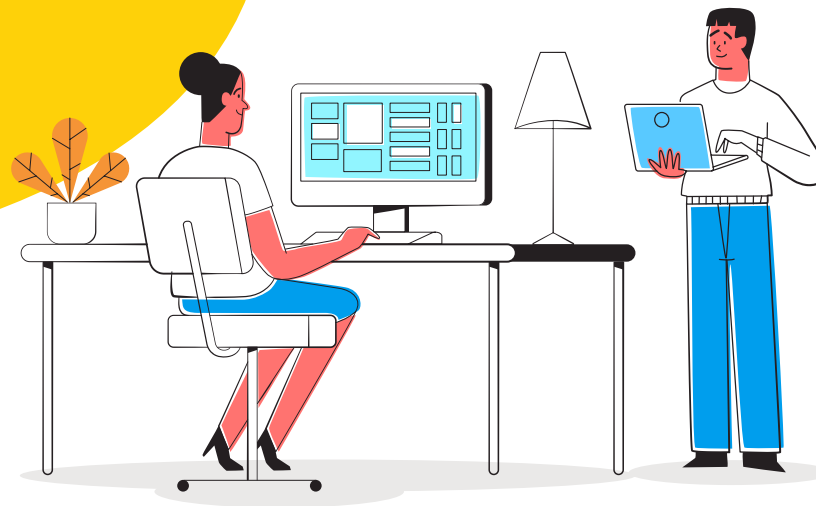


Yellowfin User Adoption Best Practices



Yellowfin User Adoption Best Practices

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Yellowfin User Adoption Best Practices

You've done the hard work of identifying your requirements, comparing vendors, and implementing the best analytics solution for your organization – what's there left to do?

Perhaps the most important step – getting people to use it. Your software investment won't solve any business problems if no one uses it. To realize the full value from your investments can be challenging. Change is hard! So how do you drive user adoption? Tell a better data story with compelling content driven by insights?

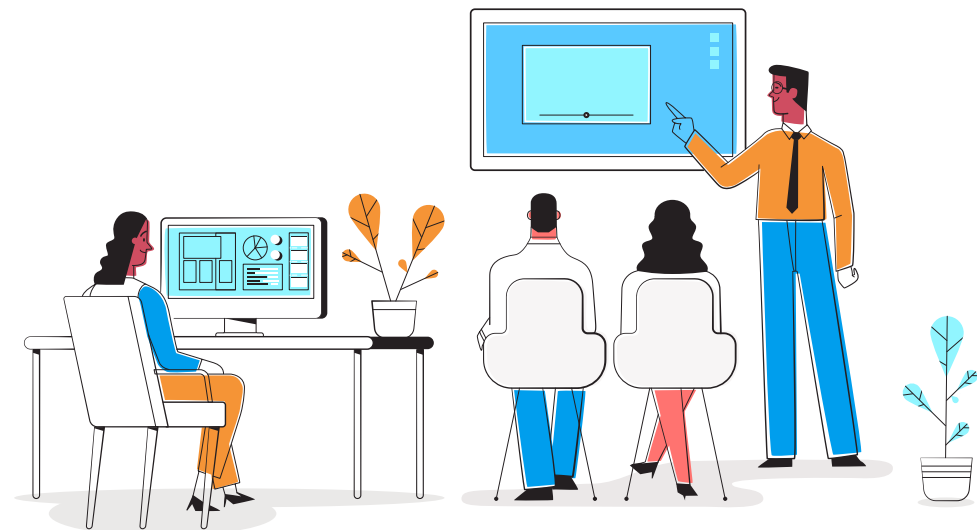
In a Technology Services Industry Association (TSIA) survey, *Achieving Enterprise Software Success*, 72% of those surveyed said “effective user adoption was the most important factor for realizing software value.” The survey report goes on to state:

“Many software deployments deliver 100% on the business requirements only to fail in the final phase of user adoption.”

Adoption is not the moment you ‘go live’ and everyone starts logging into your new or upgraded application. When you focus on the go-live milestone as the finish line, you miss the real opportunity to successfully prepare for employee proficiency and long-term productivity. Go-live is not the end point, but rather the first step towards building a data driven culture within your organization.

Although there are a variety of metrics to quantify adoption, for most organizations it's a major problem.

At Yellowfin, we want to make sure you have the best chance of success; we've created a step-by-step guide to share our experience as industry leaders around collaboration and building a data driven culture within our global customer base.



Yellowfin adoption far exceeds the average rate - it's three times better than the average, according to the [World's largest BI Survey](#).

Our success starts with a focused plan, which we want to share with you. We have outlined the important steps, along with our most recommended tips.

Step 1: Prepare for change

It is important to properly plan with the stakeholders of the project. Talk about training needs, documentation, how success will be measured, changes needed to the organizational structure, and process changes (both internal and external). Focus on the problem you are trying to solve – why did you need to implement Yellowfin and how can you implement it in a way that solves the problem?

Clearly outline what your business objectives are and what your organization needs in order to deliver those objectives, and how insights through analytics can help you achieve your objective.

In order to be successful with an analytics implementation, there are several other points of consideration:

- What does your training plan for business users and analysts look like?
- Is your data ready for consumption?
- Are you worried about data integrity and security?
- Who will your end users be? How many users are there?
- How will you gather feedback and measure success with your project at launch, and into the future?

Best practice tip

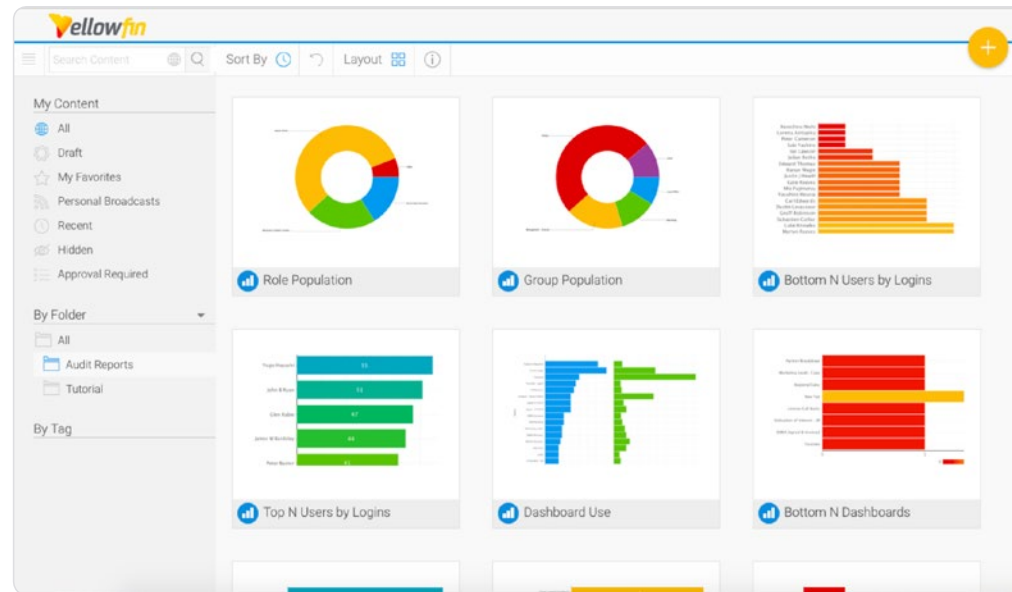
Measuring adoption starts with the right tools. If you already have Yellowfin content rolled out, it's important to know where you have been so you can steer towards where you are going. You can start with the included adoption reports and dashboards that come with Yellowfin (Admin Audit, Content Audit, and User Audit), to share how your project is progressing with the team. You can also collaborate on ways to improve adoption, share the success, and use your new insights to drive change. Set up broadcast alerts to notify when data insights are happening with your BI program.

Tracking time-to-value (time to ROI) will make all stakeholders happy. These three dashboards focus on the core areas of a deployment, but they also allow project owners and system administrators to manage overall deployment health.



Here's how you can use adoption reports and dashboards to dive deeper into how your company is performing, and what's important to the users.

1. Install the Audit Content file. This is available on the [Yellowfin Marketplace](#), or can also be added via the Yellowfin Installer.
2. Once you have imported the file, navigate to the Browse page. You will notice an 'Audit Reports' folder on the left side.
3. Click on it to view all the system usage reports. You can access all types of reports related to admin, content, or user performance.
4. Yellowfin also has ready made dashboards specific to this content. To view them, change the filter type on the Browse page to dashboards.
5. You can also take advantage of already present audit metadata in the view builder to conjure up your own reports.



Step 2: Executive sponsorship is critical for launch success

To drive company wide adoption, you need commitment from all levels to help centralize your data collaboration goals. A data driven culture starts at the top but grows from the ground up.

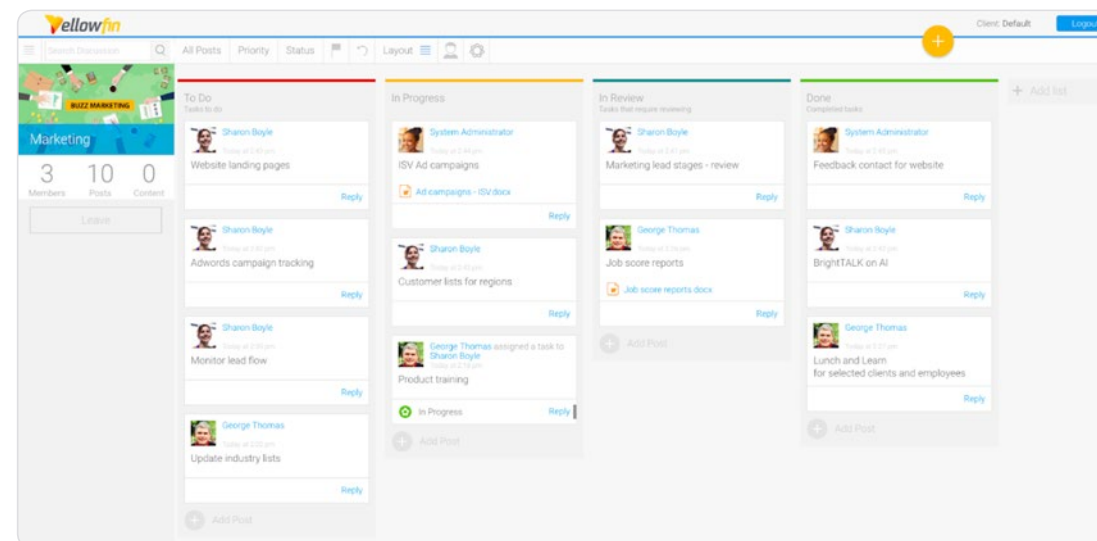
Present your implementation plan and next steps to the executive audience. It is important to clearly define the project objectives, project plan, time to value, and desired outcomes. Be open to their advice and the changes they propose as their visibility of the organization may differ from yours.

Best practice tip

Use Yellowfin to create a [discussion stream](#) based on the project and invite all key stakeholders to follow this engagement stream so they can see updates on the project status, open tasks, milestones hit, and reports that show time to value, adoption numbers, and insights shared. Use our Kanban option to visualize the project easily. Think of this collaboration project stream as your project war room with a focus on success.

Use the Kanban option in a discussion stream to simplify visualization:

1. Create a new Discussion Stream using the Create button. Upon providing its details, save it.
2. Change the Layout to Discussion Lists.
3. Invite stakeholders using the Members option.
4. Create lists to add sections to the discussion stream.
5. Add new posts for project tasks, milestones, reports, and anything else to track your project.



Step 3: Think of the end user first

For larger enterprises, the business user requests reports and dashboards from the analyst team. The analyst will create the reports and build dashboards for the business user to review. This back and forth request process is an endless cycle of accidental discovery without context or insight. The goal of any BI program is to drive data collaboration and action to help users make better business decisions.

Yellowfin offers several free training resources to help you (and your end users). Familiarize yourself with these, and use the channels to win some battles:

- [The wiki](#)
- [The Community](#)
- [Yellowfin University](#)
- The team at Yellowfin.

Best practice tip

Create roles within Yellowfin that align to the needs of each user persona. This lets you control what type of access each user has. Yellowfin has a few pre-configured roles as defaults (seen below), but you can also create your own custom roles if you need to.

Business User: Access public content and contribute to collaborative features such as streams, timeline, Stories, etc. Create personal content for their own consumption - not public shared content. Get automated insights with Signals with detail narratives that explain data.

Analyst: Create content to be consumed by themselves and other users in system. Can collaborate with streams, timeline, Stories, etc. Extended access to create and manage views, report approvals, other admin items. Configure automated analysis jobs for Signals. Use sparingly.

Administration: Widest range of access. Should have a limited number at this level. Can do everything - from creating content to managing system tasks.

Quick guide on how to set up your own user role.

1. Navigate to the Admin Console via the Administration section.
2. Expand the 'Roles' tab, and click Add.
3. Give the new role a name and description so that it's easy to know its purpose later.
4. Then enable only those functions that are specific to the users who are granted this role. (Fig. 1)
5. Save the new role.
6. To add members to this role, expand the User tab in the Admin Console. Click on the menu icon of a member, and change their role to the one just created. Fig. 2

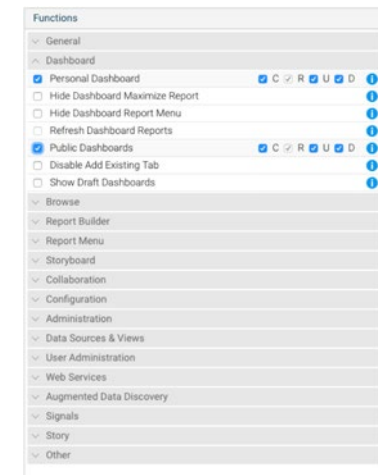


Fig. 1

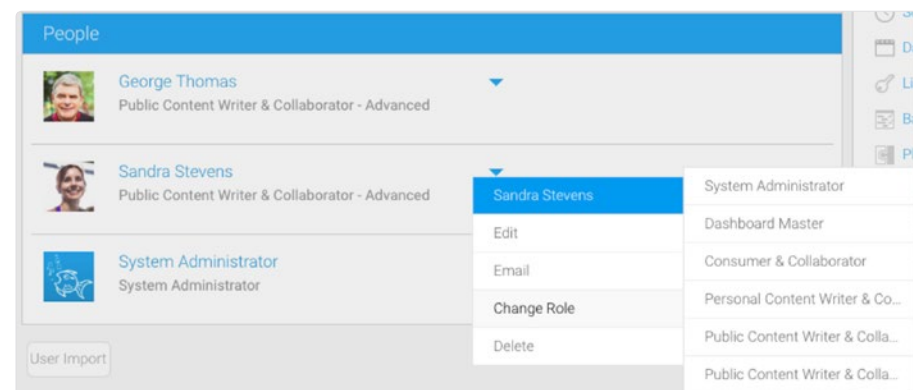


Fig. 2

Step 4: Take the time to prepare your data

Data preparation is a fundamental process in your journey. You must ensure that the data you are presenting to your users is complete, consistent and correct. Your users need to trust what they're presented with before they fully adopt it.

This often means transforming the raw data, creating new relationships between database tables, applying naming conventions, business rules and calculations, or grouping data that makes logical sense for your business.

Best practice tip

Our View Builder is ideal for preparing your data so that it's ready for consumption. After you create a metadata layer, we recommend using our data profiling and data preview capabilities. This allows you to see what options are available for you to optimize the efficiency of the view. Ensure that you refine the metadata by providing a standard naming convention, specify unique names, create data grouping fields, establish default formatting. Fig. 3

You can connect to external data sources, such as your Google Analytics, Twitter, Facebook, or Marketo accounts. But to quickly clean up, merge, and enhance this extracted data, use the Data Transformation module. This module also allows you to bring your data science algorithms and models to life, such as PMML, PFA, H2O.ai, or R. You will no longer require an external tool to productionize such models, simply download the [free transform steps](#) available on the Yellowfin Marketplace to be used with the Data Transformation module.

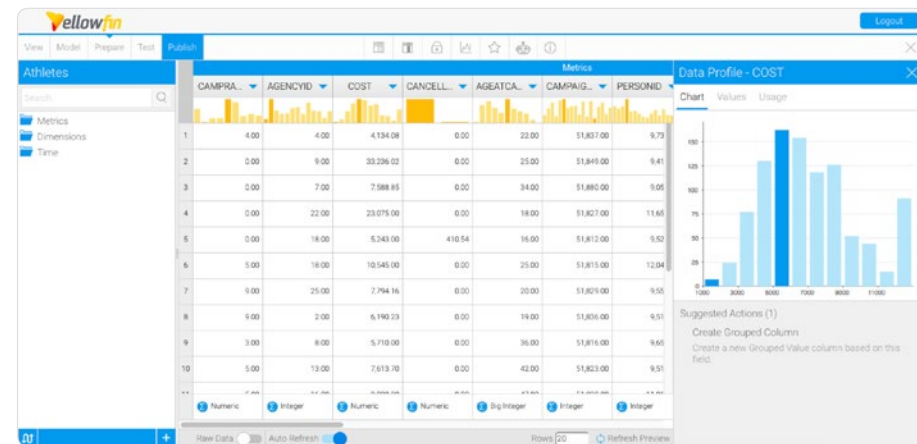


Fig. 3

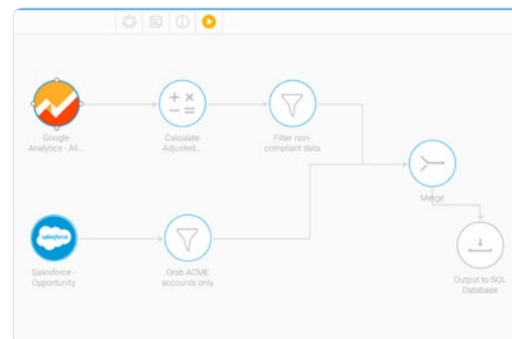


Fig. 4

Step 5: The Internal Marketing Campaign

It's recommended that you create an internal marketing campaign educating users on why change is happening and what's in it for them with this implementation. Highlight the benefits that the platform will provide and include the timelines for implementation, training dates, and the go-live date.

The emphasis of the marketing material should focus on the organization's current pain points and why the solution will help each member of the team be a part of the data driven culture to solve problems together.

Best Practice Tips

Yellowfin Stories is our data storytelling product, that includes features that encourage collaboration. Constant communication is a major factor when aiming for a successful project and the foundation to build a successful data driven culture. You can use various channels to send emails, create planning documents, and pass around training items, but with Stories, you can do all that and more using the same product.

Share company announcements, write plans, push out reports, and send updates. Yellowfin Stories tracks all readers who engage with each story, so you can better understand what content is driving the most engagement. Figure out the secret early and push more content with the same style elements.

Start by writing your implementation plan in a story and share it with the entire organization. Use clear terms when writing a story, so that information is not misinterpreted. You can be creative and employ the use of images, reports, videos, etc. Fig. 5

Our Collaboration module includes the [Activity Stream](#) for adding comments or assigning tasks. This is included with a great number of Yellowfin's products, including reports, dashboards, Stories. This panel can be used by the team to collaborate further by having discussions, sharing files, assigning tasks. With Stories and the activity stream, you can open multiple channels for your users to communicate and give them more reason to use the system. Fig. 6

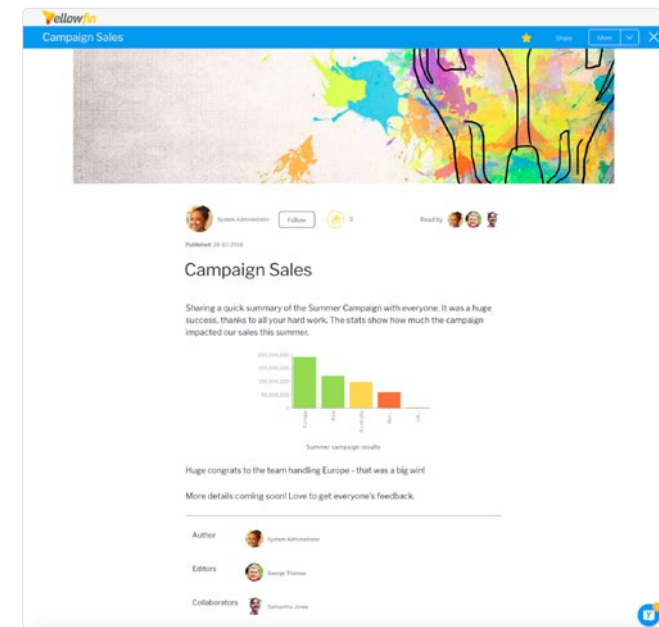


Fig. 5

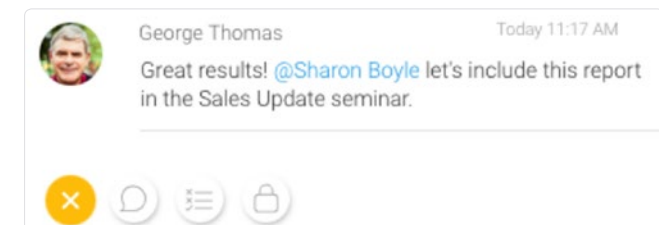


Fig. 6

Step 6: Speed up your analysis

Can your analytical team explain why the changes occurred or quickly provide clear results when comparing this year vs. last? Of course they can, but only after spending considerable time. Make sure that you are utilizing the full capability of Yellowfin to give your team more time and quicker insights with Assisted Insights.

Best practice tip

Assisted Insights delivers automated insights that instantly seek out the answers to your queries in the form of smart data visualizations and natural language explanations. Use it to understand changes, or compare results instantly. With Yellowfin answering your questions quickly, analysts and business users will have free time to focus on more important issues. This will help drive user adoption. The functionality is already there - but make sure to switch it on so you can save time and effort.

Assisted Insights is available in two of our leading products: Yellowfin Dashboards and Yellowfin Data Discovery. In the dashboard, your metrics are quickly explained or compared with the help of a few clicks. But you can also use the **Instant Insights** wizard in the report builder to perform automated analysis. Each of these result in an auto generated report equipped with charts and descriptive narratives that explain these charts using natural language for complete clarity and easy comprehension.

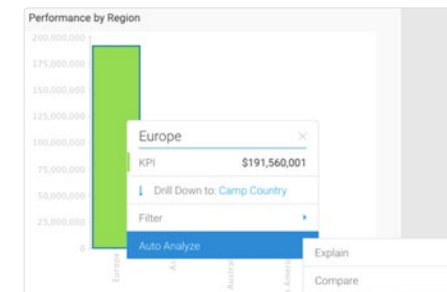


Fig. 7

Here's how you can use it on your dashboards:

1. If using Assisted Insights on a dashboard, hover your cursor over the insight to bring up the menu. Choose 'Auto Analyze' and then either Explain to understand a single data metric, or Compare to compare two metrics. Fig. 7
2. The system will perform the analysis in the background and conjure up some suitable results, that will appear in a new panel.
3. Select the charts that interest you, then click on the menu icon in the bottom left of the panel (the vertical ellipses) and choose Edit Analysis.
4. You will be taken to the report builder showcasing an auto generated report. Here you can edit the report, or the auto chart as required, and save the analysis, as you would any report. Fig. 8

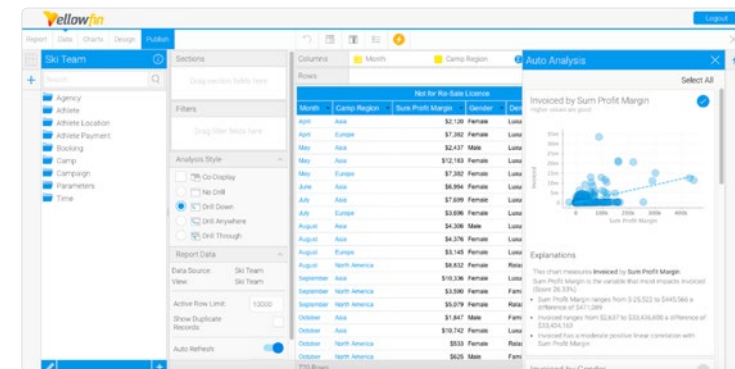


Fig. 8

Step 7: Keep a consistent standard for your data

Having consistency will help you and your team to quickly find the right content they are looking for, and help them more easily comprehend results. There are multiple ways to accomplish this in Yellowfin; it starts with naming conventions, color coding, and general look and feel that is consistent throughout their content. A consistent color scheme ensures your users are always able to identify the value measured simply by looking at specific colors. For example, marking every 'profit' metric blue, and 'revenue' as green, will condition users to always associate blue with profit and green with revenue whenever they see it in a chart. If this is consistent across the application, users will be able to comprehend this data quicker.

Best practice tip

Come up with standard naming and color conventions to be used across the organization. For example, you can add a unique object name as a prefix or suffix to your expense reports. Let's assume you have a set of expense reports, but need only the one for EMEA. If your expense reports were named according to regions, looking for the EMEA report would be easy to find. Similarly, adding a description will further help in identifying content quickly and easily. If some of the expense reports are verified with a special verification icon in Yellowfin, your users will identify them as a better copy more quickly.

Establish a universal color scheme across your organization. Yellowfin offers a number of ways for doing this, but the ideal method is by selecting colors for metrics at the view level. This way, any reports and charts that you create using those metrics will always apply the specified color. Follow our guide below on how to do this:

1. Access your View and open it in edit mode.
2. In the Model step, ensure that you have selected all the metric fields that you want to assign custom colors.
3. Move to the Prepare step, and click the menu option of a metric field. Fig. 9
4. Click the Edit Format option from the menu to bring up the format setup page.
5. Then look for the Color parameter under the Format section, and pick your preferred color for that field. For example, choose green for the Profit Margin field. Fig. 10
6. To do same for other metrics, for instance choosing blue for revenue, or orange for invoice.
7. Publish the view to save the changes.
8. Now when you create a report in this View, and use these metric fields, you can apply the 'metric color' selection for Colors. Fig. 11
9. Your charts will always display those metrics in the colors that you had specified for them. Keeping a consistent color scheme will train everyone to always recognize green as profits, for example.

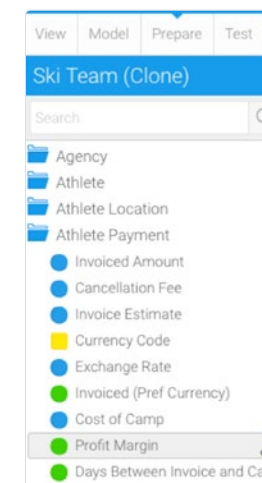


Fig. 9

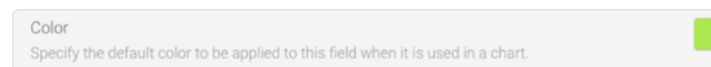


Fig. 10

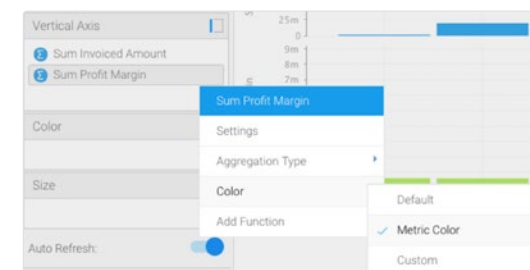


Fig. 11

Step 8: Execute your implementation plan

It's important to share how the project is trending across the organization with regularly scheduled updates - get users excited about the process! Monitor the project key metrics and milestones to make sure you see adoption happening early. Constant collaboration and instant user feedback is key.

Best practice tip

Our **collaboration capabilities** offer a range of features that will be of use to your users. It has a built-in timeline stream that lets you share what is happening, gathers feedback, and allows you to keep everyone updated. This is a great way to keep the project fresh, updates get pushed out the right way, and you can monitor and share the adoption trends. Create Discussion Streams that different teams want to join and let them start to share.

As your BI program evolves, you will have requests to build content, change reports, and address any data issues that users might need addressed. Yellowfin has a task management system to keep all requests in one place - you can use it to manage requests and issues within Yellowfin. Fig. 12

Use the polling feature in Yellowfin to make decisions on business insights or data changes, or gather user feedback on the system. Fig. 13

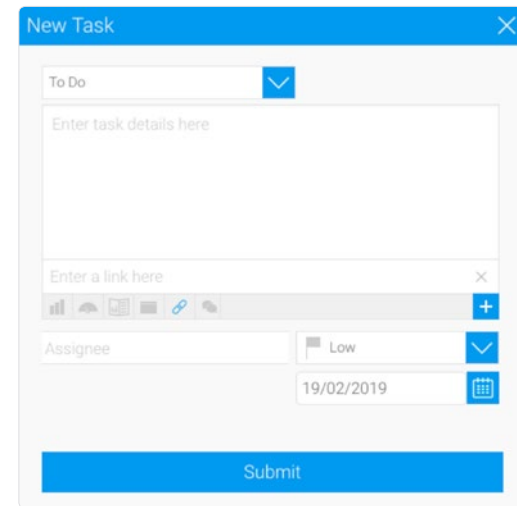


Fig. 12

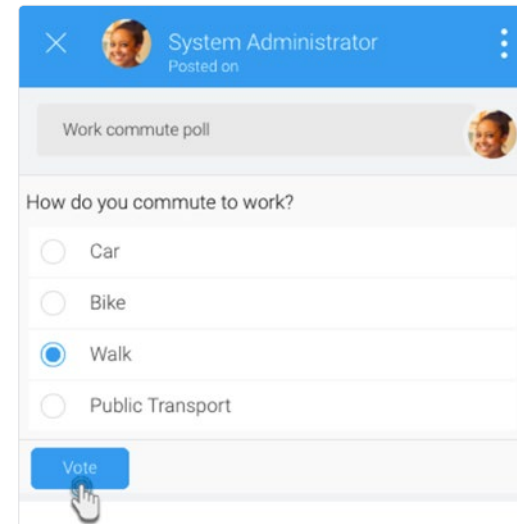


Fig. 13



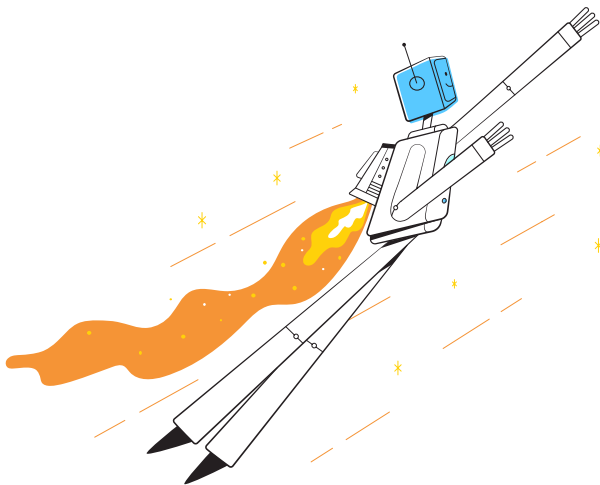
Step 9: 3...2...1 Ignition!

Go-live day can be exciting and full of doubt. If you put the time into your planning you will give your BI program the best shot of continued success. For the go-live make sure you celebrate the launch. Upon going live, get ready to fix any issues - there are always login problems! Make sure to provide training sign-ups to new users who have joined since launch.

Best practice tip

Identify product champions in your team, so even if your support team is occupied, you will always have someone with the product knowledge to assist with answering user queries. Ideally this would be someone in close proximity, who you can trust to give out right advice and help with using the system. Let your champions be more involved in product meetings, and share best practices in white papers, and case studies.

Once your user base has begun using Yellowfin, it's important to routinely monitor the queries sent to your database. This will allow you to tune your database to queries being run most often, providing your end user with a speedy experience. Have your system administrator monitor the different queries, services, tasks, background jobs running via the [background execution](#) and [schedule management](#) pages.



Step 10: Post launch

Create a culture that focuses on user adoption as a continuous education program. Before implementing any new software, some resistance should be anticipated, and a plan should be created to overcome it. Change management best practices can ease the transition.

For on-going ROI you have to continuously review your success metrics, business objectives, and team feedback to ensure that your adoption and system health are meeting expectations. To build a successful data driven culture, ensure that as your business strategy and goals change, so should your data management strategy.



Other tips in continuing to drive adoption:

- Avoid analysis paralysis - providing too much content can be as detrimental as providing too little. Taking a minimum viable approach is always better than throwing the kitchen sink at your end user.
- Schedule adoption health checks. Who will be in charge of your adoption metrics? Proactively schedule meetings to review and enlist the help of your Yellowfin Customer Success Manager where necessary. Even better, write a Story on how the data culture is going to keep everyone in the know.
- Performance tuning scheduled. Set a date now to review system performance. A slow system will discourage user adoption.
- Annual “spring cleaning” of old data, reports, dashboards. Reviewing content created but never used helps ensure quick search capabilities for users and helps to keep your system focused and fresh. Use the Yellowfin adoptions dashboards to isolate content that you can remove or promote for more focused value.
- New data needs as the business evolves. Create new content for growing, new, and changing teams.

Stay current on product changes and new features as the product evolves. Enjoy the best of everything that Yellowfin has to offer, such as:

Yellowfin Signals: How do you make sure that you haven’t missed an important data change, or your analyst hasn’t misinterpreted something? Yellowfin offers a solution in which the business users do not need to rely solely on their analysts. Signals can perform background analysis and upon finding relevant changes, send you alerts. The resulting Signals are detailed and interactive, providing computer generated narratives that explain the detected trends and changes for easier comprehension. Fig. 14

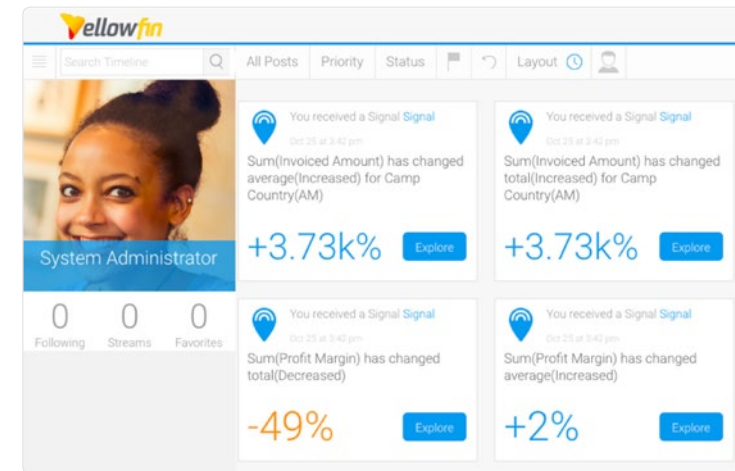


Fig. 14

Conclusion

The team at Yellowfin has implemented thousands of successful BI projects and we'd love to share what we know to help ensure your team's success. Contact your CSM to learn how we can drive your user adoption goals to the next level.

Let us help with your new analytics program launch, upgrade, adoption strategy, or continuous education through one of our offered programs:

- Accelerated YF training programs offered through our online [University](#)
- Tailored on site or remote training options led by one of our professional trainers via a classroom format using sample data or train with your own data and build content as you train
- Professional services package that can be used to:
 - Plan a Yellowfin upgrade
 - Content development (reports, dashboards)
 - Intensive (deep dive) Health Check of your implementation
 - Rebrand, white label, customize your Yellowfin
 - Security review
 - Single Sign-On (SSO)
 - Customer roll out
 - Performance optimization
 - New project you're planning for.

If you have questions, please don't hesitate to contact your customer success manager at Yellowfin.





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