

INTEGRATED RENEWAL PROGRAM

Workday Wednesday: Change Readiness Themes and Open Demo

August 21, 2019

Carri Lawrence, Okanagan Transformation Director

Ashley Bloor, Subject Matter Expert

Lauren Hatchard, Change Management Analyst

Erin Shannon, Business Lead, Student Records and Advising



TODAY'S OUTLINE



Change Readiness Results Discussion



End to End Testing Review and Open Demo



Upcoming Activities and Engagements



Q&A



WHY WORKDAY?



A **new set of tools** to replace 25 year-old institutional systems which have reached end of life.



A **better user experience** for faculty, staff and students – anywhere, anytime.



Streamlining administrative processes to make our work **easier and faster**.



Real-time data and reporting for effective decision making and more transparency.

WHY WORKDAY?

Brock
University

UNIVERSITY OF
WATERLOO




workday®

UNIVERSITÉ
McGill

Langara.

Yale

LSU

 THE OHIO STATE UNIVERSITY

ASU Arizona State
University

WHAT IS IN SCOPE?*



STUDENT

- Admissions (Undergraduate)
- Assessment Outcomes
- Curriculum Management (limited)
- Enrolment
- Graduation
- Learner Financial Management
- Learner Financial Support
- Learner Management
- Program Planning and Management
- Progression
- Registration
- Scheduling
- Transfer Credit



HUMAN RESOURCES

- Benefits
- Compensation
- Core HR Management (incl. Onboarding/Off-boarding)
- Payroll
- Talent Acquisition
- Workforce Management – Time & Attendance



FINANCE

- Budget Development (core to Workday) *
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning) *
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants Administration
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense

*Scope areas listed have budget approval. This is a multi-year program and new functionality will be introduced to meet UBC's evolving needs in subsequent years.



SUPPORTING THE CHANGE: TRANSITION NETWORK



**Building strong
relationships
between units and
IRP**



**Support
localization of the
change**



**Leading and
facilitating the
transition within
home units**



**Share learnings,
practices &
resources across
units to support
transition**



Change Readiness Assessment

Themes and Mitigations



CHANGE READINESS SURVEY THEMES

Survey Theme

People are excited for an improved system, but don't understand its functionality or what it looks like.



Action

Define what is changing. Assist the UBCO community in understanding what is different between future state and current state.

How are we doing this?

- ✓ Workday Wednesdays
- ✓ Faculty/Department presentations
- ✓ Monthly HR and Finance call-in sessions



HR AND FINANCE CALL-IN SCHEDULES

HR

September 18 th 2019	The Employee Lifecycle: Staff Recruitment
October 9 th 2019	The Employee Lifecycle: Faculty Recruitment
November 5 th 2019	The Employee Lifecycle: Hire & Change Job
December 11 th 2019	Hold for items regarding April 2020 Go Live

Finance

September 24 th 2019	Current Year Budgets in Workday
October 15 th 2019	Grants Management
November 13 th 2019	Asset Management
December 17 th 2019	Hold for items regarding April 2020 Go Live



CHANGE READINESS SURVEY THEMES

Survey Theme

Project timelines are unclear and people are unsure of when they will need to be involved.



Action

Demystify timelines and plans for implementation. Provide a detailed project timeline with milestones and key activities.

How are we doing this?

- ✓ Reviewing upcoming engagements in presentation decks, noting where community can be involved.
- ✓ Providing updates in '*IRP In the Know*' each month to outline key activities and project status.



UPCOMING ACTIVITIES AND ENGAGEMENTS

HR/FIN
Go Live



Adoption & Sustainment

Ongoing Transition Network Meetings (spanning Jun to Dec)

Change Readiness Assessment (spanning May to Jun), (spanning Sep to Oct), (spanning Jan to Feb)

Monthly HR & Finance Call-in sessions (spanning Jun to Dec)

Training

Train the trainer (spanning Nov to Dec)

Training for all UBC employees (spanning Jan to Feb)

Testing

★ End-to-End Testing (spanning Aug to Sep)

★ Parallel Payroll Testing (spanning Nov to Dec)

User Confirmation Reviews (spanning Dec to Jan)

Additional Activities

Workday Wednesdays (spanning Sep to Dec)

Finance Security Role Mapping (spanning May to Jun)

Drop-ins (spanning Sep to Oct)

HR Security Role Mapping and Sup Org Validation (spanning Jul to Sep)

Timelines on this slide are subject to change.

CHANGE READINESS SURVEY THEMES

Survey Theme

People do not understand the benefits Workday will offer them and are unsure how this will change their day-to-day.



Action

Define a clear case for change. Define the current problems that are going away, and which activities/workflows will be streamlined or consolidated and made easier.

How are we doing this?

- ✓ Conducting stakeholder impact assessment to understand the key business processes that will be streamlined with Workday.
- ✓ Validate our findings with Transition Leads in October.
- ✓ Use findings to inform communications, engagements, and training activities and resources.



CHANGE READINESS SURVEY THEMES

Survey Theme

Communication has not outlined what is relevant for faculty and staff.



Action

Uplift current communication strategy. Equip UBCO employees with the right information at the right time.

How are we doing this?

- ✓ Solidify key project messages each month for different audiences.
- ✓ Equip Transition Leads with information relevant to their respective units.
- ✓ Utilize the '*IRP In the Know*' to share information relevant to Okanagan community.



UPCOMING ACTIVITIES AND ENGAGEMENTS

HR/FIN
Go Live



Adoption & Sustainment

Ongoing Transition Network Meetings (spanning Jun to Dec)

Change Readiness Assessment (spanning May to Jun), (spanning Sep to Oct), (spanning Jan to Feb)

Monthly HR & Finance Call-in sessions (spanning Jun to Dec)

Training

Train the trainer (spanning Nov to Dec)

Training for all UBC employees (spanning Jan to Feb)

Testing

★ End-to-End Testing (spanning Aug to Sep)

★ Parallel Payroll Testing (spanning Nov to Dec)

User Confirmation Reviews (spanning Dec to Jan)

Additional Activities

Workday Wednesdays (spanning Sep to Dec)

Finance Security Role Mapping (spanning May to Jun)

Drop-ins (spanning Sep to Oct)

HR Security Role Mapping and Sup Org Validation (spanning Jul to Sep)

Timelines on this slide are subject to change.

OPEN DEMO



QUESTIONS?



★ **New location!**

Next Workday Wednesday: *Workday Student* – meet the team and learn what they’ve been up to
Wednesday, September 11 | **COM Engagement Theatre** | 12:00 – 1:00pm



IRP OKANAGAN TEAM

Want to **request** an IRP presentation for your unit? Have **questions**?

Get in touch with us!

Carri Lawrence | carri.lawrence@ubc.ca

Lauren Hatchard | lauren.hatchard@ubc.ca

Ashley Bloor | ashley.bloor@ubc.ca

Erin Shannon | erin.shannon@ubc.ca

