Workday@UNR Focus Groups Feedback

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I. Summary

The Workday Communications and Training team hosted a series of Workday Focus Groups. Representatives were invited to attend based on their employee type, department, and potential role in Workday. Sessions were offered by audience including Managers, Administrative Assistants, or Faculty and Classified staff.

Summary of Recommendations

The following are our recommendations based on the focus group feedback. Each recommendation is outlined in greater detail in the Common Themes and Concerns section of this report.

- Share Workday functionality and business processes at a conceptual level
- Develop comprehensive communications and training plans for all impacted audiences
- Share information about upcoming policy and practice changes and provide guidelines

II. Design

The sessions were small and informal. Fifty-three employees participated in 7 sessions. There was an average of 8 employees in each one hour session.

While the training team shared some project information and facilitated the discussion, the bulk of the sessions were driven by the participants. The goal of the focus groups was to assess campus awareness and impressions of the upcoming Workday implementation and inform our communication and training strategy going forward. We hoped to identify:

- Groups that are not adequately aware of the Workday implementation
- Populations that may need additional outreach or encouragement to engage in the project
- Topics that may be problematic for the implementation
- Impressions of what is good/bad about the application
- Champions of the project we can invite to be Change Ambassadors

III. Project Awareness

General Awareness

Generally, awareness of the Workday@UNR project is high. Almost all participants were aware that Workday was coming and that it focused on improving HR and Financial processes. They also focused on Workday replacing paper-based processes. Surprisingly, no one mentioned standardization across NSHE campuses.
Disparities in Awareness

Overall, there seems to be two levels of awareness on campus. Participants in the Managers and Administrative Assistant sessions had the strongest awareness of the project. Several managers had been involved in mapping accounts or business processes. Administrative Assistants received information regarding the implementation during monthly Network meetings. These groups are eager for specifics on business processes and policy/practice changes.

Participants of the Employee sessions were less aware and had a more basic understanding of the project. There were a few participants who had not heard of Workday or did not know what it was. More foundational information should be shared across the campus through a variety of communication methods.

High Level Awareness

While participants were generally conscious of the project, that awareness was at a very high level. The groups were hungry for more specifics and information on how everything fits together. One participant stated, “We know it is different – we’ve heard that. Generalities are losing their impact”.

Informal Communications

It seems the university has a strong informal communications network and information spreads quickly. By our last session, everyone in the room knew the project was likely to be delayed even though it had not been officially announced. This could be beneficial going forward, but it also means we will have to be proactive in sharing information. Rumors spread quickly and we need to make sure we are ahead of them to ease anxieties and decrease frustration.

IV. Common Themes and Concerns

A number of common themes and concerns were seen across sessions and audience populations. These items should be addressed strategically by the project.

Recommendation: Share Workday functionality and business processes at a conceptual level

Changes to Business Processes (BP’s)

For months, employees have heard the HR and finance process will be streamlined and more efficient. They understand that this will mean a significant change to the way they do business. Employees with departmental HR or finance roles, as well as administrative assistants and managers, are beginning to get nervous because they know the change is coming but they do not know what it looks like.

While Workday does not recommend training until 2 or 3 months before Go Live, a greater Change Management effort is needed in this area.

Recommendation

The campus Workday project team can address these fears by distributing more information about changing policies and practices. There are certain processes that we can share at a conceptual level without getting into the step by step process in Workday. We also should acknowledge that some BPs are still under development and that configurations are still being done.
There are also processes that will change significantly at Go Live. If there are policy changes departments can make now, it may ease the transition. For example, in Workday, all employees will need to be terminated in the system when they separate. In order to prepare records for conversion, departments are being asked to do this going forward. This was shared with Administrative Assistants during Network. For changes like this, a formal communication and post on the Workday website with information on the why and how will serve as part of change management across campus. This will help guarantee all partners understand the new policy and are clear on how to move forward.

Representation at the department level

Employees, particularly managers and administrative assistants, are concerned that there is not enough representation at the department level and that the project team will not understand their unique business processes. Several individuals stated that their department is “different” and that they can’t do things the way everyone else does.

Recommendation

The easiest ways to assuage these kinds of fears is through transparency and additional information. Informational sessions and web information regarding the process that was followed for developing the BPs. The project’s guiding principle of a greater focus on standardization across the NSHE campuses should be communicated repeatedly. The project team should increase communication with departments to better prepare them for what is coming. Major changes should be communicated early to prepare employees.

Recommendation: Develop comprehensive communications and training plans for all impacted audiences

Training Academic Faculty

Although several were invited, no Academic Faculty participated in the focus groups. The project team needs to develop a strategy to engage academic faculty as some will have expanded roles in the system and it is imperative that we develop a strategic plan to reach them.

Recommendation

We should develop a comprehensive plan to address this audience. Some strategies may include: participating in short regularly scheduled meetings/trainings; working with their staff to train them directly; and short targeted materials to assist with new business processes. We will also hold additional focus groups targeted at Academic Faculty in the fall.

Departments with large populations of shift workers or employees without computers

Several departments, particularly Facilities and Police, who were well represented in the sessions, have employees that work non-traditional hours and spend most of their day away from a computer. The communications and training approach for these populations should be targeted and differ from other departments.

Recommendation

The Workday training department has begun meeting with departments with “special populations” including Facilities and Police, to determine the makeup of their employees, the way they will be
interacting with the systems, and the best ways to reach them for change management activities and training. Some strategies will include:

- Attending staff meetings and go onsite for training, possibly during non-traditional hours
- Training people within the departments to help train and support their people
- Visual campaigns and printed training materials

**Recommendation: Share information about upcoming policy and practice changes and provide guidelines**

**Delegation**

The possibility of delegation was brought up in nearly every session with both positive and negative reactions. There was concern that some managers would just delegate everything. There were also concerns around security and who tasks can be delegated to. Many participants also brought up how cumbersome signing authority is now.

**Recommendation**

The concept of delegation and the delegation options in our Workday system should be shared with the campus. It should include an explanation of what can be delegated to whom and how delegated security was configured. Additional information would result in better understanding of system capabilities and alleviate some anxiety.

**Legacy Systems**

Participants had several questions about what legacy systems were being replaced by Workday and what systems would be integrated. They also asked if there were plans to integrate additional systems in the future.

**Recommendation**

Display a comprehensive list on the project site of what systems are being replaced and what systems are being integrated. Delineate any systems that will either be replaced or integrated post Go Live.

**Mobile Component**

Several questions were raised regarding the Workday mobile component. Privacy concerns were stated repeatedly. There was also concern that employees may try to take advantage of the service. These included: requesting mobile reimbursement; requesting overtime for work they do on their phones; and requesting to work outside the office. Additional concerns were expressed around adding a work app to your personal phone and being required to respond when you are away from your desk.

**Recommendation**

A comprehensive, written mobile policy is needed. It should be mentioned in end user training and clearly posted on the Workday website.
V. Communications Strategies

The focus groups confirmed our assumption that communications and training methods will need to vary widely. There are diverse audiences on campus and communications and training will need to be tailored to reach the different groups.

Regarding communications methods, we often heard contradictory feedback depending on the audience. For example, managers strongly encouraged communications from the Deans level. Administrative assistants, however, mentioned that information from the Deans level did not always trickle down to them or the general population.

Participants identified a number of communications methods during the focus groups. As the sessions progressed and we heard from varied audiences, we heard both benefits and challenges for each method.

<table>
<thead>
<tr>
<th>Communication Method</th>
<th>Benefits</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct emails from the project team</td>
<td>• Email is the best way to communicate with me and my people</td>
<td>• We get too many emails</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• No one reads them</td>
</tr>
<tr>
<td>Communications sent via the Deans</td>
<td>• We read everything from the Dean</td>
<td>• Deans don’t always share the information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• It doesn’t trickle down</td>
</tr>
<tr>
<td>Information shared by managers and supervisors</td>
<td>• More weight when information comes from your manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Not all managers share information</td>
</tr>
<tr>
<td>Information shared by the Admin Assistants</td>
<td>• They know everything that is going on in the departments • Trusted, the people coworkers go to for questions already</td>
<td>• They already have enough on their plates</td>
</tr>
<tr>
<td>Information shared by HR and FIN representatives in the departments</td>
<td>• They know what is going on because they do it • Trusted, coworkers go to for questions already • They will know the system better than anyone else in the departments</td>
<td>• It may be overwhelming for them. They have to learn the new system and support their whole department</td>
</tr>
<tr>
<td>Project Website</td>
<td>• Information is all in one place • You know where to go to find it</td>
<td>• Nothing is driving you to go there</td>
</tr>
<tr>
<td>Project List Serve</td>
<td>• You can see the questions other people have • Employee driven rather than driven by the project</td>
<td>• Nothing is driving you to go there</td>
</tr>
<tr>
<td>Newsletters</td>
<td>• Gives visual cues that this is about Workday</td>
<td>• No one reads those things</td>
</tr>
</tbody>
</table>
Communication methods will vary and will be targeted to each audience. Most communications will be disseminated through multiple channels. For example, an announcement about training requirements may be:

- Emailed to the Dean’s level for overall awareness and oversight
- Shared with administrative assistants and fiscal officers in the departments through the Network and PCB meetings
- Emailed directly to the employee with a CC to their manager
- Be posted as a flyer in the break rooms across campus
- Posted on the Workday@UNR website

The Workday@UNR website will also include all communications shared with campuses so employees have one central place to find information.

VI. Training Strategies

Participants also discussed a number of different training methods. While no new methods were suggested, the focus groups helped to refine the training audiences and match them to the appropriate training methods. Suggestions included:

- Instructor-led in computer labs
- Larger forums (Town hall meetings, Lunch and Learns, etc.)
- Train-the-trainer for departmental representatives
- Online Training
- Short 2-3 minute videos demonstrating specific tasks
- Reference materials such as Quick Reference Guides and Job Aids posted online
- Printed binders with step-by-step guide

Recommendation

Training strategies will vary widely depending on the employee’s role in the system as well as their departmental and position information. The training team will continue to do an audience analysis to determine training needs for all constituent groups. Once the audience analysis is complete, the team will map a curriculum that includes training methods informed by these sessions.
VII. Topics to Focus On in the Near Future

There are several topics the training team can focus on in the coming months to help ease anxiety around the project and help create a more seamless transition, even with the delay. This list is built based on feedback from the focus groups as well as from the overall change management strategy. Materials should be created around these topics and shared with appropriate audiences as well as posted to the website.

- Expanded Core Concepts training to be advertised to a wider audience as well as posted to the website
- What is Workday HCM?
- What is Workday Finance?
- Workday Supervisory Org Structure
- Workday Finance Structure
- How track the workflow and progress of a transaction
- Delegation
- What is a Manger in Workday and what can they do
- How Travel rules will change

VIII. Next Steps

Going forward, we hope to build upon the general awareness of the Workday@UNR project and begin to provide more definitive information regarding system functionality.

The first question on everyone’s mind is “When will we begin using Workday”. We will share this information with the entire campus as soon as we know more and will continue to update you on any major project changes.

The Communications, Change Management, and Training Plans will be updated and completed based on feedback from these focus groups and the new time frame.

In the coming weeks, we will focus on:

- Continuing to build out the [http://www.unr.edu/workday](http://www.unr.edu/workday) website and adding additional materials
- Completing a comprehensive Audience Analysis for a full understanding of the campus’ training needs
- Developing a Change Network made of representatives from each department and job class to can help share information throughout the campus