

- Requirements
- Risks
- Standards
- Core Objects
- Asset Classes
- Assets
- Processes
- ISSUE_ID

< Previous Next > Save Save and Run Save as New Cancel

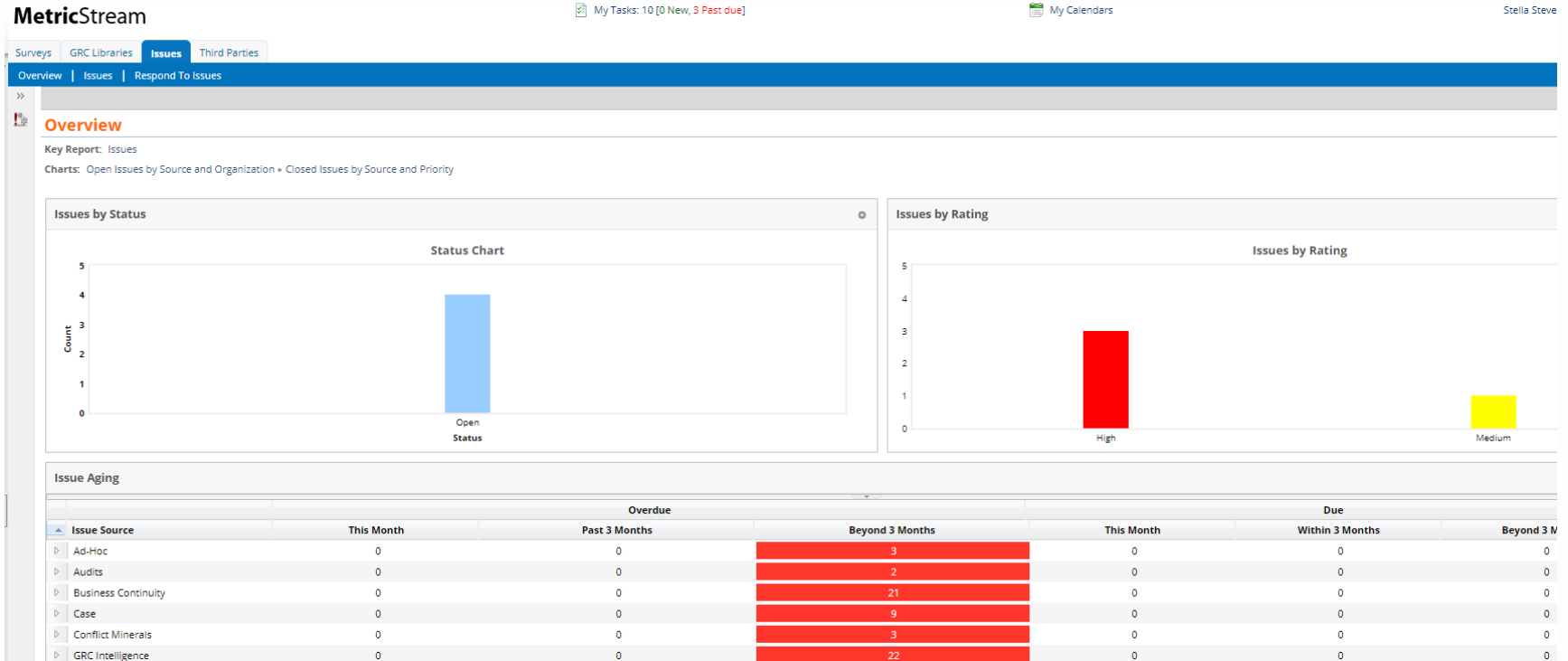
Simplify the report output by removing unnecessary columns. They can always be added back at a later point in time.

Quick Wins: Standard Report Modifications

- After all standard report modifications are complete, click Save to apply the new default report output for the Detailed Issues Report.
- The display output will appear in the same order for all users, and will be much easier to absorb, navigate, filter, and export.
- Repeat as needed for other reports.
- Unsure what Report to select? That's where Infocenter management comes in handy!

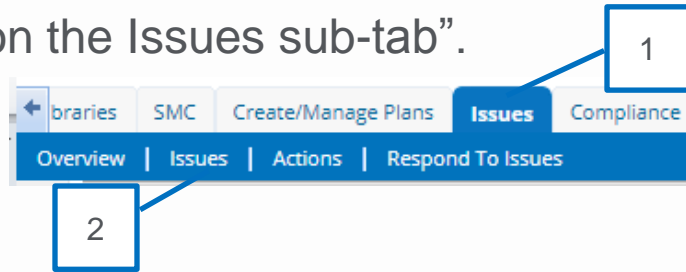
Quick Wins: Infocenter Configurations

Is this landing page familiar to you (Issues – Overview)? Do you use any of the information in it? If not, why are you showing it to your users on login?



Quick Wins: Infocenter Configurations

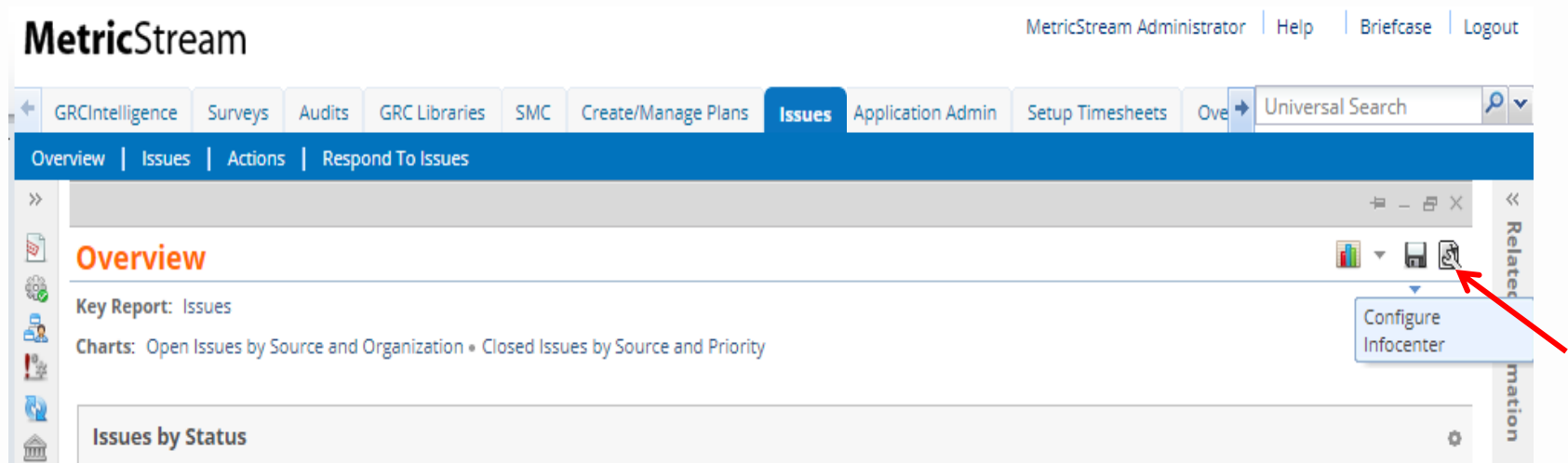
- Infocenter Landing Pages are the first things your users see when logging into the system or selecting different tabs.
- Much of the screen real estate is being underutilized or completely ignored. Your instructions should never start out “Click on the Issues tab, then click on the Issues sub-tab”.



- Configuring Infocenters allows you to put relevant information or actionable items in front of your users right away, greatly reducing the number of clicks per action.

Quick Wins: Infocenter Configurations

- Log in as SYSTEMI, then select the Tab (Infocenter) you want to configure. Click the wrench icon to Configure the Infocenter.



The screenshot displays the MetricStream web application interface. At the top left, the 'MetricStream' logo is visible. The top right corner shows the user role 'MetricStream Administrator' and navigation links for 'Help', 'Briefcase', and 'Logout'. A horizontal navigation bar contains several tabs: 'GRCIIntelligence', 'Surveys', 'Audits', 'GRC Libraries', 'SMC', 'Create/Manage Plans', 'Issues' (which is the active tab), 'Application Admin', and 'Setup Timesheets'. To the right of these tabs is a 'Universal Search' field with a search icon and a dropdown arrow. Below the navigation bar, a secondary blue bar contains the sub-navigation options: 'Overview', 'Issues', 'Actions', and 'Respond To Issues'. The main content area is titled 'Overview' and includes a 'Key Report: Issues' section and 'Charts: Open Issues by Source and Organization • Closed Issues by Source and Priority'. On the right side of the main content area, there is a vertical sidebar with a 'Related Information' label. In this sidebar, a wrench icon is highlighted with a red arrow, and a dropdown menu is open, showing the option 'Configure Infocenter'.

Quick Wins: Infocenter Configurations

- This allows you to reorganize the page and display relevant information to

Manage Users > Edit Infoports

Overview

Layout: 2 columns 3 columns Widths(%)

Filters: 1. 2. 3.

Key Report

Type:

Show in Toolbar:

Assigned Items:

1. Issue List Report:

Span Across:

Number of records to display:

Infoport Height (in pixels):

Description/Tooltip:

Charts

Type:

Show in Toolbar:

Assigned Items:

1. MS_ISM_Os_Src_org:

2. MS_ISM_Closed_Iss_By_Sr...:

Span Across:

Number of records to display:

Infoport Height (in pixels):

Description/Tooltip:

Issues by Rating

Type:

Assigned Items:

1. MS_ISM_Issue_By_Severit...:

Default to Saved Preference:

Span Across:

Column: 1 2 3

Number of records to display:

Infoport Height (in pixels):

Description/Tooltip:

Issue Aging

Type:

Assigned Items:

1. Issue Ageing Report:

Default to Saved Preference:

Span Across:

Number of records to display:

Infoport Height (in pixels):

Description/Tooltip:

Each Infoport can be renamed by double-clicking here.

Multiple options are available for each of the infoports. Report Link is a link for the desired report which will open in a new window. Report output will automatically run the report and display the results.

Report names are show in the Infoport. This is helpful when identifying reports to modify

Quick Wins: Infocenter Configurations

- Infocenter Changes can simplify User Experience, greatly reducing clicks, and enhancing User Adoption.

MetricStream My Tasks: 20 [0 New, 0 Past due]

Case Regulatory Change Management Compliance Regulatory Change Management Operational Risk Operational Risk Operational Risk Operation

Application Types | Enterprises | Gadgets | Locales Engines | IUP | Monitor | Tools

Overview

Log Issue: Issue

Key Reports: Detailed Issues • Detailed Actions

My Issues

Issue Title ▲	Source Type
---------------	-------------

20

My Issue and Action Tasks

Offline	Task	Category	Assigned By
No data found to display.			

Issues can be logged directly from this view.

Links to the Detailed Issue and Detailed Action reports

All of My Issues are displayed for easy review.

Direct access to my Issue and Action Tasks, complete with easy filtering.



Thank You
Continue the conversation on [#GRCSummit](#)



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