Transforming Administrative Systems One Step At A Time

NCCI Conference, July 15, 2016
Sherry Steinaway, University of Washington
Sara Pendergast, North Highland Worldwide Consulting
THE UNIVERSITY OF WASHINGTON

$6.9 Billion

Multi-Campus University

16 Colleges and Schools

294 Programs

530 Degree Options

World-class Academic Medical Center

1,800 Undergraduate Courses

>12,000 Degrees Annually
CURRENT STATE

44 Radically Decentralized Units

Multiple, Manual HR Processes
Department-Specific Separate Solutions
No Centralized Business Process
Limited Standard Operating Procedures

146 Intersecting Systems
Governance

34 Year-Old Payroll System, no central HR system
IMAGINING THE FUTURE STATE

ANNA MARIE’S Scribed goals graphic:

- Going Strong
- Known for Innovation
- No more kicking the can

School Community

We are on Fire

Tuition Bottom Line

Impact A lot of People

Benefit Visibility

A SPRINT with Obstacles

Demonstrates our ability to continue to lead

This matters

A Legacy

We must achieve!
SOUND FAMILIAR?

• How familiar is UW’s goal for transformation to you?
  • What kinds of transformational change are you addressing or considering on your campus?

• How does your current state compare to UW’s?

• Turn to a neighbor and compare notes
Choosing To Transform

The End Of Add-ons And Quick Fixes
HOW WE ARE TRANSFORMING THE UW

• What does the future state mean about our employees’ experience?
  • **Agility**—A New Way Of Working
  • **Responsiveness**—A New Way To Serve Our Support Needs
  • **Security**—New Opportunities And Challenges
  • **Scalability**—Never This Big
  • **Sustainability**—Software As Service And Beyond
HOW WE ARE TRANSFORMING THE UW

Agility—A New Way Of Working

• Breaking down silos to build a network of collaboration
• Maximizing competencies with data-driven business processes across the enterprise
• Developing flexibility with Software as a Service
• Responding to change through continuous improvement
HOW DOES YOUR CAMPUS RUN?

SELF-ASSESSMENT—How ready are you to transform?

• Do you have clear enterprise-wide structures and guidance?
• How does major change happen across your university?
  • Who drives the change?
  • Who supports the change?
• On a scale of 1-10 (10 is the highest), how would you rate your university’s agility (e.g., its ability to flexibly and quickly react to change)?
HOW WE ARE TRANSFORMING THE UW

Responsiveness—A New Way To Serve Our Support Needs

• Integrated business processes enable quicker response across the enterprise
• Quick, cost-effective updates with Software as a Service
• A network capable of fast and accurate responses to employees
CURRENT SERVICE LEVELS

SELF-ASSESSMENT—Are you where you need to be?

• Think about a HR process change—such as onboarding—how many different ways do you do it at your university?
• Who makes decisions about how things get done?
• How many people would you need to consult to design a change?
• Given your current state, how many different variations of training material would you need?
• How responsive are you now?
HOW WE ARE TRANSFORMING THE UW

Security—A New System Of Opportunities And Challenges

• New system challenges—increased access to information
• Business processes across the enterprise—new visibility
• Software as a Service—maintaining security roles and access
• Continuous improvement—what to do when things keep changing
CONCERNS WITH SECURITY

SELF-ASSESSMENT—How secure is your university?

- Multiple breaches across campuses
- Desirable target for increased and more sophisticated attacks
- Overall thoughts on how visibility is addressed or will be addressed on your campus?
HOW WE ARE TRANSFORMING THE UW

*Scalability—Never This Big*

- Every employee touched by the new system
- Key enterprise business processes are transformed
- Operating as one University—streamlining and standardizing
- Continuous improvement—what to do when things keep changing
HOW BIG IS BIG

SELF-ASSESSMENT—How much have you taken on?

• What are you currently doing that is impacting your campus?
• Who’s involved?
HOW WE ARE TRANSFORMING THE UW

Sustainability—Software As Service And Beyond

• New thinking to support new ways of working
  • Integrated Service Center
  • University-wide governance
• Key enterprise business processes
• Continuous improvement
  • What to do when things keep changing?
  • How will we expand our capacity to handle growth?
  • How adequate will our current bandwidth be in the future state?
SUPPORT IN A NEW WORLD

SELF-ASSESSMENT—Can you meet expectations?

- Scope of service
- Service experience and expectations from staff and faculty
- Cost of service influences solutions
ASSESSING THE GAP

*Same As It Never Was*

- Who are we now?
- What is our current employee experience?
- Who do we need to be?
- Why is any of this important now?
BUILDING OUR BRIDGE TO THE FUTURE

If Not Now, When?

• Changing course to change culture
  • Resetting the program
  • Establishing leaders, building teams
• Plotting a new roadmap to the future state
  • What support do they need?
• How will we know we’re transforming?
  • How will we sustain our new capacity and competency for change?
Programming In Change And People Readiness

Working Like We Never Have, Starts Now
DELIVERING VALUE EFFICIENTLY

Managing the relationship between the phases of technology development with the people readiness phases delivers initial value faster and establishes a model for sustaining continuous improvement.
MODELING THE CHANGE

Integrated Change Management (ICM): It’s not about what we do. It’s about what the UW does.

**ICM Core Services**

<table>
<thead>
<tr>
<th>Stakeholder Engagement</th>
<th>Communication Strategy and Execution</th>
<th>Training</th>
<th>Stabilization</th>
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<tbody>
<tr>
<td>• Support definition and measurement of stakeholder engagement and adoption</td>
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<tr>
<td>• Prepare Change Leaders and Managers</td>
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<td>• Serve as centralized support for readiness teams</td>
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<td>• Facilitate determination of system access rights</td>
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<td>• Assist in gap analysis from current to future business processes</td>
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<td>• Assist in business process improvement</td>
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<td>• Create, manage and consult on program-level communications</td>
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<td>• Consult on creation of unit communication plans.</td>
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<td>• Perform needs assessment</td>
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<tr>
<td>• Consult on creation of training strategy and plan</td>
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<td>• Manage training and performance support material creation</td>
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<td>• Manage training delivery</td>
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<td>• Define training environment needs</td>
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<td>• Execute training and feedback process</td>
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<td>• Conduct Post Go-Live assessment</td>
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<td>• Execute Performance Support</td>
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HOW DO WE BRING PEOPLE WITH US?

A Simple Process That Focuses On People

To transform the UW in a sustainable way, people need to:

• Build change competency
• Learn new things just in time to apply them
• Engage in a repeatable cycle
• Know they are making progress through measured momentum

Just telling people what to do isn’t enough. We needed the 7 Steps to start our new work.
7 STEPS
We Will Start Now and Repeat for Each Cycle of Continuous Improvement

IMPROVE OUR WORK
- Identify and document ways to improve our business processes and new system.
- Identify and document ways to improve the Integrated Change Management (ICM) approach.
- Continuously improve our business processes and new ways of working.

DO OUR NEW WORK
- Go Live by deploying new HR/Payroll processes and Workday.
- Determine need for additional support and training.
- Evaluate impacts in the new environment.
- Evaluate new ways of working.

LEARN NEW SKILLS
- Understand the full impact of new business processes.
- Train users on the new system.

PREVIEW & TEST OUR NEW WORK
- Become familiar with our new system through demonstrations and roadshows.
- User Acceptance Testers (UATs) test selected Workday functions.
- Validate, adjust, and keep working on readiness plans.

ESTABLISH OUR NEW FOUNDATION
- Become oriented to a new system, new roles and responsibilities, new security access rights, and new terminology.
- Begin to understand what’s changing.

UNDERSTAND THE IMPACTS OF CHANGE
- Learn business processes in the future state.
- Identify, define, and document unit specific end-to-end business processes and those needing improvement (gap analysis).
- Identify, define, and document change impacts to units.
- Determine training and other support needs.

PLAN FOR CHANGE
- Document changes to end-to-end business processes based on new business processes.
- Finalize readiness plans, communications plans/roadmaps, and training needs.
- Begin implementing readiness plans.
BUILDING COLLABORATIVE MUSCLE: THE CHANGE NETWORK

Engaging people in the 7 Steps involves simple instructions and support from a clear, centralized communication hub with an easy method for feedback.
KEEPING THE STORY STRAIGHT

The Change Network houses accurate, timely communications that readiness teams can use to inform their audiences.
GETTING THE WORD OUT, STEP-BY-STEP

As the program progresses, a new step is promoted via a web page which includes the purpose, method, benefits, metrics for measurement, as well as session homework and materials (when relevant).
The question resolution library is visible on the Change Network and is updated weekly.

The question resolution button on the CN home page takes you to the new library.
HANDLING QUESTIONS ... IT'S A PROCESS

CM's  HRPASK@  Info Sessions

CAMPUS QUESTIONS

Question Resolution Form

Subject Matter Expert(s)

Question Resolution Library

Quality Assurance Check

Change Manager

Change Manager
7 STEPS
We Will Start Now and Repeat for Each Cycle of Continuous Improvement

ESTABLISH OUR NEW FOUNDATION
• Become oriented to a new system, new roles and responsibilities, new security access rights, and new terminology.
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PLAN FOR CHANGE
• Document changes to end-to-end business processes based on new business processes.
• Finalize readiness plans, communications plans/roadmaps, and training needs.
STEP 1: ESTABLISH OUR NEW FOUNDATION

**Inputs**
- Accurate and fully validated security roles broken down by process
- Sup. Org. configuration fully verified and understood across ICM
- Data collection and validation plan
- Scope, timeline, and resources plan
- Key business decisions inventory

**Actions/Activities/Processes**
- Unit Engagement:
  - Security role education and data collection
  - Supervisory Org. education and data collection
  - Education around key decisions made, general Workday knowledge, and ICM Strategy
- ICM data documentation and validation work with technical/functional groups
- Engagement mediums updated and verified

**Outputs**
- Valid and system verified:
  - Role mapping data of personnel
  - Sup. Org. mapping data
- Unit understanding of HRPM Program scope, timeline, and resources among the readiness teams
- Unit readiness/progress documented and mitigation/action plans developed
STEP 1: THINGS PEOPLE SAY

Why are we doing this?

Who is paying for this?

Do we really need to do this?

We can opt out, right?

Why haven’t we done this earlier?
NOW IT’S YOUR TURN

*Discuss and document your thoughts on the key questions for Step 1*

- What is changing?
- How is it changing?
- Why are we making this change(s)? What’s the business case?
- Who do we expect is impacted by the change(s)?
- What do I need to support this work?
- What kind of support is being offered?
- How have we engaged our leaders to support our efforts?
7 STEPS
We Will Start Now and Repeat for Each Cycle of Continuous Improvement

ESTABLISH OUR NEW FOUNDATION
- Become oriented to a new system, new roles and responsibilities, new security access rights, and new terminology.
- Begin to understand what’s changing.

UNDERSTAND THE IMPACTS OF CHANGE
- Learn business processes in the future state.
- Identify, define, and document unit specific end-to-end business processes and those needing improvement (gap analysis).
- Identify, define, and document change impacts to units.
- Determine training and other support needs.

PLAN FOR CHANGE
- Document changes to end-to-end business
STEP 2: UNDERSTAND THE IMPACTS OF CHANGE

**Inputs**
- True E2E Process flows (BPs) documented and verified
- Sup. Org. & role mapping status and action plan
- Decisions from business owners on policies, standards, and procedures
- Step 2 expectations and timeline mapped out and posted via engagement mediums
- CM talking points script
- Change impact templates

**Actions/Activities/Processes**
- E2E process review exercises & 3P change impact assessment sessions
- Policy, procedures, and standards review
- Demonstrations of Workday functionality
- Communications planning with units
- Develop a list of questions that need further investigation
- Partner with functional/technical/leadership to answer questions fully, with confidence
- Ops. policy and procedure documentation and management for eventual ISC handoff
- Document trends for training development

**Outputs**
- Inventory of change impacts
- Synthesis and analysis of documentation
- Readiness plan strategy
- Unit readiness/progress documented and mitigation/action plans developed
- Updates for functional/technical/leadership plan
- Updated training plan (based on training support needs documented)
- ISC knowledge transfer
STEP 2: THINGS PEOPLE SAY

- What happens if this new process doesn’t work for us?
- Who made this decision? And, How can I get it changed?
- What’s going to happen to the employees who used to do that?
- What if we can’t do this by Go Live?
- We can still do it manually, right?
Discussions and document your thoughts on the key questions for Step 2:

• What are the specific work changes expected and how will they impact my area?
• How does our work need to change?
• Who do we expect is impacted by the change(s)?
• Have we created our readiness team?
• How have we oriented our readiness team members?
• Who else do we need to involve to conduct our change impacts analysis?
• How have we engaged our leaders to support our efforts?
7 STEPS
We Will Start Now and Repeat for Each Cycle of Continuous Improvement

1. Establish Our New Foundation
   - Become oriented to a new system, new roles and responsibilities, new security access rights, and new terminology.
   - Begin to understand what’s changing.

2. Understand the Impacts of Change
   - Learn business processes in the future state.
   - Identify, define, and document unit specific end-to-end business processes and those needing improvement (gap analysis).
   - Identify, define, and document change impacts to units.
   - Determine training and other support needs.

3. Plan for Change
   - Document changes to end-to-end business processes based on new business processes.
   - Finalize readiness plans, communications plans/roadmaps, and training needs.
   - Begin implementing readiness plans.
STEP 3: PLAN FOR CHANGE

**Inputs**
- Inventory of change impacts
- Document management strategy
- Readiness plan strategy
- Policy and procedure Updates
- Mitigation/action plans

**Actions/Activities/Processes**
- Document standardization opportunities
- Readiness plan development support with units
- Change mitigation walkthrough
  - Process and policy changes
  - Behavior changes
  - Skill-based gaps
- UAT education and participant data collection

**Outputs**
- Readiness plans documented and verified “approved” by each units leadership
- UAT participant list and plan
- ISC knowledge transfer
- ICM plan update
- Communication plans updated and documented
- Unit readiness/progress documented and mitigation/action plans developed
- Updated training plan (based on training support needs documented)
I can’t do anything until I see it.

How am I supposed to archive all our old ways of doing things?

Won’t training cover everything we need to do?

Who can help me write new procedures?

Why do you need to measure my progress mitigating the change impacts?

How do I know when to take action?
NOW IT’S YOUR TURN

Discuss and document your thoughts on the key questions for Step 3

- What are we going to do to adopt and/or mitigate the change(s)?
- Who is going to be in our change support network?
- Who should be involved in making sure the change impacts are accurate and we will be able to meet our business needs?
- Who is on point to create our unit’s readiness plan and begin to implement it?
- How have we engaged our leaders to support our efforts?
CONCLUSION

• The first of many—more administrative and systems transformations are coming to UW
• Balancing and connecting higher education’s mission with business process transformation
• Taking it one step at a time
Contact Us

> Sherry Steinaway, University of Washington, sherry@uw.edu
> Sara Pendergast, North Highland, sara.pendergast@northhighland.com