This project’s success depends on people embracing and using Compass 9.2 effectively via Transition Support.

Every ERP Implementation lives and dies by change management and training. It doesn’t matter if you have a flawless system if the users cannot utilize it. If users are not given the proper technical training and explained how to conduct critical tasks in their new environment, you lose necessary ‘buy-in,’ morale dips and employee productivity slows significantly after go-live.

- University of South Carolina
Project Risks with Lack of Transition Support

- Costly last minute fire fighting due to lack of planning
- Project objectives not met
- Increased audit risks
- Poor data quality
- “Us vs them” mentality
- User resistance, lack of engagement, employee turnover
- Inability to measure success
- Redesign, rework, retraining, rescheduling
- Incorrect procedures, processes, bad information

Highlights those risks that can be mitigated with good future state business process design
Process Maps are a Critical Input for the Transition Support Plan

**Stakeholder Engagement**

**Upgrade Phases:**
- Plan & Fit/Gap
- ReApp/Config & Test Moves
- Upgrade
- Evaluate & Support

**Prepare**
- Review materials (listening tours)
- Define core change team
- Stakeholder analysis
- Organizational impact analysis

**Plan**
- Change vision and strategy
- Business Case (RACI, KPIs)
- Communication strategy
- Process Mapping
- Training/Support analysis and strategy

**Promote**
- Change Enablement project plan
- Tactical communication plan & roadmap
- Communication press kits
- Tactical training & logistics plan
- Course content development
- Reinforcement & transition plan
- Training dry run
- Train the trainer certification
- End user training delivery
- Analyze satisfaction surveys
- Analyze evaluation metrics
- Execute adoption reinforcement tactics

**Proceed**
- Project post-mortem
The Emory Community Believes the Alignment of Business Processes & Transition Support are Critical

Please rate to what extent you agree or disagree with the following statements:

Answered: 610   Skipped: 97

Less than 21% of users feel internal business processes operate effectively and efficiently

Policies are not utilized in a consistent manner across the Emory Enterprise

Training and business processes should be intertwined with how the system functions

IT IS IMPORTANT TO HAVE CLEARLY DEFINED BUSINESS PROCESSES THAT MAP TO THE COMPASS SYSTEM
Once a process is mapped, it is easier to spot redundancies, omissions, insufficient work support, ineffective communication & workflow, and other obstacles that impede the performance of work.

A narrative makes this type of analysis difficult.

Maps offer a systemic view of work, so we see each employee’s work in the context of the complete workflow and interactions with others rather than only studying the work of one person at a time.

The swim lane method, unlike a narrative, makes it easy to see all the tasks performed by one role/group for the end to end process.
Future State Process Maps Benefits (cont.)

- The detailed step-by-step descriptions included in process maps provide a clear and concise **blueprint for training content**.
- As a quick overview of a process, the maps provide a **handy job aid** for employees.

- Many people in organizations find it easier to understand performance problems and their consequences when they see a **visual depiction**.
- Process maps are often **more compelling** to executives and managers, for example, than a narrative report or an oral presentation.
Future State Process Maps Benefits (cont.)

- The process maps will **show entry and exit points to larger, outside processes** that are above and beyond this project.
- The maps can be leveraged for other efforts to improve processes across Emory.

- The maps will help shed a light on CFO processes to **ensure stakeholders understand the work that we do**.
- If others better understand our processes then we can work with them to improve inputs and outputs from the processes.
- Addresses a key concern from prior project.
Program Guiding Principles are Rooted in Transition Support and Accomplished Partly by Process Maps

- Promote shared ownership, collaboration, and communication
- Fully evaluate functionality and impacts
- Represent all enterprises
- Be transparent
- Understand the business need and consequences in every decision
- Consider impact to constituents and related budgets
- Encourage improved functionality, safeguarding valued existing solutions
How will the Future State Process Maps be Created?
Process Maps will Complete Much of the Detailed Design Work and Provide Key Inputs for Transition Support

We will design the Future State Processes by building off the business cases and leveraging project team expertise

...the FS Process Maps will support
- Detailed Design
- Transition Support
- Future Upgrades

FS Process Maps will feature a rich set of data
- Description
  - Key policy
  - Audit control point
  - Configuration (new or existing only)
  - Customization
  - Bolt on
  - Interface (that serves as inputs to the process)
  - Report (that are outputs of the process)
WHO: The Operating Review and Module Teams Provide Key Input to the future state designs

The Operating Review Team and the Module Teams will act as subject matter experts and participate in highly facilitated design sessions conducted by the Business Process Resources (Elire).

A transition network team is needed to engage the impacted users across the Emory population. These individuals will play an important change leadership role to prepare the business leading up to and beyond go-live.
## WHO: Transition Support Roles & Responsibilities

<table>
<thead>
<tr>
<th>Operating Review Team</th>
<th>Members</th>
<th>Roles</th>
<th>Commitment</th>
</tr>
</thead>
</table>
|                       | • Business & Process Policy Owners  
                        • Audit  
                        • Steering Committee  
                        • Belva White | • Act as the process and policy change owners  
                        • Provide input and help design new business processes to help streamline operations  
                        • Take FS business processes out to Emory Community | • 60 to 90 minutes future state design worksessions per DDN  
                        • Emory Buy-in phase |

<table>
<thead>
<tr>
<th>Module Teams</th>
<th>Members</th>
<th>Roles</th>
<th>Commitment</th>
</tr>
</thead>
</table>
|              | • Emory and Consultant Module Subject Matter Experts | • Provide input and help design business process to help streamline operations  
                        • Provide 9.2 PSFT expertise | • 60 to 90 minutes future state design worksessions per DDN |

<table>
<thead>
<tr>
<th>Business Process Resources (Elire)</th>
<th>Members</th>
<th>Roles</th>
<th>Commitment</th>
</tr>
</thead>
</table>
|                                   | • Richard Merrill  
                        • Patrick Gahagan | • Facilitate sessions  
                        • Create maps in Visio | • Ongoing |
Continuous Feedback Loops are Critical

- Call Center Phone Interview
- Quarterly Satisfaction Survey
- Deployment Readiness Survey
- Process Design and Validation
  - This is where the future state design is created
- Emory Community Buy-in
- Early Warning Surveys
- Listening Tours & Focus Groups
- Advisory Council
WHAT: Scope for Developing Future State Maps

Not all DDNs require a process map

DDN: Design Develop Number

Business Case
High and medium impact with significant level of change

DDN1
Process Map → Detailed Design → Test Scripts → Training

DDN2
Detailed Design → Test Scripts → Training
HOW: High Level Process to Create Process Maps

**Planning**

- FS Process Design Worksession

**Future State Design and Validation**

- The Business Process facilitator will prompt the **Module Team and the Operating Review Team** to define the process inputs and tasks, the sequence of tasks, the resulting outputs, and any other elements of importance
- Each session will last about 60 to 90 minutes per DDN

**Produce Visio Draft**

- The **Business Process Facilitator** will develop the draft of the Process Map in Visio

**Review and Validate Draft Map**

- The facilitator will review and validate the Visio map with the **Module Team and the Operating Review Team**

**Emory Community Buy-in**

- **Emory User Validation to Finalize Map**

The **Operating Review Team** is responsible for representing the Emory Community’s requirements in these sessions

- **Operating Review Team** will work with the Emory Community to get buy-in

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**HOW: Future State Process Design Maps will feature a Rich Set of Data**

- Each FS process map will have an Excel file that details the process steps and its associated data, including metrics.
- Again, this information completes much of Detailed Design.

### 1.0 INVOICE PROCESSING

<table>
<thead>
<tr>
<th>Process Step #</th>
<th>Process Step</th>
<th>Icon</th>
<th>Reference number</th>
<th>Icon Description</th>
<th>Documentation Source</th>
<th>Metric</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Send Invoice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Code invoice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3</td>
<td>Enter invoice into PSFT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.4</td>
<td>Approve invoice</td>
<td>Key policy</td>
<td>1.4.1</td>
<td>An approval matrix details levels of approval authority</td>
<td>Provide numbering or file name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.5</td>
<td>Pay invoice</td>
<td>Control point</td>
<td>1.5.1</td>
<td>Invoice above certain amount needs Controller signoff</td>
<td>Provide numbering or file name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.6</td>
<td>Review aged invoices</td>
<td>Control point</td>
<td>1.5.2</td>
<td>Invoice older than 90 days need special handling</td>
<td>Provide numbering or file name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.6</td>
<td>Review aged invoices</td>
<td>Report</td>
<td>1.6.1</td>
<td>Report is distributed and reviewed with business</td>
<td>Provide numbering or file name</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
We will Collaborate to Create the Future State Designs

- Operating Review Team and Module Teams will supply Emory expertise
- Consultants will provide 9.2 PSFT and leading practice expertise

- Compare current state to estimated future state to ensure we improved process
- Track to the Survey, Listening Tours, and Bus. Case Benefits for Benefits Realization

- Business Process Resources will strengthen the Future State Design by helping to identify and remove process inefficiencies
- Idea sharing among University Partners for Common Leading Practices
Next Steps: We Will/Have Been Conducting Planning Meetings

- We are having planning sessions with key members of the **Operating Team and Module Teams**

- Goals include:
  - Confirm which DDNs require a Future State Process Map
  - Work with Project Leadership to refine Design Principles
  - Develop a draft of the RACI (which roles SMEs play in the design sessions)

- During the Planning phase the Business Process resources will review Fit Gap Deliverables, Business Cases, & Current State Maps, if any

At least 1 FS Design Worksession is already scheduled