UTSA Change Management

UTShare PeopleSoft Implementation

June, 2013
Key Change Management Points

- Where we are at UTSA – UT Partners and Project Management
- UTSA Change Management – Actions to Date
- UTSA Steering Committee and Change Leader interface
- Questions, Concerns, and Comments?
The ‘Commitment Curve’ shows the stages that employees typically move through during a change initiative. Each of the stages is addressed by **communications** and the right methods to manage the “people side” of change. **Change Management moves at the speed of Project Management.**
Integration of Project Management and Change Management Ensures Optimal Success for UTSA

There is a significant correlation between effective Change Management and Project success.

Across 7 UT Institutions:
- UT Arlington
- UT Brownsville
- UT El Paso
- UT Permian Basin
- UT San Antonio
- UT System
- UT Tyler

Leadership/Sponsorship

Projects meet objectives
Projects finish on time and on budget
Return on investment (ROI) realized

Project Management
Change Management

Across 7 UT Institutions
Integrated Change Management & Project Management

**Project Management**

- Core HCM, FMS Functionality
- Recruiting and Candidate Gateway
- Hyperion Budgeting & Planning
- Purchasing
- Travel & Expense
- Time & Labor and Absence (Pilot)
- Time & Labor and Absence (Remaining)
- Project Close

**Change Management**

- Managing Change through Change Leaders Forums, Focus Groups, Campus-wide Communications, Previews
- Change Leaders Forums, Campus-wide Communications, Demos, & Training
- Change Leaders Forums
- Campus-wide Communications, & Training
- Reinforcing Change through Change Leaders Forums, Campus-wide Communications, & Training
- Focus Groups, Surveys, online Training and Usage Metrics

**Sequence 1**

- Initial Go-Live
- Business improvement process
- Post Go-Live

**Sequence 2**

- Initial Go-Live
- Change management process
- Post Go-Live

**Pre-Go-Live**

- Initial Go-Live
- Change management process
- Post Go-Live
Information alone is not enough. The successful “change” journey requires one-to-one dialog, engagement, coaching, and active listening in order to build trust and manage resistance. This is the People-Side of change.
## Data gathering at UTSA: Interviews, Focus Groups, Surveys, and On-site Observations

<table>
<thead>
<tr>
<th>Technique</th>
<th>Why</th>
<th>Benefits</th>
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<tbody>
<tr>
<td><strong>Interviews</strong></td>
<td>• Gain deep understanding of employee’s perspective</td>
<td>• Employees, Staff know that their observations and concerns are heard and escalated</td>
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<tr>
<td><strong>Focus Groups</strong></td>
<td>• Engage small groups in deep exploration of mindsets</td>
<td>• Group setting increases candor and open dialog; leads to brainstorming towards future state</td>
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<td></td>
<td>• Observe interactions of participants, in addition to gathering their input</td>
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<td><strong>On site observations</strong></td>
<td>• Capture “business as usual” state</td>
<td>• Allows for underlying behaviors to be revealed allowing for the recording of nonverbal behavior</td>
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<td><strong>Surveys</strong></td>
<td>• Scale limited only by willingness to participate</td>
<td>• Surveys emphasize verbal responses from those who participate</td>
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<tr>
<td></td>
<td>• Responses easily quantified and compared</td>
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<tr>
<td><strong>Structured analyses</strong></td>
<td>• Gather and interpret data on large scale</td>
<td>• Current, ‘real-time’ data ensures accuracy to paint the ‘real-time’ story</td>
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Change Management Actions – Focus Groups

About Focus Groups: Meet with Change Leaders in all UTSA departments (May 23 – July 2)

- Focus Group Objective - Team approach to ensure we gather your departmental expertise with transactions, reporting and the cascading communications, change, training, and resources to your team.

- Specifically, what are the issues and opportunities to improve UT Share/PeopleSoft communications for your key performance and department areas?

- Validate what we know - tell us what we don’t know and need to address!
  ➢ 10 open-ended questions around department, people, process, communications, attitudes, and needs from Change and Project teams

- Outcome: we will summarize the campus-wide, cross-departmental issues and recommendations. Address actionable items and present back to Executive Committee, Steering Committee, and Change Leaders.
Cascading Communications Ensures UTSA Integration and Alignment

The “Cascading“ approach builds Trust, Awareness, and Visibility; provides mechanisms for feedback and questions ensuring overall PeopleSoft Implementation Adoption and change in organizational behaviors.

<table>
<thead>
<tr>
<th>Level</th>
<th>Message/Schedule</th>
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<tbody>
<tr>
<td>Executive Sponsor</td>
<td>Program Kick-Off, Mid-Point, Transformation</td>
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<td>Project introduction across UT System (UTSA)</td>
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<td>Executive Committee</td>
<td>Mission, Vision, Goals</td>
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<td>Town hall meetings</td>
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<tr>
<td>Director-Level (AVP’s)</td>
<td>Objectives, Outcomes</td>
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<td>Team Meetings, Campus-wide messages, Individual</td>
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<tr>
<td>Manager-Level (Change Leaders, Project Managers, Back &amp; Front Office)</td>
<td>Behavior, Change is Here</td>
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<tr>
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<td>Team Meetings, Campus-wide messages, Individual</td>
</tr>
<tr>
<td>Staff, Faculty, Associates</td>
<td>What’s in it for Me?</td>
</tr>
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<td></td>
<td>Why Now</td>
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<tr>
<td></td>
<td>What do I do Next?</td>
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Two-Way Feedback Mechanisms, UTShare@UTSA.edu

Metrics & Measurement
Change Management Actions at UTSA

- Ensure the cross-functional Change Leader team and Steering Committee members drive on-going leadership and project messaging and to listen to employee concerns to cascade back to project team and UTSA leadership.

- Integrate Change Management Practices with Project Management at UTSA and with UTShare Project PMO to effectively address both the Operational and the ‘People-side’ of change.

- Coordinate critical timing of key communications in Change and Project Management events for UTSA, align with Change Leaders.

- Finalize campus-wide focus-group opportunities to integrate CM practices, methods and criteria aligned with Change Leader and employee input to ensure sustainable project success (July 5).