



Alleviating the Chaos During Open Enrollment

Presented by:
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Agenda

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



BACKGROUND

County Background

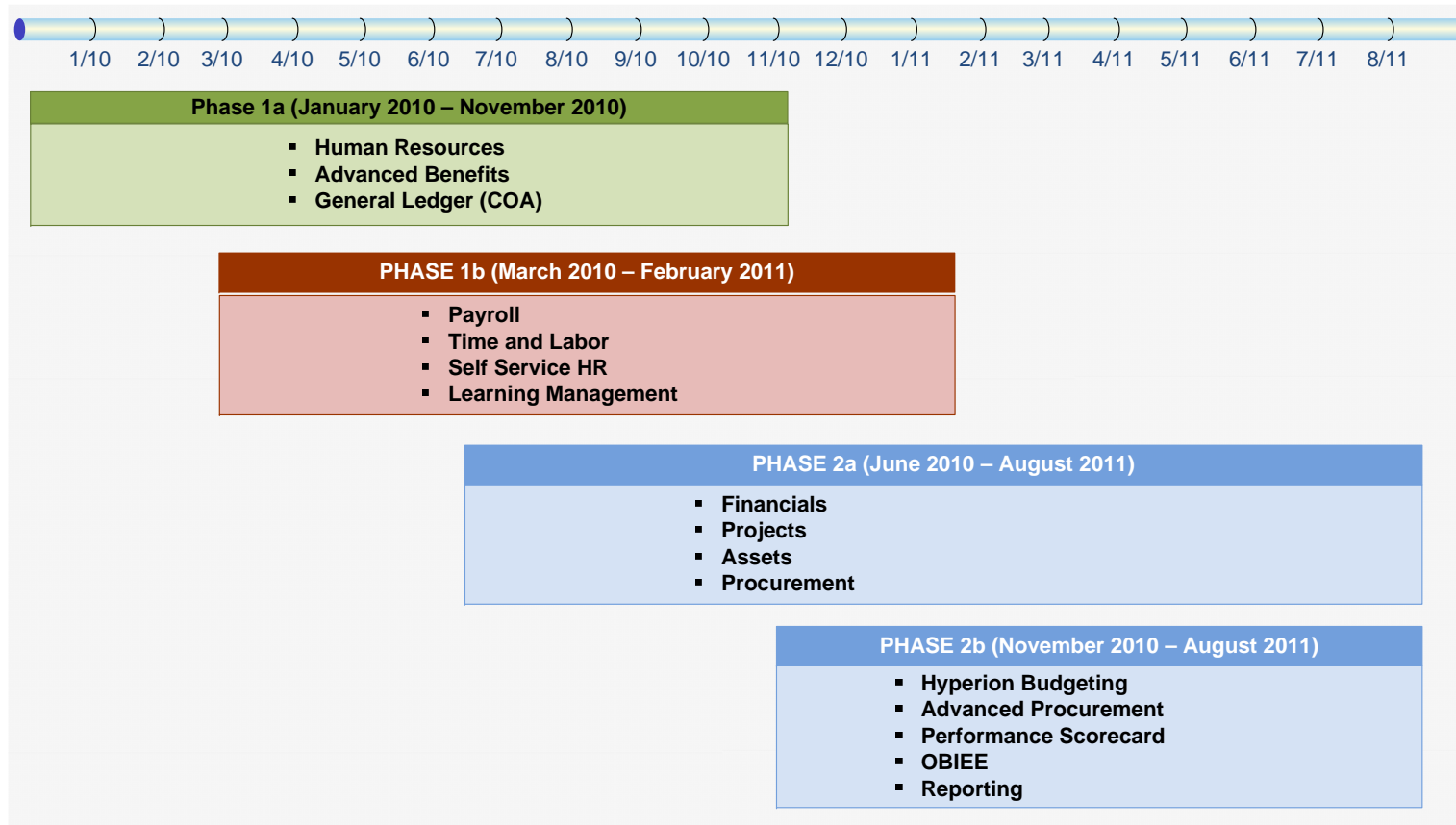
- 25 government bodies
 - ▶ 1 for each of the 24 cities/municipalities
 - ▶ 1 for the unincorporated area
- ½ the county is unincorporated
- County: tip to tip is 38 miles long and 15 miles wide
- Originally part of Hillsborough County
- 2nd smallest county in Florida
- Most densely populated (3,372 person per square mile)



Project 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

Project Schedule





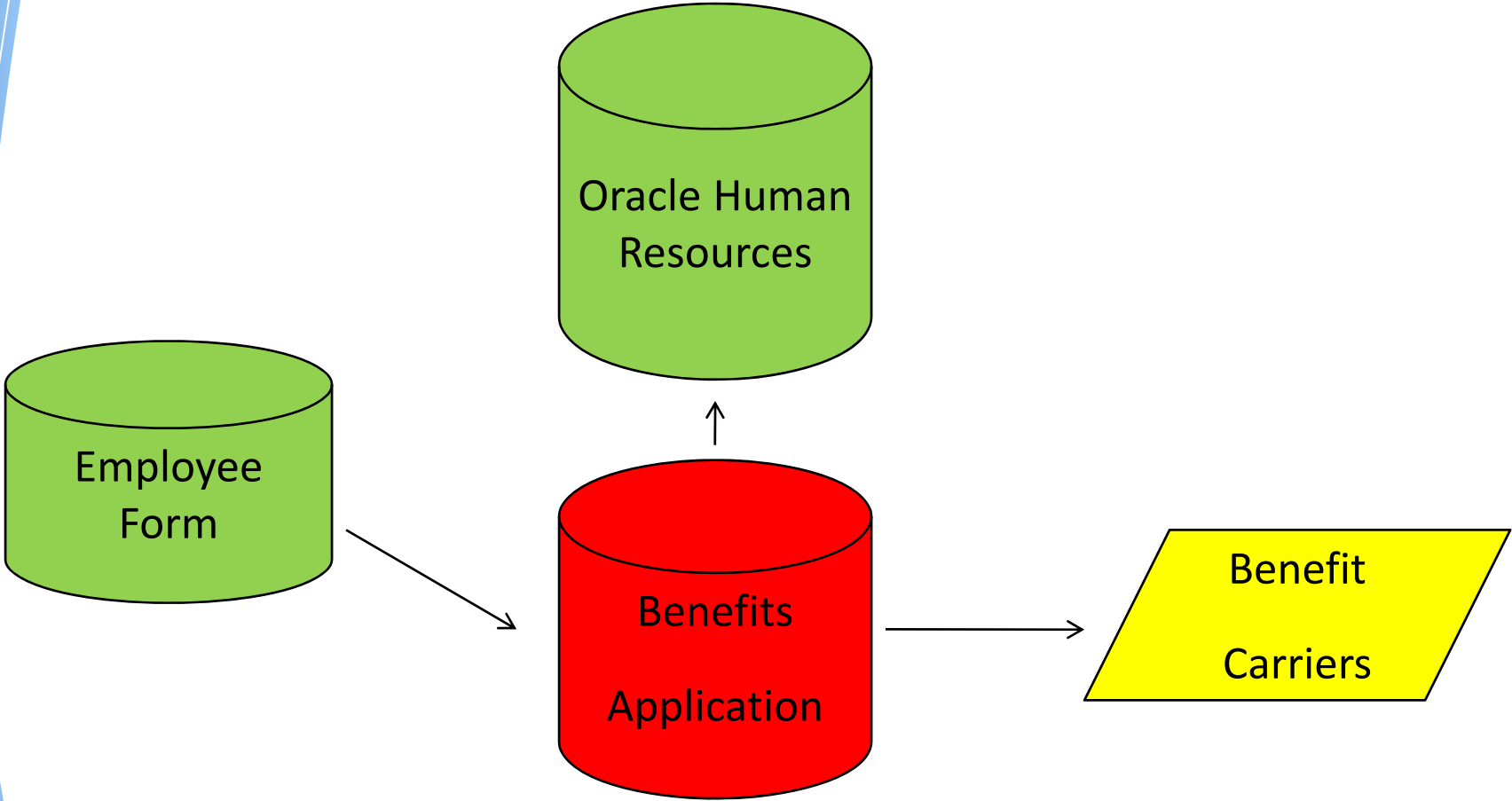
SITUATION

Business Situation

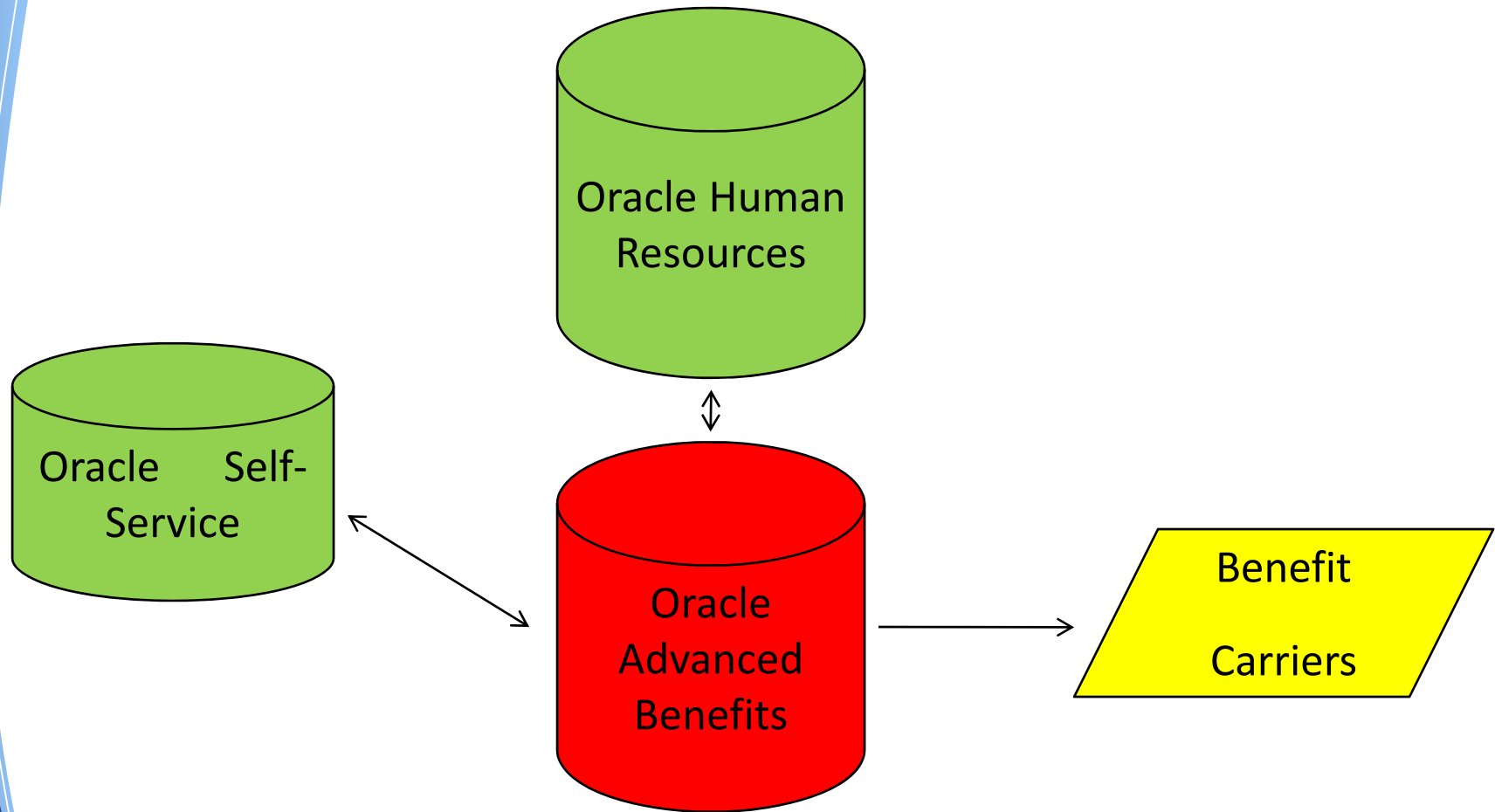
- Approximately 3,500+ users (current employees)
- Approximately 500+ retirees
- Change in business process & system interaction
- Reduction-in-force



As-Is Process



To-Be Process



Benefits

- Opportunity to update annual 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



STRATEGY & PLAN

What is the main reason software implementation projects fail?

Goal

- To put in place a strong training and change management strategy
- To create a diverse 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



Change management is:

The process, tools and techniques to manage the people-side of change to achieve the required business results.

Consequences

- Lower productivity
- Passive resistance
- Active resistance
- Turnover of valued employees
- Disinterest in the current or future state
- Arguing about the need for change
- More people taking sick days or not showing up
- Changes not fully implemented
- People finding work-arounds
- People revert to the old way of doing things
- The change being totally scrapped
- Divides are created between 'us' and 'them'

Three States of Changes

Organization

Current

How things are done today?

Transition

How to move from current to future?

Future

How things will be done tomorrow?

Individual

Current

How I do my job today

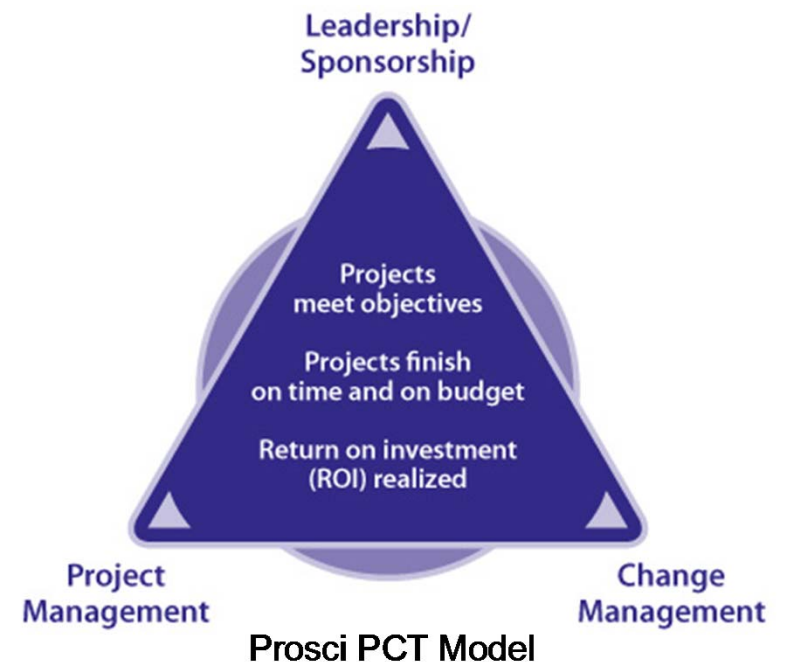
Transition

How I will do my job after the change is implemented

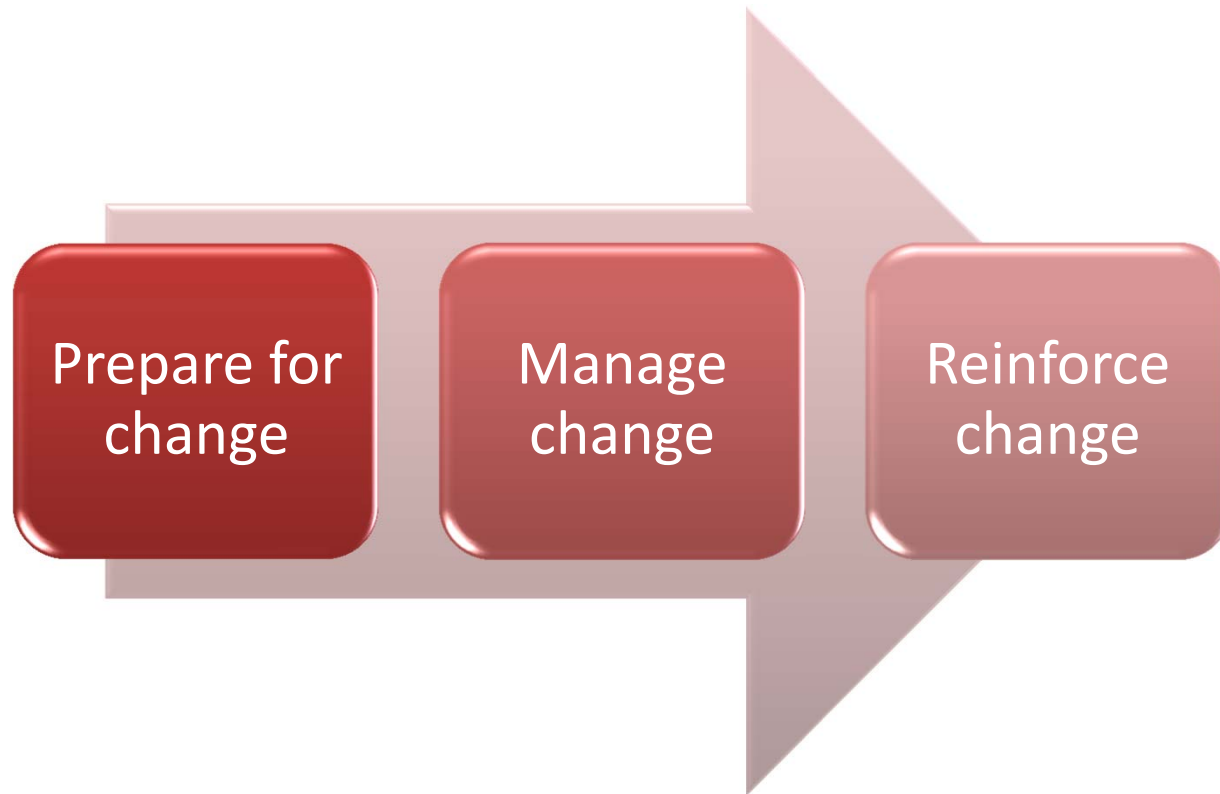
Future

Needed for Project Success

- **Leadership / sponsorship** provides guidance and governance
- **Project Management** gives structure to the technical side of the change
- **Change Management** supports the people side of the change



Process: Change Management



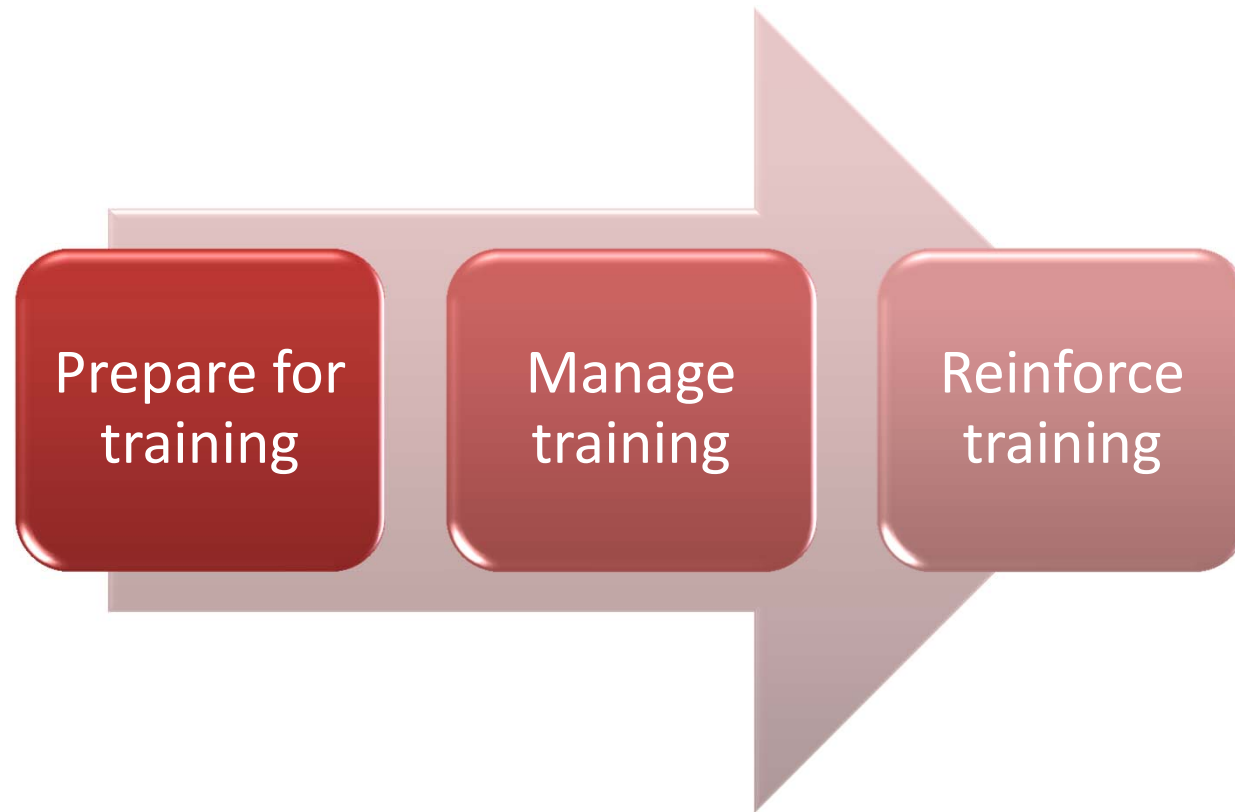
Responsibilities: Change Management

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

Strategy: Change Management

- Leadership alignment
 - ▶ Executives
 - ▶ OBAEC: Oracle Business Applications Executive Committee / Project Sponsors
 - ▶ Project Managers
 - ▶ Change Management Team
- Communication plan
 - ▶ WIIFM
- Readiness assessment & change impact analysis
- Training & transition

Process: Training



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

Strategy: Training

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

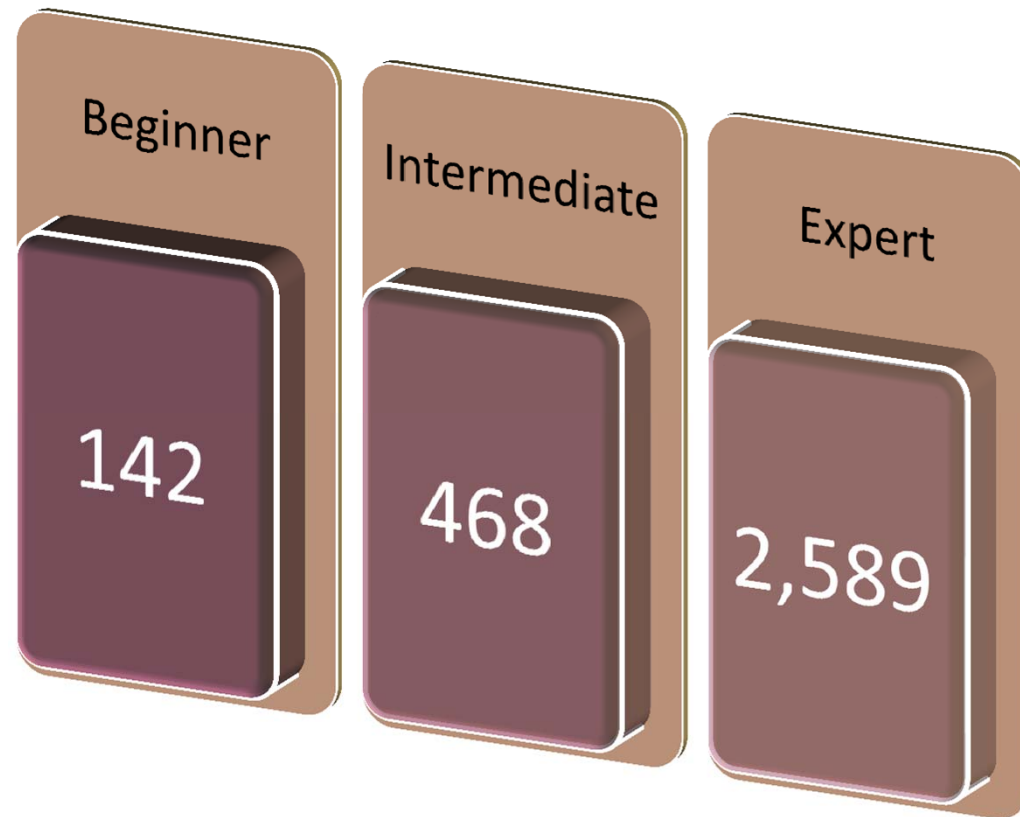
*“I am always ready to learn, but I do not always
like being taught.”*

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



Issues

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

Audience

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



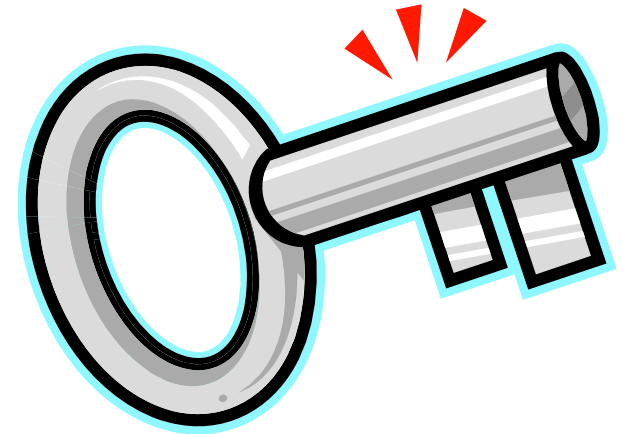
Delivery Methods

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



Key Aspects

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



Tools

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



Tool: User Productivity Kit

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

The image shows a screenshot of the Oracle Applications interface. The main window is titled "UPK Dev Training - UPK Developer" and contains a menu bar (File, Edit, View, Link, Tools, Help) and a toolbar. A "Library" pane on the left shows a tree view of "Invoices" with various sub-items like "Enter Supplier Invoice - No PO Match - Header". A "Recorder" overlay is positioned in the center-right, with the text "Recorder - Add a Customer" and "Press PrintScreen to record." Below this, it says "Next screenshot records: Left click on Editfield <User ID>" and "Last recorded event: Start Screen". A "Finish" button is at the bottom of the recorder. A green text box at the bottom center contains the text: "UPK will record your navigation steps", "Mouse clicks", and "Keyboard". At the bottom of the Oracle Applications window, a status bar shows "Record: 1/1" and "<OSC>".

Tool: User Productivity Kit

Documentation

Process Guides
User Acceptance
Test Scripts

Training

Web based
Instructor-Led
Job Aids

Support

Simulations
Online Help
Job Aids

Go Live

UPK: Single content customization and development

Courseware Development

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

Demonstration



UPK Demonstration.Ink



ROLL-OUT

Change Management

- Communication
 - ▶ Road show
 - ▶ Change agent workshops
 - ▶ Communication tools: newsletters, intranet, E-mails, change agent communication
- Evaluations
 - ▶ Readiness assessments
 - ▶ Change impacts study
- Sand box

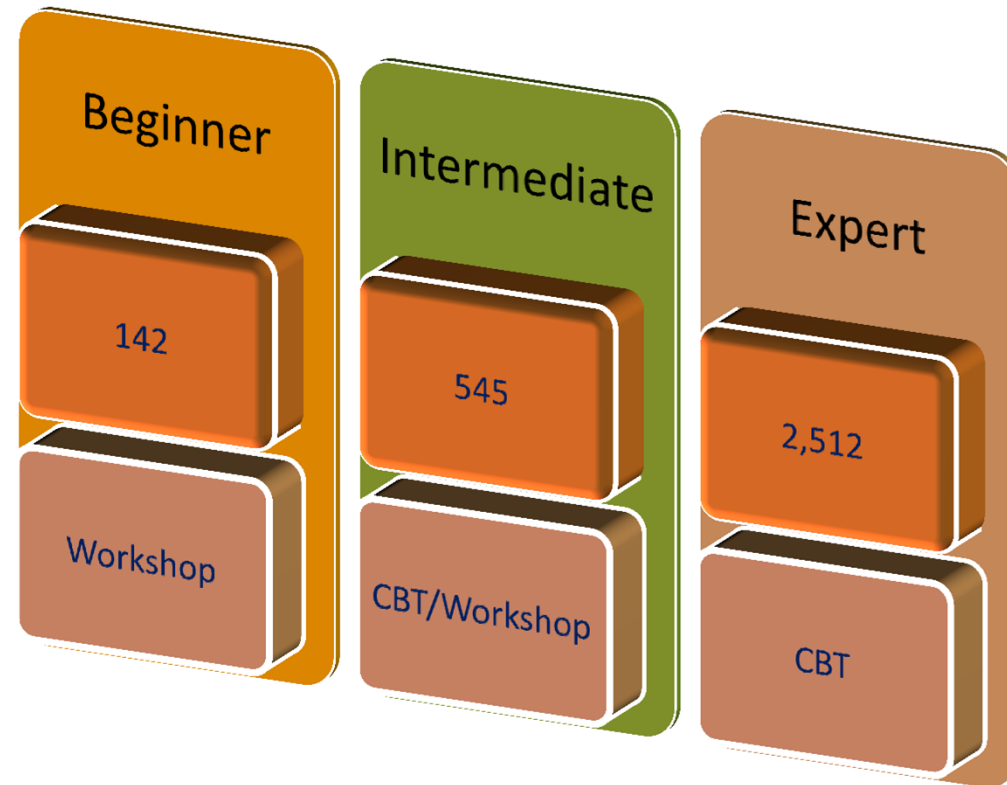
Training Methods & Support

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

Training Administration

- Training communication
- Training invitation
- Scheduling

Training Delivery



Training Schedule

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



“Practice is the best of all instructors”

Syrus

Go-live

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



Follow Up

- Questionnaires
- Verbal feedback
- Adjustments



OUTCOME

Results

- No major issues or concerns
- Change management plan effective
- 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

Conclusion

- **ALL** current County employees enrolled via **Self-Service Benefits**
- Plan and get the message out early
- Need to be attuned to diverse audience
- Use UPK in earlier project phases
- 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

Questions & Answers

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