Maine's Public Universities

UNIVERSITY OF MAINE SYSTEM

Enterprise Resource Planning Project

Communications Plan for Financials Implementation 2005

May 2004

UPDATED: September 28, 2004

University of Maine System Project Enterprise connecting people & information

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University of Maine System
Enterprise Resource Planning Project
Communications Plan for Financials Implementation
May 2004/Updated September 27, 2004

Introduction

In April of 2005, the University of Maine System Enterprise Resource Planning Project (Project Enterprise) will implement PeopleSoft's General Ledger, Accounts Payable, Purchasing, and Position Management systems. Also at that time, a pilot group will implement the Expenses module. These new initiatives will have an impact upon many individuals within the University System, from chief financial officers to department heads to administrative assistants. Most notably, this implementation will alter not only how data are entered, but also how university business is conducted. Familiar reports will undergo change, as will, in some cases, traditional responsibilities.

Purpose

The purpose of this communications plan is to:

- **introduce** Project Enterprise team members
- **identify** audiences with whom the Project must communicate in order to facilitate the Financials Implementation
- **define** the appropriate methods of communication
- **outline** the information to be communicated
- **highlight** the link between communications and training
- **develop** a communications and training timeline

Project Teams

Project Enterprise is headed by John Sponaugle. Project teams include Project staff members, university personnel, and specialists in the functional processes of the modules to be implemented.

<u>Project Training and Communications Team members are</u>:

Cindy Mitchell	Training and Communications Coordinator
Eloise Kleban	Academic Coordinator/ERP Trainer
Robin Shaler	ERP Trainer
James Wilkens	ERP Trainer
Eddie Meisner	Communications Coordinator
Sally Dobres	Human Resources Liaison

<u>Functional Team Specialists for the Financials implementation include</u>:

Bill Elsemore	General Ledger and Expenses
Jamie Campbell	General Ledger and Expenses
Janet Warnert	General Ledger and Expenses
Jean Meakin	Purchasing and Accounts Payable

Jeff Joy	Purchasing and Accounts Payable
Ann Gravelle	Position Management
Miriam White	Position Management

Other critical Project personnel include members of the Technical Team, led by Mark Boyd.

The Training and Communications Team is assisted in its efforts by the Training and Communications Task Force, a group with System-wide representation that is charged to advise, provide feedback, and advocate for Project staff during PeopleSoft implementation and training. The Training and Communications Task Force was convened at the request of the ERP Steering Committee and the Project Sponsors.

In addition to the project teams, campus contacts for communications and training are essential to ensure that information flows smoothly between the project teams and the university employees whose responsibilities will be influenced by the new administrative systems.

The campus communications/training coordinators for the Financials implementation are:

University of Maine:	David Scheidt
University of Maine at Augusta:	Carol O'Donnell
University of Maine at Farmington:	Sharon Nadeau
University of Maine at Fort Kent:	Tamara Mitchell
University of Maine at Machias:	Tom Potter
University of Maine at Presque Isle:	Charles Bonin and Eldon Levesque
University of Southern Maine:	Cindy Quinn
System-wide Services:	Kitty Armstrong
University College Outreach:	Judy Jewell and Ruth Turcotte

Identifying the Audiences

A critical step in the communications process is identifying those individuals who "need to know." This is a two-step process. Initially, the functional positions that will be affected by this change are identified. Next, the individuals assigned to those roles are identified. As audiences are determined in more detail, this communications plan will be modified as necessary to include them.

Audience Analysis

The functional positions identified in the matrix below will be directly affected by the Financials implementation and will require varying levels of communication (and training), dependent upon the relevant category of change.

Table 1. Audience Groups by Categories of Change

Who?	Changes in: Business Practices	Financial Reports	PeopleSoft Financials Systems Transactions	Technical
Board of Trustees	✓			
Presidents	✓			
ERP Sponsors	✓			
ERP Steering Committee	✓			
Chief Financial Officers	✓	✓		
Faculty		✓		
Academic Department Heads	✓	✓	✓	
Administrative Department Heads	✓	✓	✓	
Departmental Administrative Staff	✓	✓	✓	
Core Users Financials	✓	✓	✓	✓
Core Users Human Resources/Student Employment	✓	✓		✓
Help Desk Personnel				✓

Methods of Communication

The following vehicles will be used to communicate with the identified categories of users:

- Presentations
- Website
- Email
- Newsletters
- Focus groups
- Information sessions
- Training

Presentations

Members of the project team or the local campus representative for communications/training will present materials to meetings of groups when information is ready for dissemination, or when a user group requests a presentation. Such meetings and/or groups might include: chief financial officer meetings, university finance departmental meetings, faculty senate meetings, university ERP meetings, union meetings, or functional user group meetings.

Website

The Project Enterprise website is the repository for project timeline and status information, frequently asked questions, the Financials training plan, and the Financials communications plan. Employee newsletters are also posted on the website, as well as reference guides and tutorials. The website will be updated with important communications and training materials as they become available.

Email

As the users who will be affected by this project are identified, appropriate listservs will be established for ongoing communication and discussion. In addition, email surveys of selected faculty members will be done to help determine appropriate training methods for that group of users.

Newsletters

The Project Enterprise Employee Update newsletter, which was distributed during the Human Resources implementation, will continue during the Financials implementation. The newsletter will provide information relevant to the current Financials effort, as well as information pertaining to the ongoing Human Resources and upcoming Student Administration implementations.

Focus Groups

Focus groups will be conducted at key stages with employees who will use the Financials modules or whose work practices will be affected by the Financials implementation. These groups--consisting of small numbers of employees with similar roles, such as administrative personnel or faculty--will provide Project staff with feedback about changes in procedures that will result from the Financials implementation.

Information Sessions

The campus communication/training coordinators will organize informal information sessions to be held at the universities so campus communities can learn about the project's status, hear about needed business changes, and ask questions.

Training

In January 2005, training on the Financials modules will begin for the identified user groups. The training will be delivered just prior to "go-live" so that trainees will have little lag time between training and application of their new skills. A "playground" database will be established in which trainees may practice as they prepare for "go-live."

Other
Targeted communications to specific campus groups (administrators, end-users, et al.) will be employed, in appropriate formats, as issues and needs arise.

Information to be Communicated

Various audience groups have differing information requirements. Chief financial officers need high-level information about business process changes and the resulting impact on the institution. Department heads need information about business process changes that affect them as well as information about how reports will be created and delivered. The primary end-users—those employees entering financials transactions such as creating journal entries or requisitions for purchases—require communication about how their work will change and, ultimately, training in how to accomplish their tasks.

The following two matrices define the types of communications required and the methods by which those communications will be delivered to the audiences.

Table 2. Type of Information by Communication Method

	Presentations	Website	Email	Newsletters	Focus Groups	Informational Sessions	Training
High Level Changes	✓	✓	✓	✓	✓	✓	✓
Business Practice Change	✓	✓	✓	✓	✓	✓	✓
Reporting Changes	✓	✓		✓	✓	✓	✓
Transaction Changes	✓				✓		✓
Technical Changes		✓	✓				✓
Training Schedule		✓		✓	✓	✓	✓

Table 3. Audience by Communication Method

	Presentations	Website	Email	Newsletter	Focus Groups	Informational Sessions	Training
Board of Trustees	✓						
Presidents	✓						
ERP Sponsors	✓		✓				
ERP Steering Committee	✓		✓				
Chief Financial Officers	✓	✓		✓			
Faculty	✓	✓	✓	✓			
Academic Department Heads		✓		✓		✓	
Administrative Department Heads		✓		✓		✓	
Departmental Administrative Staff		✓		✓	✓	✓	
Core Users Financials		✓	✓	✓		✓	
Core Users Human Resources/Student Employment		✓	✓	✓		✓	
Help Desk Personnel		✓	✓	✓	✓		

Communications and Training Link

Successful communication of information about the changes in tasks and responsibilities that end-users will undergo during the Financials implementation will result in users who are prepared for and receptive to training efforts. In order to achieve this goal, frequent interaction between the project team and the campus coordinators for training and communication is necessary. Communication with these campus contacts will be frequent, and will be accomplished through various modes. Early in the project as the business processes are being developed, most communication will be by email, as frequently as needed. In the summer as training is being developed and communication events are planned, compressed video and in-person meetings will be scheduled. These meetings will occur as needed as the train-the-trainer sessions near, and as both final end-user training and "go-live" become imminent. The meetings will be critical for sharing last-minute information about changes in business processes and PeopleSoft data entry functions.

Communications and Training Timeline

At the outset of this project, specific points in time when communication is required can be anticipated. As the project evolves, additional communications events will be added when communication and/or training needs are identified.

The following grid illustrates the basic communications and training timeline as it is currently planned.

Table 4. Communications and Training Timeline

	Mar '04	Apr '04	May '04	Jun '04	Jul '04	Aug '04	Sep '04	Oct '04	Nov '04	Dec '04	Jan '05	Feb '05
Communications Plan Completed; revised												
Audiences Identified												
New Roles/Responsibilities communicated												
Business Practice Changes Identified												
Financials functionality demonstrated												
Changes to Chart of Accounts communicated												
Newsletters released												
Website available												
Faculty email surveys												
Presentations												
Focus Groups meet												
Informational Sessions												
Emails												
Training												

Shading indicates targeted months for selected communication/training efforts.

Conclusion

Implementation of the new PeopleSoft Financials modules will involve a great many individuals, with a great variety of job responsibilities, within the University of Maine System. This Communications Plan has attempted to define and clarify the types of messages and the methods of communicating them that will be most effective in providing to employees the information necessary to encourage a smooth transition to the use of a new and powerful administrative tool.

Addendum
to Communications Plan for Financials Implementation 2005
September 28, 2004

See page 6: Email: Listservs have been established for the Campus Training and Communications Coordinators (FINTACC) and for the participants in the focus group sessions held at all seven universities, University College-Bangor, and System-Wide Services (FINFOCUS).

See page 6: Focus Groups: Focus groups were held at all seven universities, University College-Bangor, and System-Wide Services. Participants included front-line classified employees (about 15 per group) whose job responsibilities include work with the financial system. The sessions were very successful and have resulted in ongoing communication with this group of knowledgeable employees.