KEYEDIN®

WHITEPAPER

Driving User Adoption

4 Must-Haves to Ensure Successful PPM Adoption

Introduction: If They Won't Use It, It's Useless

User adoption is a challenge that has long plagued project management office (PMO) leaders and portfolio managers. While many project portfolio management (PPM) tools can address common issues, they are only as good as the data they hold. Simply stated, if no one uses it, it's useless. But the benefits of PPM far outweigh the administrative effort to maintain them, so why is it so hard to realize value from a solution? There are many challenges that come with procuring and implementing a PPM solution, but in order to successfully adopt a solution, it starts before the evaluation process even begins. Adoption requires a hard look at how goals are set for the portfolio and understanding how and why users engage with project artifacts. It requires users and management come to a common understanding of goals and a commitment to support the goals that are agreed upon. It suggests that visibility is critical to success and the understanding that you can't manage what you can't measure.

Back in 2007 PMI described PPM adoption in a way that is similar to how you might hear it described today: "No one said implementing and adopting a PPM system would be easy. The need for standards when people don't agree drives dissention; the need for monitoring makes people uneasy; and sometimes the need for leadership is simply ignored because it's not available. But the value PPM brings, from better decisions to better control over expensive investments to better allocation of resources and other benefits, make the effort worthwhile." We see a very similar reaction to initial PPM implementations, but the benefits are as worthwhile now as they ever have been – if not more so.

User adoption is often cited as a top inhibitor to PPM software enablement, with "resistance to change within the organization" the number one challenge on the list. But it doesn't have to be.

It is evident that user adoption of your new PPM software solution requires that organizational readiness and change management processes remain a priority. We identified five barriers to user adoption that you should be prepared when considering a PPM solution for your organization:

This guide will help with user adoption by:

1. Building both a strategic and task oriented PMO tool that users will want to use
2. Setting goals and managing technology enablement to allow you to proceed with the best outcomes
3. Ensuring PMO preparedness prior to exhaustive vendor research
4. Helping users adopt your solution with ease by addressing common PMO issues early - like resource capacity planning and the use of multiple project management methodologies
5. Enabling user uptake faster by finding primary wins in process control and engaging "naysayers" well in advance of RFP

Pro Tip:

Form a vendor review team comprised of key stakeholders when evaluating PPM. Assign roles for each member and engage members at all stages of the evaluation.

1. Politics
2. Failure to tackle resistance
3. Lack of senior management buy-in
4. Too much disruption and change
5. "Big Brother is Watching"

Once these are prepared for, the vendor review team must align certain goals to ensure adoption and carry over these milestones into implementation. These goals are represented in our four "must haves" for PPM adoption.

There is also what Gartner calls, the "Zombie" PMO[iv] —those PMs and PMOs who are perceived to be in a first-in, first-out "mindless" machine mode. The Zombie PMO is not flexible, is only doing the minimum: What comes over the line at you via who is yelling loudest (or who has the strongest influence) for the project. This PMO rarely imparts a valuable strategy in line with business requirements, it's just going through the motions.

Once you've decided to awaken your zombie PMO - or resolved to never become one - solid change management practices, and getting the "naysayers on board" – will stand you in good stead as you work to ensure adoption. Setting the appropriate goals for the solution will be crucial: A step-up implementation based on best practices and easy ROI achievement works best in many cases. Putting in the footwork to ensure organizational readiness will be one of the most impactful ways to ensure your PPM tool gets not only used but utilized to its full potential. Here are the top four must-haves:

Pro Tip:

Include "naysayers" among user groups of PPM evaluation to gain perspectives and address potential concerns early.

Must Have #1: Build a Strategic and Outcome-Oriented PMO

Adoption requires that everyone agrees upon a goal; and that they are actively working toward that common goal. A dashboard customized for users that lets them get their job done effectively while meeting the demand for executive communication can help achieve the goal. Deliverable and resource management tracking ensures you have the right people for the job. Powerful forecasting and analytics create additional value. These preparatory actions are examples of how you can define and deliver the vision of an empowered PMO: flexible, business oriented (strategic) and optimized for user-adoption.

The PMO must be aligned to strategy and support business optimization from end to end. The PPM solution needs to be setup to support these goals from the beginning and designed to track progress toward these goals. A tool that integrates with existing systems helps users get the data they need without

requiring too much change at a single time. Reporting becomes easier and users see up front that their fact-finding and forecasting mission will become more streamlined, saving them time and the company money. This is especially important for resource management and product development projects as the PMO needs data captured in different systems to accurately plan and manage projects.

An additional goal remains for most PMOs: A continuous flow of data with a centralized source of information. Often times visibility into project data is difficult to achieve, and can significantly help the PMO become more efficient. By providing a place to store all project data, the PMO can then make data-driven decisions. User dashboards that provide actionable insights support this continuous flow of data. These require a task-orientation to ensure adoption runs smoothly.

Must Have #2: Ensure Technological Support for Methodologies

Users will only readily adopt a tool that works like they do. For example, a technology company can have service delivery users as well as product and software development teams. Some teams might use scrum or agile; some waterfall; others, a mixture of all these methods. Workflow management for these disparate project sources require an in-tune PMO to account for flexibility. Organizations also might manage multinational and location-based project data into an enterprise-wide PMO, and need an executive friendly view to both manage resources and track revenue goals. A team might also require 24-hour access on mobile devices in real-time. In the end, understanding your unique technologies convenience standards will go a long way to ensure the team uses the system.

Must Have #3: Realize Resource Capacity Planning Power

Nothing will stifle the adoption of a PPM tool faster than overwhelming users with a litany of projects they don't have the time to accomplish; and yet many PMOs report resource capacity and resource demand management among their major headaches. As projectmanagement.com reports, resource management remains one of the major causes of time and budget overruns. "One of the most common mistakes that cause overrun is the failure to estimate the resources that would be utilized during the project. They could be underestimated, seeing that contracting conditions change accordingly and may have increased from the time when the project was planned. On the other hand, they could be overestimated and would lead to blockage of resources that could have been effectively utilized elsewhere."

> "These 'naysayers' became our most valued asset in the long run because they served as the voices we needed to heed first to ensure organizational readiness. We felt that if we pleased this demanding group, the rest of the organization would adopt the tool that much faster."
>
> **Traci Meineke**
> PMP MLIS Director, Client Services
>
> Pearson

Resource capacity and demand management is tough because it is ever evolving – resources can be unpredictable and change at any given time. Requirements are also unstable and while planning is helpful it needs to be adaptable. But PPM can help ease the burden and equip the PMO to make the best decisions possible using accurate and up to date information. By modeling scenarios or updating data, you can make informed decisions and keep projects on track.

Must Have #4: Lock in Organizational Readiness and Change Management

We won't try and dissemble: If your PPM adoption starts with poor change management, without engaging end users in the evaluation process, you might be bound to fail. Don't be afraid to include user groups and garner buy in early. Create a roadmap for your PMO transformation and include early adopters as well as resisters. This provides an opportunity for the people on the ground to weigh in and give perspective. It is much easier to gain adoption if teams can contribute to or feel engaged with the process.

Ease change management by ensuring that the screen the users want to see greets them when they log in. They see risk areas, front-and-center. Persona-based workflows, in conjunction with easy-to-use reporting ability for many first-line users, should be ready and waiting in the form of widgets and built-in options. Not only PMO leadership but also end users will end up with unprecedented transparency to facilitate collaborations, conversations, and community.

Checklist for PPM Readiness

Align your organization behind your PPM solution assessment, implementation, training and use by following some general approaches.

APPROACH	METHOD	METRICS USED	USER INPUT	VENDORS
TOP-DOWN (portfolio enablement)	Align executive sponsorship	ROI and KPIs – business-unit based	Process input	Demos in several rounds
MULTI-FUNCTIONAL PMO **(start small if necessary)**	Identify first adopter function (specific pain point for PMs)	Resource management best practices; Function-specific design that can grow	All user workgroup; function only subgroup	Exhibit growing functionality and ability to hit targets for first user groups
SIMPLE FIRST	Data requirements aligned to "most-basic" features needed	Organizational applicability (no unnecessary bells and whistles)	Workflow and process needs requests	Able to listen to business needs and never upsell
EVALUATION NOT EDUCATION- (don't spend too much time on research)	Lose the requirements matrices! Your RFP can be easier to manage	Align stakeholder needs and quantify for the project	Identify tangible daily business outcomes	Home in on your highest priorities; acts as a true partner

Project Workflow Definitions

AGILE

Agile project management is an iterative approach to managing software development projects that focuses on continuous releases and incorporating customer feedback with every iteration. Agile projects present the opposite of fixed appointments and costs. Requirements are not set in stone at the beginning, but rather developed step by step throughout the project together with the customer. In an ideal agile world, there is no role of a project manager – the responsibility for the success of the project is passed on to the Product Owner. They advance the project in the sense of the stakeholders. Their decisions don't primarily concern costs and appointments, but rather the maximization of the possible value of the business or the stakeholders from the business areas. Traditional agile project management can be categorized into two frameworks: scrum and Kanban.

SCRUM

Scrum project management is a methodology for managing software delivery that comes under the broader umbrella of agile project management. It provides a lightweight process framework that embraces iterative and incremental practices, helping organizations deliver working software more frequently.

KANBAN

Kanban is a lean method to manage and improve work across human systems. This approach aims to manage work by balancing the demands with available capacity and improving the handling of system level bottlenecks. In project management, the approach defines stages of the project workflow, then sets up a way to move each task from one stage to the other. Kanban PM uses tasks that each have a card with everything to complete the task included. A limit to these cards prevents resource overcommitment; a concentration on continuous flow and analysing backlogs allows for a major focus of Kanban—continuous improvement activities to improve the current or future projects.

WATERFALL / *CLASSIC*

Waterfall method of planning project schedules according to a fixed, cascading plan. It is a classic model, one in which the executives and stakeholders on the project will want to see fixed costs and schedules, typically used for large infrastructure projects such as bridges, tunnels, construction and manufacturing. In classic projects, the project manager is responsible for the planning and control. They are the primary decision maker and therefore also responsible for the success of the project – that is, to make sure the fixed requirements, calculated costs and stipulated appointments are realized. The participation of internal and external customers is over when they sign the specification sheets.

HYBRID

Hybrid project management tries to link classic organizational structures and procedures with agile aspects. In such cases it is important to maintain an information exchange between the participants in the procedure. That is how stakeholders can take part in sprint reviews and scrum master and in the regular meetings of the project management organization. Information can be caused by marketing or sales activities and feedback from these areas can be used for the sprint planning. Decisions are easier to comprehend with open communication, and the understanding for other business areas and the acceptance of a common approach increases.

[i] *Sklaver, R. (2007). Driving adoption of your project portfolio management system. Paper presented at PMI® Global Congress 2007—North America, Atlanta, GA. Newtown Square, PA: Project Management Institute.*

[ii] *https://www.pmsolutions.com/resources/view/the-state-of-project-portfolio-management-ppm-20131/*

[iii] *https://www.keyedin.com/keyedinprojects/article/5-common-project-portfolio-management-adoption-hurdles-and-how-to-avoid-them/*

[iv] *Light, Matt, Revitalize Your Zombie PMO, Gartner, April 30, 2018.*

[v] *https://www.microtool.de/en/what-is-hybrid-project-management/*

[vi] *Ibid.*

[vii] *Ibid.*

About KeyedIn Projects

KeyedIn Projects enables your PMO to be more strategic, more efficient, and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic PPM analytics.

Visit www.KeyedIn.com or contact 866-662-6820 to learn more.

KEYEDIN®

Corporate Headquarters

5001 American Blvd West
Suite 1010
Minneapolis, MN 55437, USA
p +1 866 662 6820

EMEA Headquarters

Maple House
Woodland Park
West Yorkshire, BD19 6BW, UK
p +44 (0)1274 863300

www.keyedin.com