

Business Process Review

Communications Strategy – Electronic Personnel Action Forms

May 2007

1. Objectives of the Project

A very a short summary of the committee's work. You do not need to restate the full objectives of the committee itself. It is important to remember that we are already aware of these. This should be the publicity 'pitch' for the committee's work – concise, clear, engaging and user friendly.

Electronic PTF Implementation Team objectives:

- Take advantage of existing Banner and Employee Self Service functionality by building and using Electronic Personnel Transaction Forms (EPAF)
 - An Electronic Personnel Action Form (EPAF) is a web-based form accessed through MYINFO. With EPAF the user can initiate a transaction such as a student hire, route the form to specified approvers and Payroll electronically from any PC with the appropriate online access.
 - The transaction can be applied directly to the Banner database without re-entering the data.
 - EPAFs in MYINFO are designed to be more user friendly than a Banner screen and can be tailored to meet the needs of individual campuses.
- Increase Efficient use of time and resources, Practical use of technology, Accurate data entry and have Fun doing it.
- Collaborate with departments to enhance training and communication between departments, central offices and campuses.

2. Communications objectives, principles and key messages

A clear detailed statement of the objectives in communicating, the principles underpinning this strategy and your key messages. These should be aligned with the objectives of the program/centre.

The primary objectives in communication are:

- Provide concise, accurate information to the right people at the right time
- Promote the positive aspects of change.
- Encourage excitement in learning and taking ownership of one's own work.
- Define and use terminology consistently

Key messages are:

- Embrace Change: Improve Our Future
- *MSU is progressing with organizational improvements including a transition to a more automated campus. The EPAF functionality automates several current payroll forms. MSU will provide every opportunity to train employees in the acquisition of new skills to promote career development opportunities within the University – and many of these skills will also be attractive to employers in the private sector.*
- *SCT Banner and Microsoft Office are MSU's institutional business tools. EPAF is a function of SCT Banner.*
- *MSU is following best practice trends that are being adopted by progressive and successful enterprises in every industry and we are moving from paper based processing to electronic processing as part of our current jobs. Many institutions are successfully using the EPAF*

function through Employee Self Service.

- *Benefits for employees include:*
 - *Times savings*
 - *Less reliance on paper, so less filing and less photocopying, less lost paper work*
 - *Less error correction*
 - *Ability to track and manage transactions*
 - *More control over the process*
 - *Less duplication of effort.*
 - *Improved skills base*
 - *Improved career opportunities from additional skills and experience.*
- *Think about life before email. Preparation of memos, internal mail delivery, waiting days for a written response, filing the mail. Compare this to life with email. Rapid preparation time, rapid turnaround and response times, electronic filing. Would we really want to go back to life before email?*
- Specific benefits of Electronic Personnel Action Forms (EPAF)
 - Efficiency:
 - time savings
 - Less reliance on paper, so less filing and less photocopying, less lost paper work
 - Practical application of technology
 - Users can access the web in order to enter and track appointment data and approvals
 - Accuracy
 - Less error correction
 - Less room for interpretation of forms, typos, handwriting.
 - More control over the process
 - Increased security
 - Fun and Fast
 - Learn something that will enhance workflow.
 - Opportunity for growth or development of new projects/cleaning up old projects (time savings)
 - Opportunity to interact with co-workers in a new way. (Trainers, Central office staff, HR)
 - Watch your work speed along the information highway

Major Concerns

Attending training requires time and commitment.

- *As technologies change, all of us throughout MSU like in any other enterprise have to update our skills in order to be fully effective and productive employees.*
- *If employees are well trained they will save time because they will be utilizing more automated applications and processing*

New skills means new responsibilities

- *New skills do not mean new responsibilities. New skills allow employees to take care of routing paper processing tasks more quickly – so they have much more time to support the Primary Objectives and Constituents of their department.*

Lack of Banner skills

- *SCT Banner, and Microsoft Office are MSU's institutional business tools. EPAF is a function of SCT Banner. It is an employee's responsibility to learn how to use the institution's business tools*
- *EPAF is accessed through Employee Self-Service (MyInfo) which is a tool that is used in conjunction with SCT Banner. It is more user friendly than many of the forms in Banner.*

No time to test, train, or implement:

- *We live and work in an environment and world that is reliant on technology for its business operations, and in which technology will change on a regular basis. Given this we must regularly set aside time to "invest" in enhancing technology and employee skills.*
- *Benefits for employees include:*
 - *Times savings*
 - *Less reliance on paper, so less filing and less photocopying, less lost paper work*
 - *Less error correction*
 - *Ability to track and manage transactions*
 - *More control over the process*
 - *Less duplication of effort*
 - *Improved skills base*
 - *Improved career opportunities from additional skills and experience*
 - *We need to invest the time to reap the benefits (FUN)*

3. Key Audiences

Who are you communicating with – a detailed description of your key audience and user groups. What are your priorities? Include what they already may know about you – people, research, subject What do you think they should know? And do break down the users into sub categories and add contacts already made.

Executives from each MSU Campus, Agency and Division.

A critical element of change management is the visible executive support. This has been present during Phase I and II of BPR with communication to the Chief Executive Officers and Chief Business/Finance Officers of all campuses.

Phase III implementation impacts on employees from all parts of the campuses and agencies and the visible executive support from the apex of the other organizational hierarchies is another critical element for Phase III.

The executives also have a communication role in supporting BPR and the implementation strategies in their areas of responsibility.

Middle Management: Deans, Directors and Department Heads

The middle management group of Deans, Directors and Department Head are also a critical group from two perspectives: being part of the visible executive support group, and being a key constituent group who are usually the management person who is the "end user" of many of these improved administrative processes. Not only do we need support from this group we also need to ensure that we deliver a service that meets all of their needs and/or assist them to make decisions to facilitate transitional activities in their departments. For example, how to deal with delegated authority (proxies) for EPAF approvals when the Dean is absent.

- This group can be accessed through listservs and meeting groups already in place.
- This is an opportunity to turn what may be a negative perception of HR/P&P on the Bozeman campus into a perception of cooperation and the willingness to provide expert

customer service.

Internal Audit and systems groups

Internal Audit and the GID coordinators need to be kept in the loop to avoid any potential pitfalls or procedural errors that could compromise the integrity of the data and business processes.

MSU Administrative and Accounting associates on all campuses.

This group of employees are going to be the most directly impacted group to implement and continue to use the changed processes. There is a small but vocal group of highly anxious people. This is to be expected in the advent of wholesale change. The remedies are continuous repetition of key messages to reassure about the impact of the changes, high availability of training and reference materials, and last but very importantly the high level of visible executive support not only from central administration but also from the direct management hierarchy, being middle management group and the executive groups of that institutional unit.

- New and transitioning employees in positions responsible for completing EPAF's will need to have access to Banner and Employee Self Service training in order to be successful in that job.
- Advisory groups in select departments have already been identified for testing and a pilot rollout.
- There are established contacts and listservs for each of the 4-campus HR/payroll departments.
- Timesheet packets are most often opened by the departmental people who would be responsible for filling out PTFs and EPAFs. Flyers which can be inserted with the timesheet packets may be used for introductory and general information.
- Giving concise, accurate and pertinent information at the right time is essential to this group.

4. BPR Specific Marketing Opportunities.

We have several people from other areas of the University who are enthusiastic about the implementation of the various IT enhancements. We need to use these people as advocates for BPR implementation.

We need to hold advisory/focus group meetings with the specific objective of positively marketing the benefits of the enhancements to the other employees. Options that are available to us:

- Advisory group meetings not only to gather input but also to demonstrate the benefits
- Engender enthusiasm through a multi layered communication channel. This is a similar principle to pyramid marketing structure.
- Communication opportunities and techniques specific to the EPAF implementation team include the following:
 - A brief message on a flyer inserted into the timesheet packets.

- HR 4-campus team meetings
- Putting update blurbs on MyInfo (ESS)
- Employee Self Service training sessions already exist, advanced sessions may be required for EPAF originators and approvers
- Testing the new EPAF functions will take place with advisory departments prior to rollout to all the departments on all campuses

5 Target audience ranked by importance	Preferred/appropriate channel of communication
<p>How are you going to communicate, what is the most appropriate channel – a newsletter, a large conference, networking lunch, workshop, an evening reception, email alerts, press release, website, promotional literature, regional seminars?</p> <p>You will probably have several channels that are appropriate</p>	
CEOs, CFOs, President's Executive Council	Formal presentations Newsletters, website
Oversight Committee	Regular meetings Exec Presentations Newsletters, website Ad Hoc reports
Division Executives and Middle Management <ul style="list-style-type: none"> • Office of Sponsored Programs • Administration and Finance • Great Falls Campus • Billings Campus • Northern Campus • Facilities • Auxiliaries • Affiliated Agencies 	Exec Presentations, Newsletters, Website, Ad Hoc reports, HR systems 4 campus conference calls (HR directors are encouraged to participate), Auxiliary Services HR representatives regularly attend BZ Payroll Production and Payroll Tech meetings.
University Community – Admin and Accountants	Training sessions geared toward using EPAF on MYINFO, Camtasia tutorials Newsletters inserts in the timesheet packets Website Portal Super Users group training and info sessions Business Procedures Workshops OSP Roundtable Departmental Staff Meetings E-mail
Central HR/ payroll staff, OSP, Internal Audit	Internal training and documentation of procedures.

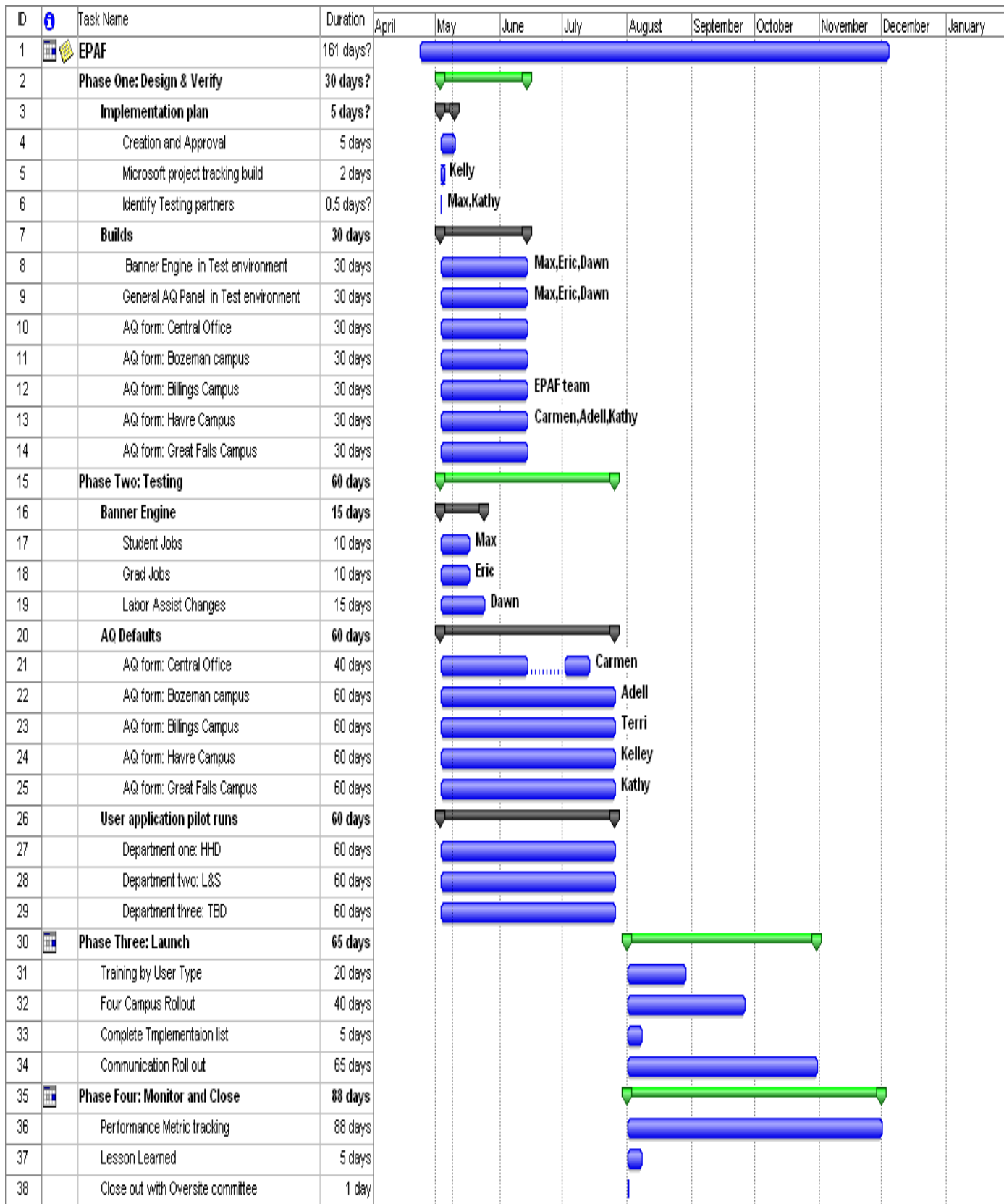
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6. Communication Timeframes		
Key Audience	Regular Communications	Responsibility
Executive Management: CEO's	Board of Regent meetings	Rolf Groseth/Jo Oudshoorn
Executive Management: Campus executive	BZN: PEC Monthly updates Other campuses??	Jo Oudshoorn
Middle management	BZN: 3 weekly Administration and Finance Student Administration Assistance Dean's Council BL, GF, HV	Jo Oudshoorn Campus representatives on Oversight Committee
Campus Community	BZN: OSP Round Table May 24,2007 BL, GF, Nthn –	Carmen Fike and EPAF team Campus representatives on Oversight Committee
	Initiative Specific communications: EPAF – Efficient, Practical, Accurate, Fun <ul style="list-style-type: none"> ▪ A brief message on a flyer inserted into the timesheet packets. May, Aug, Jan ▪ HR 4-campus team meetings: weekly conference calls ▪ Putting update blurbs on MyInfo (ESS) ▪ Employee Self Service training sessions already exist, advanced sessions may be required for EPAF originators and approvers ▪ 2 weekly updates via the BPR implementation lead meeting and the EPAF team meeting. ▪ Achievement of a milestone or critical event.(EPAF Implementation Lead- Max All EPAF team members If need arises (not anticipated) EPAF team and BZ Personnel Techs-May, June, July timesheet packets Max Web Tailor ESS testing w/ HR liaisons – EPAF team Implementation team lead update and EPAF team update - Max

	<p>e.g. successful build of an EPAF and functionality in the test database 5-7-08, when ready to build into production, when pilot departments are beginning to implement, when EPAF trainings are designed and scheduled</p> <ul style="list-style-type: none"> ▪ End of any stage of implementation. --- After sufficient testing in the test database, After EPAF build in the production is complete, After pilot department training (mid June) ▪ Advisory groups - ongoing ▪ ESS training- ongoing ▪ EPAF training- ongoing internally. Pilot project Mid June- Aug, Prior to full roll out Feb. and then ongoing . 	<p>Implementation team update; Oversight</p> <p>Max</p> <p>Max EPAF Team</p> <p>Select users, 4 campus payroll leads</p> <p>Connie Hupka New Employee Orientation leaders</p> <p>EPAF team BZ Payroll Techs GF, HV, BL Payroll Leads</p> <p>EPAF Team, Campus payroll leads</p>
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<p>7. Achieving your objectives – working project plan</p>			
<p>Full details of all the relevant communications activities developed into a working project plan with deadlines and responsibilities. Remember to include key milestones and review dates, think carefully about cost, include staff and consultants, also how will you evaluate success? Below are some suggested groupings, the table is led by activity but you may well want to have one for each year of activity.</p>			
<p>Communications plans are living documents and will need regular reviewing and updating.</p>			
Activity	Budget /resources	Deadline/timeframe	Success criteria
Internal communication			
Meeting agenda	Teams, Project Team (all team	Weekly meetings	Issued and on website

	leads)		
Meeting minutes	Teams, Project Team	Weekly	Issued and on website
Newsletters	Project Team	Monthly	Issued and on website
Website	Tracy & Shana	As required	Issued and on website
Executive presentations	Jo	As per plan & at CEO meetings	Presented and on website
Progress Reports	Jo, EPAF Team	At weekly implementation meetings	Written and on website
Ad Hoc reports	Jo, Project Team, and EPAF Team. HR/P&P Staff Pilot departments	As requested and after each milestone May 9 th -- reported TST build and functionality After HR/PP internal testing /training.-May 16 th Last OSP roundtable May 23, 2007 Regularly during Phase 2 testing (advisory group) June 15 th – July 31 st After Approval Categories built July 31 st . During pilot July2007 – Jan 2008. After full rollout, Feb. 2008 (after major hardware upgrade in ITC)	Written and on website, Email by request. Ad hoc advisory briefing/training as required. Brief demo



8. Evaluating Success

How will you know if you have succeeded and met your objectives? How are you going to evaluate your success, what performance indicators and evaluating measures will you use.

- Provision of communications and updates as per schedule.
- Reduction of adjustment checks due to late paperwork
- Reduction of time between origination of paperwork and entry of paperwork in Banner.
- Positive, constructive customer feed back.