



TRANSFORMING THE EXPERIENCE OF STAKEHOLDER CHANGE

University of Virginia - Finance

November 2, 2023



Presenters – UVA Finance

- Angela Knobloch, Senior Director, Change Enablement & Continuous Improvement
- Patty Marbury, Training & Development Director
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Background – The Change Context

We'll share approaches and insights to navigating change based on our journey of FST – which are applicable to any type of change



**Finance
Strategic
Transformation**

Finance Strategic Transformation (FST)

- Initiative to transform the way UVA conducted finance began in September 2018
- Workday Financials selected as tool (Workday HCM launched January 2019)
- Workday Financials launched July 2022

Agenda

Change Management Fundamentals

Deep Dive into Change Framework

Takeaways & Wrap-up



Change Management Fundamentals



Beliefs about Change

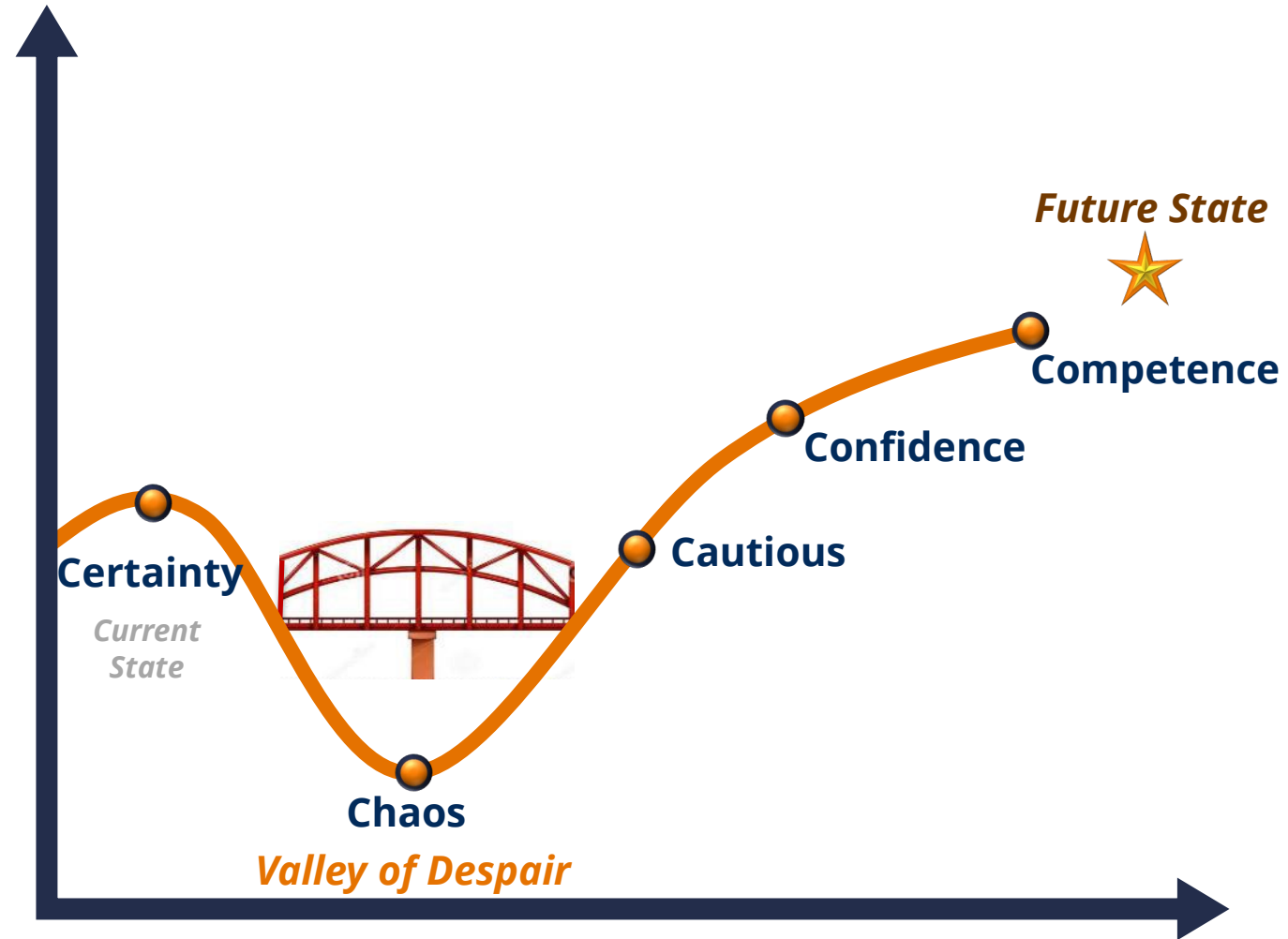
Discussion

Pick one statement and share your thoughts with a partner.

Beliefs about Change (True/False)

- | | |
|----|--------------------------------------------------------------------------------------------------------------------|
| 1. | Change is a process not an event. |
| 2. | Organizations don't change, people do. |
| 3. | People generally fear change. |
| 4. | Change management is primarily a leadership activity. |
| 5. | Change is both a rational process and highly emotional one. |
| 6. | Perceptions about change are based on facts |
| 7. | Change does not actually occur until the people who do the work decide they are going to do something differently. |
| 8. | Resistant behavior indicates that others don't support the change. |

Experience of Change



Change Management Framework

Change management is a **systematic approach to addressing the transition or transformation of an organization's goals, processes or technologies**. The purpose of change management activities is to prepare, support and help individuals and teams in adopting new behaviors required.

Stakeholder Engagement

Opportunity for stakeholders to share ongoing feedback and influence future state that most impacts them

Goal: INVOLVED

Communication

Key information and updates shared on a consistent basis through a variety of avenues

Goal: INFORMED

Organizational Readiness

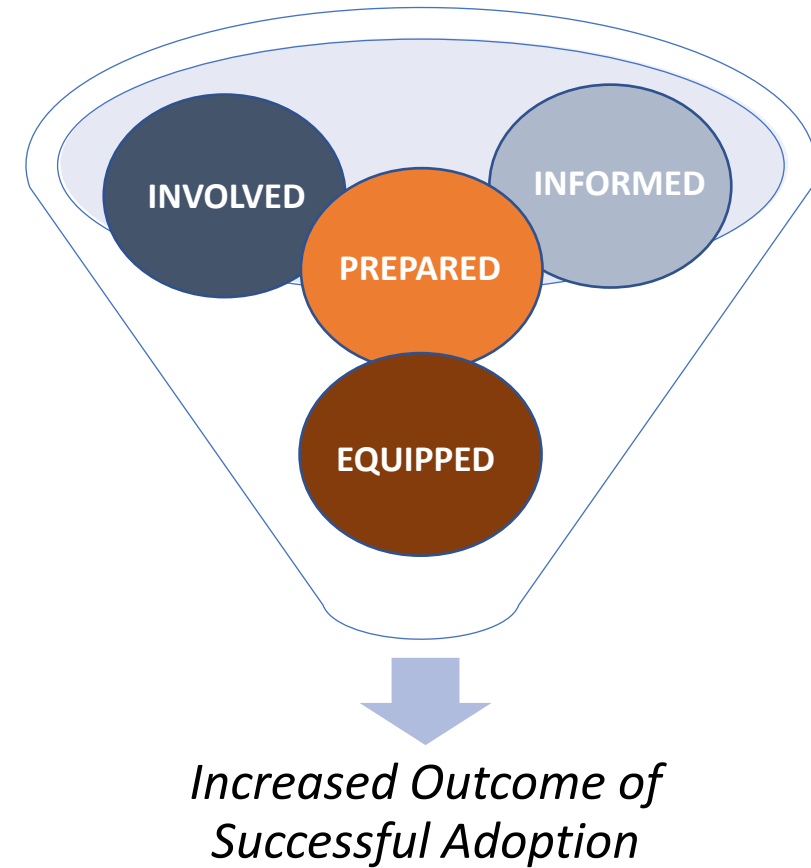
Organizational preparedness across process, people, technology and policy

Goal: PREPARED

Learning

Providing opportunities through a variety of modalities to ensure stakeholders can perform in the future state

Goal: EQUIPPED

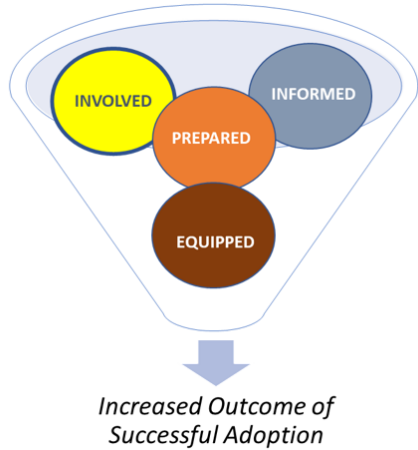




Deep Dive: Stakeholder Engagement



Deep Dive: Stakeholder Engagement | Involved



- Opportunity for stakeholders to share ongoing feedback and influence future state that most impacts them.
- Stakeholder: An individual or group that is affected by the outcome of a project or initiative.
- **Key: Identifying Stakeholders**

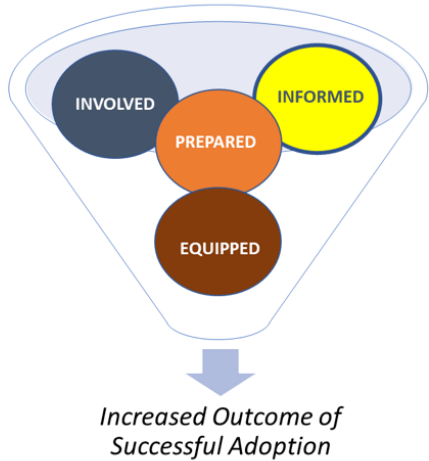


- Change Leaders for each school/unit
- Established advisory groups who met monthly
- Involvement in Critical Stages:
 - Process design sessions
 - User experience review
 - System demos



Deep Dive: Communication

Deep Dive: Communication | Informed



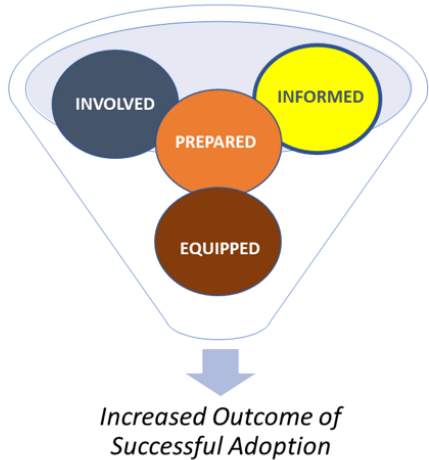
- Information and updates shared on a consistent basis through a variety of avenues
- **Key: Flexible communication channels that can adjust to stakeholder bandwidth.**



Created "Five Things to Know about FST" and WFST Radio, two new short form channels focused on the basics and the needs of a multitasking audience



Deep Dive: Communication | Informed



- Information and updates shared on a consistent basis through a variety of avenues
- **Key: Flexible communication channels that can adjust to stakeholder bandwidth.**



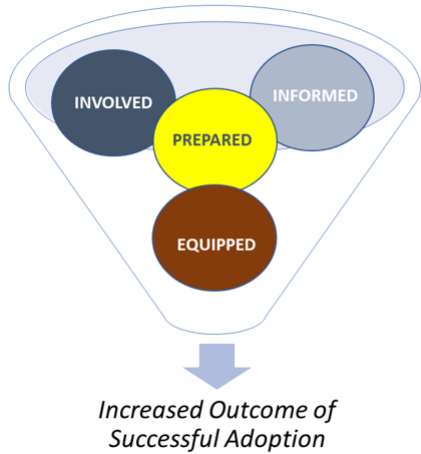
- Kept the Communications team plugged into meetings early and often (think media presence) in order to identify, shape, and translate content for stakeholders as needed
- Early and consistent integration of Communication meant functional experts recognized communication partners
- Hybrid meetings allowed more flexibility for Communication team presence



Deep Dive: Organizational Readiness



Deep Dive: Organizational Readiness | Prepared



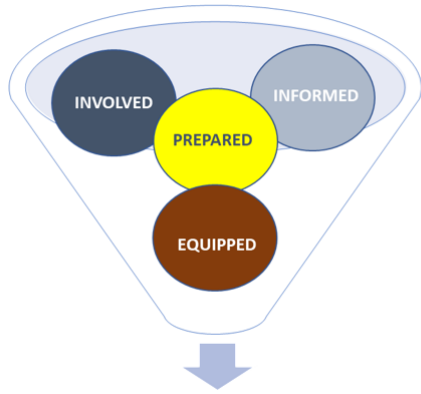
- Organizational preparedness across process, people, technology and policy
- **Key: Determine what stakeholders need to “do” to be ready for the change**



Created monthly checklists for our Change Leaders in Schools//Units of items they needed to complete operationally before the cutover to Workday Financials

UNIVERSITY OF VIRGINIA Change Leader Checklist			
Due Date	Task/Description	Priority Area	Status
MARCH			
3/1/2022	Participate in User Experience Review (selected participants)	Functional	
3/4/2022	Finalize Gift Workbook (mapping of gifts to cost centers and gift manage Gifts		
3/11/2022	Finalize Position-to-Security Role Mapping	Role-to-Position Mapping	
3/17/2022	Request New Worktags (March 17th is the last day)	FDM Mapping	
	FDM Frost Begins March 18 - New Worktags cannot be created (Exceptions: New Grants, Gifts & State Funds that are required to comply with regulatory or donor requirements)	FDM Mapping	
3/18/2022		FDM Mapping	
3/31/2022	Unit Budget Conversion	Budget	
3/31/2022	FDM Mapping	FDM Mapping	
3/31/2022	FY22 Budget Revision/Forecast	Budget	
	Work with FST Business Analysts for School/Unit Transformation		
3/31/2022	Opportunities		
3/31/2022	System Remediation Testing	System Remediation	
	Stakeholder Engagement Tasks		
3/31/2022	Change Leader Engagement by Schools and Units	Stakeholder Engagement	
3/31/2022	Participate in Demos of Key Business Processes	Stakeholder Engagement	
3/31/2022	Review Regular FST Communications	Stakeholder Engagement	
	Review Scenarios and Provide Feedback on UER QRGs (selected		

Deep Dive: Organizational Readiness | Prepared



Increased Outcome of Successful Adoption

- Organizational preparedness across process, people, technology and policy
- **Key: Determine what stakeholders need to “do” to be ready for the change**



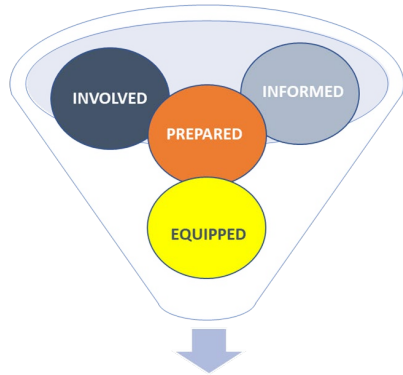
- At monthly meeting, Change Leaders completed a status update on how they were progressing on checklists
- Provided a cross-institutional view of preparedness and informed additional strategies to help support the stakeholders

FST UNIT READINESS DASHBOARD							
5/23/22							
27/30 Units Reporting							
Readiness Area	Readiness Health Across Units						Units indicate readiness as not applicable this month
	May	% change since 4/20	May	% change since 4/20	May	% change since 4/20	
Role to Position Mapping	On Track 96%	↑ +7%	Monitor 4%	↓ -3%	At Risk 0%	↓ -4%	N/A 0 units
DM Mapping	On Track 93%	↑ +14%	Monitor 7%	↓ -11%	At Risk 0%	↓ -3%	N/A 0 units
Budgets	On Track 89%	↑ +11%	Monitor 11%	↓ -7%	At Risk 0%	↓ -4%	N/A 0 units
Stakeholder Engagement	On Track 74%	↑ +8%	Monitor 26%	↓ -7%	At Risk 0%	↓ -3%	N/A 0 units
Process Transformation	On Track 70%	↑ +7%	Monitor 26%	↓ -4%	At Risk 4%	↓ -3%	N/A 2 units
System Activity	On Track 64%	N/A	Monitor 36%	N/A	At Risk 0%	N/A	N/A 5 units
System Remediation	On Track 44%	↓ -2%	Monitor 51%	↑ +9%	At Risk 5%	↓ -7%	N/A 10 units
Spendable Fund Balance Realignment	On Track 35%	↑ +6%	Monitor 61%	↑ +12%	At Risk 4%	↓ -18%	N/A 2 units



Deep Dive: Learning

Deep Dive: Learning | Equipped



Increased Outcome of Successful Adoption

- Providing opportunities through a variety of modalities to ensure stakeholders can perform in the future state
- **Key: Identify knowledge, skills and abilities stakeholders must acquire to adopt to the change and how it will be delivered**

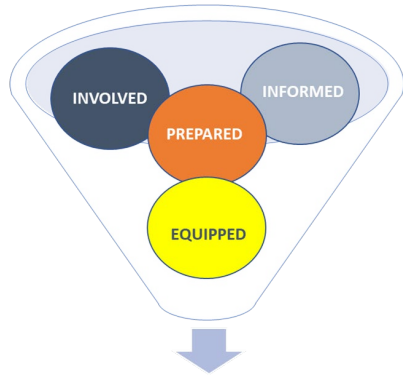


**Finance
Strategic
Transformation**

During planning and designing the training program and content:

- Determined specific training needs by assessing change impacts
- Designed role-based training – customized content for different roles
- Tested resources during User Experience Review and tracked metrics through evaluation

Deep Dive: Learning | Equipped



Increased Outcome of Successful Adoption

- Providing opportunities through a variety of modalities to ensure stakeholders can perform in the future state
- **Key: Identify knowledge, skills and abilities stakeholders must acquire to adopt to the change and how it will be delivered**

During the implementation phase:



- Offered a variety of training modalities
Virtual instructor-led, Self-paced, Demos and Q&A on selected topics
- Developed a variety of resources: *Quick Reference Guides, Slide decks, Videos*
- Utilized Train-the-Trainer approach when appropriate
- Held open office hours
- Offered scheduled time with trainers
- Provided anonymous feedback mechanism so we could make necessary changes to training content and modalities



Change Framework Questions

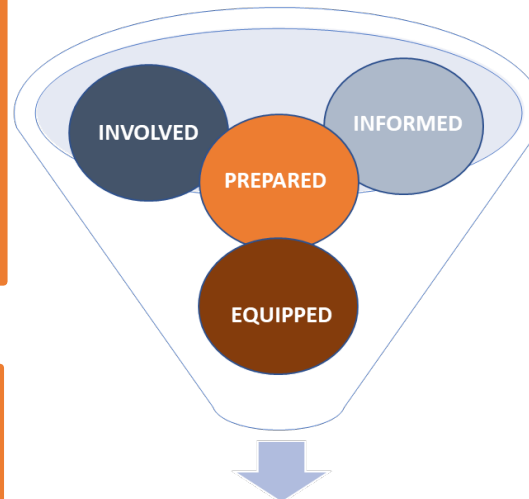
Change Framework Questions

Stakeholder Engagement: **Involved**

1. Identify one key stakeholder (individual or group) for your current example
2. How might you involve them in your change example now?

Communications: **Informed**

1. For the stakeholder(s) you identified, what might be the key messages important to them?
2. How might you inform them in your change example now?



Increased Outcome of Successful Adoption

Organizational Readiness: **Prepared**

1. Anticipating ahead a bit, what might your stakeholder(s) need to “do” to be prepared in your change example?
2. How might you provide guidance and support?

Learning: **Equipped**

1. Based on the stakeholder(s) you identified, what might be a knowledge, skill or ability they will need to learn to be equipped for success?
2. What ideas have you heard today for learning might be helpful in your change situation?



Wrap-up & Takeaways



Takeaways



Application

1. An “ah ha” for me today regarding change management is _____.
2. One thing I will consider/immediately apply is _____.

Our dilemma is that we hate change and love it at the same time; what we really want is for things to remain the same but get better.

– Sydney J. Harris, journalist



Thank you!

Angela
Patty
Brandi



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