

WolfieONE

Change Leader Network Kickoff

Nov 2024

Office of Change Management



Agenda





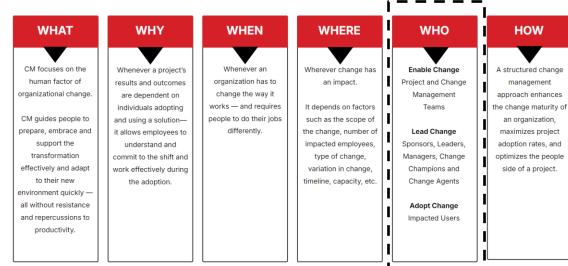


Change Leader Network (CLN)



What is a Change Leader Network?

- An integral part of the Change Management Methodology at Stony Brook
- A peer-led group of influencers and impacted users across Stony Brook who will assist in building awareness, active listening and gathering concerns, promoting buy-in, and providing support to stakeholders impacted by the project
- An indispensable asset to drive and support change adoption



Change Management at Stony Brook

Why is a Change Leader Network needed?





Promote **understanding** to assist employees in understanding changes, dealing with uncertainty and ambiguity as the program progresses through implementation



Advocate positive change through face-to-face and informal communications that are required to **change behaviors** and attitudes



Build **accountability** and **ownership** by empowering Change Champions to gather feedback from stakeholders, answer questions and resolve concerns without having to wait or rely only on "formal, official" communications



Build a **community of early adopters** who value the opportunity to try out new technology first and get a chance to demonstrate their leadership skills



Accelerate the adoption of the change by quickly disseminating timely and accurate information and build trust through communication and feedback



Building the Champion Network







Why are we here?

Highly motivated and able to motivate others

Drive...

someone who has a sense of urgency to make change happen

Share...

someone who shares information, lessons learned and provides feedback

Strong informal network of peers

Facilitate...

passionate about facilitating and driving change throughout the process



Change Champions

People whose deliberate actions drive organizational, social, and behavorial change



Link...

someone who links people, program, activities, etc.



Translate...

someone who can relate the Messages so that everybody understands



Communicate...

a proactive communicator and a messenger (two ways) of SOAR initiatives

Ability to informally influence people



Change Champion Network Structure



The following represents the various "tiers" in the network:





Power Users



SBU's Power Users collaborate with the project team to ensure the solution meets the business needs. What do Power Users do?



Learn and articulate the shifts from current to future state processes to Change Champions and direct reports. Play a role in process improvement.



Business user at the Unit level who understands the business context, end to end processes, transactions, procedures and systems within their area.



Participate in the "Build" phase Sprints, testing (UAT), validate system functionality; Train-the-Trainer, and Onboarding. Build user proficiency in their process area (post go-live).

High-Level Responsibilities include:

Promote WolfieONE

Promotes best practices, continuous improvement and works as a positive change agent for the business.

Inform SBU's WolfieONE Project Team

Gathers feedback from Champions and direct reports; informs the Project Leadership where adjustments and training enhancements should be made.

Support (post go-live)

Works with department and program leadership to design, test, train and provide ongoing employee support to the WolfieONE Change Champions. Front-line support for non-technical issues.

Change Champions



SBU'S Change Champions enable the success of our WolfieONE implementation by driving adoption.

What do Change Champions do?



Serve as **project advocates** that play a role in shaping the future of Stony Brook Disseminate & Amplify the OCM materials/message.



Enable a cross-functional network to execute change campaigns and enable delivery of standardized messaging.



Participate in Champion meetings & assist with rapid change campaigns.

Be a conduit for change, tailored to groups via a two-way communication channel.

High-Level Responsibilities include:

Promote Stony Brook's WolfieONE Transformation

Learn about **new functionality and processes**. Share the benefits using OCM materials to increase awareness and adoption.

Inform SBU's WolfieONE Team

Provide feedback to the project team as the **eyes and ears** within SBU to prioritize the needs of the business.

Position the message

Help develop and craft messaging and **mitigation plans** to proactively drive an authentic and relevant change experience for operating units.

Evaluate operational readiness

Participate in **change readiness** activities to provide a pulse on the organization, supporting he opportunity to pivot the engagement program and involve leaders.



Benefits of Being a Change Champion

WolfieONE











Play a key role in shaping the future of Stony Brook as an institution Be among the first to see, learn and use new technology and processes Be seen as the "go-to" person with key information to serve peers Demonstrate leadership skills and opportunity to upskill Be valued by the organization / senior leadership





Networking Activity



Networking Activity



In Breakouts (groups of 4), WolfieONE Champions are given 10 minutes to network. Prompts:

- Share name and department name
- How long they have been a Seawolf
- Favorite yearly event or activity on campus
- Your "Superpower" the secret sauce, the thing YOU consider your strength!
- What (if anything, that you learned so far) are you the most excited about in the move towards Oracle Cloud?





About WolfieONE



WolfieONE Elevator Pitch

WolfieONE

Business Transformation Initiative:

WolfieONE is more than just a software update. It is a strategic transformation initiative that will design and implement an Enterprise Resource Planning (ERP) ecosystem at SBU, supported by Oracle, to better support our financial, budget, HR and business operations.

The new, cloud-based software will replace some of our systems but will also seamlessly integrate with many existing systems.

Our WHY:

Beyond the business reasons that became apparent during and post-pandemic, there are human capital drivers for this initiative, such as **employee morale and institutional reputation**.

The industry is moving from on-premise to the cloud in a number of ways. To remain competitive, modernizing archaic systems and processes is essential.

The employee experience and how you spend your time interacting with data is one of our top reasons for this transformation.

Actionable "North Star"



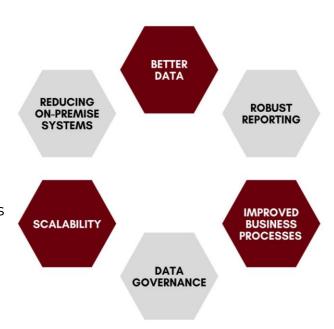
Vision Statement

Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.

Expected Benefits

WolfieONE

- > Gradual reduction of on-premise (i.e., campus-based) systems, paper-based processes and labor-intensive manual processes
- Better integration across various ERP modules which supports smoother transaction processes and more powerful blended analytics/reports
- ➤ Integrated information systems that provide more up-to-date and accurate financial and operational data that increases transparency, and enhances planning and forecasting efforts
- ➤ Robust reporting capabilities enabling better decision-making as well as managing from a holistic vantage point rather than a siloed view
- ➤ Increased automation and self-service processes (and fewer human errors as a result)
- Simpler, more intuitive, modern user experiences and enhanced cloud-based data security





Guiding Principles

WolfieONE

- Collaborate cross-functionally
- Be transparent in decision making
- Communicate fully, seeking input and feedback

- Put Stony Brook interests above anything else
- Make strategic decisions that support the mission of our university and hospitals
- Leverage every opportunity to elevate Stony Brook's reputation



governing bodies

in place

- Self-service
- Improve policies and practices

• Adhere to the governance structure

• Refer to the guiding principles to

guide organizational decision making

• Respect the authority of the

during day-to-day activities

- Build for the long-term
- Data-empowered decision making

- De-siloed and transparent data
- Adopt and practice data governance
- Develop trust in system data

Streamline workflows

OPERATIONS & PROCESSES

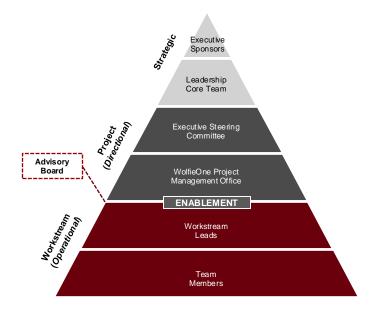
- Simplify operations
- Redesign processes based on higher education best practices



Project Governance



Stony Brook and Deloitte team members have dedicated escalation channels to the project leadership stakeholders – driving efficiency and consistency in the decision-making process leads to better communication and fewer bottlenecks.





Our Executive Sponsors

WolfieONE

Simeon Ananou CIO and VP of the Division of Information Technology



Carl Lejuez
Provost and Executive
Vice President



Justin Fincher
Chief Deputy to the President and SVP for
Government & Community Relations



Jed ShiversSenior Vice President for Finance & Administration



Carol GomesChief Executive Officer, Chief
Operating Officer, SB Hospital



William Wertheim
Interim Executive Vice President for
Health Sciences and Stony Brook Medicine



Dr. Gerald KellyChief Information
Officer, SB Hospital



Our Steering Committee

Braden Hosch

VP for Educational and Institutional Effectiveness



Cassie Amadio

AVP for Accounting and University Controller



Colette Brown

Chief HR Officer Stony Brook Medicine



Heather Montague

Senior AVP for Budget and Financial Planning



Hina Kausar

Director, Office of Change Management

WolfieONE



Jim Gonzales

AVP Enterprise Applications & Integrations (DoIT)



John Hennessey

Chief Applications Officer, Stony Brook Medicine



Lyle Gomes

Vice President for Finance



Tracey McEachern

AVP HR Operations, Services, and Payroll



Dennis Gallagher

CTO, Medical Information
System





Entity Scope ERP & HCM



The purpose of this Entity Scope view is to articulate how user populations within the below entities will align with respect to Day 1 Future-state WolfieONE application use and/or data integration. The Legal Entities that will be configured in Oracle is separate from this scope view.

Functional Area	Entity										
	SB University	SB Foundation	FSA	Research Foundation ³	SB Medicine						
					SBUH ¹	LISVH ¹	СРМР	ELI ²	SBSH ²	Other Affiliates ²	
ERP (Finance)	Yes	Yes	No	Integrate	Integrate	Integrate	No	No	No	No	
HCM (HR)	Yes	No	No	Yes	Yes	Yes	No	No	No	No	

Definition					
Yes	Populations within this entity will log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.				
No	Populations within this entity will not log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.				
Integrate	Data from this entity will integrate with WolfieONE Oracle Cloud.				

Notes

- 1. SBUH/LISVH: EPM at summary level they have their own budget system for daily operations. ERP integrate for URAS reporting purposes they have their own GL. Will load audited financial statement data to FCCS for consolidated financial reporting.
- 2. ELI/SBSH/Other SBM Affiliates: These entities will load audited financial statement data to FCCS for consolidated financial reporting.
- 3. **RF**: HCM consideration RF employees include select CPMP and SBF staff.



WolfieONE Workstreams



In our next session, we will deep dive into the 3 main workstreams that lead to change impacts that have the broader reach (ERP, HCM, EPM).

Workstreams relevant to educational campuswide efforts:

Enterprise Resource Management: all things Accounting & Reconciliation!

Human Capital Management: HR processes

Enterprise Performance Management: Budgeting, planning and forecasting.

Technology: Integrations & Reporting

Change Management

* Although other workstreams are performing crucial work, those process areas are expected to directly impact a much smaller group of end users.

What's Changing?



CURRENT STATE SYSTEMS/PROCESS	FUTURE STATE SYSTEMS/PROCESS
Inconsistency across processes and practices	Standardize processes and practices (80/20)
Oracle/ Peoplesoft software for Financial	Enterprise Resource Planning (ERP), Enterprise Performance Management (EPM)
Oracle/ Peoplesoft software for Human Resources	Oracle Human Capital Management (HCM) Cloud
Campus Budget Module (CBM) for Budget and Planning	Enterprise Performance Management (EPM)
SOLAR (time and attendance; employee information, NOT the student side)	Oracle Human Capital Management (HCM) for reporting time and attendance
Recruiting and onboarding in Taleo	Oracle Recruiting Cloud (HCM)



What's not changing?

WolfieONE

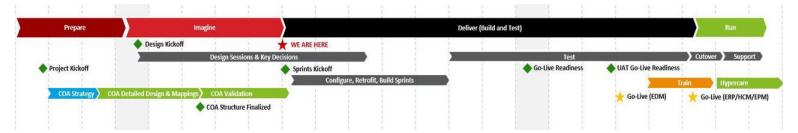
CURRENT STATE	FUTURE STATE INTEGRATIONS
Jaggaer (WolfMART) SUNY system- wide SaaS solution for Procurement	Possible retrofit for some fields with the new COA, integration with Oracle, enduser will continue to use Jaggaer in the same way
Concur for travel & expense reimbursement	End-user will continue to use Concur in the same way as in the current state.
Hospital - Finance (Lawson)	Hospital finance professionals will continue to use their current COA in Lawson
Student Information Systems	Campus Solutions will integrate with WolfieONE. Students' employee records will also exist separately from their Academic record in WolfieONE.
Hospital usage of Kronos	Will integrate with SUNY system for payroll purposes

Project Phases



ERP & HCM are in Build/configure, while going through an iterative process to make decisions about certain system components still in Design, before moving those processes and user stories into "Sprinting" mode. Enterprise Performance Management is in Design.

Once we configure the system, we test, make adjustments, test again, then train the trainers, who will in turn train the end users.





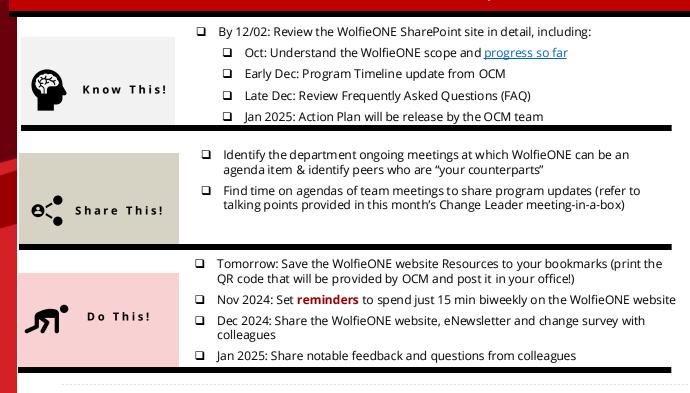


Next Steps



Change Champion Action Plan

Know, Share, Do | Oct- Dec 2024









Copy/paste THE
WolfieONE logo
(Appendix) and add to
your e-mail signature,
along with:

"Proud Change Champion, ask me about WolfieONE!"

OCM Contacts



Hina Kausar Director, Office of Change Management <u>Hina.Kausar@stonybr</u> ook.edu



Nichole Gladky Training Manager, Office of Change Management Nichole.gladv@stonyb rook.edu



Ker Famer OCM, Deloitte <u>karilev.famer@stonvbr</u> Change Management ook.edu OR kfamer@deloitte.com



Kevin Wong Intern, Office of kevin.t.wong@stonybr ook.edu



Appendix



Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.















WolfieONE

WolfieONE







Getting Started with Change Management



The Change Curve

It is natural for anyone to prefer the status quo, not because they are against change, but because humans naturally gravitate towards maintaining things as they are.

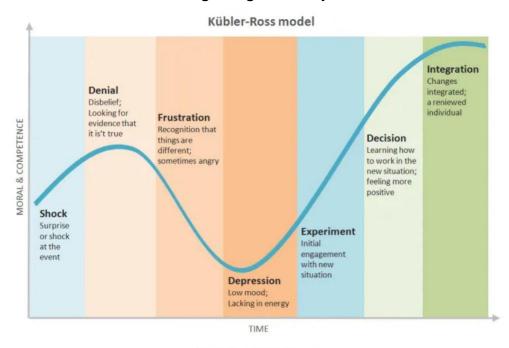
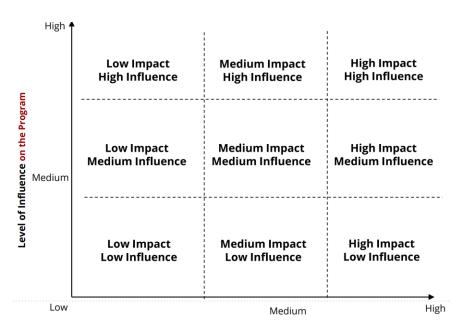


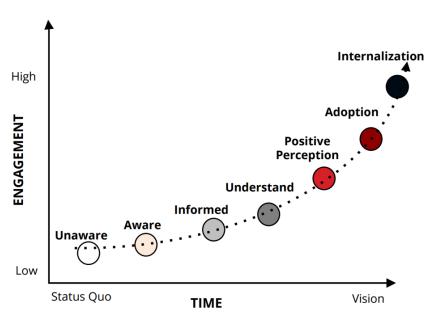


Image from Cleverism.com

Change Management: Foundational elements







Stakeholder's Level of Impact by the Program

The Engagement Curve



Change Network | Highly Impacted groups

HR professionals

Finance administrators

Asst. to the Chair Capital Planning Student Affairs

Enterprise Risk Management

IFR Managers

DolT HRIS

Hospital HR

SBF

Bursar's

HSC - Health Science Center

School of Medicine

Communications

University Advancement

OVPR/RF

Accounting (incl. procurement)

Institutional Effectiveness

President's office

School of Dental Medicine

Government and Community Relations

Athletics

School of Nursing Labor relations Procurement

OEA (Office of Equity and Access) Academic(Dean, Chair, Faculty)

A full list of Change Champions will be on the WolfieONE website!

Change Management

Change Awareness



Engagement and Education



Training



Reinforcement

- Be vocal about supporting WolfieONE goals
- Let your team know that there is a gradual engagement curve between Awareness and Adoption

- Listen and document constituents' questions and concerns
- Change
 Champions
 network
 launch;
 Champions
 engage their
 colleagues

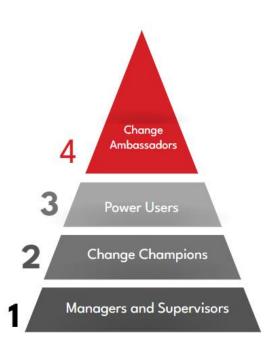
By March 2025, help engage stakeholders in your organization about the training timeline and scope. The messaging at that point will be centered around training.

Upon Go-Live:
Promote
training
enrollment
(encourage
your leadership
teams to carry
this out) and
collect feedback
(encourage
your teams to
respond to our
readiness
surveys



Change Champion Network

The following represents the various "nodes" in our network:





NOW: Be vocal about supporting WolfieONE goals and changes.

Listen and document constituents' questions and concerns (pass it to OCM) in your regular meetings and informal chats.

Carry our message to your peers. OCM will provide materials (eNewsletters, toolkit).



By January next year, help engage stakeholders in your organization about change impacts, the training timeline and process/systems scope. The messaging at that point will be centered around training.

Align with OCM team on the cadence of peer network meetings.



Upon Go-Live:
Promote training
enrollment and
collect feedback;
encourage your
peers to respond to
our readiness
surveys!



That's you, the center of this influence network!



Topics to cover during Kick-off

Kick-Off

- ➤ What is a CLN?
- Why you?
- Benefits
- Structure of CLN
- Roles and responsibilities
- About WO
- Scope, entities, workstreams
- Next Steps assign some readings/recordings
- Resources

Orientation/training

- Change Management
- Modules; ERP, EPM, EDM, HCM,
- Processes
- > COA
- Known Change Impacts

Toolkit

- What are they expected to do?
- Cascade information (newsletter); intro toWO
- How? Comm channels in dept., meetings, events
- Where to find resources? Website, calendar





Oracle Cloud Overview





Workstreams relevant to educational campuswide efforts:

Enterprise Resource Management: all things Accounting & Reconciliation! Messaging must be sensitive to "what's not changing", which is student receivables.

Human Capital Management: HR processes (messaging must be sensitive to "what's not changing", such as Interfolio, Handshake, and Healthstream)

Enterprise Performance Management: Budgeting, planning and forecasting.

Technology: Integrations & Reporting

Change Management & Project Management Office

Enterprise Data Management Security and Controls Analytics



ERP Example- General Ledger breakdown

1. Maintain Chart of Accounts

Maintain Global Segments and Values

Maintain Cross-Validation Rules



3: Perform Account Reconciliation

Perform Reporting

Perform Account Reconciliation

4: Manage Period Close

Execute Month-End Close

Execute Year-End Close



ERP Example of Receivables breakdown

1. Manage Customers

Manage Customer Records

2: Manage Receivables

Process Invoice - Import Process Invoice - Manual

Adjust Invoices Process Credit Memo

Deep Dive – SBU/SBF Specific Business Process

3: Manage Cash Receipts

Record Cash/Check Receipts

MISC Receipts

Process Refund

Reverse. Reapply, Write-Off. On Account

Deep Dive - SBU/SBF Specific Business Process

4: Close Receivables Close

Customer Statements Invoice Template

Execute Month-End Close

Collections (TBD)

Deep Dive – SBU/SBF Specific Business Process



ERP Example of Fixed Assets breakdown

1. Maintain Asset Flex Fields

Maintain Asset Category

Maintain Locations

Maintain Asset Key Fields



3: Perform Asset Reconciliation

Perform Reporting

4: Manage Period Close

Calculate Depreciation

Close Period

ERP Cash Management breakdown

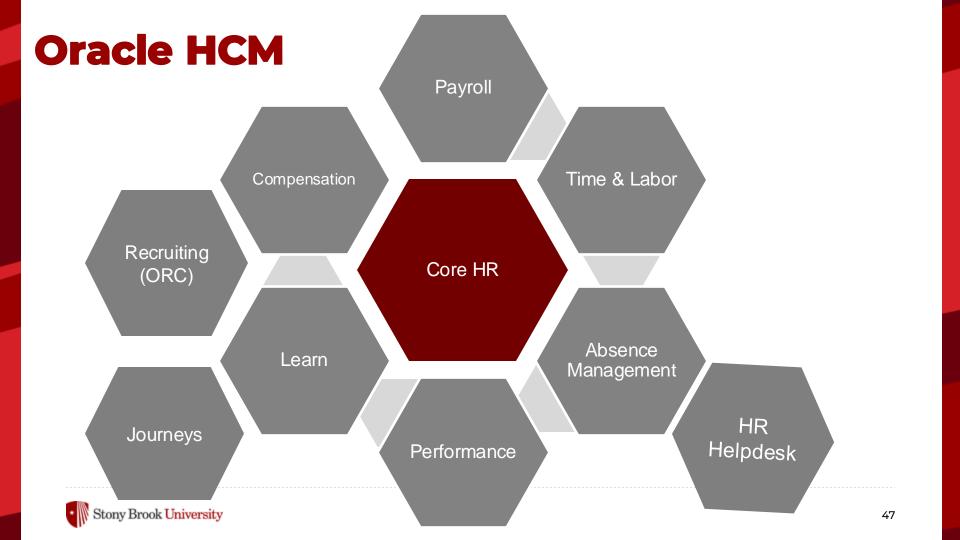
1. Manage Bank Master Data

2: Manage Bank Account Transfer

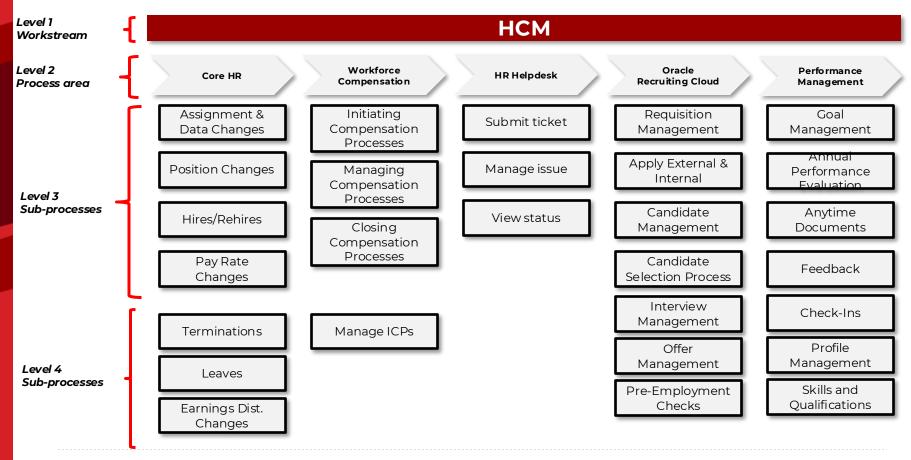
3: Receive Bank Statements

4: Reconcile Bank Statement



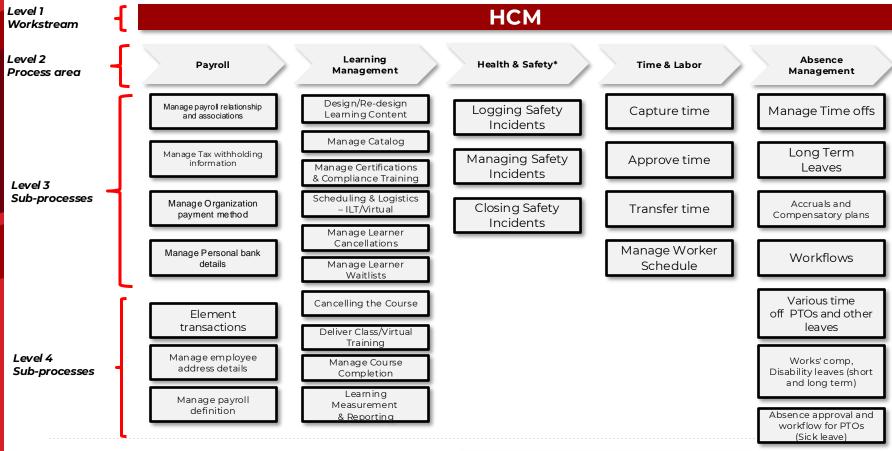


HCM Processes in Scope





Process Scope





Change Network | Contact Information

Name, Stony Brook Group	Email and Phone Number	Preferred Contact Method



Placeholder for Change Management

The OCM team has developed a framework and tailored approach to prepare, equip, and support the campus community to successfully adopt new processes, procedures and system changes as a result of the WolfieONE transformation.

We work gradually and programmatically to **drive adoption** through data gathered from understanding the current state and the future state, stakeholders' perceived readiness, and end user needs and preferences. OCM works to identify risks, develop mitigation paths, and developing a training curriculum. Post go-live, OCM will enable functional and tech leaders during hypercare, and provide additional support to the end user by measuring adoption and developing additional trainings in key areas, as needed.



Message bank (key themes)

The time is NOW: Build foundation knowledge, so as to prepare for formal training. Change is gradual and must be broken into small bites.

Peak-end rule: people will remember the most meaningful/intense part of their experience and their last portion

Nudges are visual and timely reminders to encourage the right behaviors for



Toolkit Introduction

The Change Leader Toolkit is meant to serve as a helpful resource for our Seawolves' network of Power Users & Change Champions.



This Toolkit is	This Toolkit is not
 a living document that is updated regularly View the "as of" dates of change impacts for a timestamp of the last update 	Meant to holistically inform Change Champions. Educational meetings (starting in Dec) and two- way communication are also critical to this network.
a tool for Change Champions to:	perfect or holistic, and we love feedback!
Stay informed	Please reach out to Hina Kausar/OCM
Access key resources	Mailbox [ocm@stonybrook.edu] with any content you'd like to see added or any gaps you
Understand their roles and responsibilities	notice need filled that could be helpful



Change Champion Toolkit

Goals

The goal of this Toolkit is to serve as an updated repository of information meant to keep Change Champions and Power Users in the WolfieONE know.

The Change Leader Toolkit will include key resources, points of contact, and tools to help the Change Leader network succeed in becoming a cohesive, effective team.

WHAT'S INCLUDED



Roles and Responsibilities



Program overview, scope, timeline and updates specifically curated for Change Champions



Tools like email templates and opt-in email signatures and Zoom backgrounds



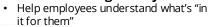
Access to other helpful resources



Change Champion Journey

Change Champions will be asked to act as representatives of their departments or units and as partners of the WolfieONE program, and align their WolfieONE expertise with modules/processes, rather than departments.

1. Tell the Change Story



 Be realistic and recognize that change is challenging, "status quo bias" is expected

2. Provide Honest Feedback

 Leverage your subject matter expertise and familiarity with your Stony Brook group or department to help us shape communications, engagement, and training

3. Build Trust

- Engage others with whom you have influence, build support (informal networks matter!)
- Become a trusted communicator by taking on the responsibility of keeping your department or group "in the know"



4. Champion Change

- · Continue vocal support as go-live approaches
- Use existing forums and channels to build awareness around what to expect at go-live
- Reinforce the focus on the overall vision

5. Monitor Resistance & Empower End Users

- Serve as an informal "go-to" point of contact for two-way communications
- Escalate obstacles that are preventing your group or department from being ready for change as you empower them to be confident that they are prepared for go-live







6. Support Adoption

 Partner with SBU leaders to drive adoption and continue to connect end users to channels for learning and support⁵⁵



Change Champion Journey

Change Champions will be asked to act as representatives of their units or peer group in support of this Oracle Cloud implementation. The following represents **examples of specific actions** that Change Champions can take as part of their Journey:

	Stage of Journey	Example Action / Activity
	Tell the Change Story	 Work with OCM to construct a shared "Stony Brook Change Story" at your next leadership meeting, in your upcoming departmental newsletter, or via existing comms channels for your group.
	Provide Honest Feedback	Provide input and feedback on program communications
_	Build Trust	Update your email signature to say "Ask me about WolfieONE"
	Champion Change	 When the time comes, put up go-live posters in your office / workspace Use WolfieONE Zoom backgrounds
	Monitor Resistance & Empower End Users	 Schedule a regular check-in with your Change Ambassador or OCM team point of contact to talk about any current resistance within your department or grou to brainstorm solutions
Sto	Support Adoption	 Set an automatic email reply to reinforce the use of Oracle for key processes within your department or user group (e.g. "Oracle WolfieONE is now live! Need help registering for courses this month? Reach out to [insert support channel details]")



Appendix



Change Champion Expectations

Change Champions will actively champion WolfieONE, foster smooth adoption through communication and promotion, and provide invaluable feedback perspective to the program.



Learn & Engage

Attend monthly onehour Change Leader Network meetings

Attend program and/or workstream-related events and activities (webinars, roadshows, townhalls, etc.)



Foster Two-Way Communication

Influence colleagues to adopt change:

- Collect concerns, questions, & feedback from peers & community, share with program team
- Spread awareness & key information from program to peers & community
- Share ideas for strategies to best engage schools and units



Participate

May be selected to participate in key implementation activities or recommend individuals to participate:

- User acceptance testing (UAT)
- Train-the-trainer
- End-user training

Time Commitment:

- 3-5 hours total in 2024
- 2-3 hours per month in 2025
- Oct 2024 Dec 2025

The role of Change Champions does **NOT** include:

- Decision-making
- Providing input on functional design



Meeting Cadence

2024: only two more educational meetings after this one, minimal time commitment

Begin your journey with a recap of the Town Hall: WolfieONE_Town_Hall_April_2024.pdf (stonybrook.edu)

2025: At the Change Champions' discretion, how often to meet with peers.

Feedback loop through the feedback form and Change Readiness Survey:

• The OCM Feedback form should be used regularly to inform OCM of any updates. OCM team will bring up the topics from the feedback form in the next meeting:

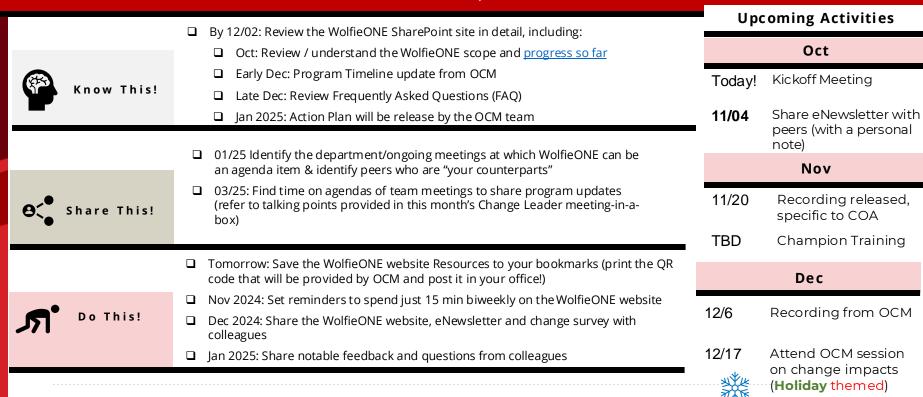
Feedback | Change Management (stonybrook.edu)

• The Change Readiness Survey is your key tool (get your peers to fill it out)



Change Champion Action Plan

Know, Share, Do | Oct- Dec 2024





Why is a Change Leader Network needed?

Promote **understanding** to assist employees in understanding changes, dealing with uncertainty and ambiguity as the program progresses through implementation

Accelerate the adoption of the change by quickly disseminating timely and accurate information and build trust through communication and feedback



Advocate positive change through face-toface and informal communications that are required to **change behaviors** and attitudes

Build a **community of early adopters** who value the opportunity to try out new technology first and get a chance to demonstrate their leadership skills

Build **accountability** and **ownership** by empowering Change Champions to gather feedback from stakeholders, answer questions and resolve concerns without having to wait or rely only on "formal, official" communications



graveyard

The resources listed on this slide are meant to ensure that Change Champions have access to resources to invite inquiries about WolfieONE in easy, low-effort ways, like via an **email signature add-on or Zoom background**

All the below modes of engagement are opt-in!



Copy/paste this logo and add to your e-mail signature, along with "**Proud Change Champion, ask me about WolfieONE!**"

Email Templates,
Newsletters, and
Vetted Responses

✓ Zoom Backgrounds

- ☐ Vetted Responses for high-level Oracle WolfieONE questions can be found on the WolfieONE FAQs page; Business processes will be covered in upcoming educational sessions
- ☐ If folks have questions that you don't know the answer to, **reach out to OCM!**
- ☐ The WolfieONE Change Champion [PLACEHOLDER FOR GOOGLE GROUP] brings our cohort together for easy collaboration
- ☐ Zoom backgrounds (see Appendix) are an easy way to welcome questions surrounding WolfieONE at Stony Brook and we have multiple options!

