Change Champion Training – Part 2

December 13, 2024
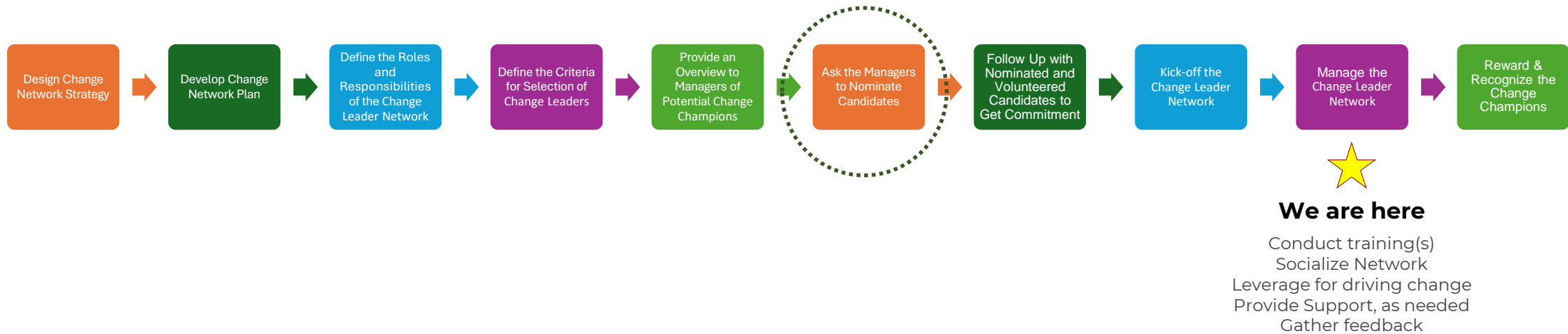
AGENDA

- ➢ Recap
- ➢ Getting Started as a Champion
- ➢ ERP Change Impacts
- ➢ Personas
- ➢ Champions' Journey
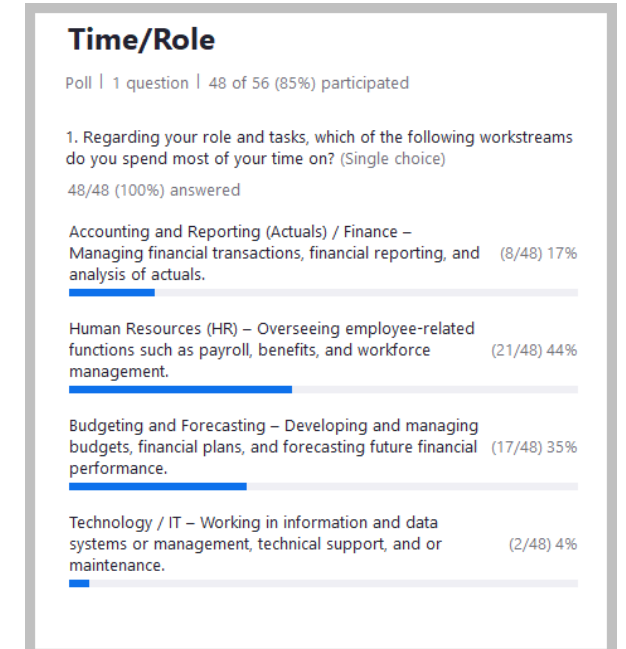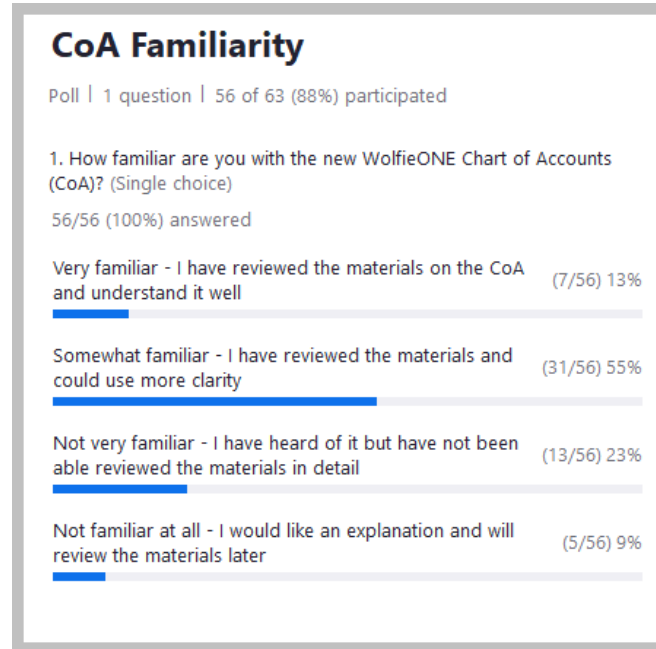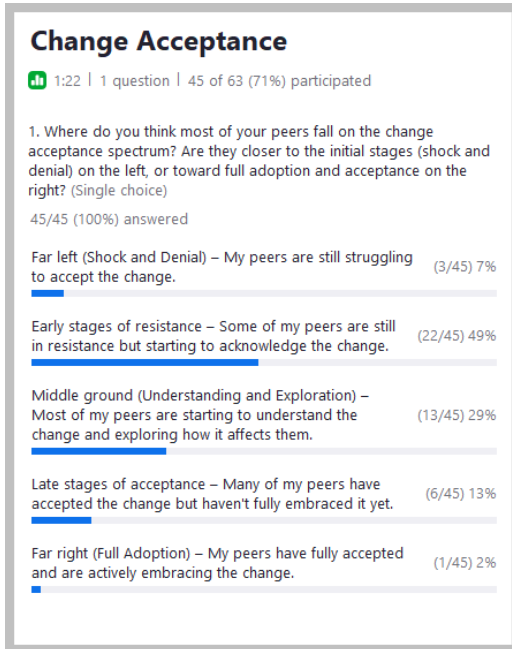- ➢ Website Walkthrough
- ➢ Elevator Pitch exercise
- ➢ Next Steps

RECAP

Change Leader Network Training – Part 1

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Change Leader Network (CLN) Process

| Design Change Network Strategy | → | Develop Change Network Plan | → | Define the Roles and Responsibilities of the Change Leader Network | → | Define the Criteria for Selection of Change Leaders | → | Provide an Overview to Managers of Potential Change Champions | → | Ask the Managers to Nominate Candidates | → | Follow Up with Nominated and Volunteered Candidates to Get Commitment | → | Kick-off the Change Leader Network | → | Manage the Change Leader Network | → | Reward & Recognize the Change Champions |

We are here

Conduct training(s)
Socialize Network
Leverage for driving change
Provide Support, as needed
Gather feedback

Recap

➢ *Change Management*
➢ *WolfieONE – High Level Changes*
➢ *Chart of Accounts (COA)*
➢ *Oracle Cloud Overview*
➢ *WolfieONE Modules and Processes*
➢ *HCM Known Change Impacts*

Change Acceptance

1:22 | 1 question | 45 of 63 (71%) participated

1. Where do you think most of your peers fall on the change acceptance spectrum? Are they closer to the initial stages (shock and denial) on the left, or toward full adoption and acceptance on the right? (Single choice)

45/45 (100%) answered

Far left (Shock and Denial) – My peers are still struggling to accept the change.   (3/45) 7%

Early stages of resistance – Some of my peers are still in resistance but starting to acknowledge the change.   (22/45) 49%

Middle ground (Understanding and Exploration) – Most of my peers are starting to understand the change and exploring how it affects them.   (13/45) 29%

Late stages of acceptance – Many of my peers have accepted the change but haven't fully embraced it yet.   (6/45) 13%

Far right (Full Adoption) – My peers have fully accepted and are actively embracing the change.   (1/45) 2%

CoA Familiarity

Poll | 1 question | 56 of 63 (88%) participated

1. How familiar are you with the new WolfieONE Chart of Accounts (CoA)? (Single choice)

56/56 (100%) answered

Very familiar - I have reviewed the materials on the CoA and understand it well   (7/56) 13%

Somewhat familiar - I have reviewed the materials and could use more clarity   (31/56) 55%

Not very familiar - I have heard of it but have not been able reviewed the materials in detail   (13/56) 23%

Not familiar at all - I would like an explanation and will review the materials later   (5/56) 9%

Time/Role

Poll | 1 question | 48 of 56 (85%) participated

1. Regarding your role and tasks, which of the following workstreams do you spend most of your time on? (Single choice)

48/48 (100%) answered

Accounting and Reporting (Actuals) / Finance – Managing financial transactions, financial reporting, and analysis of actuals.   (8/48) 17%

Human Resources (HR) – Overseeing employee-related functions such as payroll, benefits, and workforce management.   (21/48) 44%

Budgeting and Forecasting – Developing and managing budgets, financial plans, and forecasting future financial performance.   (17/48) 35%

Technology / IT – Working in information and data systems or management, technical support, and or maintenance.   (2/48) 4%

Poll Results from 11/14 Training Session

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Getting Started as a Champion
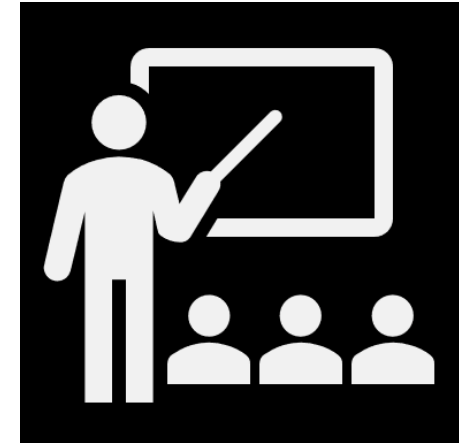
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Champion Role

Champion the Program

- Promote yourself as a Champion
- Spread awareness & key information from program to peers & community
- Share the expected benefits

Promote our Guiding Principles

- Stony Brook First
- Transparency and Inclusion
- Governance
- Single Source of Truth
- Optimized Operations and Processes
- Transformation

Participate

- Attend monthly one-hour Change Leader Network meetings
- Accept invites, show up, be engaged
- Attend program and/or workstream-related events and activities (webinars, roadshows, townhalls, etc.)

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Champion Role
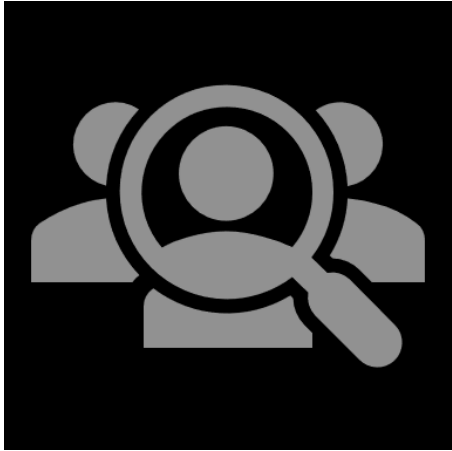
Learn and Engage

- Learn and understand the solution – new tools, technology, roles, behaviors needed
- Participate in key implementation activities or recommend individuals to participate

Communicate Changes & Gather Feedback

- Distribute communications
- Help them understand the change and its benefits
- Foster two-way communication
- Collect grassroots concerns, questions, & feedback from peers & community, share with program team
- Share ideas for strategies to best engage Stakeholders

Ease Tensions and Anxiety

- Engage with users, group leaders and managers
- Guide colleagues through the process of change (change curve)
- Share ideas for strategies to best engage Stakeholders
- Identify and address points of resistance

Change Framework

ADKAR: A methodology framework to achieving individual change

| A | Awareness of the need for change | D | Desire to participate and support the change | K | Knowledge on what is changing for me and how to change | A | Ability to implement required skills and behaviors | R | Reinforcement to sustain the change |

KNOW IT

SEE IT

TRY IT

DO IT

ADOPT IT

KNOW IT
- Promote yourself as a Champion
- Spread awareness & key information from program to peers & community
- Share the expected benefits

SEE IT
- Attend monthly one-hour Change Leader Network meetings
- Attend program and/or workstream-related events and activities (webinars, roadshows, townhalls, etc.)
- Participate in key implementation activities such as solution demos or recommend individuals to participate

TRY IT
- Understand the Solution yourself first and how to navigate the new system and processes
- Participate in
  - User acceptance testing (UAT)
  - Train-the-trainer
  - End-user training
  - User Readiness Surveys

DO IT
- Support your user community at go-live as they make the transition to performing their job tasks
- Point them to resources and support available
- Watch for users finding workarounds

ADOPT IT
- Ensure your user community is adopting the new systems, processes, tools and behaviors
- Provide continued support
- Be on the lookout for users reverting to old ways of working

ERP Change Impacts

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ERP Change Impacts

It's important to communicate that if your peers use systems **that integrate with WolfieONE, such as Jaggaer and Concur**, they will need an understanding of the new COA, and *why*. This is because the transactions must flow between systems with the accurate chartstrings. Entering the wrong information will result in having to do the work twice! The summary of big picture ERP changes, or "noteworthy mentions" is as follows:

Greater oversight, **transparency** and **ease of tracking** transactions (finding exceptions and variances), and monitoring financial performance. For example: seeing projected balances and leveraging **budgetary control.**

End-to-end **training will be needed** for transacting and on new reporting tools.

Department-level managers (and IFR managers) will need training on areas such as **creating invoices and receipts (AR), queries and reports. This includes continual training on the Chart of Accounts,** which users don't interact with on a regular basis in the current state in PeopleSoft.

Reporting (for the processes in scope) will be generated from a single source of truth through various tools, such as BI Publisher, Oracle Transactional Business Intelligence (OTBI), and FDI (Fusion Data Intelligence). ERP supports the Chart of Accounts benefits, such as **multiple levels of hierarchies** in each segment. Hierarchies provide summaries that can be queried and reported.

Subledger accounting is a new mindset, in which transactions roll up to the General Ledger from the subledgers, and the Accounting team can drill down from the General Ledger to the subledger for transaction details.

The monthly **period close** process will be net **new** to Stony Brook, as well as using the 13th period (instead of the current adjust period and closing periods). Closing the period monthly is a leading practice and enables the institution to have monthly financial statements.

With new integrations, WolfieONE will become the source of truth for SBU and SBF financial data, which means the information within the system can be "consumed" in a **more up-to-date** manner and with less of a lag in data feeds from other sources.

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ERP Change Impacts

	Future State
Cash Management	**All workflows will be new.** Oracle allows for **Automated reconciliation, NET NEW** processes. ONLY impacts central accounting.
Fixed Assets	Ability to upload or manually add, manage, depreciate, and track fixed assets in WolfieONE. **Net new processes** will require training. **Gaining visibility into assets** value/depreciation/financial details, automation of data capture and reporting.
Payables (AP)	Leveraging functionality for **patient refunds, student refunds, travel reimbursements** and department refunds (departments refunding a customer that they billed through AR). Moving to Oracle Cloud. **1099/1042** Reporting and Withholding will be new for **SBF** and will require training.
Receivables (AR)	- **New processes will require training: invoicing external clients, balance reconciliation** (not done in the current state), **creating invoices in ERP, creating and applying receipts**, using *infolets* and *watchlists*. - **Decentralized AR model** distributes the workload across department (for external invoices) and improves accountability while requiring more unit level training - Increased **visibility into external billings and better financial reporting** - Data natively integrated with the General Ledger, enabling the tracking of external receivables, aligning with our *Optimized Operations & Processes* principle.
General Ledger (GL)	Net new processes will require training. - Create, post, review and query journal entries in Oracle Cloud. **Entering and posting transactions on time** or more frequently is key to having accurate financial statements. The importance of entering/updating data in a timely manner is a key training piece. - New concept: which **Business Unit** in which to transact and which values to select. **Increased coordination and standardized maintenance with HR is paramount, because the org structures are shared**.

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Personas

Personas

As a Change Champion, it is important for you to know and communicate to your peers:

- Personas can have **multiple Oracle Cloud custom roles** (your department will be helping DoIT, HR, BFP&A and the Office of the Controller in mapping the right roles to the personas)
- Training (learning pathways) is aligned with personas

/per·so·na/ A **fictional character** designed to represent a **segment of stakeholders** who might interact with a process, service or product in a similar way.

Examples of HCM Personas

Manager

- Manage a team
- Onboarding support
- Generate reports
- Evaluate performance
- Assign learning content
- Fill vacancies

- **PAIN POINTS:** manual paper forms, having to ask DoIT or HR Administrators to perform a transaction for their direct reports

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Employee

- View Personal and Employment information
- Complete required training for compliance
- Update personal records
- View pay slips
- Understand performance metrics and access their yearly review
- Complete I-9

- **PAIN POINTS:** Having to ask DoIT or their Managers to change their personal data; Manual paper forms (timekeeping, leave requests, disjointed onboarding tasks)

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Personas

> **/per·so·na/** A fictional character designed to represent a segment of stakeholders who might interact with a process, service or product in a similar way.

General Ledger Manager

- Review requests for changes to COA
- Specify cross validation rules or security rules
- Review/approve journal entries
- Approve adjustments and close the period
- Supervise GL Accountants
- Oversee changes to policies and to GASB, FASB accounting standards
- Business process documentation steward
- For SBF: manage external audits and multiple state tax filings
- Responsible for 1042 and 1099 reporting
- Develop leaders within the team

- **PAIN POINTS:** system limitations, reconciliation issues, process control issues, manual processes, missed month end close deadlines, spending too much time on finding documentation.

General Ledger Accountant

- Create Manual journals & Recurring journals
- Upload third party journals
- Reconcile unposted entries
- Review and create month-end reports
- Process month-end and year-end adjustments
- Perform period-end activities
- Resolve discrepancies or irregularities in records
- Account reconciliation within the system and the boundary systems
- Ensure financial data is recorded in the appropriate period (accruals, deferrals, prepaids)
- Review and post journals
- Review/Approve reimbursements (Concur)

- **PAIN POINTS:** Delays in sub-ledger closing and reconciliations
- Spending too much time on finding documentation and chasing people for approvals/sign-offs
- Limitations with current system, inconsistent tools
- Too many types of journals from various sources
- Lack of governance of the chart of accounts.
- High volume of cost transfers to balance budgets

Billing Clerk

- Professionals with understanding of billing processes and experience using billing software
- Responsible for generation and delivery of invoices to customer, managing the related corrections and reconciling customer payments and invoices
- the review of revocable permit contracts received from AP office
- Running reports

- **PAIN POINTS:** Not receiving communication on delayed billings and appropriate approvals on correction entries such as credits and adjustments
- Lack of time and resources to work with customer to build relationship and collect payments
- Incorrect or outdated billing rates for Service Center.

Champion's Journey

Change Champion Journey

WolfieONE

Change Champions will be asked to act as representatives from their departments or units and as partners of the WolfieONE program, and align their WolfieONE expertise with modules/processes, rather than departments.

1. Tell the Change *Story* (Spring 2025)- not the data
- Help peers understand what's "in it for them". Work with OCM to construct a shared "Change Story" at your next leadership meeting, in your upcoming departmental newsletter, or via **existing communication channels**
- Be realistic and **recognize** that change is challenging, **"status quo bias" is expected**

2. Provide Honest Feedback (April 2025)
- Leverage your subject matter expertise and familiarity with your peers and counterparts to help us shape communications, engagement, and training
- Provide input and feedback on program communications

3. Build Trust (ongoing)
- Engage others with whom you have influence, build support (informal networks matter!)
- Become a trusted communicator by taking on the responsibility of keeping your department or group "in the know"

5. Monitor Resistance & Empower End Users
- Serve as an informal "go-to" point of contact for two-way communications
- **Escalate obstacles** that are preventing your group or department from being ready for change as you empower them to be confident that they are prepared for go-live

4. Champion Change (ongoing)
- Continue vocal support as go-live approaches
- Use existing forums and channels to build awareness
- Reinforce the focus on the overall vision (the bigger picture)
- Put up go-live posters in your office / workspace with the QR code that will link to formal training (closer to go-live)
- Use WolfieONE **Zoom backgrounds**

Go Live

6. Support Adoption
- Partner with project leaders to drive adoption and connect end users to support channels
- Set an automatic email reply to reinforce key messages (e.g., "Need help registering for courses this month? Reach out to **ocm@stonybrook.edu")**

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Change Champion Journey

Learn about **new functionality and processes**. Then, share the benefits using OCM materials to educate peers.

Design	Build			Test	Train

NOW: Schedule time in your "local" meeting, OR offer to host one. Explain, through formal and informal channels, that while "some modules are in Build, some elements are still in Design"- big picture decisions that will impact configuration. **EPM started later, therefore, the timeline is behind ERP and HCM.**

Jan 2025: **HR Changes** meeting-in-a-box from OCM team, with a focus on Employee Self Service (ESS) and some modules such as Learn (LMS), Oracle Recruiting Cloud (ORC) will enhance the **employee experience.**

Feb 2025: **Manager Self Service (MSS),** meeting-in-a-box, and how some modules such as performance management and time and labor will be leveraged by and enhance the manager experience.

March 2025: **New COA:** with a focus on educating targeted audiences on **segment definition,** single use for each segment and sharing some relevant **examples**.

April 2025: Champions to support the OCM team in assessing organizational readiness. Goal: Drive an increase in the number of respondents to the **Mid-Point Change Readiness Survey** (as compared to the Baseline Readiness Survey - before the launch of the Champion Network)

OCM team delivers a new action plan for the next 3 months.

2025: Change Champions will gain access to Oracle environment to start familiarizing themselves with the interface and prepare to participate in testing.

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WolfieONE Champion Toolkit

Toolkit Introduction

WolfieONE

The Change Leader Toolkit is a collection of resources, to refer for your own knowledge and to help inform your peers. This is linked here WolfieONE Champion Website and meant to serve as a one-stop-shop for our Seawolves' network of Power Users & Change Champions.

This Toolkit **is…**	This Toolkit **is not…**
…a repository that is updated regularly • View the "as of" dates of change impacts for a timestamp of the last update.	Meant to holistically inform Change Champions. Educational meetings and two-way communication are also critical to this network.
…a tool for Change Champions to: • Stay informed • Access key resources • Understand their roles and responsibilities • Knowing which process areas to focus on (Finance vs. HR vs. Tech)	…perfect or holistic, and we love feedback! • Please reach out to Hina Kausar /OCM Mailbox [ocm@stonybrook.edu] with any content you'd like to see added or any gaps you notice need filled that could be helpful.

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Champion Website

Change Network

ABOUT CHANGE LEADER NETWORK (CLN)

CHANGE LEADERSHIP NETWORK PROCESS

WOLFIEONE CLN STRUCTURE
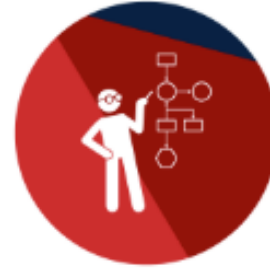
FIND YOUR WOLFIEONE CHAMPION

WOLFIEONE CHAMPION TOOLKIT

About Change Leader Network (CLN)

Change Leader Network Process

WolfieONE CLN Structure

Find Your WolfieONE Champion

WolfieONE Champion Toolkit

WolfieONE Champion Website

Next Steps

1. Review the Champion Toolkit - [WolfieONE Champion Website](#)
2. Identify audiences you would like to share WolfieONE information with. Check with other Champions to ensure there is no duplication of effort. Check the Events Calendar - https://docs.google.com/spreadsheets/d/e/2PACX-1vRfh3gdssAkKI1wsKb3Yh6eymQI_akkGQIcxxoct6l3473czJrNmJmixn-fPbT0FOQ2b94pFuFqi4pJ/pubhtml
3. Request time on meetings you can join and add to the Events Calendar using this link - https://docs.google.com/spreadsheets/d/1mFG-WrT48Kv5aorcH1-l67ptlqDkQpP0UKiOjXU0_JE/edit?gid=2023941331#gid=2023941331
4. Review material to present (will be shared in the Champion Toolkit)
   1. Jan 2025 – ESS
   2. Feb 2025 – MSS
   3. March 2025 – COA
5. The expectations are uniform from **all Champions** (managers, direct reports)
6. Communicate with us – we love to hear from our Champions

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Trainer

TBD

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Appendix

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What's Changing?

CURRENT STATE SYSTEMS/PROCESS	FUTURE STATE SYSTEMS/PROCESS
Inconsistency across processes and practices; Data inconsistency	Standardize processes and practices, ensure data consistency
Oracle/**PeopleSoft** for Finance	Enterprise Resource Planning (ERP) Cloud
Oracle/**PeopleSoft** for Human Resources (SOLAR & "Admin")	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)	Human Capital Management (HCM) for reporting time and attendance and personal records
Recruiting and onboarding in **Taleo**	Oracle Recruiting Cloud (HCM)
CPR (Capital Planning, construction)	E-builder, which will integrate with EPM

New Chart Segments

Entity – Major institutional operating unit (e.g. SBF, SBU).

Org – An operating area that is responsible or benefits from the specific transaction. The area must have intended permanence and must have an employee and/or a financial budget greater than $100,000.

Fund Type – A classification of the funds based on how the funds are allowed to be used.

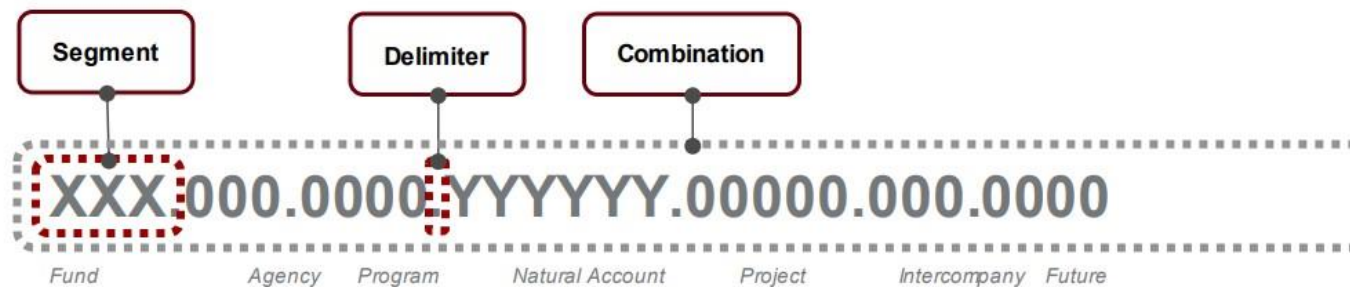**Fund Source** – A self-balancing set of accounts categorized by purpose, ownership, responsibility or restriction.

Account – Nature of the transaction (e.g. asset, liability, expense, revenue, net position).

Classification – A classification of the balance sheet, revenue or expense transaction.

Initiative – Cross-organization used segment to identify activity for organization initiatives and/or where two or more departments contribute.

Budget Year – An identification of the budget year for prior budget spending.

Future – A segment that allows for growth in the future.

| Segment | Delimiter | Combination |

XXX.000.0000.YYYYYY.00000.000.0000

Fund   Agency   Program   Natural Account   Project   Intercompany   Future

*For illustration purpose only

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Networking Activity

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Elevator Pitch

In Breakouts (**groups of 5**), WolfieONE Champions are given **10 minutes** to network. Create an Elevator pitch for your peers that illustrates a business challenge and how WolfieONE solves it.

Prompt: Problem statement (current state, **choose ERP or HCM** for your pod, and then a process area, for example "HR: too many levels of approval or too many approvers for recruiting"

1 Craft Your Elevator Pitch

2 **Pair up** at your table or **take turns** as a table group and **practice your pitch**!

3 Come back together and **share pitches** with the full group.

Steps	Prompt	Hints
Opening	Start with an engaging opening to capture attention	Example: "How might we fill vacancies faster and attract the best talent?"
Problem Statement	Clearly define a problem that your department faces that Oracle Cloud, our new system, addresses.	• *What is a constant point of frustration of current systems? How does it impact the people using those systems?* • *Review earlier slides in your handout*
Benefits	Highlight the system, the benefits to your department, and how it solves the problem. (What is on their minds, tailor the next step to how the WolfieONE benefits speaks to their needs)	• *Think back to your table talk conversations* • *What are people excited about with the move to Oracle Cloud?* • *You may refer to materials that emailed or on the WolfieONE website*
Call to Action	End with a clear call to action or next step for your peers	• *Example: "I'm going to educate my peers by hosting a coffee chat with a focus on this one process area and invite a SME to help me present."*