Marketing the Financial Systems Replacement Project

Moving UC Finance *Forward*

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FINANCIAL SYSTEMS REPLACEMENT PROJECT
Overview

- Document current systems
- Find improvements
- Understand needs
Deliverables

- Conduct User Surveys/Questionnaire
- Conduct Change Management Case Studies
- Propose Marketing Communications Plan
- Evaluate Change Management Models
- Conduct User Surveys/Questionnaire
Normal Response to Change

Impact

Positive

Negative

Stages
Skill vs. Will

- High Skill, High Will: DOES
- High Skill, Low Will: WON'T
- Low Skill, High Will: CAN'T
- Low Skill, Low Will: WON'T
The Heart of Change

1. Act with urgency
2. Build a guiding coalition
3. Define a compelling vision
4. Communicate for buy-in
5. Empower others
6. Create short-term wins
7. Don’t let up
8. Make change stick
Deliverables

EVALUATE CHANGE MANAGEMENT MODELS

CONDUCT CHANGE MANAGEMENT CASE STUDIES
Conduct Case Studies

- UCLA’s Electronic Health Record Program
  - careCONNECT
- Research Administration
  - Process Improvement & Deployment
Case Study - careCONNeCT

- Urgency
  - Incentives, Penalties
- Guiding coalition
  - Executive Oversight Board
- Communication and Vision
  - Support from leaders, Branding
- Short-term wins
  - Website, Testimonials, User Feedback
- Don’t let up
  - Program Roadmap, Enthusiasm and Motivation
Case Study - UCLA RAPID

- **Urgency**
  Faculty and staff concerns about UCLA’s delivery of research administration services

- **Guiding coalition**
  Organizational assessment, Recruitment

- **Communication and Vision**
  Process modernization, Forums

- **Empowerment and Short-term wins**
  Support from leaders, Branding, Channels for feedback, Celebrate accomplishments

- **Don’t let up**
  Phased implementation of solutions (closeout tool → PAMS, PI Portal, PATS), Performance metrics, Regular updates
Case Study - UCLA RAPID

- Strengthened ORA organization
  - Structure Changes
  - People
  - Process
  - Technology
  - Performance Metrics

- Improved relationships within the research community

- Delivered Results
  - Faculty Service
  - Financial Management
  - Compliance
Deliverables

- Conduct User Surveys/Questionnaire
- Conduct Change Management Case Studies
- Evaluate Change Management Models
Survey/Questionnaires - Original

- Gauge interest
- Identify focus groups
- Foresee challenges
- Suggest improvements
- < 50 Responses
Survey/Questionnaires - Revised

- Increase exposure
  Life Sciences, School of Medicine, Physical Sciences, Facilities Management
- Add more targeted questions
  Departments, Channels of communication, Frequency
- 238 Analyzed responses (417% ✓)
  Specified, Open-ended
Survey/Questionnaires - Revised

PERCENTAGE OF RESPONSES BY CAMPUS ORGANIZATION

- Medicine: 26%
- Letters and Science: 16%
- Neuropsychiatric Institute: 14%
- VC Research: 9%
- Administrative Vice Chancellor: 8%
- VC Graduate Programs: 4%
- All Others: 14%

Legend:
- Medicine
- Letters and Science
- Neuropsychiatric Institute
- VC Research
- Administrative Vice Chancellor
- VC Graduate Programs
- All Others
Survey/Questionnaires - Revised

PERCENTAGE OF RESPONSES VS. PERCENTAGE OF ACTUAL USERS

- All Others: 24% of Survey Responses, 45% of FS Users
- VC Research: 4% of Survey Responses, 8% of FS Users
- Admin VC: 14% of Survey Responses, 12% of FS Users
- Medicine: 16% of Survey Responses, 26% of FS Users

% of Survey Responses % of FS Users
User Survey/Questionnaires

PERCENTAGE OF USER RESPONSES BY CAMPUS ORGANIZATION

% Survey Complete

- 0%
- 25%
- 50%
- 75%
- 100%

VC Research
Neuropsychiatric Hospital
VC Graduate Programs
Neuropsychiatric Institute
Office of Info. Technology
Intercollegiate Athletics
Letters and Science
Keyword Analysis

- integration
- user-friendly
- reports
- ability
- people
- payroll
- meet
- link
- ledger
- information
- include
- improve
- help
- getting
- general
- fund
- departments
- different
- expenses
- functions
- current
- data
- change
- code
- communication
- campus
- everyone
-Bruinbuy
- efficient
- buy
- general
- cost
- difficult
- campus
- easier
- getting
- improve
- training
- web-based
- transactions
- balance
- different
- help
- link
- meet
- payroll
- person
- web-based
- qdb
- reports
- processing
- better
- transactions
- think
- tools
Deliverables

- Conduct User Surveys/Questionnaire
- Conduct Change Management Case Studies
- Propose Marketing Communications Plan
- Evaluate Change Management Models
- Conduct User Surveys/Questionnaire
Marketing/Communications Strategies

Target & Personalize

Build Momentum & Community

Communicate the Vision
Target and Personalize

Smaller Focus Group

Personalize Communications

Develop FSRP Champions
Build Momentum & Community

FSRP.ucla.edu

Moving UC Finance Forward

Welcome to the Financial Systems Replacement Project

About Us
Contact Us
Projects
Services
WIKI
FORUM
RECENT MILESTONES

About ERP & Change Management

About ERP & Change Management and their vital roles in UCLA’s mission.

To upgrade its suite of financial tools, UCLA's Financial Systems Replacement Project team is developing an ERP system. The team received all necessary approvals, and the project is underway and expected to take about 3 1/2 years.

Understanding the Need

Learn why this enterprise-wide change is necessary for UCLA.

Resources

For more information, please visit the FSRP website.
Communicate the Vision

**The What**

FSRP

**The Why**

- Integrating UC Finance
- Moving UC Finance *Forward*
- Innovating UC’s Financial Future
Multiple Communication Channels

- UCLA Today
- LEARN @ LUNCH
- FSRP
- FSRP YouTube
Conclusion

Target & Personalize

Build Momentum & Community

Communicate the Vision
Special Thanks

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Special Thanks to all of YOU.....

...who took the time to complete our user survey!

We couldn’t have done it without YOU!
Questions?

Marketing the Financial Systems Replacement Project
Moving UC Finance *Forward*