Improving User Adoption

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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 | Confi

Overview | Issues | Actions | Respond To Issues

Detailed Issues

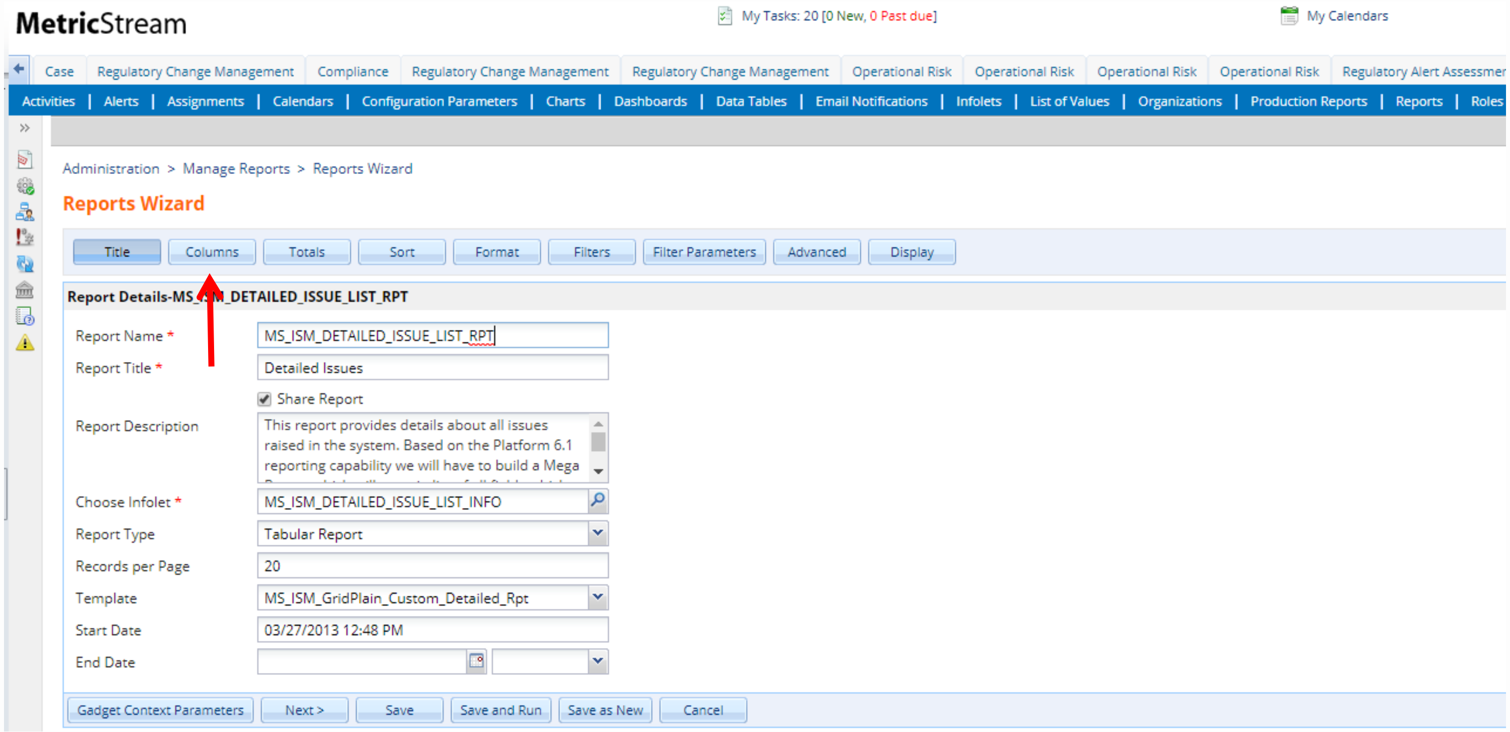
Issue Title ▲	Status	Owned By Organizati...	Issue Owner	Initial Approver Orga...	Initial Approver	Action Plan Approver...	Action Plan Appro...
Business Users did not complete the SAF...	Closed	LOB - Accounting	Andy Andre	LOB - Accounting	Howard Hughes	LOB - Accounting	Howard Hughes
Business Users did 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

- SYSTEMI is your best friend, and worst enemy. ALWAYS test in Dev, not in Prod.
- Log into MetricStream as SYSTEMI 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.

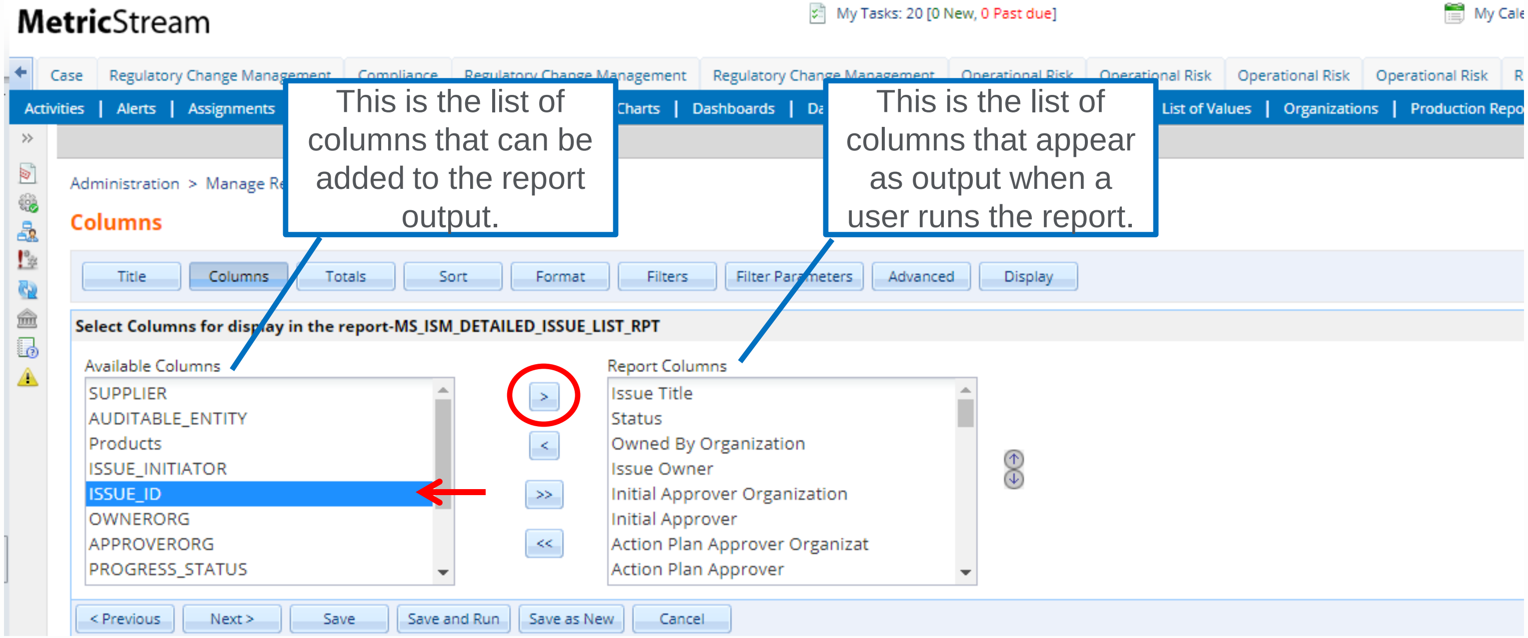
Quick Wins: Standard Report Modifications

- Select Columns from the Reports Wizard



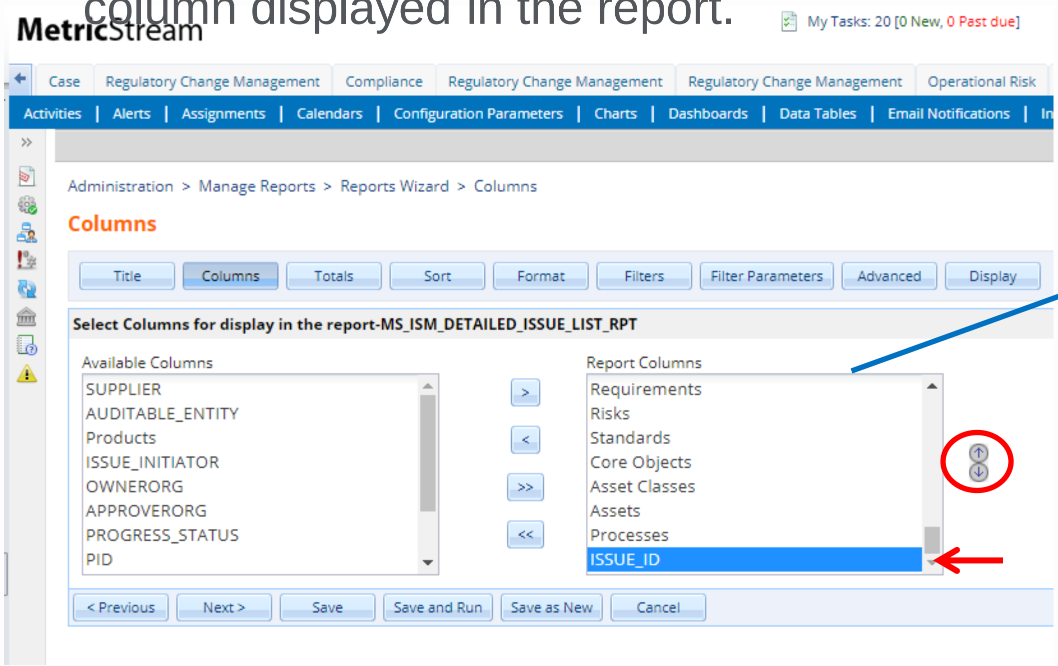
Quick Wins: Standard Report Modifications

- 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.



Quick Wins: Standard Report Modifications

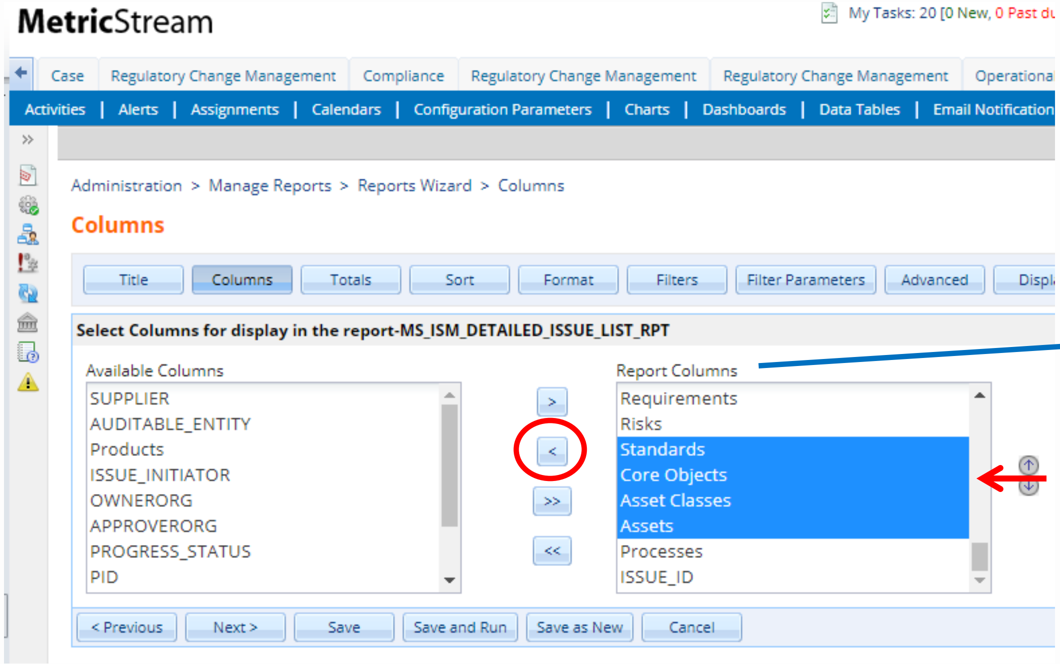
- The added field will appear at the bottom of the list. Click to highlight it and use the up/down arrows to select report output position. Top is the first column displayed in the report.



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.



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.

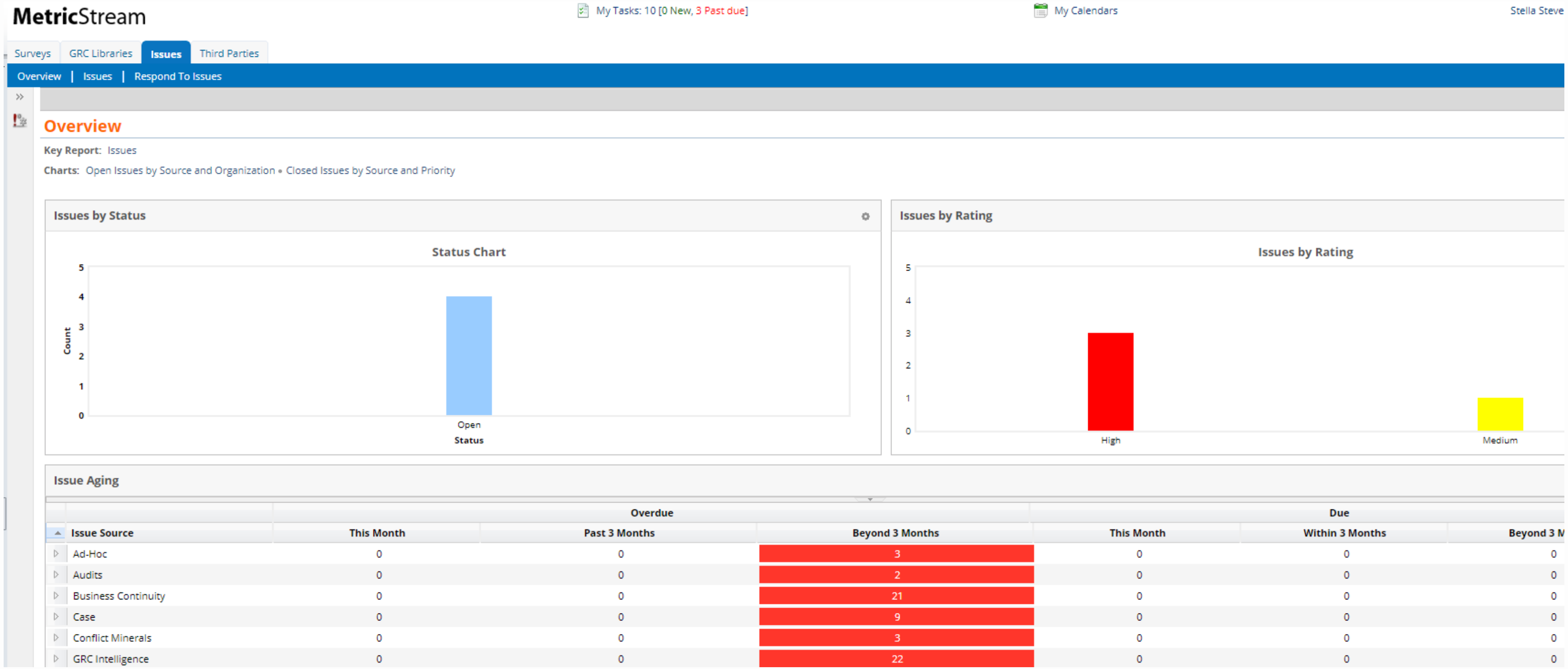
- The display output will appear in the same order for all users, and will be much easier to absorb, navigate, filter, and export.

- Repeat as needed for other reports.

- Unsure what Report to select? That’s where Infocenter management comes in handy!

Quick Wins: Infocenter Configurations

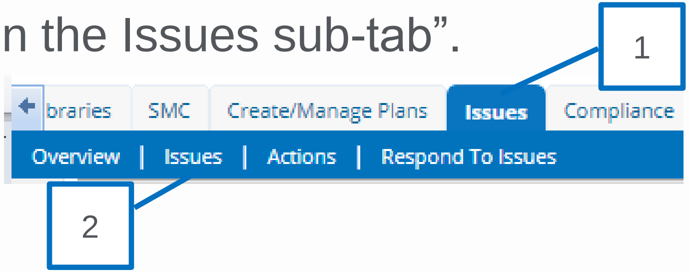
Is this landing page familiar to you (Issues – Overview)? Do you use any of the information in it? If not, why are you showing it to your users on login?



Quick Wins: Infocenter Configurations

- Infocenter Landing Pages are the first things your users see when logging into the system or selecting different tabs.

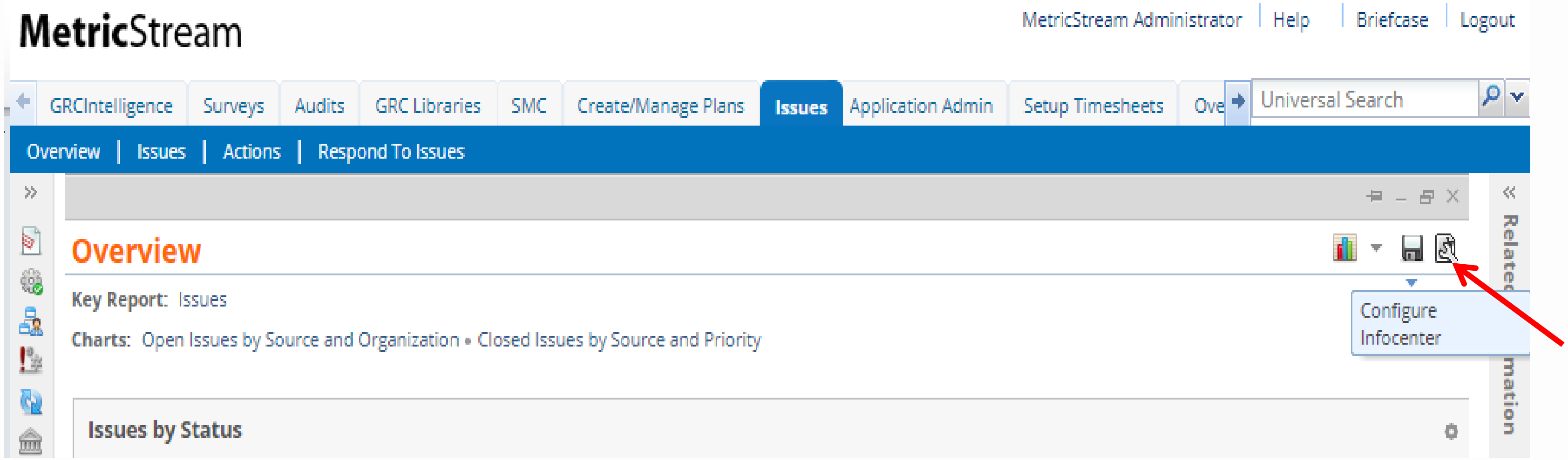
- Much of the screen real estate is being underutilized or completely ignored. Your instructions should never start out “Click on the Issues tab, then click on the Issues sub-tab”.



- 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.

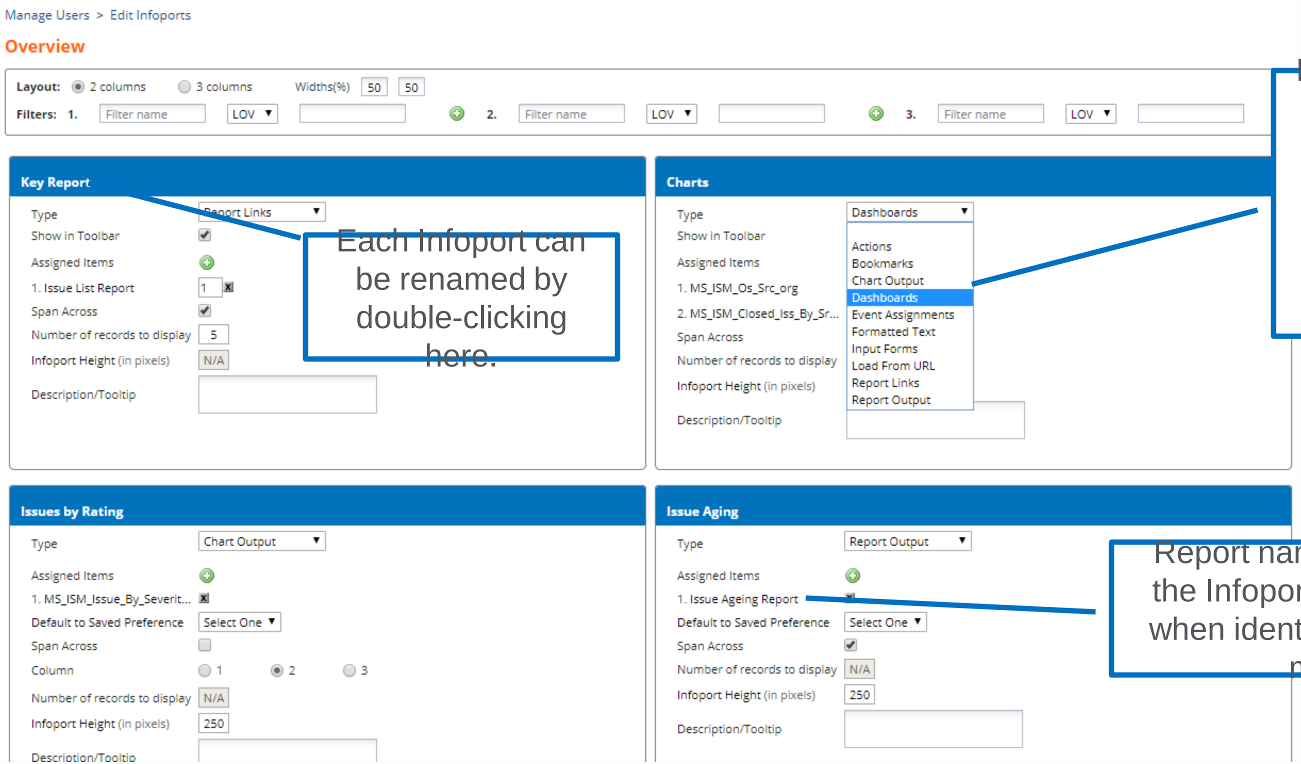
Quick Wins: Infocenter Configurations

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



Quick Wins: Infocenter Configurations

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



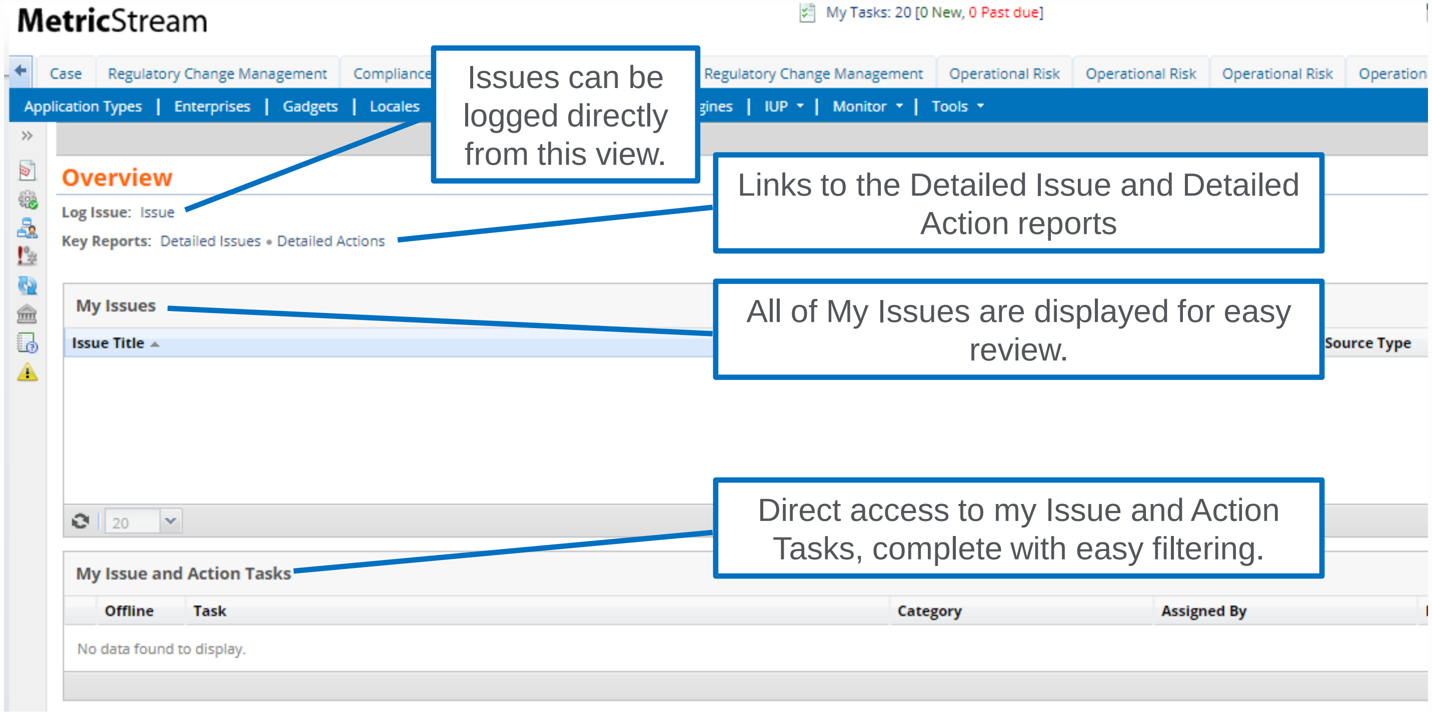
Each Infoport can be renamed by double-clicking here.

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.



Thank You

Continue the conversation on #GRCSummit

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