



Participation
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Alleviating the Chaos During Open Enrollment



Fatima Beach



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Agenda

- Background
- Business & Technical Situation
- Strategy, Plan & Rollout
- Issues
- Solution & Outcome
- Lessons Learned
- Conclusion
- Questions & Answers



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Introduction

- Training & Change Management Practice
- MSHR & BBA
- Prosci Change Management Certification
- Oracle experience since 10.7
- Training & development experience since 1992
- Presented at other industry conferences
- OU certified trainer
- Multi-industry experience



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Introduction

- Applications Software Technology Corporation
- National Oracle consulting practice
 - E-Business Suite
 - Fusion Middleware
 - Business Intelligence
 - Managed Services





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Definition

- **Alleviate:** *a* : to make (as suffering) more bearable <her sympathy *alleviated* his distress>
b : to partially remove or correct <measures taken to *alleviate* a labor shortage>

Webster's dictionary



Definition

- **Chaos:** 1. *obsolete* : chasm, abyss; 2. *often capitalized* : a state of things in which chance is supreme; *especially* : the confused unorganized state of primordial matter before the creation of distinct forms — compare cosmos *b* : the inherent unpredictability in the behavior of a complex natural system (as the atmosphere, boiling water, or the beating heart); 3. *a* : a state of utter confusion <the blackout caused *chaos* throughout the city> *b* : a confused mass or mixture <a *chaos* of television antennas>

Webster's dictionary



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Purpose

- Explain how we “removed or corrected” any current or future state “utter confusion” during our client’s **Self-Service Benefits Open Enrollment** roll-out





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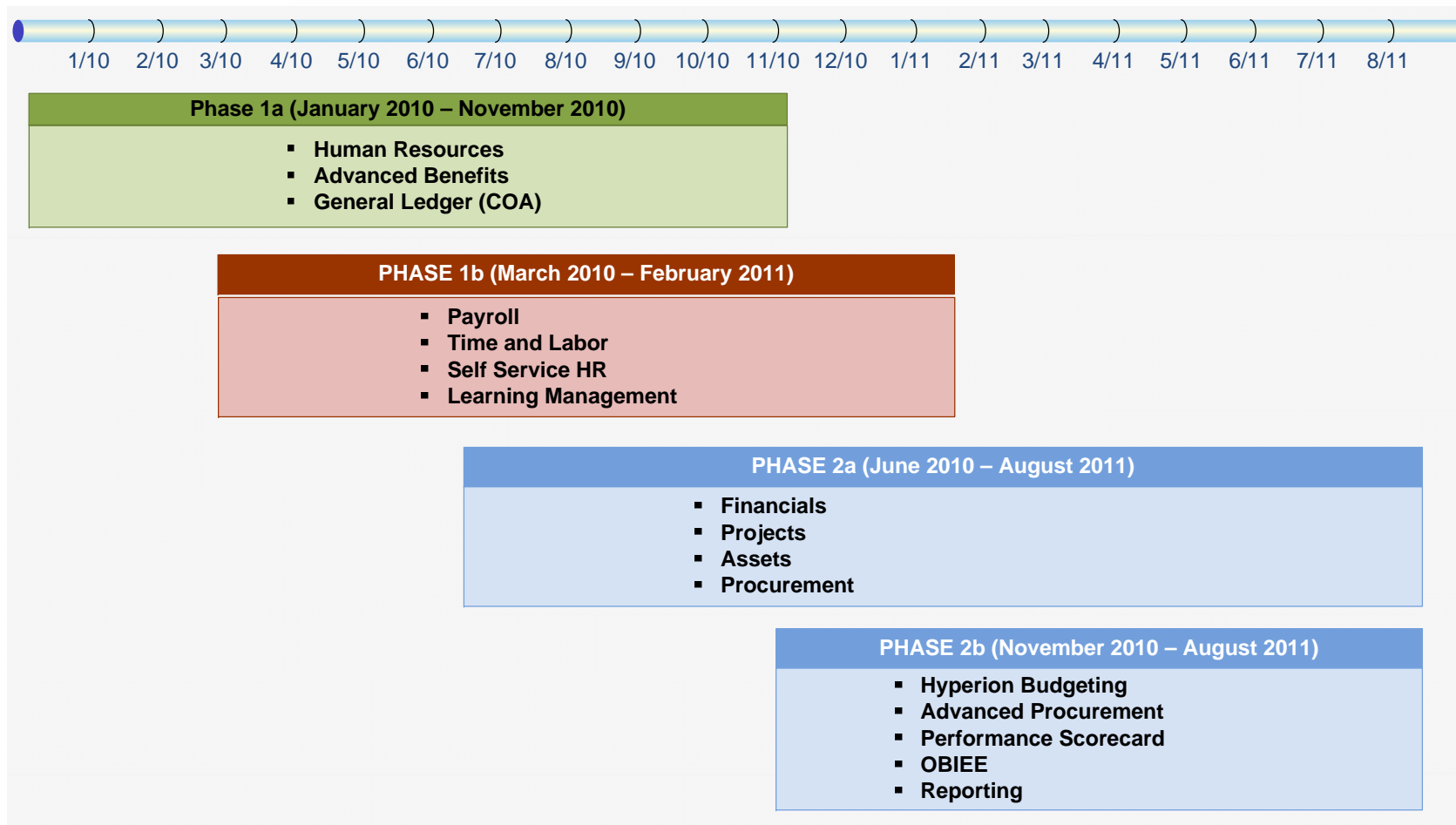
Background

- Project started in January 2010
- “OPUS” – Oracle Project Unified Solutions
- Implementation of Oracle E-Business Suite, OBIEE and Hyperion Budgeting
- Previously implemented limited number of Oracle EBS modules
- Project broken up in 4 separate phases



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Project Schedule





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Business Situation

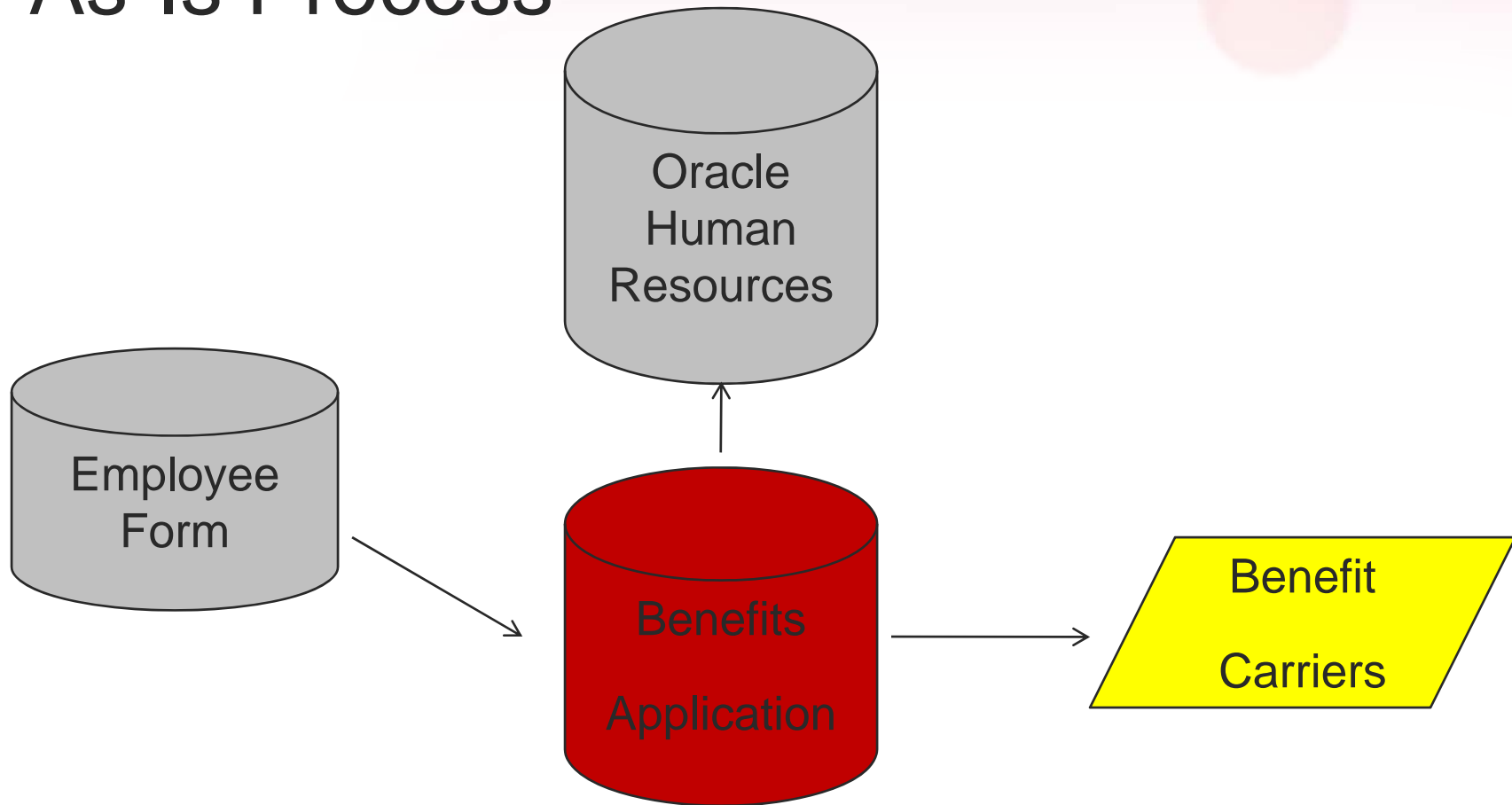
- Approximately 3,500+ users
- Change in business process & system interaction





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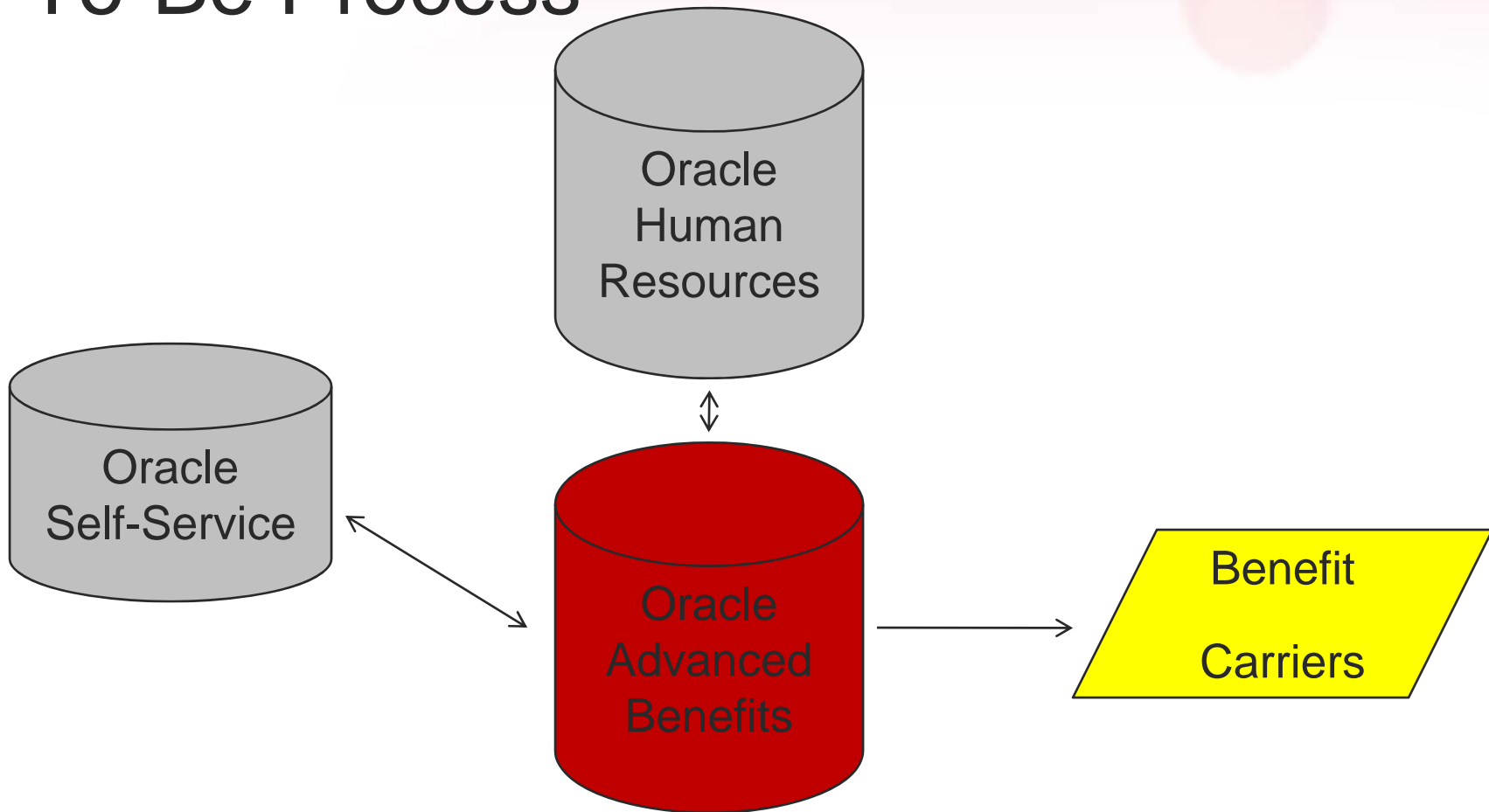
As-Is Process





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To-Be Process





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Benefits

- Yearly opportunity to update benefit elections
- Elections are fully integrated with HR and payroll
- Unreadable handwriting, data entry errors, and double keying are greatly reduced





Technical Situation

- Current environment
 - Different department and appointing authorities
 - Employees & retirees
- Access to a computer
- Level of computer literacy
- Last year training method: webinars & paper forms



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Goal

- To put in place a strong training and change management plan
- To create a diverse training plan to appeal to different users
- To effectively roll out Self-Service Benefits Enrollment training to the 3,500+ end users ready for the 10/18/10 go-live





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“Keep away from people who try to belittle your ambitions. Small people always do that, but the really great ones make you feel that you too, can become great.”

Mark Twain



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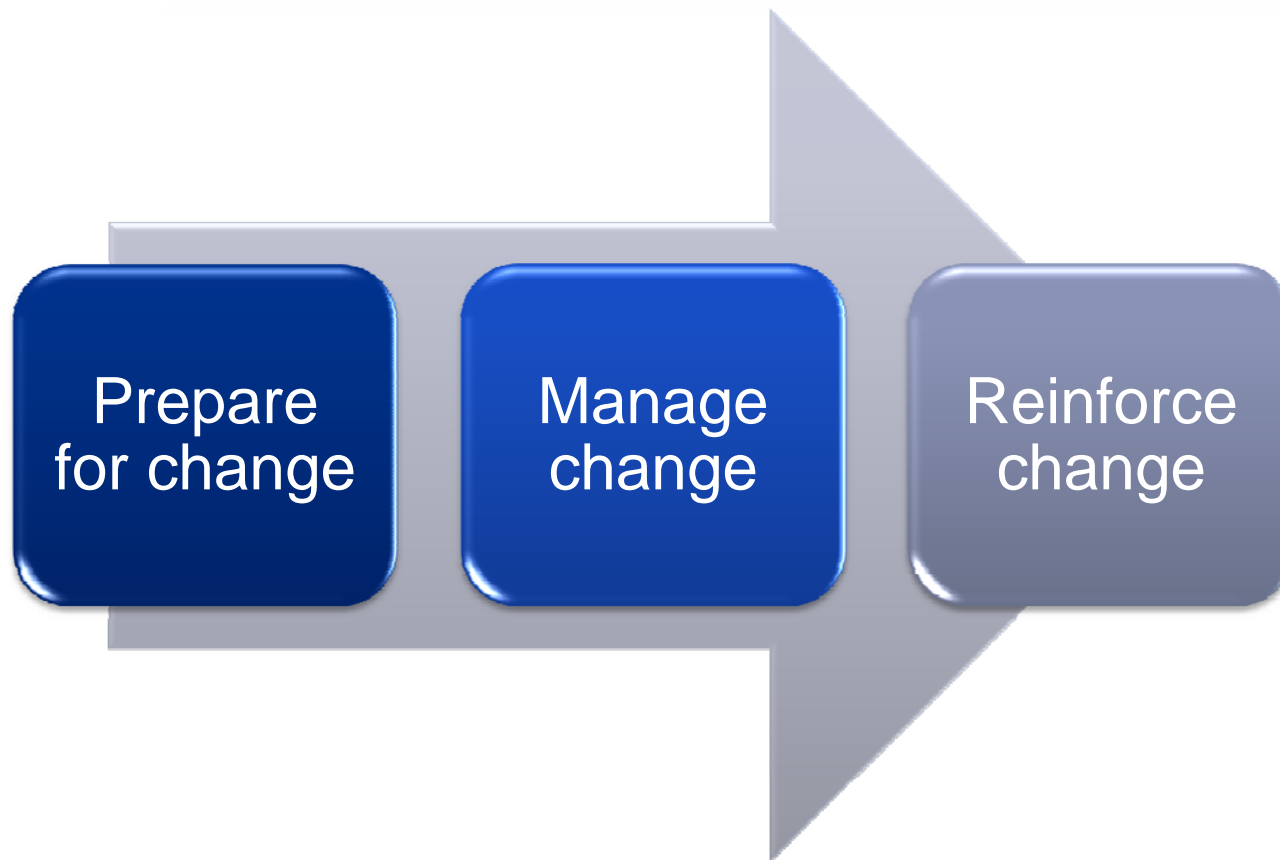
Define...

- A strong change management strategy
- A strong training strategy



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Process: Change Management





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Responsibilities: Change Management

Group	Task / Activity	AST	County
CM	Change Management Strategy	Lead	Participate
	Communication strategy & plan	Lead	Assist
	Change management & communications plan execution	Shared	Shared
	Change management evaluation	Shared	Shared



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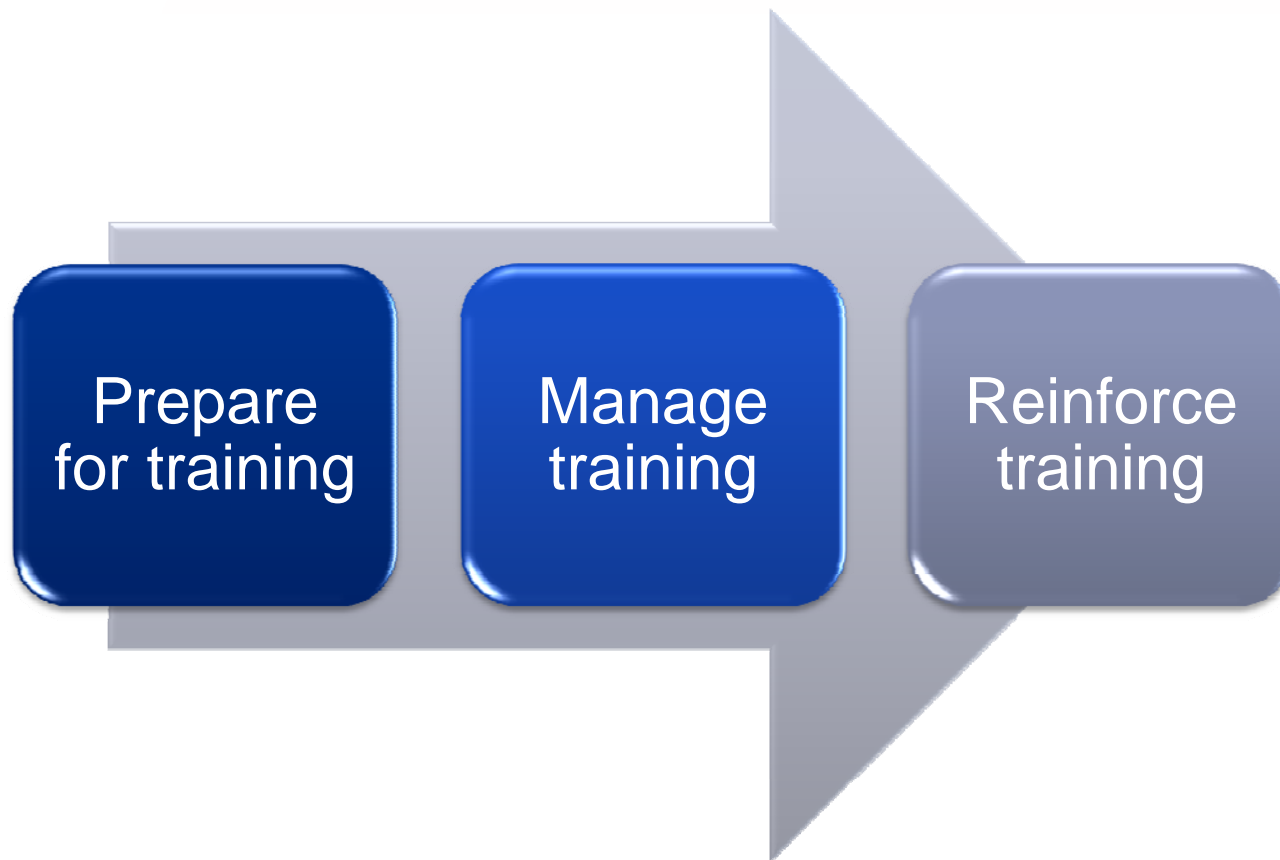
Strategy: Change Management

- Leadership alignment
 - Executives
 - OBAEC: Oracle Business Applications Executive Committee
 - Project Sponsor Committee
- Communication plan
 - WIIFM
 - Change impacts
- Readiness assessment & change impact analysis
- Training



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Process: Training





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Responsibilities: Training

Group	Task / Activity	AST	County
Training	Project Team Delivery	Lead	Participate
	Technical Team Training Gap Analysis	Lead	Assist
	Develop end-user training strategy	Lead	Assist
	Train-the-trainer course development	Lead	Assist
	Train-the-trainer delivery	Lead	Assist
	End-user training development	Lead	Assist
	End-user training delivery	Shared	Shared
	Knowledge transfer	Lead	Assist
	Logistics and training administration	Assist	Lead



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Strategy: Training

- Training needs analysis
- Audience
- Training administration
- Delivery methods
- Key training aspects



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*“I am always ready to learn, but I do not
always like being taught.”*

Sir Winston Churchill



Training Needs Analysis

- Training questionnaire
- Topic Areas Use: Daily (2), Occasionally (1), Never (0)
 - Beginner: 0.00 – 0.75
 - Intermediate: 0.76 – 1.25
 - Expert: 1.26 – 2.00
- Goal: establish training methods & get 100% feedback
- Cross reference for active employees with no computer



Training Questionnaire Results





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Issues

- Logistics and coordination
- How to roll-out training to 3,000+ users
 - Schedule
 - Different computer literacy backgrounds
- Meaningful courseware
- End users that were still resistant to change
- Outcome may affect the remaining phased roll-outs



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Audience

- County-wide employees
 - 11 appointing authorities
- Retirees
 - Were opted out from process
 - Continued with form processing





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Delivery Methods

- Instructor-led
- On-the-job
- Train-the-trainer
- Computer-based training
- Presentation
- Quick reference cards
- Workshop

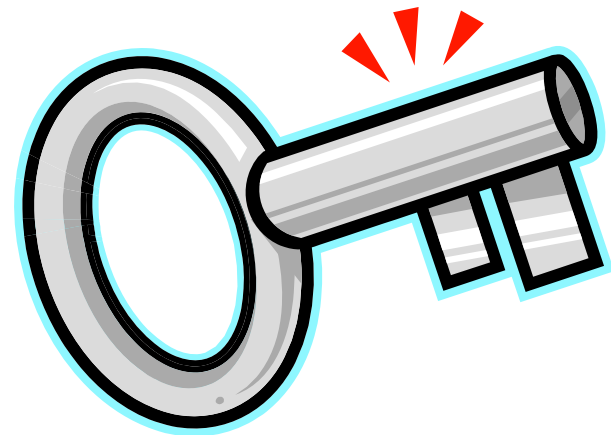




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Key Aspects

- Team
- Locations
- Material
- Scalable program
- Duration
- Software & hardware requirements
- Administration





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Tools

- Change Management:
 - Change agents
 - Communication methods
 - Surveys
- Training
 - Training coordinators
 - Questionnaire
 - Oracle User Productivity Kit





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Tool: User Productivity Kit

- Single, synchronized authoring session
- Application agnostic
- Multiple learning methods
 - See It!
 - Try It!
 - Know It?
 - Published content
 - In application support
- Full-feature sound recording and editing



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The screenshot shows the Oracle Applications interface with a recording overlay. The recording overlay is a blue rounded rectangle with a play button icon and a 'Finish' button. It contains the following text:

Recorder - Add a Customer
Press PrintScreen to record.
Next screenshot records: Left click on Editfield <User ID>
Last recorded event: Start Screen

The Oracle Applications interface shows a 'Library' pane on the left with a tree view of 'Invoices' and a 'Functions' pane on the right with a 'Top Ten List'.

Record: 1/1 | ... | <OSC>

UPK will record your navigation steps
Mouse clicks
Keyboard



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Tool: User Productivity Kit

Documentation

Process Guides
User Acceptance
Test Scripts

Training

Web based
Instructor-Led
Job Aids

Support

Go Live

Simulations
Online Help
Job Aids

UPK: Single content customization and development



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Courseware Development

- AST worked with County to create courseware
- Focused on navigation of Self-Service Benefits
 - Not HR policies
- Several work sessions and testing



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Demonstration



Solution: Training Methods & Support

- Train-the-trainer
- Navigation; not benefits training
- Training delivery
 - Workshop
 - CBT/Workshop
 - CBT (Web based training)
- Department SMEs
- Help desk



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Solution: Training Administration

- Training communication
- Training invitation
- Scheduling



Solution: Training Delivery





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Solution: Training Schedule

- Training: 09/27/10-10/12/10
 - Concurrent sessions at multiple locations
 - Department SMEs
 - Support
- Go-live: 10/18/10



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“Practice is the best of all instructors”

Syrus



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Solution: Go-live

- Kiosks
- Shared department computers
- Web based training access
- On-site coaches
- Help desk
- County: Webinar





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Follow Up

- Questionnaires
- Verbal feedback
- Adjustments



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Outcome

- No major issues or concerns
- Training roll-out successful
- 100% enrollment completed online and on time





Lessons Learned

- Training questionnaire: Judgment call
- UPK: Use in every project phase
- UPK recording: 600 x 800 resolution
- Sharepoint/E-Mail: Too large to upload
- Two monitors: Use main monitor
- UPK - Know It!: Not well received
- Train-the-trainer: Right trainer
- Change agents: Right change agent



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Conclusion

- All current County employees enrolled via **Self-Service Benefits**
- Plan and get the message out early
- Need to be attuned to diverse audience
- Work sessions to fine-tune CBT
- Roll out of mixed training delivery methods effective
- Helped set a positive tone for future Phases of the project



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Questions & Answers

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