Change Network Kick-Off
Leading through Change

Norm Schultz
Change Management

April 19, 2017
Agenda

• Welcome and Opening Comments
• Timeline and Project Update
• Evidence of Success
• Change Agent Network
• Readiness Review
• Upcoming Action Items
# Meeting Objectives

## Feel – Know – Do

<table>
<thead>
<tr>
<th>Feel</th>
<th>Know</th>
<th>Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible for representing your respective stakeholders</td>
<td>Project time-line and transformation benefits</td>
<td>Leverage the Change Agent toolkit</td>
</tr>
<tr>
<td>Aligned with change management strategy</td>
<td>Change Agent Team Lead role and responsibilities</td>
<td>Take actions as described in the “Next Steps” section</td>
</tr>
<tr>
<td>Supported by the project team</td>
<td>How the Transformation Change Agent Network will operate</td>
<td></td>
</tr>
</tbody>
</table>
Welcome

Opening Comments

What’s changing?

Why now?

Who is affected?
Timeline

Project Schedules
Change Network

Working Together
Leading the Transformation

Building a Network

What is a Change Network?
• Each project (EAM, HCM and Finance) will have its own network
• Network is comprised of department or business unit resource linked to each deployment team
• They help lead change initiatives in their specific deployment area
Leading the Transformation

Building a Network

Structure:

• Designed around roles that support the project
• Varies based on business unit or departmental size and complexity
Leading the Transformation

Building a Network

Purpose:
To establish a network of respected and influential employees that can serve as a trusted bridge between the project team and the local employees and managers.
Change Network

Responsibilities and Benefits

- **Assess Local Needs**
  - Familiar face supports managers and employees through transition
  - Ensures stakeholder representation

- **Share information**
  - Disseminate information
  - Familiar face delivers tailored communications and reinforces messages

- **Feedback Loop**
  - Serve as liaison between local employees and project teams
  - Is a sounding board for their community
Change Network

Responsibilities and Benefits

• Identify right resources
• Build relationships

Identify

Develop

• Standard messages and tools
• Tailored communications
• Enforce deadlines

• Create feedback channels
• Take action

Act
Change Agents

Role

• Representation from all stakeholder groups/geographies
• Leaders (formal or informal)
• Influencers
• Reputation of success
• Know the details
• Know the escalation paths
• Able to execute
Change Agents

Engaged and Informed

Meetings
• Regular
• In-person (if possible)
• Formal agenda that encourages dialogue

Website
• Document management
• Announcements
• Social media
• Tracking
• Contact information

Communications
• Regular

Tools & Resources
• Communication tools & templates
• Training tools & templates
• Contact information
Change Agents

Time Commitment

T-3 Months
1-5 hours weekly

T-1 Month to T+1 Month
5-10 hours weekly

Post Go-live
5 hours monthly
Change Agents

Right Attitude

• Respected, liked by the organization
• Buy into the change and can articulate the WIIFM (What’s In It For Me)
• Persistent and willing to “stand up” for their project
• “Voice of conscious” when a mid-course correction is contemplated
• Ability to work in the “grey area” – OK with instability and uncertainty
• Dedicated to the project
• Sense of humor
Change Agents

Knowledgeable

• Understands the business rationale for the project
• Well connected in the organization
• Knows the tell tale signs of resistance
• General knowledge about organizational change techniques (or is open to learning about them!)
• Good general knowledge about the impacted organization
Change Agents

Necessary Skills

- Good facilitation skills
- Good communicator
- Provides feedback effectively
- Provides “bad news” constructively
- Manages people, time, and budget
- Good recruiting skills
- Effectively deal with resistance
- Empathetic
- Good listener
- Creates a sense of urgency

- Tactful and diplomatic
- Manages conflict effectively
- Organized, disciplined, analytical (when needed), but not RIGID!
- Possesses good people skills
- Good negotiator
- Can bounce between strategy and tactics
Pulse Check - Activity

Think about your past experiences with change at Purdue.

• What worked well?
• What are some good lessons learned?
Change Agents

Supports Communication and Reinforces Leaders

Leadership - Key Messages
Say, Do, Reinforce

Sponsors & Steering Committee Members
- All Key Stakeholder Groups
- Exec. Leadership Meetings

Manager/Supervisor

Change Agents
- All Key Stakeholder Groups
- All Sites

End User - Key Messages
Say, Do, Reinforce

All End Users

Broad Communications

All End Users
<table>
<thead>
<tr>
<th>Change Agent Team Lead (CAL) Name</th>
<th>Project</th>
<th>Function represented</th>
<th>CAL Location (Dept/College)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angie Delworth, DFA – College of Technology</td>
<td>HCM</td>
<td>Business Management</td>
<td>KNOY</td>
</tr>
<tr>
<td>Kristi Hartwick, DFA – Provost</td>
<td>HCM</td>
<td>Business Management</td>
<td>HOVD</td>
</tr>
<tr>
<td>Amy Boyle, Dir – Student Life, Physical Facilities HR</td>
<td>HCM</td>
<td>Human Resources</td>
<td>SCHL</td>
</tr>
<tr>
<td>Pam Nesbitt, Senior Director, Human Resources</td>
<td>HCM</td>
<td>Human Resources</td>
<td>KPTC</td>
</tr>
<tr>
<td>Katherine Prochno, College of Liberal Arts HR Consultant</td>
<td>HCM</td>
<td>Liberal Arts/Human Resources</td>
<td>BRNG</td>
</tr>
<tr>
<td>Jan Metzinger, Asst Athletics Admin, HR</td>
<td>HCM</td>
<td>Athletics/Human Resources</td>
<td>IAF</td>
</tr>
<tr>
<td>Kara Bohlinger, Payroll Operations</td>
<td>HCM</td>
<td>Comptroller</td>
<td>KPTC</td>
</tr>
<tr>
<td>Kirk Willing, DFA – College of Liberal Arts and Education</td>
<td>G/L</td>
<td>Business Management</td>
<td>BRNG</td>
</tr>
<tr>
<td>Cherise Hall, DFA – College of Agriculture</td>
<td>G/L</td>
<td>Business Management</td>
<td>AGAD</td>
</tr>
<tr>
<td>Kathy Vanderwall, Fund Accounting Manager, Accounting Services</td>
<td>G/L</td>
<td>Comptroller</td>
<td>KPTC</td>
</tr>
<tr>
<td>Tim Riley, Asst Comptroller and Bursar</td>
<td>G/L</td>
<td>Comptroller/Bursar</td>
<td>HOVD</td>
</tr>
<tr>
<td>Amada Carlson, Managing Director – Operations, PFFA</td>
<td>G/L</td>
<td>Physical Facilities Financial Affairs</td>
<td>PTCA</td>
</tr>
<tr>
<td>Ryan Gallagher, Sr Director Buildings and Grounds, PF</td>
<td>EAM – Maintenance</td>
<td>Physical Facilities</td>
<td>PTCA</td>
</tr>
<tr>
<td>Jim Keefe, Sr Director, Capital Project Management, PF</td>
<td>EAM – Capital Projects</td>
<td>Physical Facilities</td>
<td>PTCA</td>
</tr>
<tr>
<td>Al Gilewicz, Director Energy and Utilities, PF</td>
<td>EAM – Maintenance</td>
<td>Physical Facilities</td>
<td>PTCA</td>
</tr>
<tr>
<td>Brad Bowen, Sr Director Asset Management, PF</td>
<td>EAM – Capital Projects</td>
<td>Physical Facilities</td>
<td>PTCA</td>
</tr>
<tr>
<td>Rita Clifford, Sr Director, Student System Comp Center</td>
<td>(all to some degree)</td>
<td>Information Technology</td>
<td>ROSS</td>
</tr>
</tbody>
</table>
Change Impacts

Today vs. Tomorrow
“Change Impacts” are:

• Anticipated **effects or reactions experienced by the business** resulting from the project design

• Measures the gap between the 'current state' and ‘end state’.
Changes are brought about by process redesign and system enablement

Impacts of these changes can affect many areas of the business

Actions need to be taken to mitigate risks & gain acceptance for these impacts
Change Impacts Documentation

**Effort to track labor expenses on work orders (High)**

**Impact Description:** Labor expense tracking will no longer be done manually. Labor expense tracking will be automated using iPad.

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manually enter work order through daily payroll paper time card using a variety of shift codes and rates.</td>
<td>Labor time tracking entered via iPad to complete work order. Payroll entered weekly payroll process.</td>
</tr>
</tbody>
</table>

**Key Benefits**

<table>
<thead>
<tr>
<th>From</th>
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<tbody>
<tr>
<td>Simplified, streamlined process to enter expenses</td>
<td>Move to the use of technology to manage payroll processes (vs. legacy paper driven processes).</td>
</tr>
<tr>
<td>Ability to see charges for work accounts in real-time</td>
<td>New skill requiring training of a new payroll professional who has experience in review analytics to determine if the work center will be impacted due to labor changes.</td>
</tr>
<tr>
<td>No more data transcribing</td>
<td>Breaking out payroll process to utilize mobility collection time.</td>
</tr>
<tr>
<td>Changes handled through exception reporting</td>
<td></td>
</tr>
</tbody>
</table>

**Impact Type**

- **Culture**
- **People**
- **Process**
- **Technology**
- **Customer**

**Impacted Functions**

- Supervisors
- Technicians
- Finance
- Reporting Staff

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**Shifting to University-wide Performance Appraisal Process (High)**

**Impact Description:** Staff will utilize a standardized, University-wide, performance appraisal process through SuccessFactors. The performance appraisal and merit increase processes will be aligned, providing consistency across the institution.

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today, areas manage their own performance appraisal processes, including various systems and different performance (time) periods.</td>
<td>During the transition, supervisors and staff will need to adjust current appraisal period and move appropriate performance-related documentation to SuccessFactors.</td>
</tr>
</tbody>
</table>

**Key Benefits**

<table>
<thead>
<tr>
<th>From</th>
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<tbody>
<tr>
<td>Consistent, standard performance management processes across the institution.</td>
<td>Shifting performance assessment to standardized, automated process steps and appraisal period.</td>
</tr>
<tr>
<td>Available reports tracking employee and manager performance appraisal progress and completion.</td>
<td>Staff and supervisors will utilize SuccessFactors for performance management.</td>
</tr>
<tr>
<td>Reminder messages to employee or manager when steps are not completed.</td>
<td>Standardized performance appraisal process across the University. This brings increased annual assessment functionality and change to every unit. Department-specific paper-based processes will be eliminated.</td>
</tr>
<tr>
<td>Performance appraisal process synced with merit pay process.</td>
<td></td>
</tr>
</tbody>
</table>

**Impact Type**

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
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<tbody>
<tr>
<td>Culture</td>
<td>Shifting performance assessment to standardized, automated process steps and appraisal period.</td>
</tr>
<tr>
<td>People</td>
<td>Staff and supervisors will utilize SuccessFactors for performance management.</td>
</tr>
<tr>
<td>Process</td>
<td>Standardized performance appraisal process across the University. This brings increased annual assessment functionality and change to every unit. Department-specific paper-based processes will be eliminated.</td>
</tr>
<tr>
<td>Technology</td>
<td>SuccessFactors Performance Management and Goals Management (PMGM) will be utilized for annual goal setting and performance management.</td>
</tr>
<tr>
<td>Customer</td>
<td>Current performance appraisal period will be adjusted to fit new standardized performance period.</td>
</tr>
</tbody>
</table>

**Impacted Functions**

- All staff (faculty, staff, student-employees involved in current performance evaluation processes)
- Human Resources:
  - Compensation
  - Employee Relations
  - UOD
- Customer
Readiness Review
Measuring for Success
Measuring Readiness

Goals

Three scheduled reviews provide visibility of stakeholder readiness for Go Live.

Four Readiness Goals:
1. End User Readiness
2. Operational Readiness
3. Project Execution Readiness
4. System Support Readiness
# Measuring Readiness

## Three Reviews

<table>
<thead>
<tr>
<th>First Readiness Review (Get Ready)</th>
<th>Second Readiness Review (Get Set)</th>
<th>Final Readiness Review (Go)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Introduces measurements</td>
<td>• Shows significant progress in reaching goals</td>
<td>• Confirms readiness activities are complete</td>
</tr>
<tr>
<td>• Sets expectations for all Readiness Reviews</td>
<td>• Shows decreased Change Impact risk index</td>
<td>• Determines final Change Impact risk index</td>
</tr>
<tr>
<td>• Establishes baseline and Target Change Impact risk index</td>
<td>• Reports current level of readiness and risk</td>
<td>• Reviews operational contingency plans</td>
</tr>
<tr>
<td>• Reports current level of readiness and risk</td>
<td></td>
<td>• Reports current level of readiness and risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Leadership confirms site is ready to go</td>
</tr>
</tbody>
</table>
## Readiness Status

### Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>Deliverable is off track. At least one issue with no mitigation plan or the deliverable is behind schedule.</td>
</tr>
<tr>
<td>Yellow</td>
<td>At least one issue. Mitigation plans are in place.</td>
</tr>
<tr>
<td>Green</td>
<td>Project is on target, no issues.</td>
</tr>
<tr>
<td>Gray</td>
<td>No target due for Readiness Review</td>
</tr>
</tbody>
</table>
Readiness Report

- **Site Readiness**
  - Sites are prepared to operate effectively at go-live
  - End Users have the appropriate access
  - End Users are certified/trained
  - End Users are aware of why the implementation is occurring
  - Managers support the implementation
  - Managers are aware of why the implementation is occurring

- **Business Op Readiness**
  - Operating procedures are aligned with the new system
  - Data Cleansing is on-track
  - Organization is prepared to track performance post-go-live
  - Organization staffing is sufficient to operate successfully
  - Business issues/concerns have been addressed (risk mitigation)
  - Business success measures are defined
  - The required process/procedures are prepared
  - Site Leadership is prepared to support a successful deployment

- **Project Readiness**
  - The business is ready
  - Project resourced to meet business need
  - The required processes/procedures are prepared
  - Project team training is complete
  - IT Program is ready
  - Project is appropriately resourced
  - The required processes/procedures are prepared
  - Project team training is complete

- **System Readiness**
  - Infrastructure is set-up and tested
  - Business requirements have been met by design
  - Data Cleanup / Conversion are on track and monitored
  - System Development is on track
  - Testing & validation of system is on track
  - Data converted successfully
  - Cutover activities completed successfully
  - Hypercare support is in-place

**Users can do their jobs**

**The organization is prepared to operate on the system**

**Deployment Project is able to execute**

**IT Project is able to execute**

**The system meets business needs**
BUSINESS READINESS

GO TO GREEN PLAN

- Data Cleansing is on track:
  - Data Integrity
  - The requirements list:
    - Reviewing the policy management system
    - We have a data dictionary
    - ETA for data
    - Data models

USER READINESS

GO TO GREEN PLAN

- Managers Support the Implementation:
  - Finalize which Programs are in which Deployment Iterations
  - Ask to the Steering Committee:
    - Identify major activities/business initiatives, lockdowns and/or resource constraints that impact
    - Who should the project team engage with from your team validate our assumptions?
    - Deadline for your response on the above: July 28th
# Readiness: Data Driven

## Business/Operational Preparedness

**OBJECTIVE:** Operating procedures are aligned with the system.
1. I understand all the new or changed policies and SOPs.
2. Faculty and Staff understand how the new processes will be implemented at our site.

**OBJECTIVE:** Data cleansing is on track.
1. Resources are identified for Data Cleansing.
2. Data cleansing activities are understood and are engaged.

**OBJECTIVE:** Organization staffing.
1. Prototyping, Testing, Training and are engaged.

**OBJECTIVE:** Business issues/concepts.
1. Plans are in place to mitigate/manage.

**OBJECTIVE:** Business success metrics.
1. Everyone has completed training.
2. Production build is completed.
3. Integrations have been tested and successful.

**OBJECTIVE:** The required processes.

## Site Readiness

**OBJECTIVE:** Sites are prepared to operate effectively at go-live.
1. I have been provided the required checklists and updated Policies.
2. I understand the Support Plan during Hypercare and post-Hypercare.

**OBJECTIVE:** End users have appropriate access.
1. Staff and Faculty can access the systems and do their jobs as expected.

**OBJECTIVE:** End users are certified.
1. I understand the training strategy, timeline, and completion requirements.
2. All learners have been identified and are scheduled to attend training.

**OBJECTIVE:** Managers and end-users are aware of why this implementation is occurring.
1. Change impacts affecting learners have been communicated to Faculty and Staff.
2. I have received the job-aids, reference materials and change discussion guides.
3. I have a clear understanding of the project timeline and business effort resource requirements.
# Readiness: Data Driven

## General - Summary
- General - Agree: 48%
- General - Somewhat Agree: 24%
- General - Disagree: 28%

![Pie Chart](chart.png)

<table>
<thead>
<tr>
<th>#</th>
<th>Category</th>
<th>Subject</th>
<th>Question</th>
<th>% Agree</th>
<th>% Somewhat Agree</th>
<th>% Disagree</th>
<th>% Not Applicable</th>
<th>% No Response</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Not Applicable</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General</td>
<td>Program Info</td>
<td>I know when the Upgrade is scheduled to begin.</td>
<td>77%</td>
<td>14%</td>
<td>4%</td>
<td>1%</td>
<td>4%</td>
<td>1146</td>
<td>214</td>
<td>57</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>General</td>
<td>Program Info</td>
<td>I know how long the systems interruption will last (this is the time that PeopleSoft and related systems will be unavailable or view-only, also known as the cutover period).</td>
<td>64%</td>
<td>17%</td>
<td>13%</td>
<td>1%</td>
<td>5%</td>
<td>952</td>
<td>257</td>
<td>201</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>General</td>
<td>Program Info</td>
<td>I know what I can and cannot do during the systems interruption.</td>
<td>36%</td>
<td>31%</td>
<td>26%</td>
<td>2%</td>
<td>5%</td>
<td>534</td>
<td>466</td>
<td>300</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>General</td>
<td>Program Info</td>
<td>I understand that upgrades can be complex and difficult, and I am prepared to be flexible.</td>
<td>79%</td>
<td>14%</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>1179</td>
<td>207</td>
<td>28</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

**Legend:**
- **Agree**
- **Somewhat Agree**
- **Disagree**
- **Not Applicable**
Action Items

What – How – When
<table>
<thead>
<tr>
<th>What</th>
<th>How</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Build Your Change Network</strong>&lt;br&gt;Confirm you have enough and correct change agents.</td>
<td>Nominations from Leaders  &lt;br&gt;Leverage Managers &amp; Supervisors</td>
<td>April - May</td>
</tr>
<tr>
<td><strong>Change Agent Network</strong>&lt;br&gt;Establish a communication cadence with your respective Change Agents</td>
<td>Use the monthly Key Message and Say/Do/Reinforce communication</td>
<td>May</td>
</tr>
<tr>
<td><strong>Participate in Readiness Review Design</strong>&lt;br&gt;Develop strategy to deploy</td>
<td>Attend team meetings to develop RR criteria and/or participate in reviews</td>
<td>May</td>
</tr>
<tr>
<td><strong>Communications</strong>&lt;br&gt;ID best communication channels for your work-stream and let us know</td>
<td>Leverage tools &amp; mediums that are already in place</td>
<td>May</td>
</tr>
<tr>
<td><strong>Become familiar with change impacts</strong></td>
<td>Review project change impact templates</td>
<td>Now and as they become available</td>
</tr>
</tbody>
</table>
Action Items

Questions

What do you need from us?
Resources

Current website: https://www.purdue.edu/treasurer/BPR/
Dev website: https://dev.www.purdue.edu/treasurer/BPR/transform/
Backgrounder: Transforming the Way We do Business