

WolfieONE

Change Leader Network Kickoff

October 16, 2024

Office of Change Management

**FAR
BEYOND**

Agenda

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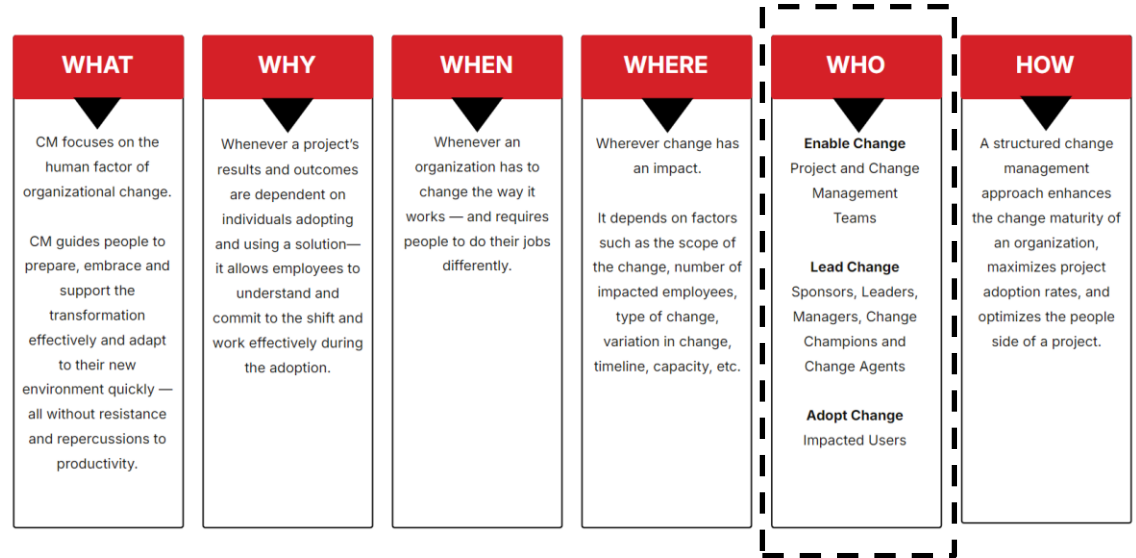
Getting started as a Champion

Q&A

Change Leader Network (CLN)

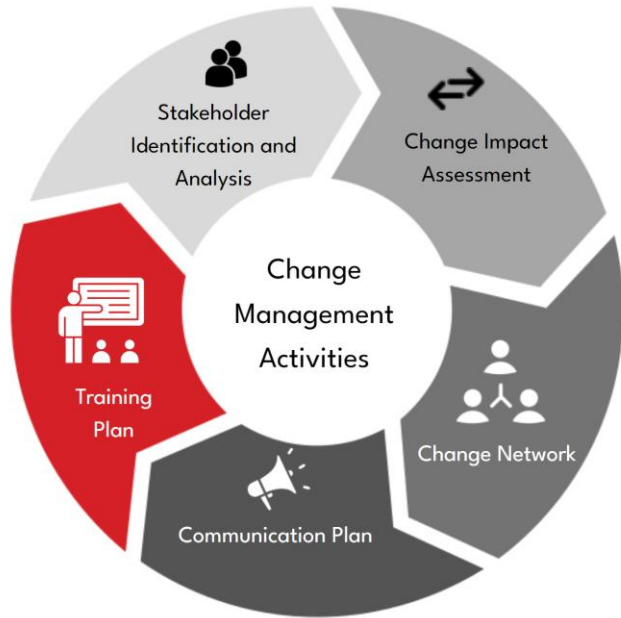
What is a Change Leader Network?

- **An integral part of the Change Management Methodology at Stony Brook**
- **A *peer-led* group of influencers and impacted users across Stony Brook who will assist in building awareness, active listening and gathering concerns, promoting buy-in, and providing support to stakeholders impacted by the project**
- **An indispensable asset to drive and support change adoption**



Change Management at Stony Brook

Why is a Change Leader Network needed?



Promote **understanding** to assist employees in understanding changes, dealing with uncertainty and ambiguity as the program progresses through implementation



Advocate positive change through face-to-face and informal communications that are required to **change behaviors** and attitudes



Build **accountability** and **ownership** by empowering Change Champions to gather feedback from stakeholders, answer questions and resolve concerns without having to wait or rely only on “formal, official” communications

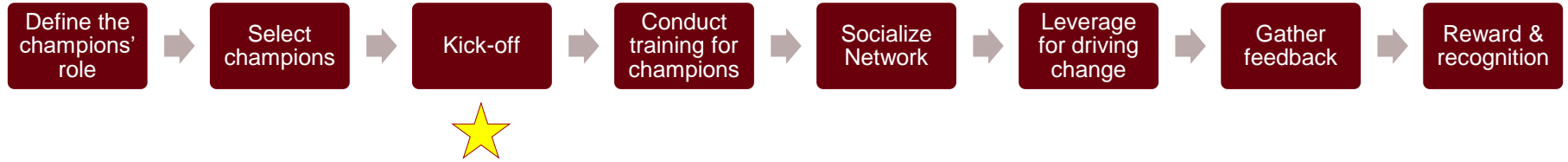


Build a **community of early adopters** who value the opportunity to try out new technology first and get a chance to demonstrate their leadership skills

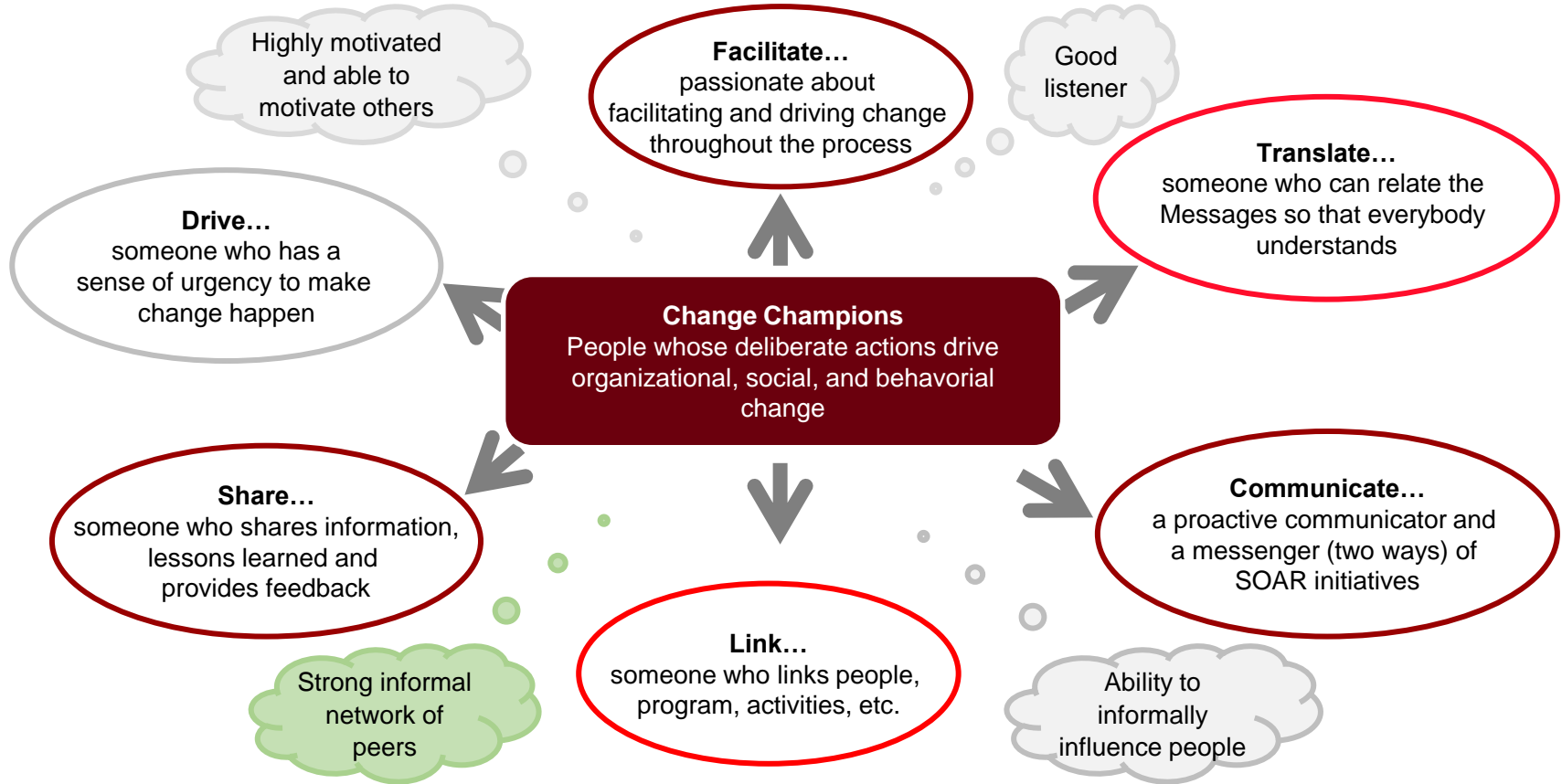


Accelerate the adoption of the change by quickly disseminating timely and accurate information and build trust through communication and feedback

Building the Champion Network

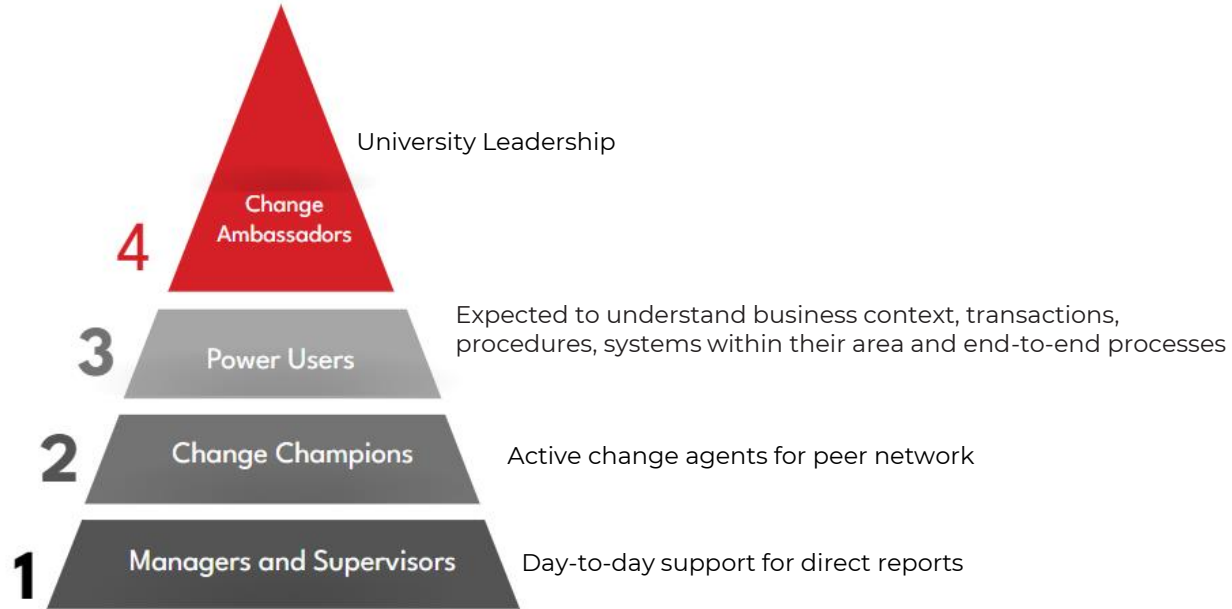


Why are we here?



Change Champion Network Structure

The following represents the various “tiers” in the network:



SBU's Power Users collaborate with the project team to ensure the solution meets the business needs. What do Power Users do?



Learn and articulate the shifts from current to future state processes to Change Champions and direct reports. Play a role in process improvement.



Business user at the Unit level who understands the business context, end to end processes, transactions, procedures and systems within their area.



Participate in the "Build" phase Sprints, testing (UAT), validate system functionality; Train-the-Trainer, and Onboarding. Build user proficiency in their process area (post go-live).

High-Level Responsibilities include:

Promote WolfieONE

Promotes best practices, continuous improvement and works as a positive change agent for the business.

Inform SBU's WolfieONE Project Team

Gathers feedback from Champions and direct reports; informs the Project Leadership where adjustments and training enhancements should be made.

Support (post go-live)

Works with department and program leadership to design, test, train and provide ongoing employee support **to the WolfieONE Change Champions**. Front-line support for non-technical issues.

SBU'S Change Champions enable the success of our WolfieONE implementation by driving adoption.

What do Change Champions do?



Serve as **project advocates** that play a role in shaping the future of Stony Brook
Disseminate & Amplify the OCM materials/message.



Enable a **cross-functional network** to execute change campaigns and **enable delivery of standardized messaging.**



Participate in Champion meetings & assist with rapid change campaigns.
Be a conduit for change, tailored to groups via a two-way communication channel.

High-Level Responsibilities include:

Promote Stony Brook's WolfieONE Transformation

Learn about **new functionality and processes**. Share the benefits using OCM materials to increase awareness and adoption.

Inform SBU's WolfieONE Team

Provide feedback to the project team as the **eyes and ears** within SBU to prioritize the needs of the business.

Position the message

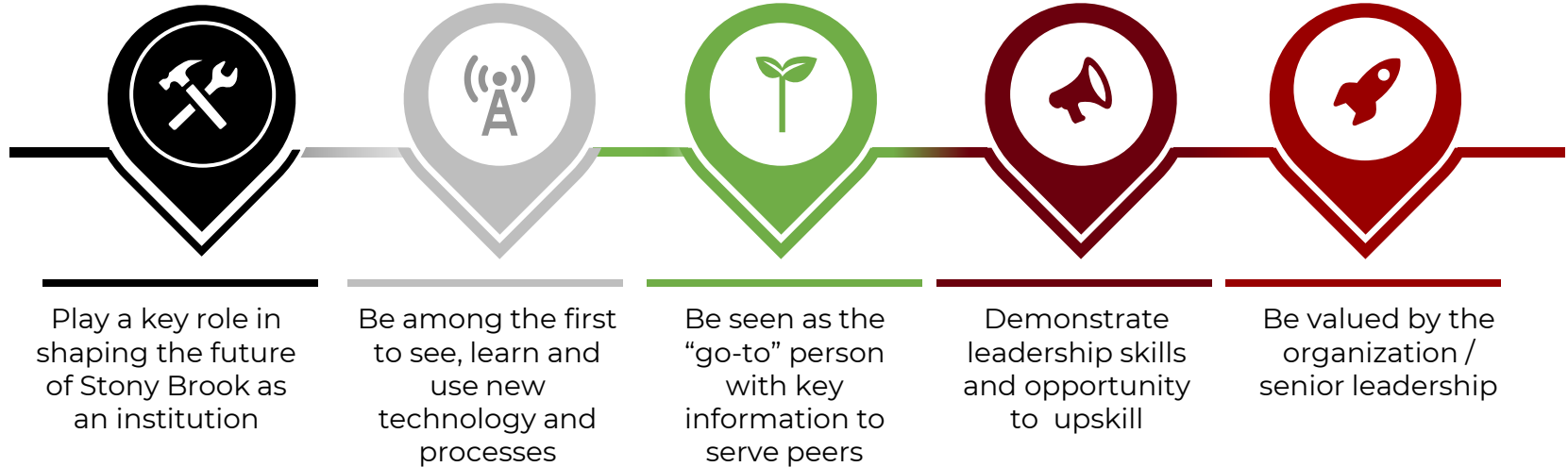
Help develop and craft messaging and **mitigation plans** to proactively drive an authentic and relevant change experience for operating units.

Evaluate operational readiness

Participate in **change readiness** activities to provide a pulse on the organization, supporting the opportunity to pivot the engagement program and involve leaders.

Benefits of Being a Change Champion

WolfieONE



Networking Activity

In Breakouts (groups of 4), WolfieONE Champions are given 10 minutes to network.

Prompts:

- Share name and department name
- How long they have been a Seawolf
- Favorite yearly event or activity on campus
- Your “Superpower” – the secret sauce, the thing YOU consider your strength!
- What (if anything, that you learned so far) are you the most excited about in the move towards Oracle Cloud?

About WolfieONE

Business Transformation Initiative:

WolfieONE is more than just a software update. It is a strategic transformation initiative that will design and implement an Enterprise Resource Planning (ERP) ecosystem at SBU, supported by Oracle, to better support our financial, budget, HR and business operations.

The new, cloud-based software will replace some of our systems but will also seamlessly integrate with many existing systems.

Our WHY:

Beyond the business reasons that became apparent during and post-pandemic, there are human capital drivers for this initiative, such as **employee morale and institutional reputation.**

The industry is moving from on-premise to the cloud in a number of ways. To remain competitive, modernizing archaic systems and processes is essential.

The employee experience and how you spend your time interacting with data is one of our top reasons for this transformation.

Vision Statement

Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.

Expected Benefits

- Gradual reduction of on-premise (i.e., campus-based) systems, paper-based processes and labor-intensive manual processes
- Better integration across various ERP modules which supports smoother transaction processes and more powerful blended analytics/reports
- Integrated information systems that provide more up-to-date and accurate financial and operational data that increases transparency, and enhances planning and forecasting efforts
- Robust reporting capabilities enabling better decision-making as well as managing from a holistic vantage point rather than a siloed view
- Increased automation and self-service processes (and fewer human errors as a result)
- Simpler, more intuitive, modern user experiences and enhanced **cloud-based** data security

Wolfie**ONE**



Guiding Principles

- Collaborate cross-functionally
- Be transparent in decision making
- Communicate fully, seeking input and feedback

- Put Stony Brook interests above anything else
- Make strategic decisions that support the mission of our university and hospitals
- Leverage every opportunity to elevate Stony Brook's reputation



- Adhere to the governance structure in place
- Respect the authority of the governing bodies
- Refer to the guiding principles to guide organizational decision making during day-to-day activities

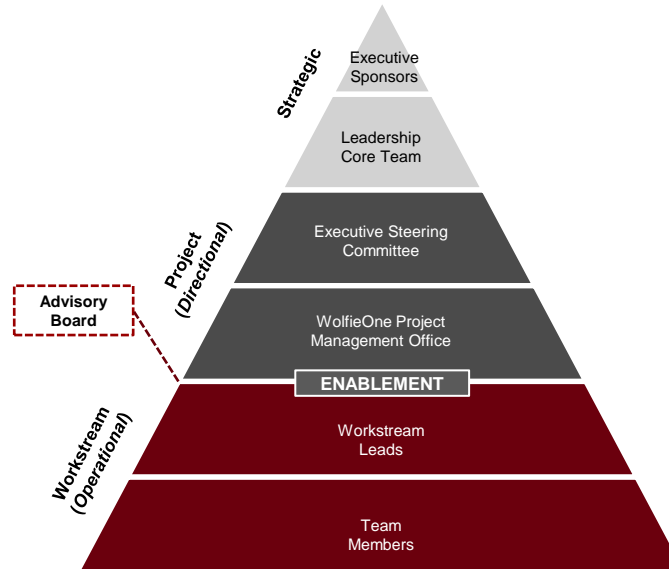
- De-siloed and transparent data
- Adopt and practice data governance
- Develop trust in system data

- Self-service
- Improve policies and practices
- Build for the long-term
- Data-empowered decision making

- Streamline workflows
- Simplify operations
- Redesign processes based on higher education best practices

Project Governance

Stony Brook and Deloitte team members have dedicated escalation channels to the project leadership stakeholders – driving efficiency and consistency in the decision-making process leads to better communication and fewer bottlenecks.



Our Executive Sponsors

WolfieONE

Simeon Ananou

CIO and VP of the
Division of Information Technology



Carl Lejuez

Provost and Executive
Vice President



Justin Fincher

Chief Deputy to the President and SVP for
Government & Community Relations



Jed Shivers

Senior Vice President for
Finance & Administration



Carol Gomes

Chief Executive Officer, Chief
Operating Officer, SB Hospital



William Wertheim

Interim Executive Vice President for
Health Sciences and Stony Brook Medicine



Dr. Gerald Kelly

Chief Information
Officer, SB Hospital



Our Steering Committee

WolfieONE

Braden Hosch

VP for Educational and Institutional Effectiveness



Cassie Amadio

AVP for Accounting and University Controller



Colette Brown

Chief HR Officer
Stony Brook Medicine



Heather Montague

Senior AVP for Budget and Financial Planning



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Chief Applications Officer,
Stony Brook Medicine



Lyle Gomes

Vice President for Finance



Tracey McEachern

AVP HR Operations,
Services, and Payroll



Dennis Gallagher

CTO, Medical Information System



Entity Scope ERP & HCM

The purpose of this Entity Scope view is to articulate how user populations within the below entities will align with respect to Day 1 Future-state WolfieONE application use and/or data integration. The Legal Entities that will be configured in Oracle is separate from this scope view.

Functional Area	Entity									
	SB University	SB Foundation	FSA	Research Foundation ³	SB Medicine					
					SBU Hospital ¹	LISVH ¹	CPMP	ELI ²	SBSH ²	Other Affiliates ²
ERP (Finance)	Yes	Yes	No	Integrate	Integrate	Integrate	No	No	No	No
HCM (HR)	Yes	No	No	Yes	Yes	Yes	No	No	No	No

Definition	
Yes	Populations within this entity <u>will</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
No	Populations within this entity <u>will not</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
Integrate	Data from this entity will integrate with WolfieONE Oracle Cloud.
Notes	
<ol style="list-style-type: none"> SBUH / LISVH: EPM at summary level - they have their own budget system for daily operations. ERP – integrate for URAS reporting purposes – they have their own GL. Will load audited financial statement data to FCCS for consolidated financial reporting. ELI/SBSH/Other SBM Affiliates: These entities will load audited financial statement data to FCCS for consolidated financial reporting. RF: HCM consideration – RF employees include select CPMP and SBF staff. 	

In our next session, we will deep dive into the 3 main workstreams that lead to change impacts that have the broader reach (ERP, HCM, EPM).

Workstreams relevant to educational campuswide efforts:

Enterprise Resource Management: all things **Accounting & Reconciliation!**

Human Capital Management: **HR processes**

Enterprise Performance Management: Budgeting, planning and forecasting.

Technology: Integrations & Reporting

Change Management

* Although other workstreams are performing crucial work, those process areas are expected to directly impact a much smaller group of end users.

What's Changing?

CURRENT STATE SYSTEMS/PROCESS	FUTURE STATE SYSTEMS/PROCESS
Inconsistency across processes and practices	Standardize processes and practices (80/20)
Oracle/ Peoplesoft software for Financial	Enterprise Resource Planning (ERP), Enterprise Performance Management (EPM)
Oracle/ Peoplesoft software for Human Resources	Oracle Human Capital Management (HCM) Cloud
Campus Budget Module (CBM) for Budget and Planning	Enterprise Performance Management (EPM)
SOLAR (time and attendance; employee information, NOT the student side)	Oracle Human Capital Management (HCM) for reporting time and attendance
Recruiting and onboarding in Taleo	Oracle Recruiting Cloud (HCM)

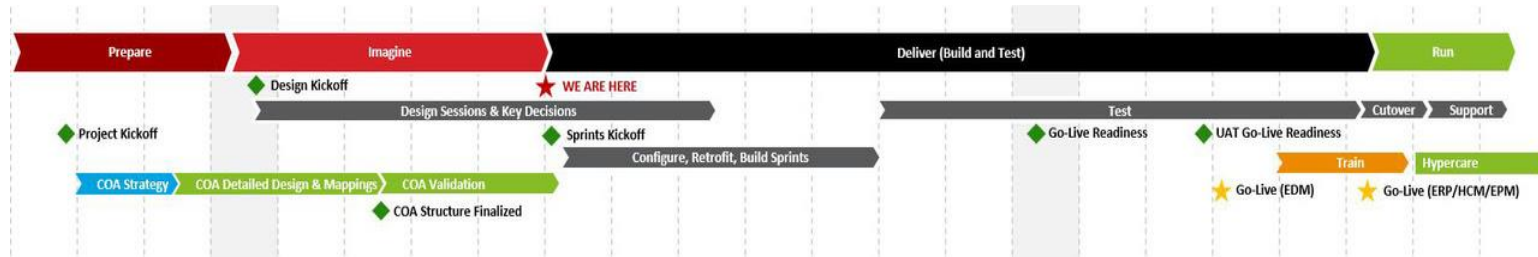
What's not changing?

CURRENT STATE	FUTURE STATE INTEGRATIONS
Jaggaer (WolfMART) SUNY system-wide SaaS solution for Procurement	Possible retrofit for some fields with the new COA, integration with Oracle, end-user will continue to use Jaggaer in the same way
Concur for travel & expense reimbursement	End-user will continue to use Concur in the same way as in the current state.
Hospital - Finance (Lawson)	Hospital finance professionals will continue to use their current COA in Lawson
Student Information Systems	Campus Solutions will integrate with WolfieONE. Students' employee records will also exist separately from their Academic record in WolfieONE.
Hospital usage of Kronos	Will integrate with SUNY system for payroll purposes

Project Phases

ERP & HCM are in Build/configure, while going through an iterative process to make decisions about certain system components still in Design, before moving those processes and user stories into “Sprinting” mode. Enterprise Performance Management is in Design.

Once we configure the system, we test, make adjustments, test again, then train the trainers, who will in turn train the end users.



Next Steps

Change Champion Action Plan

Know, Share, Do | Oct- Dec 2024



Know This!

- ❑ By 12/02: Review the WolfieONE SharePoint site in detail, including:
 - ❑ Oct: Understand the WolfieONE scope and [progress so far](#)
 - ❑ Early Dec: Program Timeline update from OCM
 - ❑ Late Dec: Review Frequently Asked Questions (FAQ)
 - ❑ Jan 2025: Action Plan will be release by the OCM team



Share This!

- ❑ Identify the department ongoing meetings at which WolfieONE can be an agenda item & identify peers who are “your counterparts”
- ❑ Find time on agendas of team meetings to share program updates (refer to talking points provided in this month’s Change Leader meeting-in-a-box)



Do This!

- ❑ Tomorrow: Save the WolfieONE website Resources to your bookmarks (print the QR code that will be provided by OCM and post it in your office!)
- ❑ Nov 2024: Set **reminders** to spend just 15 min biweekly on the WolfieONE website
- ❑ Dec 2024: Share the WolfieONE website, eNewsletter and change survey with colleagues
- ❑ Jan 2025: Share notable feedback and questions from colleagues

Customized Email Signature Add-On

Email Templates, Newsletters, and Vetted Responses

Zoom Backgrounds

Copy/paste THE WolfieONE logo (Appendix) and add to your e-mail signature, along with:
“Proud Change Champion, ask me about WolfieONE!”

OCM Contacts



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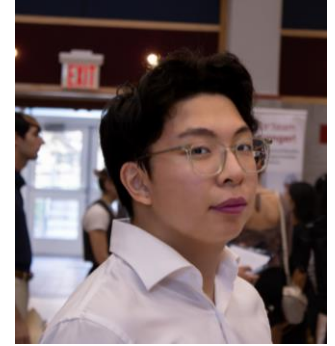
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Appendix

Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.



**TRANSPARENCY
AND INCLUSION**



GOVERNANCE



**SINGLE SOURCE
OF TRUTH**



**OPTIMIZED
OPERATIONS &
PROCESSES**



TRANSFORMATION



**STONY BROOK
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