The background is a solid purple color. On the left side, there are several overlapping, semi-transparent purple shapes: a large circle, a curved wedge, and a larger triangular wedge pointing towards the center. The word "Hello." is written in a bold, white, sans-serif font in the lower right quadrant of the image.

Hello.

2017

Apps Empowered™

 **EMPOWER**


**QUICK
BASE**



Preparing for the only constant: CHANGE!

Marykate Gass

Customer Success Team Lead, Quick Base



AGENDA

- ① Why you should prepare for Change
- ② Managing Change in your Quick Base Apps
- ③ 3 biggest stumbling blocks to change management

Marykate Gass



- Customer Success Team Lead
- 3 years at Quick Base!
- MA native
 - But don't ask me about Boston!
- Interests:
 - Playing in sand boxes
 - Going to playgrounds
 - Watching truck videos

A large purple arrow graphic pointing to the right, containing a smaller blue arrow and a white arrow, followed by a white circle containing the number 1.

1

Why should I prepare for
Change?

Change
Is
Inevitable

Definition of Change

change

/CHānj/ 

verb

1. make or become different.
"a proposal to change the law"
2. take or use another instead of.
"she decided to change her name"

noun

1. the act or instance of making or becoming different.
"the **change** from a nomadic to an agricultural society"

Reaction to Change

Exciting things to learn!

➤ New job

I hope I don't screw this up

New baby to snuggle!

➤ New baby

I don't know what I am doing

New car smell!

➤ New car

Ugh, I know this is going to get scratched

A better way to work!

➤ New process

This is not going to work

Excitement

Fear

Why are people afraid of Change?

- Change introduces uncertainty
 - Uncertainty=Risk
- We survived as a species by being certain
 - I am certain there is no bear in this cave
 - I am certain this berry is not poisonous
- When introducing change, remove as much uncertainty as possible!
 - I am certain about what I need to do
 - I am certain that the change is positive



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2

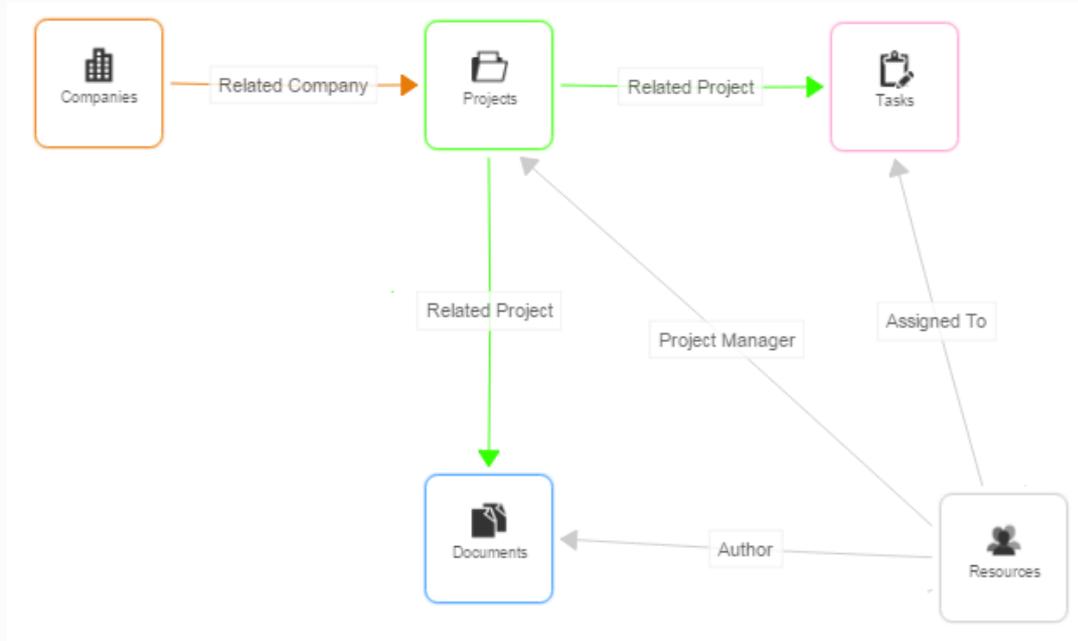
Managing **Change** in your Quick Base Applications

A note to new App Admins

- Congratulations!
 - Sure, you might feel overwhelmed right now
 - But your fresh eyes and ideas will easily identify necessary change in an App
 - Work with internal users to understand how the app works
 - Work with Quick Base Customer Success resources to guide implementation
 - Or just try it (In a copy of the App!)

Managing Change is part of a App Admins Responsibilities

Example: Project Management App



Can we also keep track of time cards?

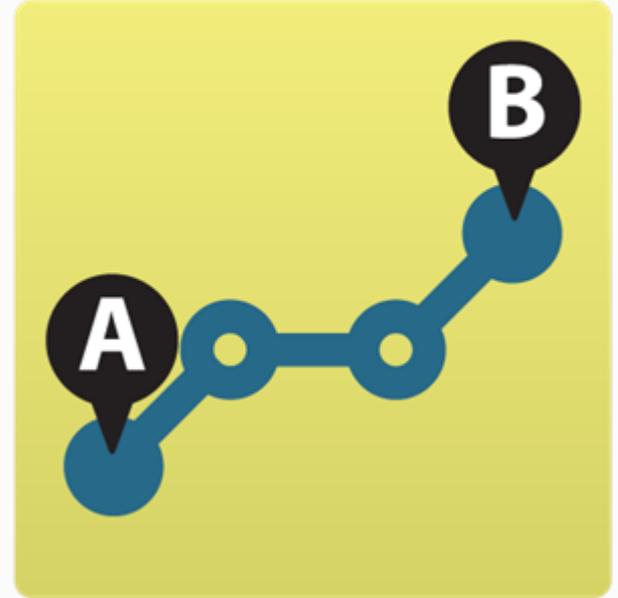


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Define your App's Purpose

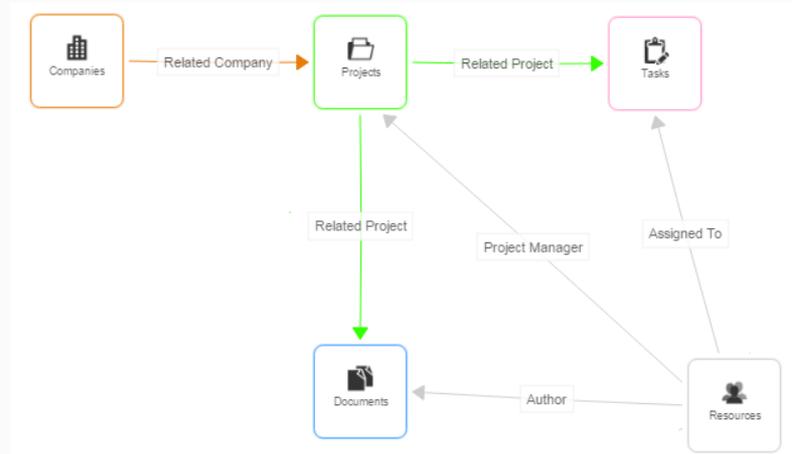
Know where you are starting from

- Start by defining the scope of your application
 - Purpose of app
 - Intended End Users



Example: Project Management App

- Purpose of App:
 - Track the progress of each project
 - Track the assigned resources for each project
- Intended End Users:
 - **People Managers-**
Report on tasks by resource
Report on projects by company
 - **Project Managers-**
Report on their projects
Update project level information
Create and assign tasks
 - **Employees**
View and modify the tasks assigned to them



Should we agree to the manager's request?

- Purpose of App:
 - Track the progress of each project
 - Track the assigned resources for each project
- Intended End Users:
 - **People Managers-**
Report on tasks by resource
Report on projects by company
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View and modify the tasks assigned to them

Can we also
keep track of
time cards?



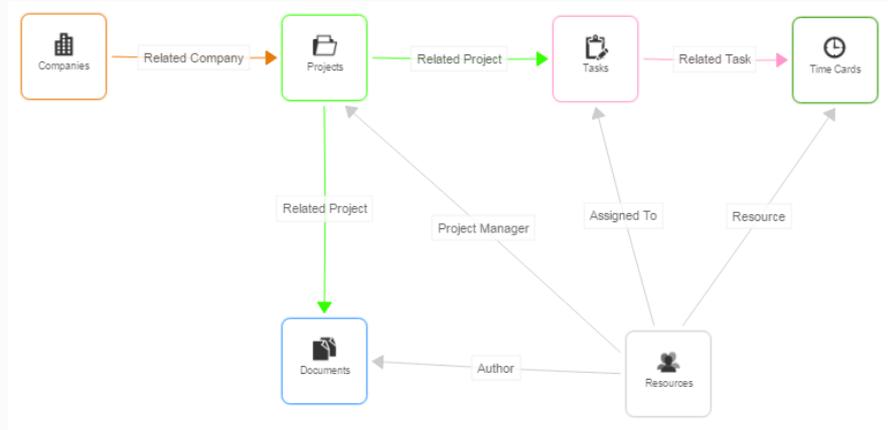
Yes!- and update scope of the App

➤ Purpose of App:

- Track the progress of each project
- Track the assigned resources for each project and associated time per task

➤ Intended End Users:

- **People Managers-**
Report on tasks by resource and hours
Report on projects by company
- **Project Managers-**
Report on their projects
Update project level information
Create and assign tasks
- **Employees**
View and modify the tasks assigned to them
- Create and modify time cards



How about this request?

➤ Purpose of App:

- Track the progress of each project
- Track the assigned resources for each project and associated time per task

➤ Purpose of End Users:

- **People Managers-**
Report on tasks by resource and hours
Report on projects by company
- **Project Managers-**
Report on their projects
Update project level information
Create and assign tasks
- **Employees**
View and modify the tasks assigned to them
- Create and modify time cards

I would like to also track prospective customers and the outreach we are doing with them.



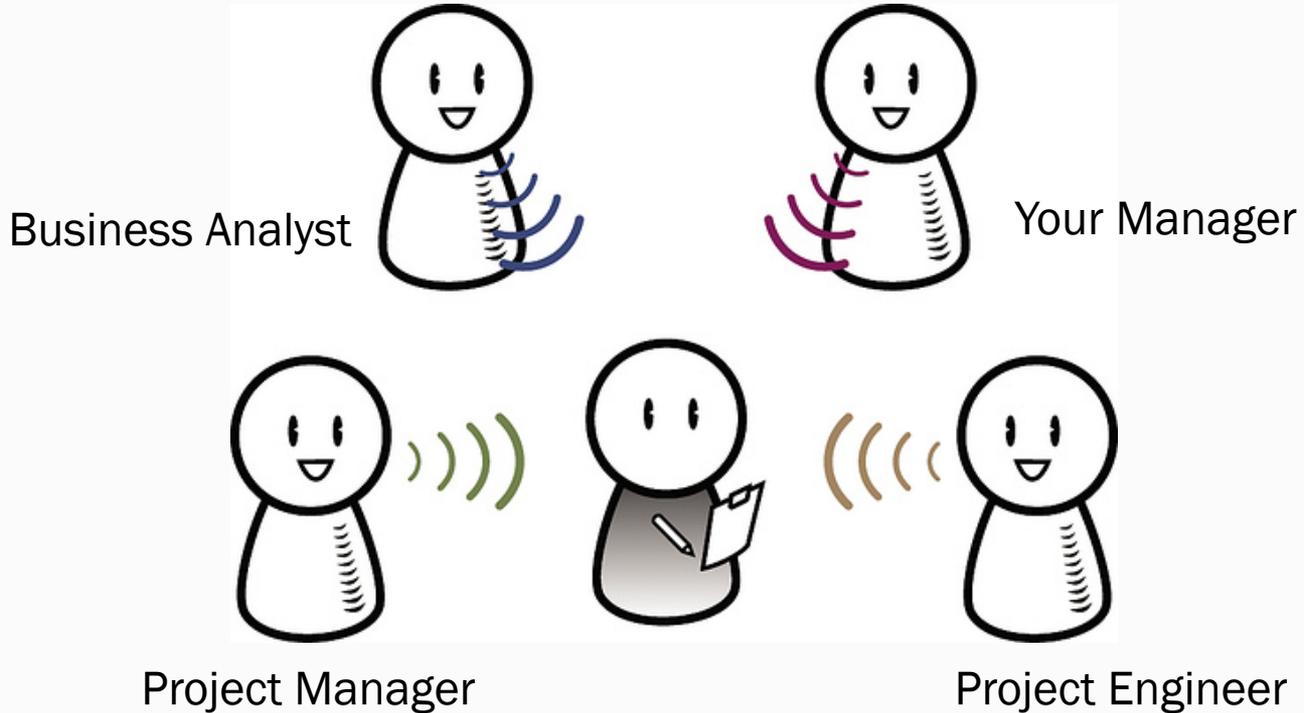
Change Management Pointers for QB Apps

1. Define the purpose of the application
 - This is a living document which should evolve over time

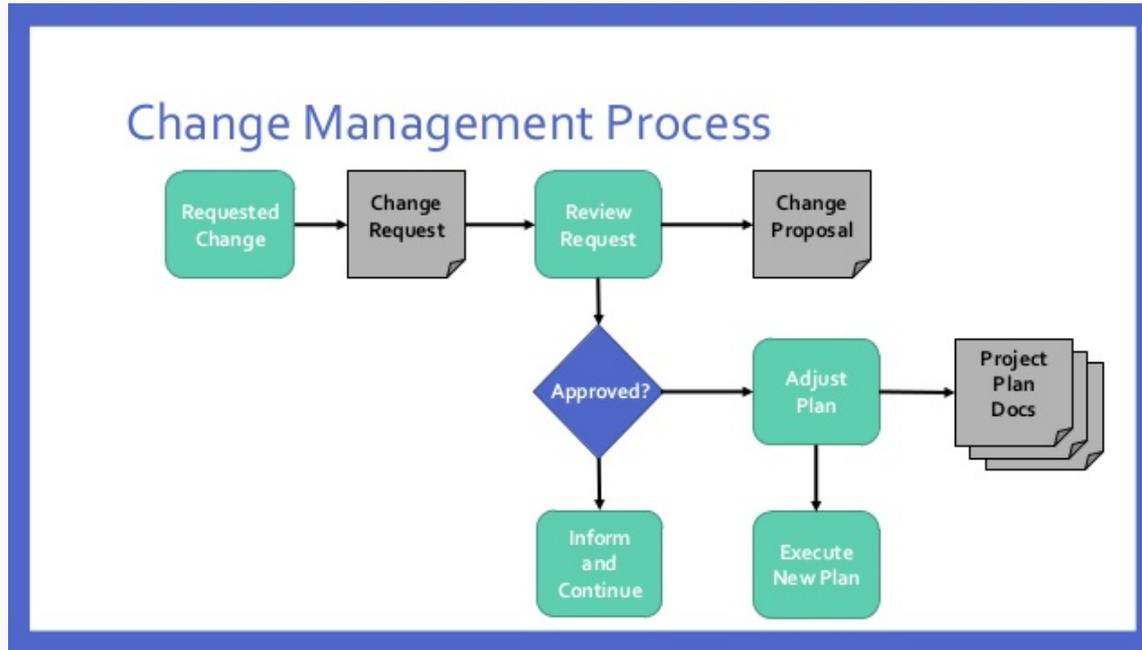
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Define your Change Request Process

Sources of Change Requests



Change Request Management Process



Implementing a Change Request Process

- Use Quick Base!
 - Track in a table of an existing app
 - Have an App to track all change requests for your App Ecosystem

Add a button to the Homepage!

Suggest ways to improve this app!

New Change Request

Keep your request process simple!

Home Users Companies Projects Tasks Documents Resources Change Requests

Change Requests SETTINGS Add Change Request REPORTS & CHARTS

Requestor Gass, Marykate

Date of Request 05-03-2017

Request There is a report on my dashboard called 'My Open Tasks'. I would like to see who created each of the tasks so when a task is unclear I can go to that person and get clarity.

Make sure you complete the loop

- It's important to inform the requestors on the disposition of their requests
 - Open communication is key to change management
 - Encourages future requests

Change Requests | Edit Change Request #1

SETTINGS | REPORTS & CHARTS

Request Information

Requestor: Gass, Marykate

Date of Request: 05-03-2017

Request: There is a report on my dashboard called 'My Open Tasks'. I would like to see who created each of the tasks so when a task is unclear I can go to that person and get clarity.

Disposition Information

Status of Request: Submitted

Reason for this disposition:

Planned Implementation:

Approved

Deferred

Denied

Submitted

Change Management Pointers for QB Apps

1. Define the purpose of the application
 - This is a living document which should evolve over time
2. Have a defined change request process
 - Use a stand alone table or another Quick Base Application



Determine your Communication Plan

Remember why Change is Scary

- Natural instinct is to oppose change; Uncertainty equals Risk!
 - Communicate why this change is happening
 - Communicate how this change will affect the user
 - Why this change is beneficial to them



Communicate that Change is Coming!

- Create awareness that change is coming so no one is surprised
- Communicate a high level on what is changing and why
 - Also good to note what is staying the same
 - Provide timing if possible
- Identify specific users who will be change agents
 - These users will help test and QA any changes
 - They will be the 'go-to' people for end users with questions
 - For small apps, the change agent might be yourself



Back to our example

- Send email to user base noting:
 - Thanks to you, the project management process has helped us become more efficient and productive.
 - In an effort to better understand the time that goes into making each project successful, we will be introducing the ability to track your time against tasks.
 - We plan on introducing this change on June 1st and will provide updates and communication about exact changes before then.
 - There will be no change to how you currently track projects and tasks, we will just be adding in the ability to collect time.
 - If you have any suggestions or feedback on this, please email me
- Identify specific users who will be change agents
 - Ask your manager to be the change agent for People Managers
 - Identify one or more change agents who are Project Managers and Employees

Document and Train on the Change

- Ensure that users are certain about the expectations of them
 - Consider documenting what is changing and the exact impact that will have on the users
 - If its warranted, have in person training to give end users the chance to ask questions
- Make it clear how end users can find answers so they don't get stuck
 - Documentation should be sent out to everyone or kept in a centralized location
 - End users should know who their change agent contact is
- Specify when this change goes into effect
 - Notify all users once the change has gone into effect
- Encourage end users to document their feedback as change requests

Create a Change Rhythm

- If possible, have regularly scheduled change introductions
 - End users learn to expect change communication
 - Encourages the continuous evolution of your Apps
 - Reduces the confusion of multiple changes



Change Management Pointers for QB Apps

1. Define the purpose of the application
 - This is a living document which should evolve over time
2. Have a defined change request process
 - Use a stand alone table or another Quick Base Application
3. Determine how you will communicate change to end users
 - Clear communication on WHY the change is happening, WHAT is changing and WHY the end users live will be better will aid your change management process

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Regularly Assess your Application

You are the Curator of your App

- Periodically assess your app to make sure its relevant to your business process
 - Quarterly for established apps
 - More frequently for newer apps
- Ask yourself:
 - Has your process changed or evolved?
 - Are you keeping track of the right things?
 - Are end users using the App as you planned?
 - Are there side processes being used?
 - Is this App having an impact on your business?

Change Management Pointers for QB Apps

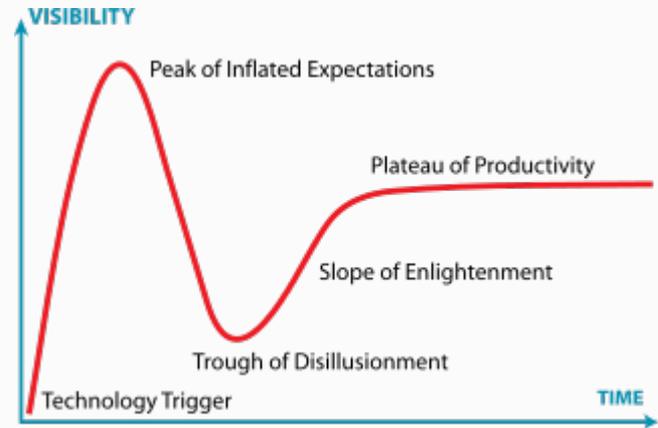
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3. Determine how you will communicate change to end users
 - Clear communication on WHY the change is happening, WHAT is changing and WHY the end users live will be better will aid your change management process
4. Regularly assess your Application to ensure its relevant to your business process
 - As your business process evolves, so should your App!

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What if I am introducing a **New App**?

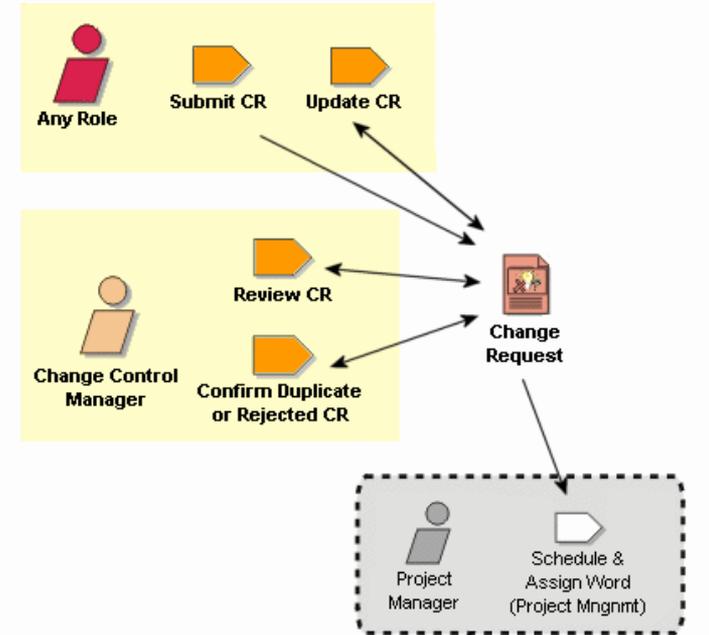
Change Management Pointers for **NEW** QB Apps

1. Define the purpose of the application
 - Don't let 'perfect' be the enemy of 'good'
 - Roll out your application with the clear expectation it will need refinement
 - And that your end users will be critical to refine it!
 - They will be 'certain' it is right because they made it!



Change Management Pointers for **NEW** QB Apps

2. Have a defined change request process
 - Make it part of your initial roll out!
 - Use a stand alone table or another Quick Base Application



Change Management Pointers for **NEW** QB Apps

3. Determine how you will communicate change to end users

- Initially communicate
 - The Purpose of the App
 - What is currently developed and what is on the roadmap
 - That you want their feedback and what that process of response is!
- Define the feedback communication loop!





3

3 Change Management Stumbling Blocks

1. The change is not perceived as necessary

- Make sure the change IS necessary before proceeding!
- Indicates that the reason driving the change is not clear and/or persuasive
- Need to state why the current process and tools are insufficient
 - Many users are loyal to their own tools and systems
 - You need to convince them the change will make their lives better

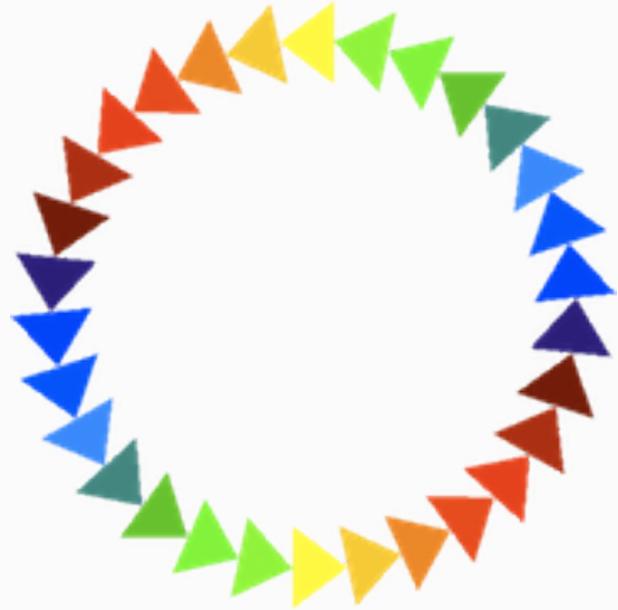


2. End Users Don't Adopt the Change As Planned

- If End Users are not bought into the reason for the change, they will not change!
- If the WHY is not clear, then there is uncertainty
 - Why do you want me to track time cards?
 - Is it so you can fire me?!
- Indicates that the communication on specific changes and their impact on end users is not clear
 - Revisit your past communications to identify the gaps
 - Consider adding more documentation or training if necessary
 - If the majority of end users understand what to do, buddy up any detractors with peers

3. The Change Maker is Not Listening

- Don't assume everything is perfect!
- Collect feedback from end users and iterate until it is
- Then be prepared to change again!



Change
Is Constant
So Be Prepared!

In Summary

- When introducing change, remove as much **uncertainty** as possible!
 - I am **certain** about what I need to do
 - I am **certain** that the change is positive
- To Manage Change in your QB Apps:
 1. Define the **purpose** of the application
 2. Have a defined **change request process**
 3. Determine how you will **communicate** change to end users
 4. Regularly **assess** your Application to ensure its relevant to your business process



Thank you!



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