Agenda

- Change Management by Phase
- Change Management Plan
  - Department Readiness
  - Training
  - All Campus Communications
  - Post-Implementation Support
- Resources
### High Level Change Management by Project Phase

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Change Management</th>
</tr>
</thead>
</table>
| Design          | • Broad, high level communications  
|                 | • Targeted SME Participation                                                     |
| Build           | • Broad, high level communications  
|                 | • Department data collection, clean-up                                            |
|                 | • Department readiness, including data/checklists                                  |
| Test            | • Targeted UAT participation                                                      |
| Pre Go-Live     | • Regular, specific communications  
|                 | • Targeted training                                                               |
|                 | • Targeted “quick reference” resources                                            |
|                 | • Functional owner readiness                                                      |
|                 | • Customer Support Readiness                                                      |
| Post Go-Live    | • Regular, specific communications  
|                 | • Intensive customer support                                                     |
|                 | • Updates to training/resources as needed                                          |
|                 | • Transition from project to owners                                              |
The Change Plan

Four-point change management strategy includes..

1. Department Readiness
2. Training
3. All-Campus Communications
4. Post-implementation support
# Department Readiness Timeline

<table>
<thead>
<tr>
<th>Champions Meetings</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Apr</td>
<td>May</td>
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</tbody>
</table>

- Readiness Toolkit Rollout
- Updates to Toolkit

<table>
<thead>
<tr>
<th>RSA Town Halls/Webinars</th>
<th>2013</th>
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</tr>
</tbody>
</table>
The Champion and Department Manager team

- Key is for Champions and Department Managers to work together to facilitate change

**Champion**
- What can I do in my role to support the change?
- How can I support and share what I know with my Department Manager?

**Department Manager**
- What can I do in my role to support the change?
- How can I collaborate with my Champion?
## Champions/Dept Managers Have Several Roles

<table>
<thead>
<tr>
<th>Department Manager/Champion roles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicator</td>
<td>Communicate with others about the change</td>
</tr>
<tr>
<td>Advocate</td>
<td>Demonstrate support for the change</td>
</tr>
<tr>
<td>Coach</td>
<td>Be a resource for others throughout the change process</td>
</tr>
<tr>
<td>Liaison</td>
<td>Engage with and support the project teams</td>
</tr>
<tr>
<td>Resistance Manager</td>
<td>Know how to look for and address resistance to the change</td>
</tr>
</tbody>
</table>
Department Readiness Toolkit

- Web based – available online mid June
- Identifies, in timeline format, key items
  - Meetings
  - Training events
  - Milestones
  - “To do” items to prepare your department
  - Items to communicate
- Provides context
  - Where we are in the F3 timeframe
  - Important items for your role
  - Expectations for future months
- Provides links to content
F³ Department Readiness Tool

Features:

- Global view of remaining F³ initiative timeline
- Drill down to items
  - Month icons
  - Arrow icons
- Links to related content to facilitate understanding
Features:

- Filter by item type:
  - Communications
  - Meetings
  - Milestones
  - Notifications
  - To Do’s
  - Trainings

- Export and Print Content

- Notification for content added, and due, within 7 days
F³ Department Readiness Tool

Features:
- Table view allows sorting and export of all content
  - Copy/paste
  - CSV
  - Excel
  - Search
Features:

- Finance3 tab provides quick links to site content
- Alert bar highlights high priority items
# Training Timeline

<table>
<thead>
<tr>
<th></th>
<th>Champions Meetings</th>
<th>RSA Town Halls/Webinars</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2013</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr</td>
<td></td>
<td></td>
<td>7/1 Changes Training</td>
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<tr>
<td>May</td>
<td></td>
<td></td>
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<tr>
<td>Jun</td>
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<td>Jul</td>
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<td>Aug</td>
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<tr>
<td>Sep</td>
<td>Readiness Toolkit</td>
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<tr>
<td>Oct</td>
<td>Readiness Toolkit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov</td>
<td>Toolkit Rollout</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dec</td>
<td>Readiness Toolkit</td>
<td></td>
<td>eLearning-HP (job aids, quick reference guides, webinars, interactive players)</td>
</tr>
<tr>
<td><strong>2014</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td></td>
<td></td>
<td>Training Labs/Help Sessions</td>
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<tr>
<td>Feb</td>
<td></td>
<td></td>
<td>COA Training</td>
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<tr>
<td>Mar</td>
<td></td>
<td>eLearning-COA (job aids, quick reference guides, webinars)</td>
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<tr>
<td>Apr</td>
<td></td>
<td></td>
<td>MyReports Training</td>
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<tr>
<td>May</td>
<td></td>
<td>eLearning-MyReports (job aids, quick reference guides, webinars, interactive players)</td>
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<tr>
<td>Jun</td>
<td></td>
<td></td>
<td>eLearning-HP (job aids, quick reference guides, webinars, interactive players)</td>
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<tr>
<td>Jul</td>
<td></td>
<td></td>
<td>Hyperion Training</td>
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Training

Spring

- Changes as of July 1: Temp Budget going away and additional NCAs. Planned communication:
  - Dept. IT meeting – May 23
  - Champions meeting – May 29
  - Town Hall – June 10
  - SOM Finance Managers meeting – June 12
  - On Line Training on Finance³ website
  - Q&A Webinar – week of June 24 and week of Aug 5
  - Communication to Weblinks Users, PI Portfolio users and Ad Hoc users

- July 1 changes prominently placed on Finance³ website including FAQs
- Help line in place
Training in Fall 2013

Chart of Accounts – beginning in September/October
MyReports – beginning in October/November
Hyperion – beginning in December/January

<table>
<thead>
<tr>
<th>Delivery Methods</th>
<th>Town Halls</th>
<th>Pre-Recorded Webinar</th>
<th>Live Webinar</th>
<th>On-Line Players</th>
<th>Job Aids/QRG</th>
<th>Class Room Sessions</th>
<th>Post Go-live Help Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lectures conducted to educate large numbers</td>
<td>Pre-recordings to aid Champions/Mgs. &amp; Depts. in key subject matter</td>
<td>Delivered to provide Q&amp;A sessions</td>
<td>Online Interactive players that use step-by-step guidance</td>
<td>1 or more page helpful reference aids</td>
<td>Interactive hands on keyboard and Q&amp;A sessions</td>
<td>Q&amp;A sessions in reserved space. Assist campus users with business examples</td>
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Role of Champions/Dept. Managers in Training

Champion/Manager Role
- read Job Aids/QRG
  > 1 or more page aids
- read FAQs
- attend Champions Overview Training
  > COA, Reporting and Hyperion Planning training
- view Pre-Recorded Webinar
  > Subject Matter Recordings

share knowledge and help determine needs Departments
- Share information from your training with departments.
- Refer users to training materials as early as possible before core training.
- Aid in determining who should attend what trainings

refer for core training Classroom

refer to help sessions Post Go Live Help Sessions

refer to Q&A webinars Sign-up for Live Webinar Sessions
# Change management timeline

## Champions
- Meetings

## RSA Town Halls/Webinars
- Rollout

## Training
- 7/1 Changes Training
- Training Labs/Help Sessions
  - eLearning-COA (job aids, quick reference guides, webinars)
  - COA Training
  - eLearning-MyReports (job aids, quick reference guides, webinars, interactive players)
  - MyReports Training
  - eLearning-HP (job aids, quick reference guides, webinars, interactive players)
  - Hyperion Training

## Town Halls
- Dept Mgr Mtgs

## Dept Readiness
- Champions Meetings
- Readiness Toolkit Rollout
- Updates to Toolkit

## Communication
- Signage placed around Campus
  - CO Newsletter
  - OE Updates
  - HR Newsletter
  - Announcements on Chatter

## Post Implementation Support
- Helpdesk and other resources

## Timeline

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All-Campus Communications

- **What:** High-level communications about wide-spread impacts
  - High-level Functional Design
  - Project Principles: Vision, Context, Benefits, Timeline, Roles, Training & Readiness Resources Availability
  - Policy changes

- **Tools:**
  - Town Hall meetings
  - Emailed newsletters: CO, OE, HR
  - Website: Finance³
  - Chatter: “All UCSF” group
Post-Implementation Support

- What: Planned support for post-implementation campus needs
  - Helpdesk:
    - CoA functional support
    - IT systems technical and functional (business process) customer support
  - On-going training resources
    - E Learning
    - Training labs
Resources

- Finance³ Website: [http://controller.ucsf.edu/finance3/about.asp](http://controller.ucsf.edu/finance3/about.asp)
- Controller’s Office newsletter (sign up): [http://controller.ucsf.edu/newsletter/newsletter_122012.asp#how_sign_up_mail_list](http://controller.ucsf.edu/newsletter/newsletter_122012.asp#how_sign_up_mail_list)
- COA
  - Tammy Wallace, Functional Leader
  - Tony Prevedello, Senior Analyst
  - Fred Selk, Project Manager

- MyReports
  - Lori Cripps, Functional Leader
  - Nora Watanabe, Project Manager

- Hyperion Planning Project
  - Mike Clune, Functional Leader
  - Linda Kittle, Project Manager

- Change Management
  - Jill Goldsmith, Project Manager
Questions