ESR Targeted SME Session: COMMUNICATIONS / CHANGE MANAGEMENT

UC San Diego, Academic Affairs - Resource Administration

OSI Partners: Allorah Pradenas & Kristin Kielich
Thank You - We Hear You

• 9 Academic Affairs Sessions with 100+ attendees
  • JSOE  • DoBS  • GPS
  • DSS  • DAH  • Quartet
  • DPS  • Rady  • EVC Units

• 300+ Challenges (Anonymized & Themed)
  • Change saturation
  • Reporting challenges
  • Training needs
  • Communication challenges
  • Lack of department engagement in decision-making
  • Overall low morale

• 100+ Potential Solutions
# Session SMEs

<table>
<thead>
<tr>
<th>SME</th>
<th>Title</th>
<th>ESR System Expertise</th>
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<tbody>
<tr>
<td>Lynn Underwood</td>
<td>Director of Strategic Organizational Change Management</td>
<td>ESR Change Management</td>
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<tr>
<td>Arlynn Renslow</td>
<td>Associate Controller - Business &amp; Financial Services</td>
<td>Oracle</td>
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<tr>
<td>Kacy Marume</td>
<td>Associate Director - Business &amp; Financial Services</td>
<td>Oracle &amp; Concur</td>
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Expectations

1. Speak one at a time
2. Stay on topic
3. Respect each other's unique experiences
4. Focus on moving forward
5. Being specific helps
Moving Forward:
Discussion
ESR Stabilization Discussion

COMMUNICATIONS/CHANGE MANAGEMENT

**ESR Listening Session Feedback**
1. Coordinate and synthesize messaging
2. Tailor effective communication for depts/divisions
3. Approach communications with an empathetic tone (e.g., fiscal managers are exhausted, frustrated, and under-resourced resulting in communication overload and sensitivity)
4. Clear communication from every level of the organization

**Solutions & Opportunity**
- Requires Service and Business Process Owners adopt standard practice for cross-promotion (i.e. FIS and UCPath), can recommend best practice and work with teams to implement. Major Incident is an example already in place.
- Targeted audiences need to be created/refined, project were not adequate, post-ESR, consider audience-sign-up option.
- Communication goals need to be end-user focused, targeted, clear, consistent, can provide guidelines based on VOC

**Existing Channels of Communication**
Walk Me, Town Halls, Emails, Confluence, ESR Blink Project Website, Blink, CMS, Committees, Advisory Groups, Change Networks, News, Calendars
ESR Stabilization Discussion

COMMUNICATIONS/CHANGE MANAGEMENT

ESR Listening Session Feedback
1. Improve and align communication timing and content (e.g., multiple groups communicating changes and updates)
2. Increase transparency into ESR stabilization challenges and solution progress (e.g., central space to communicate system issues, changes, updates, best practices)
3. Update KBAs (e.g., outdated and/or conflicting KBAs)

Solutions & Opportunity
• Chancellor's ESR Financial Systems Advisory Committee & Known Finance System Issues
• Financial Management @ UC San Diego
• Reinforce use of Blink and ServiceNow Knowledge Base Articles for content, including best practice to manage. About Support page included with new site, explains the numerous types of support

Existing Content & Support
Content: campus website, Blink, department sites, ServiceNow Knowledge Base; Support: landscape numerous options
ESR Stabilization Discussion

COMMUNICATIONS/CHANGE MANAGEMENT

**About Financial Management @ UC San Diego**

To introduce financial management in a comprehensive, unified and orchestrated way to UC San Diego audiences. In featuring financial management as an interconnected and enterprise practice we will:

- Foster audience awareness and learning about financial management.
- Align and leverage existing content as we establish consistent navigation structures, templated pages and language across the financial management landscape.
- Introduce high-level pages which serve as a one-stop-shop to learn, identify and access financial management resources.
- Curate paths to content based on different ways of knowing and working such as finding information by: Affiliation, Role, Process, Topic, Activities
ESR Stabilization Discussion

COMMUNICATIONS/CHANGE MANAGEMENT

ESR Listening Session Feedback
1. Reduce change (e.g., too much change impacting staff retention and recruitment)
2. Invite/involve departments to engage in decision-making (e.g., disconnect between how satisfied the users are with the tools/reports that are created and available for staff to use)
3. Provide understanding of the difference between policy changes/best practices versus system limitations

Solutions & Opportunity
• ESR implementing lessons learned with SIS, EIM, EEPMP projects embracing
• OCM reliant upon feedback, what feedback (2 way) communication approaches are preferred?
• Differentiating change requires understanding change impact; can tie to audience assessment to provide guidelines for post-ESR system and process owners/OCM

Existing OCM
Formal roles with % allocation, Roles dedicated to OCM functions (i.e. communications, training), structured and unstructured