PeopleSoft Project

Florida School Financial Officers Association
FSFOA June 2017 Conference
IT- Change Management

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“It may be hard for an egg to turn into a bird: it would be a jolly sight harder for it to learn to fly while remaining an egg.”

- C. S. Lewis
PeopleSoft Project

- Overview of Project
- Structure of Project Management
- Change Management
- Training/Retraining Management
- Challenges
- Questions
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ERP Replacement Program: Vision

“To design and successfully implement a robust business platform that supports user-friendly, automated and accurate business processes, services and reporting, and reduces operational costs so that District resources can be invested back in the classroom”
ERP Replacement Program: Goals

- Collect, analyze, and report timely and reliable data
- Eliminate duplicate data entry
- Access data when needed
- Streamline and improve recruiting and hiring processes
- Eliminate paper based processes
- Automate manual processes
- Enhance productivity
- Accurately forecast, budget, and report on financials to the State and the Federal Government
- Facilitate strategic thinking
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ERP Overview

• An Enterprise Resource Planning (ERP) system integrates all departments and functions across the district onto a single, integrated software program.

• The goal of using an enterprise resource planning system is to provide one central repository for all information that is shared by all departments to improve the flow of data across the organization.
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ERP Replacement Program: Overview

3 projects make up the Enterprise Resource Planning ("ERP") Replacement Program:

- **Campus Solutions**: Manatee Technical College (MTC) project to integrate Student Financials with District and replace MTC’s Student Information System
- **PeopleSoft**
  - FSCM: Financials and Supply Chain Management
  - HCM: Human Capital Management
- **Taleo Upgrade**: Taleo optimization project to streamline hiring and onboarding

District-wide project to replace Business and Web Apps
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Program Overview

• 3 projects make up the ERP Replacement Program:

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*District-wide project to replace JDE*

Includes:
• District Financials
• School-Based Internal Accounts
• Human Resources
• ePortal Replacement
• Payroll / Timesheets
• Employee Self Service
• Purchasing
• Warehouse / Inventory / Assets...

**Taleo Optimization**

*To streamline hiring & onboarding*

Includes:
• ACE questions to sort/rank applicants
• Simpler application process for applicants

**Campus Solutions**

*To integrate MTC student financials with SDMC*

Includes:
• Financial Aid
• Student Financials
• Campus Community
• Admissions
• Academic Advising
• Student Records
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ERP Program Timelines

• Three projects are underway, with varying Go-Live dates:

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*Taleo Optimization will occur in 2 phases:

• Phase 1 Go Live: 4/1/2017
  • Adding ACE questions
• Phase 2 Go Live: 2/1/2018
  • Integrating to PeopleSoft
PeopleSoft Project Timeline

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<th>2016</th>
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<td>Mar/Apr</td>
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<td>◆ Fit Gap Sessions</td>
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<td>Development – Interfaces/Customizations/Reports</td>
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<td>Develop End User Training Content</td>
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<td>◆ Cutover</td>
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Change Management Activities

Today

Post Prod. Supt.
Program Governance – SDMC

- School Board
- Superintendent
- Program Sponsor
- ERP Program Team (See next slide)
  - Subject Matter Experts
  - Change Agents
  - Site Communication Leads
### Organizational Change Management

#### Leadership and Stakeholder Engagement
- Create a change agent network
- Develop change leadership skills and commitment
- Promote stakeholder involvement
- Help end users to “get ready” for the implementation

#### Communications
- Create targeted messaging, based on change impacts
- Reduce resistance by facilitating communications with end users and the project team
- Create ownership for the success of the ERP Replacement Program

#### Organizational Alignment
- Assess organizational change readiness
- Align roles and responsibilities
- Pinpoint areas with change resistance
- Identify change impacts

#### Training
- Provide role-based end user training
- Develop training materials
- Manage knowledge transfer for key project resources

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[Image 90x22 to 151x42]
[Image 36x11 to 79x54]
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Change Management in a Nutshell

Employees are more willing to accept change when they:

• Understand what is changing and how they are impacted
• Understand the context and necessity for change
• Are provided the necessary information, tools, and/or skills to do their jobs effectively
• Receive clear and consistent project information
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Change Management

Change Management includes the work required to prepare the people and the organization for changes resulting from the PeopleSoft implementation.

**Key Objectives**

- Build effective change sponsorship from the top
- Align change management activities with the project vision
- Involve relevant stakeholders early and throughout the change process
- Communicate key messages and ideas at the right time, to the right audience, and at the right level of detail
- Prepare the organization and users to use the new processes and applications proficiently in their daily activities
- Evaluate Change Readiness for risk mitigation and success measurement
- Reduce disruption pre and post go-live

Change Agents help with the activities outlined in green.
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**Cascading Communications**

**Change Team**
*PeopleSoft Project*

Create communications, aligned with key program milestones, using effective vehicles.

Collect feedback and address concerns.

**Sponsorship**
*Network of Leaders and Change Agents*

Discuss key changes with employees, based on the materials created by the change team.

Gather feedback from colleagues to assess change readiness.

**Employees**
*People Impacted by Upcoming Changes*

Are employees throughout an organization, in different departments and at different levels, that receive consistent messaging from managers and change agents.
Change Agent Network

The Change Agent Network includes employees from across the district – Change Agents – that share information and solicit participation in communications and employee engagement activities as part of the PeopleSoft Project.

Objectives

- Create a “personalized” communications channel for employees.
- Provide feedback to the project team.
- Help move employees along the commitment curve.
- Reduce employee resistance.
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Engagement: Change Network

- The Change Network supports communications to SDMC employees.
- Change Agents and Site Communications Leads help to:
  - Inform, educate, and engage SDMC staff
  - Create general awareness, understanding, and ownership of the ERP Replacement Program
  - Develop a communications loop between operations, schools, and the ERP Replacement Program Team
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Change Commitment Curve: Overview

The Commitment Curve depicts typical stages of organizational change. The Change Management Strategy is designed to help monitor and facilitate the appropriate movement of affected employees through the Commitment Curve.

Program Leadership and Senior Stakeholders  Change Agents  Employees and End Users

Program Leadership, SMEs, and Change Agents move up the Commitment Curve before the broader employee/end user group to help drive the change effort and bring users to desired levels.

Note: The Unaware level is not displayed on the diagram, but is the beginning phase and is characterized by the stakeholder having little or no knowledge of the project.
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Change Readiness Assessment

The Change Readiness Assessment will be used to assess the organization’s readiness for change.

The analysis of the responses will provide:
• Information about the district’s change history and current aptitude for change
• Potential barriers to a successful change implementation
• An ongoing assessment method to monitor and react to people’s readiness for change

Design Survey
• Identify the target audience
• Determine demographics and focus areas
• Develop questions for the assessment

Deploy Survey
• Distribute the survey
• Allow 2 weeks to complete with a reminder 1 week after the initial distribution

Analyze Results
• Identify change management opportunities and challenges
• Modify the change management strategy and communication plan as needed

Assessment Report
• Report Change Readiness Assessment results to Change Agents, SMEs, and Leadership
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Project SharePoint Site

• The project SharePoint site will store project communications materials, including: fact sheets, program briefings, and Frequently Asked Questions (FAQs).
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Change Agent Network

Objectives

- Create a “personalized” communication channel to support change throughout the organization.
- Directly influence stakeholders and teams in the field.
- Allow the project team to better penetrate the organization and reach areas of need or concern.
- Build momentum along the commitment curve through clear and consistent expectations.
- Create a strong line of communication back to the program team to assess progress, issues, and risks.

Benefits

- Provide positive role models, committed to the change effort.
- Provide an employee perspective on the change effort.
- Maximize movement along the commitment curve by providing readiness and acceptance input.
- Reduce resistance through active leadership and employee involvement.
- Enable a faster, better, and smarter implementation of changes.
- Increase effectiveness of messages through respected peer delivery.
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Change Impact Assessment: Defined

A Change Impact Assessment:

• Mitigates risks associated with moving to a new system environment by identifying major areas of change
• Assesses the magnitude and complexity of required changes
• Creates an understanding of organizational impacts for planning and effectively managing change
• Develops information that may be used for:
  • Training
  • Technology
  • Communications
  • Change Management
  • Security and Controls
• Clarifies what is NOT changing
Impact of Change: Process

A Change Impact Assessment is typically conducted in four steps:

1. Gather key process changes
   - Understand the key differences between “as-is” and “to-be”
   - Work with the functional teams to outline key changes

2. Document changes with associated impacts
   - Identify impacts to organizational structure, roles, processes, skills, behaviors, and supporting technology

3. Assess magnitude and complexity of changes
   - Rate each change as high, medium, or low impact
   - Calculate ratings based on level of impact to the organizational structure or to employees’ work processes, job content, tools, skills, knowledge, and workload

4. Develop change impact documents
   - Outline key changes and impacts
   - Use as input into action plans and change management activities
   - Provide employees with an understanding of changes
Enable end users to perform their job tasks effectively
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ERP Training Overview

• Provide training to all employees
• Blend training delivery methods
  – Online/Web-based
  – Classroom/Instructor led
• Just in time
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ERP Training Overview

• Training “to-be” Manatee County Processes
• Step by Step
• Hands on Activities
• Role based
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Challenges

• Staff Time
• Budget
• Change Management
• Process Improvement
• Decision Making Paralysis
• False Starts
• Staff Turnover and Reassignment
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Questions and Answers