# Best Practice Quick Base Platform Governance

Overview:

For all organizations with the vision to benefit from broad use of the Quick Base platform, Advantage recommends a systematic governance model, for the reasons outlined below. The responsibilities and best practices described here are best managed if assigned to a central Governance/Oversight group. Advantage can also provide some or all of this management on an outsourced basis for an organization's IT or designated Governance group, as needed.

Primary Objectives:

- Risk Management (data security, legal, sound project/program management and company policy compliance).
- Cost Management (licensing, management of redundancy, inefficiency/ineffectiveness in applications).
- Any organization and categorization (using metadata) needed to catalog the population of Quick Base applications, for better understanding and management (such as: "which parts of the organization are using which applications, and what is the value these apps are providing for the organization?")
- Optimized utilization of the Quick Base platform for your organization (how much is Quick Base worth to the company, qualitatively?)
- (Optional – Advanced): Optimization of value/ROI of the platform (how much is Quick Base use worth to the company, quantitatively?)
- Documentation of the policies, activities and efforts around this governance and management strategy of Quick Base use.

High-Level Governance Process Workflow Diagram
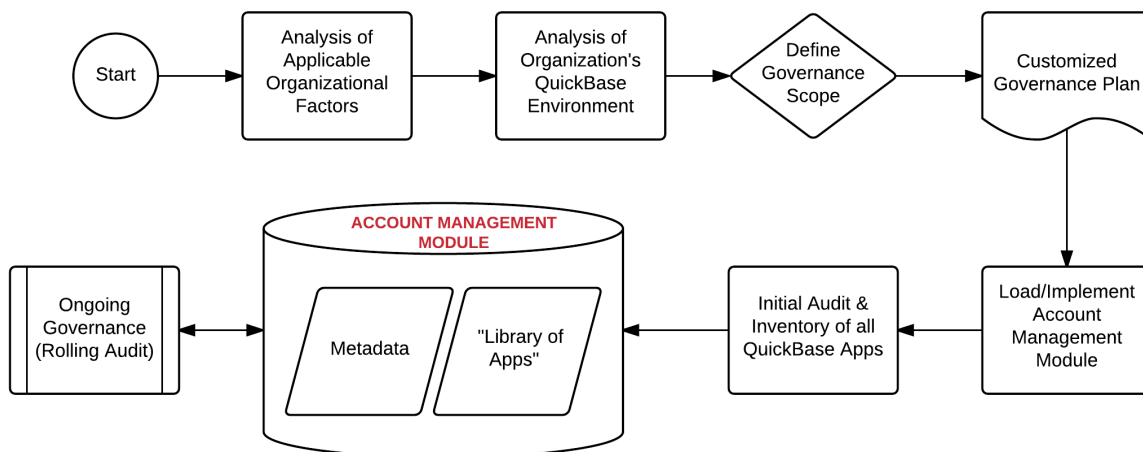
Initial Steps:

- Identify, analyze and document specific risk elements, IT and other security and compliance requirements for the organization that apply to Quick Base use.
- Implement Advantage's Account Management Module (AMM), if desired, as a central tool supporting the initial and ongoing governance efforts described in this document.
- Review the current environment of Quick Base and related systems/processes used for a complete understanding of the "current state" (additional insight will come from an audit process, as described below).
- Decide on the initial scope of intended Quick Base use, and obtain approval for a level of cost for that level of use. The scope is likely to grow over time, as the comprehensive value and true ROI from broader Quick Base use is realized.
- Initial audit and inventory of all Quick Base applications (using Advantage's AMM for Quick Base, if available), creating a "library of apps":
    - Capture metadata and categorize current applications using such criteria as "active/inactive", "business unit owner", "business need/purpose", "compliance with IT/organizational requirements", "sensitive data", etc. Input from app managers/administrators is often needed to complete this process. Documentation of such users' input and the associated data can be automated with a combination of broadcast emails and grid-edit reports for input directly into the AMM.
    - In the AMM, label any "mission critical" applications and/or existing integrations with other systems, which may create exposure to, or high risk of impact from, any performance issues. Identification of additional application tuning and/or monitoring may be identified, associated with such applications.
    - Work with app creators/owners to archive data and delete obsolete and inactive applications and users.
    - Address and correct any risk or compliance concerns in the applications or user access.

This initial audit and cleanup should provide for basic compliance and cost management enhancement. Additional and/or ongoing actions will capture remaining opportunities for improvement.

Ongoing Governance and Platform Management Elements:

1. Oversight and support of Application Creators/Owners (app creators) to ensure quality and meet Objectives upfront as much as possible (details below).
2. Ongoing review of existing application inventory and user population to maintain compliance, deletion of inactive apps and users for cost control and housekeeping.
3. Optional proactive platform optimization.

1. **Support Application Creators**
   Providing appropriate training, direction, app creation approval, oversight, and help desk support to the employees who have user rights to create Quick Base applications, is a powerful tool in management of the use of the platform. Best practice is to ensure appropriate applications are being created upfront, rather than finding errors, redundancy, non-compliance and waste issues later. More specifically:
   - Create/implement a simple process to validate existing creators, and approve and onboard new app creators.
   - (Optional, where appropriate): Use a "Managed Deployment" approach to introduce Quick Base to different groups within the company, in an orderly fashion. Identify, qualify and train new app creators in an organized manner for best results.
   - Create a "Center of Excellence and Training" approach for best practice training and support of the population of authorized app creators.
   - Require a level of Quick Base training and understanding of an Quick Base app creation policy for app creators (Advantage can assist with best practice training material and process implementation).
   - Create a simple "request for approval" process for creating new applications, or at a minimum, request submission of details around new apps users create (like business unit owner, purpose, added value, confirmation or request to confirm there are not existing applications that could be used or leveraged, number of intended users, level of data sensitivity, estimated value to the organization, etc.). Note: these factors can be captured in a Quick Base app, or simply in a table added to the AMM itself.
   - Advisement of app creators on best practices in app creation, deployment and use. Referral to a Quick Base Solution Provider (QSP) such as Advantage for assistance with applications that are relatively complex. Business units may contract for such outside help themselves or through the central Governance group.
   - Inform app creators of help desk support available from the Governance group, including who to contact for support or questions with their Quick Base apps, and use.
   - Equip and support app creators/owners to allow them to provide training and Level 1 support to the end users of the apps they own, as well as ensure they can submit any trouble tickets needed around Quick Base performance to Quick Base itself.

2. **Ongoing Review and Management of the Population of Quick Base Applications and Users**
   Quick Base use is dynamic by nature, and following continuing efforts can allow a Governance group to most effectively manage an organization's Quick Base use:
   - Identification and deletion of applications and users as they become obsolete.
   - Identification of any applications that fall out of data security or other compliance requirements previously documented.
   - Identification of underutilized applications to update or improve.
   - Identification of applications that would have more value with additional functionality or were best combined with other applications, and facilitation of that development.
   - Identification of applications that could be more valuable if additional users had access, and facilitating that access.
   - Identification of redundant applications and consolidation or standardization.

- o Validation that Quick Base is the best tool for all applications, or recognition of any that aren't, for planned migration to a better-suited platform.
- o Identification of any applications that would benefit from integration with other systems, which can be a source of value and improved data integrity.

Advantage's Account Management Module can be instrumental in the execution and documentation of all these efforts and results. This ongoing review process can be a "rolling audit", so that periodic scheduled audits of Quick Base use are not needed to keep an organization's Quick Base use well managed.

3. **Optional: Optimization of Platform Utilization and Value**
   We recommend these best practice efforts to maximize the comprehensive *value* an organization gets from the Quick Base platform. It will improve the utilization of Quick Base, its overall value and ROI, which can be tracked and reported over time as a key metric for management.

   It is relatively easy to quantify what an organization directly spends on Quick Base simply from its monthly licensing fee, but more challenging and often more valuable is to calculate how much Quick Base use is *qualitatively* worth to an organization (and the resulting ROI). Value needs to be measured to be managed and maximized, and proactive efforts can ensure that Quick Base functions as one of an organization's best technology tools and investments.

   Best practice optimization includes:
   - o Training and advising the authorized app creators to identify and create high value and ROI apps, and supporting the app creators so the apps continue to deliver their potential value.
   - o Identify developers in the organization skilled in use of the Quick Base API, or have a qualified Quick Base Solution Provider (QSP) such as Advantage available to develop the custom functionality and integrations in Quick Base often needed for more advanced and valuable applications. Also, make these experts available to app creators, for more efficient and effective development of their applications.
   - o Using categorization and other metadata for analysis to identify what areas of the company are using Quick Base, what they are using it for, and creating a gap analysis to determine others areas where Quick Base could most valuably be used (leveraging existing applications or developing new ones).
   - o Use of categorizations to classify redundant apps for consolidation, and as info to help avoid the creation of additional apps that would be redundant.
   - o Proactively identify business needs in the business units where Quick Base would be the most compelling solution. Prioritize and facilitate building Quick Base applications to solve those needs.
   - o Capture an estimate of the current annual value of existing applications, with the addition of an Annual Value field in the AMM and subsequent input from app owners to estimate the annual value of their apps to the organization. Compare this with the subscription cost of Quick Base.
   - o Simple calculations and reports on ROI at the app level can also segment the apps to identify the highest and lowest ROI apps, for any further optimization on those.

- o Create a feedback loop with periodic requests to app owners to report on the value and usability of their apps, to capture any needs for support, intervention or expert input on existing or planned apps.
- o Work with the app creator group (and Advantage or other engaged QSP) to facilitate and accelerate efficient, effective conception, development and use of valuable new Quick Base applications to meet an organization's dynamic and evolving information and collaboration needs.
- o Availability in general, as an advisor to associated business units for needs they have that can best be solved with Quick Base.

Platform Roadmap

Revisit the progress, goals and potential for Quick Base use on an annual or as-needed basis, to verify at least these components:
- Risk and Cost Management is sufficient
- Quick Base use is within current scope and level of approval
- ROI (if calculated) is high and/or improving
- Advantage or other QSP engaged is meeting/exceeding the organization's expectations
- Optimal utilization of the platform is on schedule
- Confirmation that authorized app creators are adequately empowered and supported to solve business needs within the current scope of Quick Base use
- Corporate management approval and funding is in place for any needed increase in scope of use
- Validation or the update of the list of outstanding business unit needs where Quick Base is the best solution and plan for the solutions to be built next (internally or by a QSP)

The Role of Advantage's Enterprise Account Management Module for Quick Base

Advantage developed the AMM to help manage broad Quick Base use at our client organizations. The AMM provides excellent reporting, account tracking, analysis, change logging and documentation, and tools to automate and save significant time in best practice management of use of the Quick Base platform. The AMM significantly improves monitoring of large and growing populations of Quick Base applications and users, and supports and facilitates all the best practices outlined within this document. The AMM is intended to be indispensable for managing broad use of Quick Base, and it is highly customizable and extensible beyond its core functionality. Video overview here.

When implemented, Advantage's AMM is configured to support the way each organization wants to monitor, measure and manage its broad Quick Base use.

Conclusion

Broad use of the Quick Base platform can create significant value for an enterprise. With that broad use comes the need for central Oversight/Management/Governance to accomplish the objectives listed above. These best practices, implemented internally or with Advantage's help, will help ensure optimum value and appropriate controls over use of the platform.