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
  - DSS
  - DPS
  - DoBS
  - DAH
  - Rady
  - GPS
  - Quartet
  - 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

SME	Title	ESR System Expertise
Lynn Underwood	Director of Strategic Organizational Change Management	ESR Change Management
Arlynn Renslow	Associate Controller - Business & Financial Services	Oracle
Kacy Marume	Associate Director - Business & Financial Services	Oracle & Concur

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
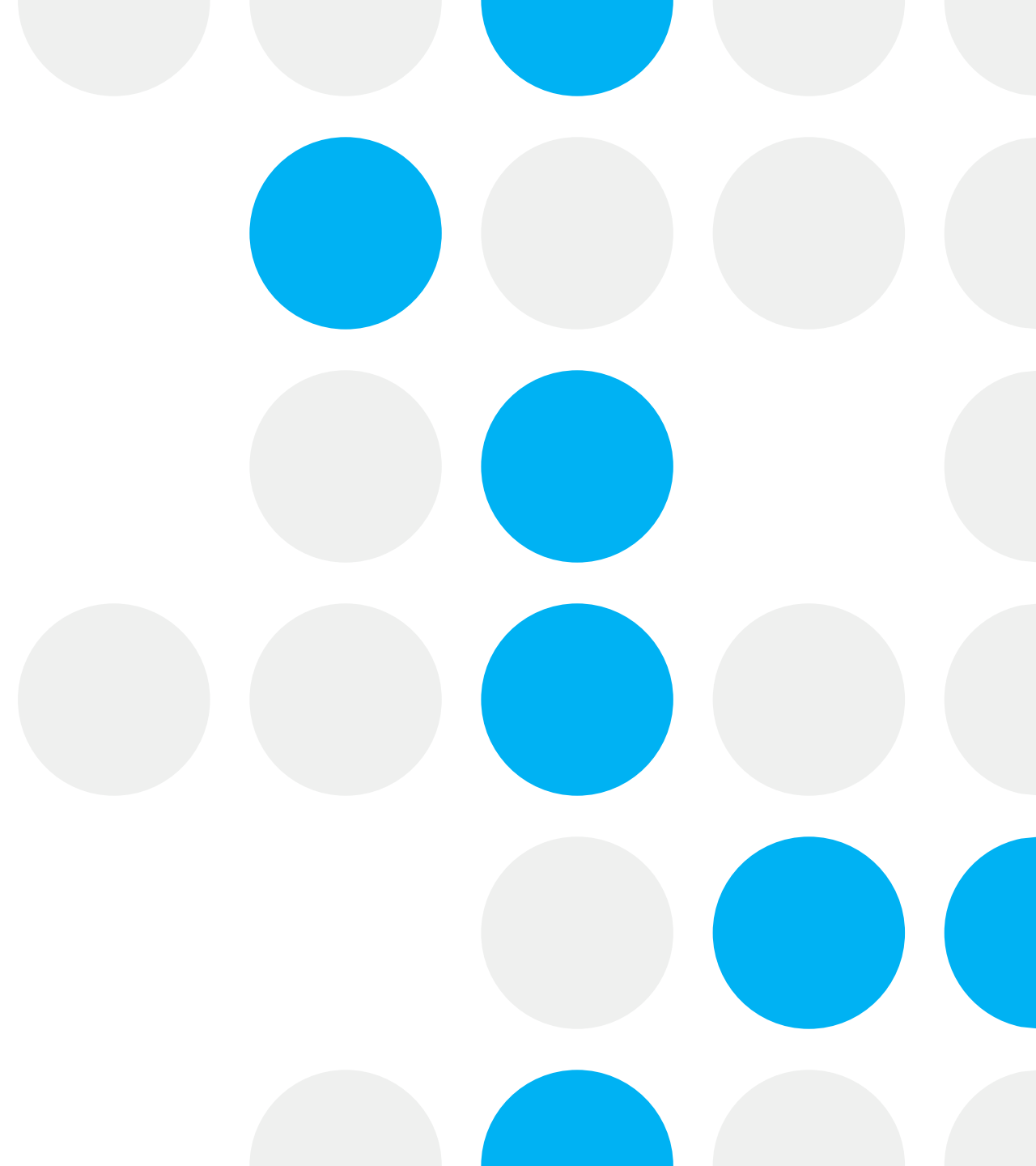
Existing OCM

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

Thank You

ADDENDUM

Post-Meeting: Recurring Themes, Questions, and Comments

ESR Stabilization Discussion

Post-Meeting: Recurring Themes, Questions, and Comments

Communication / Notifications

- Change in gift cards policy and students are no longer able to use them. Policy was changed without communication to faculty/staff. There has been a request from staff to distribute a communication since May.
- Final invoicing for the year received day before the deadline. It would be more helpful to receive before the deadline.
- Why isn't there a calendar with important deadlines, including UCpath, IPPS, OCGA and fiscal deadlines?
- Regarding notifications on outages, can we get more context in the communications on what is impacted by the errors in? A recent notice was sent to fiscal staff and they were not aware of what "E-078" meant, but turns out this notice applied more to HR transactors.

Resources

- Blink needs to be better maintained, updated, easier to search, and consistent with Knowledge Base Articles (KBAs).
- There is a need to connect Blink and KBAs to ensure resources point to each other.
- There is a need to better define and separate collaboration tools versus information repositories
- Faculty and staff are still dependent on Blink. The turn-around for update requests on Blink or a KBA should be better.

ESR Stabilization Discussion

Post-Meeting: Recurring Themes, Questions, and Comments

Resources (Cont.)
- Connecting search terms to the correct place using language that is more common and less jargon-y is really helpful. For example, a new person processing a student refund searches student refund and gets nowhere, because a student refund is a "non employee payment request". Bottom up, user focused terminology can help new- hires feel less lost. Or people changing jobs to transition easier.
- A unified source for fiscal info would be very helpful. Right now, information seems to be organized by the content units (Travel, Procurement, CBO, etc.) in each of the various channels (Blink, KBAs, etc.). Someone new to UCSD doesn't understand the overall organization, so they can be at a disadvantage.

Other
- Is there an update on when there is a change in the time frame for adding suppliers to Payment Compass, processing reimbursement, etc.
- There is an opportunity to conduct more listening sessions within the Fiscal Contacts meetings.