Iowa WorkSmart Steering Committee

November 5, 2020
Agenda

- Welcome
- Steering Committee Purpose
- Project Status
- Phase 1: Human Capital Management (HCM)
- Phase 2: Financial Management (FIN)
- Adaptive Phase 1 Go Live
- Organizational Change Management (OCM)
- Readiness: Building the Change Network
State of Iowa Change Vision

Unite as one team with one resource as we lead the State of Iowa through a modernization of State government.
Steering Committee Purpose

Ensures Stakeholders Are Aware Of Project Status And Progress

Support Business Process Improvements

Plays Key Role In The Change Network

Represents Wide Cross-section Of Agencies To Consider Statewide Needs
# Workday Project Status

We are HERE

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<th>Month</th>
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**We are HERE**
Phase 1:
Human Capital Management (HCM)
Project Team’s current focus is on preparing for the end-to-end (E2E) testing cycle.

What is CCS? Series of meetings where project leads previewed the initial prototype of Iowa’s HCM system, demonstrating high-level functionality and business processes.

What is Unit Testing? It’s when all functionality and each business process is tested independent of integrations.

What is E2E Testing? It’s when testers validate that a process works from initiation through approval, with business processes configured and integrations turned on.
From Here to Workday

TODAY I NEED TO ...

- submit travel expense
- view State contact info
- request vacation
- view my paycheck
- hire someone

IN THE FUTURE

- Google contacts or SOI website
- eLeave or other
- online payroll warrant
- HRIS
HCM Functionality

HCM Functional Highlights

**CORE HCM / COMPENSATION**
- Self-Service: Update personal info & contact information online
- Access to data real-time
- See total compensation package

**TIME TRACKING/ ABSENCE MANAGEMENT**
- All-in-one time reporting, leave requests, approvals, accrual calculations, leave balance. Workday = official system of record
- Self-Service: Complete timesheets online
- Check & request time off using smart calendar from any device

**BENEFITS**
- Paper-free processes including online enrollment for all benefits & deferred compensation
- Self-Service: Update beneficiaries online
- Retiree benefits in Workday

**PAYROLL**
- Access to pay statements, W-2s & payroll information available online
- Self-Service: Manage direct deposit accounts online & split paychecks between multiple accounts

**TRAVEL EXPENSE REIMBURSE**
- Online travel requests: In-State/Out-State/International, expense reporting & submission
- Self-Service: Submit travel receipts online

**SECURITY / REPORTING**
- User account access & permissions determined by role
- Online workflows provide security, efficiency
- Introduction of real-time reporting capabilities
Phase 2: Financial Management (FIN)
Phase 2: Financial Management (FIN)

Scope
• Foundation Data Model (FDM)
• Financial Accounting
• Budget Controls
• Accounts Receivable (Customer Accounts)
• Accounts Payable (Supplier Accounts)
• Banking & Settlement
• Business Assets
• Procurement
• Projects
• Grants Management
• Expenses
Phase 2: FIN Status

1. **Transitional Foundation Data Model (FDM)**
   - Ph 1 Transitional FDM - I/3 Chart of Accounts/Workday Dimensions
   - Financial Manager Preview

2. **Data Validation**
   - Completed October
   - End to End data validation begins Dec. 7

3. **Phase 2 Planning**
   - Workday Engagement Manager/Project Plan
   - Monthly Financial Manager Meetings planned

4. **FIN Workstream Update**
   - Workstream meetings in progress
   - High level requirements being developed
   - FIN Architect stage to begin in April
Adaptive Phase 1 - Go Live

- Phase 1 of the Adaptive Budgeting tool went LIVE Friday, Oct, 30
- Includes current approved budget data and 5 years of I/3 financial actuals
- Provides reporting, dashboards, data analysis, “what if” scenarios
- I/3 will be used for budgeting purposes until Workday Financials is implemented in 2022
Organizational Change Management (OCM)
OCM Timeline – Phase 1

- **Payroll Testing**
- **End User Training & UAT**
- **Training Materials**
- **Development**
- **Deliver Change Network Materials**
- **Conduct E2E Testing**
- **FDM Sessions**
- **Regression Testing**
- **UAT**
- **Weekly Functional Meetings (Benefits, Payroll, Time/Absence, Expense, Security)**
- **Weekly Reporting Meetings**
- **Conduct Train the Trainer Program**
- **Finalize & Deliver Training**
Organizational Change Management (OCM)

Communication

Change Measurement

Building The Change Network

Training

Readiness
A Change Network is:

• A structured group of individuals who advocate for the change and help others within their unit adopt the new business processes and technology as efficiently and quickly as possible.

• Made up of people in various roles who foster sponsorship and ownership of new business capabilities and other changes generated by the implementation.

• Enabled to raise the visibility of the anticipated changes and build support ahead of the actual change.
Why use a Change Network?

- Using a Change Network is standard for Workday and many large implementations.
- Change Networks are imperative to the overall success of the project.

Successful change is:

- **Agile**: Able to adjust to frequent reassessment and plans.
- **Insight-Driven**: Data-driven change decisions maximize the value.
- **Collaborative**: Focused on activating change from day one, through teamwork and innovation.
- **People-Focused**: A positive statewide employee experience supports high-performance and minimizes obstacles.
WorkSmart Change Network Approach

**Change Leaders** - Steering Committee members, Business Process Improvement Committee members, and Directors

They are responsible for:

- Attending status meetings
- Setting a positive tone for change amongst their peer group and teams
- Understanding change impacts
- Raising concerns or issues
Readiness Overview

PEOPLE | PROCESS | TECHNOLOGY

**Stakeholder Analysis**
- ✔ Gather lists of agencies and contacts
- ✔ Evaluate complexity of change
- ✔ Gain understanding of stakeholders and challenges through surveys and interviews
- ✔ Develop readiness plans for Stakeholder groups

**Engagement**
- ✔ Form Project Steering Committee and Business Process Improvement Committees
- ✔ Define and mobilize Change Network
  - Engage Change Agents
  - Conduct virtual roadshows and other presentations

**Change Impacts**
- ✔ Identify and document changes from current to future state
  - Assess impact of changes for each group of stakeholders
  - Create artifacts to communicate changes and impacts at the appropriate level

**Measurement**
- • Gather tools to monitor readiness of people, processes, and technology
- • Prepare baseline and periodic surveys for key stakeholder groups
- • Prepare Readiness Scorecards and Dashboards for transparent reporting of readiness factors
Change Impact Process and Status

- Identify changes & impacts
- Confirm impact per audience
- Group by function
- Share changes with impacted audiences
- Create stakeholder level change plans

Confirmed Change Impacts

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EXAMPLES OF CHANGE IMPACTS

• HRAs will initiate the onboarding process. Managers will complete the onboarding template. Employees will complete onboarding tasks - all in Workday.

• Most employees will enter time worked directly into Workday. Some will continue to use external systems integrated with Workday. Most employees will manage time-off and Leave of Absence requests in Workday.

• Vacation and sick time will be on the Absence Calendar and managers will view their team’s absence calendar in Workday.

• Employees will manage beneficiaries in Workday.
Change Management Measurement

To **drive change readiness** and **assess adoption levels**, we will proactively use data and end-user insight to identify potential areas of concern to ensure Program success. This will be delivered through three stages:

1. **CURRENT STATE ASSESSMENT** (Baseline)
   An initial measurement of readiness to adopt Workday, as well as levels of excitement after customer confirmation sessions.

2. **CHANGE READINESS TRACKING** (Journey)
   Formal tracking of change preparations against predefined metrics to provide a readiness score for each department by functional domain prior to go-live.

3. **ADOPTION TRACKING** (Result/Outcome)
   Assessment and tracking of Workday adoption success or roadblocks post go-live based on both quantitative and qualitative data; and Workday generated reporting.
# Readiness Team Next 90 Days

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Questions?

Next Quarterly Meeting: February 4, 2021

Email: WorkSmart@iowa.gov
or
Website: WorkSmart.iowa.gov