Agenda

- Welcome
- Steering Committee Purpose
- Phase 1: Human Capital Management (HCM) Update
- Phase 2: Financial Management (FIN) Update
- Adaptive Update
- Organizational Change Management (OCM) Update
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
Phase 1:
Human Capital Management (HCM) Update
**Current Focus**

- Includes integrations and reports
- Execution from January 11 through March 12
- 110 testers participating
- ~775 total test scenarios

- Integration Business Owners are participating in knowledge transfer (KT) sessions to learn how to run their integration(s)
- 69 total integrations

- Second round of supervisory organization reviews with agency representatives will take place in February

- Transaction Catch Up (TCU) Planning began in December
- TCU process syncs Workday with transactions entered into HRIS after the final data pull
- TCU activities will be coordinated with Agencies prior to go-live
Phase 2: Financial Management (FIN) Update
Phase 2: FIN Highlights

Current Focus
- Focus on FIN admin roles, payroll accounting, expenses, and interdisciplinary business processes requiring audit level/accountant approvals

End-to-End Testing (E2E) – Phase 1

Transitional FDM - Phase 1
- Finalized I/3 Chart of Accounts/Workday Dimensions in Foundation Data Model (FDM)

FIN Phase 2
- On track to complete Phase 2 design work by March
- Planning FIN Phase 2: Officially beginning in March, Architect stage to kick off in April
- High level Phase 2 requirements collected in FIN workstream sessions will serve as the foundation for Architect phase
Adaptive Update
Recap of Phase 1

○ Phase 1 of the Adaptive Budgeting tool went live Oct. 30, 2020
○ An infrastructure project phase that built the integrations and data infrastructure to import 2 yrs of approved budget data and 5 years of actuals in the Adaptive tool
○ Provides reporting, dashboards, data analysis, “what if” analysis using Office Connect
○ I/3 will be used for budgeting purposes until Workday Financials is implemented in 2022
Adaptive - Phase II

Scope of Phase II

- Integrate / Import data from source systems to include
  - Existing Headcount
  - Projected Headcount
  - Existing Salary
  - Projected Salaries

- Replicate I/3 Scheduled Reports to allow greater visibility into the budgeting process
  - B7 - Personnel Report (Org, Approp, Special Dept.)
  - B9 - Budget vs. Projected Salary (Prior and Current Year)
  - B10 - Projected Salary by Position
  - B12 - Salary Projections Actual and Projected by Position
Adaptive Phase II Timeline - DRAFT

- **Initiate Phase**: 2/8/2021 - 2/15/2021
- **Model & Validate Phase**: 2/23/2021 - 4/30/2021
- **Deploy Phase**: 5/5/2021 - 5/21/2021
- **Post Prod Support**: 5/24/2021 - 6/1/2021

Final deadline: 6/8/2021
Organizational Change Management (OCM) Update
OCM Team Role

Inform, monitor, educate, and prepare State employees for the transition to Workday through Communication, Readiness, & Training
Smart Talk

January debuted - Smart Facts

WorkSmart.iowa.gov

Analytics

Resource

Introducing Smart Facts

January 2021

The Iowa WorkSmart Project Team is pleased to introduce Smart Facts, a one-page infographic providing high-level information and key talking points about the WorkSmart Project. A series of Smart Facts will be released throughout the project, each addressing relevant information based upon the stage in the project timeline.

Whether you’re an employee, manager, or project team member, Smart Facts will help you explain the Iowa WorkSmart Project to anyone!

WorkSmart Seeks Statewide Trainers

The search is on! The Iowa WorkSmart Training Team is seeking high-performing and well-respected team members to participate in the statewide Contributed Trainer Network.

Contributed trainers will help educate those state employees on Workday and list skills and confidence needed to successfully utilize the new system. Agencies who contribute trainers benefit by having multiple experts available to provide support, advice, and after training.

Change Agents have been tasked with identifying trainers from state organizations. The worksmart training team will provide instructor skills training to ensure trainers remain informed and relevant contact your Change Agent to learn more.

WorkSmart Training: A Glimpse of What’s to Come

The WorkSmart Project Training Team is creating a number of tools designed to provide the best possible training experience for state employees at all levels:

• Smart Guides - Similar to Job Aids but typically shorter in length.
• Virtual Learning - including sessions for large and small groups, with lectures, demonstrations, hands-on activities, and Q&A.
• Video Snippets - Short videos to demonstrate simple Workday processes.

As the training plan takes shape, more information will be posted on the Iowa WorkSmart website Resources and Training pages.

Visit WorkSmart.iowa.gov or contact the WorkSmart Team at WorkSmart.iowa.gov with any questions.

Why Workday?

For designated WorkSmart will be branded with a similar design January 2021

For more information about the WorkSmart Project, please visit WorkSmart.iowa.gov or contact the WorkSmart Team at WorkSmart.iowa.gov. For questions specific to your organization, reach out to your designated WorkSmart Champion.
### Readiness

Engage with stakeholder groups to increase awareness, create desire for change, provide knowledge about Workday, enhance ability to adapt, and reinforce adoption through support.

<table>
<thead>
<tr>
<th>Stakeholder Group</th>
<th>Engagement</th>
<th>Outcomes</th>
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</thead>
</table>
| Change Agents         | Monthly meetings  | • Held conference calls in Sept, Oct, Nov, Jan. with up to 140 agency change agents  
                      |                   | • Providing slides for sharing with others in their agency  
                      |                   | • Starting to measure readiness through Checklists, Scorecards, and Surveys                                                        |
| Agency Leaders        | Virtual Roadshows | • 25 sessions held – 18 targeted for one agency, another 7 for registered attendees.  
                      |                   | • Reached ~600 leaders!                                                                                                               |
| All groups            | Production Support| • Facilitating discussions around long-term operational support model  
                      |                   | • Beginning preparations for post go-live support                                                                                     |
Readiness Next 90 Days

- Monthly Change Agent Meetings
- Readiness Checklist & Scorecard
- Support Model Development
- Manager / Supervisor Change Discussions
- Policy/Procedures
Training Material Development

**Training Curriculum:**
- Created WorkSmart curriculum
- Began training material development, identified priorities
- Kicked off biweekly review meetings with functional teams

**Accessibility:**
- Partnering directly Iowa Department for the Blind (IDB) to ensure accessibility
- Training material templates under IDB review
# Training Materials

## By Type & Functional Area

<table>
<thead>
<tr>
<th>Training Material Types</th>
<th>Definition</th>
<th>Number of Materials</th>
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<tbody>
<tr>
<td>Job Aid/ Smart Guide</td>
<td>Instructional step by step guides with screenshots (1-10 pages)</td>
<td>102</td>
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<tr>
<td>vILT</td>
<td>Instructor Led Training delivered via Zoom with lectures, demos, and hands-on activities with ~20 participants per session.</td>
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<tr>
<td>Webinar</td>
<td>Similar to vILTs, but delivered in a Town Hall forum. Generally greater than 100 participants per session, with limitations on the interactivity from audience besides Q&amp;A. Recorded and edited down to create Video Snippets.</td>
<td>9</td>
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<tr>
<td>Video Snippet</td>
<td>Short videos demonstrating simple processes.</td>
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## Functional Area

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<th>Functional Area</th>
<th>Total</th>
<th>Job Aid/</th>
<th>vILT</th>
<th>Webinar</th>
<th>Video</th>
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<tr>
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<td>1</td>
<td>1</td>
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Contributed Trainer Network

Network of Workday trainers who will deliver virtual training to end-users

**Trainer Orientation (1/28):** Introduction to Workday, WorkSmart Project, and the WorkSmart Training Team - nearly 200 trainers

**Trainer Skills Assessment:** Self-assessment designed to measure and evaluate trainer skills to help design the Train-the-Trainer (T3) process

**Train-the-Trainer (T3):** Training approach to prepare individuals to be successful WorkSmart trainers in (1) Instructor Presentation knowledge and skills, and (2) Workday knowledge and skills
Workday Demo: Basic Navigation, Profile, Payment Election
State Change Journey

February 4, 2021

- WorkSmart Virtual Leadership Roadshows
- Training Curriculum Development
- End to End System Testing
- Train Agency Trainers
- Change Discussions with Managers/Supervisors
- Agency Readiness Measurement
- May Steering Committee Meeting
- Training Materials Development

May 6, 2021
Questions?

Next Quarterly Meeting: Thursday, May 6, 2021

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