People Centered Change Management

:

CAL's pilot implementation of the new travel system

College of Arts & Letters Travel Implementation Change Management Team

Penny Shanks, Pete Havlatka, Jennifer Nelson, Sherry Stevens, Viki Townsend-Gietzel

Recognizing the Opportunities

- What did we learn from the travel system demos?
    - Travel processes were going to change significantly
    - Many people would be impacted on an individual level
    - The new system didn't equal an "Easy Button"
- What did we learn from the EBS implementation?

Building a Change Management Team

- What are the characteristics of a great "Change Management" team?
  - Team members needed to be:
    - Respected by the travelers
    - Able to relate to the traveler's challenges
    - Empowered to advocate for the travelers
    - Excited about improving travel processes for everyone
  - Team members need to compliment each other
    - Leaders instinctively look for people who are good at executing
    - Ideally teams should be balanced – Executing(5), Strategic Thinkers(7), Influencing(1) and Relationship Building(12) strengths

What is Change Management

- CAL Travel Team embarked on a yearly journey to answer this question
  - Researched other University implementations of Concur
  - Ted Talks on change management
- It's not about the "Concur System"
- It's not about "us"
- It is about leading people through a transition
- Controlling the pace of change

Why did we want to be the pilot

- Set expectations for our travel team and our travelers
  - Collaborators
  - Leaders
  - Influencers
  - Spotlight
  - Travelers became owners of the process
- Piloting helped to control the pace of change

How the Team tackled Change Management for a Smooth Implementation

Benchmarking: Processes, Timing, Roles & Responsibilities, and Quantity
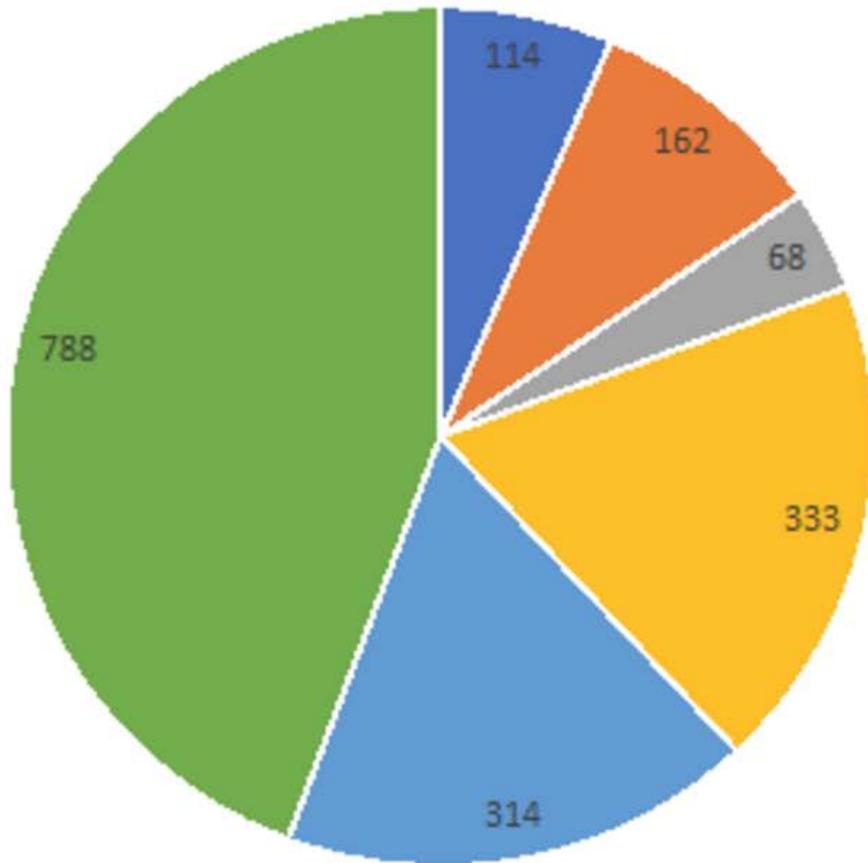
Research from other universities using the system

University Travel Committee and Hands on Experience with the New System

Training on Change Management

College of Arts & Letters - All Travel
Total 1779

Legend:
- IN-STATE-NON-UNIVER EMPLOYEE
- IN-STATE-UNIVER EMPLOYEE
- INTERNATIONAL - NON-UNIVER EMP
- INTERNATIONAL -UNIVER EMP
- OUT OF STATE - NON-UNIVER EMP
- OUT OF STATE - UNIVER EMP

Values: 114, 162, 68, 333, 314, 788

Faculty Survey

Disliked the lack of common policies and procedures between departments.

Disliked how long it takes to get reimbursements.

Disliked having to save paper receipts and try to keep them together to submit.

Disliked not knowing if they had travel funds left on their grant.

Support Staff Survey

Disliked having to get information from the traveler to try and fill out pre-trip forms. Received push back when trying to get traveler to fill the form out and submit.

Afraid that this travel system is just another way to reduce headcount and CT employees will lose their jobs.

Average time to prepare and submit a Travel Expense Report is 1-2 hours, if all the information has been provided and they aren't interrupted, but it may take 1-2 days or even up to a week trying to get all the data from the traveler.

It takes time to collect per diem rates, currency calculations and mileage/ground transportation details. It's rare for a traveler to submit all of their travel details and receipts at the same time.

Fiscal Officers must manually encumber funds for approved travel, ensuring the grants are not overspent. Not all information is always available to build accurate encumbrances.

Learning about Change Management

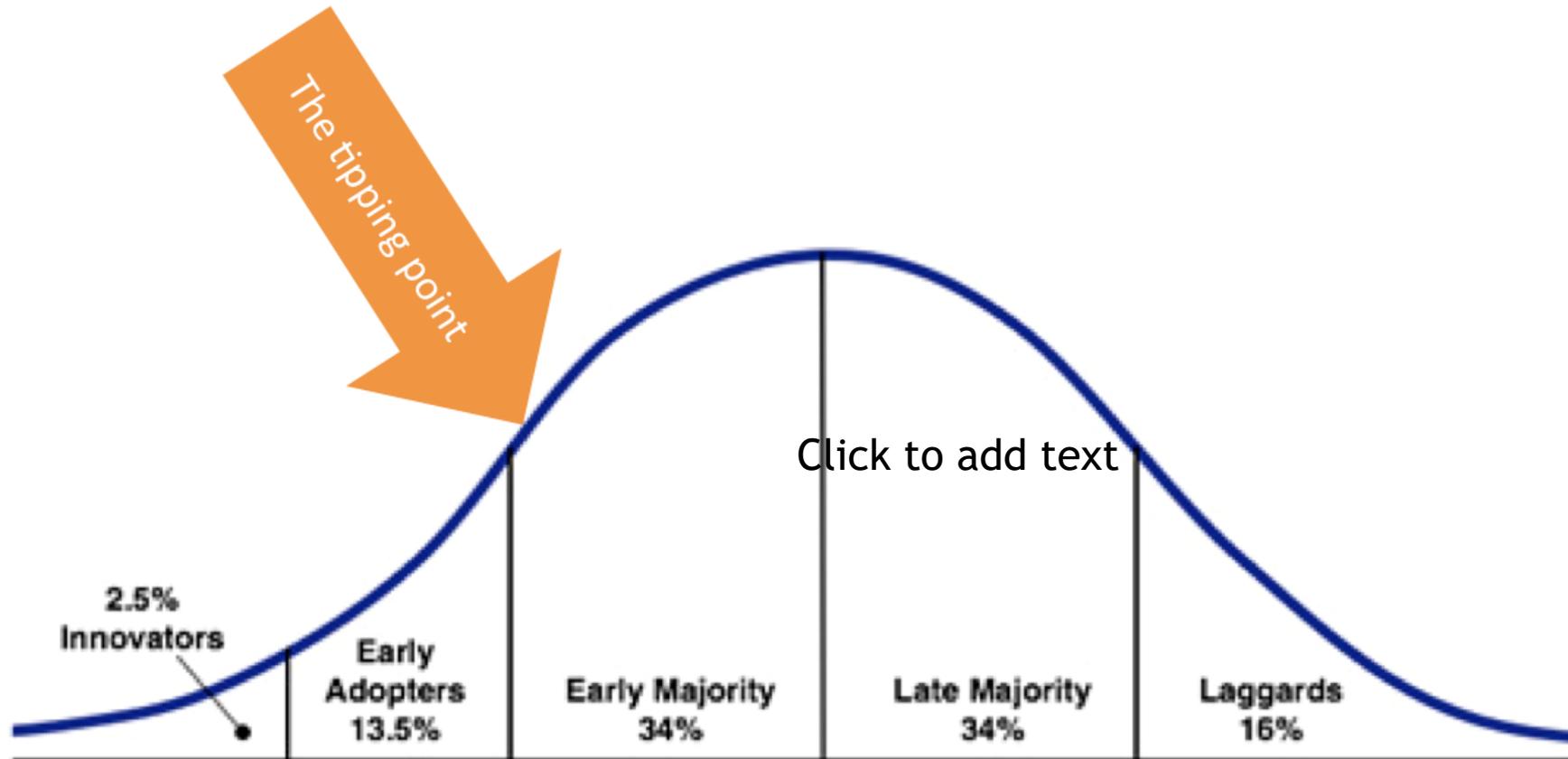How to Start a Movement TEDTALK with Derek Sivers (3 Min) *The importance of followers*

How Leaders Inspire Action TEDTALK with Simon Sinek (18 min) *The power of why*

5 Ways to Lead in an Era of Constant Change TEDTALK with Jim Hemerling (13 min) *People centered*

How Simplification is the Key to Change with Lisa Bodell TEDXNormal (14 min) *Adding and Subtracting*

Change Management vs Change Leadership with John Kotter TED Ed (5 min) *Processes vs an Engine*

The law of diffusion of innovation

The tipping point

Click to add text

2.5%
Innovators

Early
Adopters
13.5%

Early Majority
34%

Late Majority
34%

Laggards
16%

GREEN LIGHT   YELLOW LIGHT   RED LIGHT

Why is personal change/transformation more energizing than institutional change?

Personal change is done with energy and enthusiasm to achieve a better state.

Institutional change usually begins from a need to streamline, save money or realign roles and responsibilities to respond or meet an external threat/goal.

Planning for Change Leadership

Be the engine that drives change.

Why are we changing?

There's power in understanding WHY things are happening.

The team focused on messages that explain the change in personal terms—not accounting rubrics.

Simplify to make room for change

Analyze current state and seek out ways to remove time-waste inefficiencies while implementing change.

How can the College of Arts & Letters do it better?

We had some ideas.

Aligning Change Management with the College of Arts & Letters Way

Putting People First

5 areas we can do this

1. Inspire through purpose

The rationale for implementing the New Travel Solution must begin with the user in mind.

Traveler Safety

Our PURPOSE is to improve global and domestic safety of travelers.

We can do this if we have a centralized data base with emergency contact information for all our travelers and we know where they are and how long they'll be there. We will be able to notify them of emergency situations to avoid, help reroute our MSU travelers to safety and keep people safe.

Pre-trips also ensure that MSU Travelers are covered by MSU Insurance.

The new Travel solution lets travelers fill out their own "Travel Request/Pre-Trip" online or with a mobile app and track it 24/7 so they know it's authorized and they are covered. Our recommendation is to have 100% compliance with Travel/Requests prior to travel.

Transparency

Our PURPOSE is to provide travelers with a more transparent process where they know the status of their approval and reimbursements just by logging into the system using smart phones, tablets or computers.

Our PURPOSE is to provide fiscal officers a more transparent process. Better encumbrance tools ensure accurate and transparent travel accounting before, during and after travel takes place for both the traveler and the fiscal officer.

Reduce Wait Time for Reimbursements

Our PURPOSE is to decrease the waiting period for reimbursements.

Travelers who learn the new system and take control of their own electronic receipt management can quickly enter their own travel expense report without having to off load it to a middle man (support staff). This can decrease the waiting time for reimbursements.

Travelers can check on the status of their reimbursement with their mobile app or online EBS portal.

The new system no longer "disapproves" a Travel expense report requiring it to be entered new. Instead, the report is sent back for amendments. When adjustments are made the report continues on, speeding up the road to final approval.

2. In order to WIN, we need to go ALL IN!

If you need to lose weight and train in order to run a marathon, you won't be successful if you only lose weight.

So what IS "All In" with the new travel system?

- Lead from the top: Dean Chris Long committed to doing his own travel.

- We focused on the early adopters first, then the middle of the road people and then the stubbornly entrenched—this built momentum for the wave of change from the bottom up.

- Our GOAL is 100% compliance and participation—but we are working towards that goal, not focusing on and punishing the outliers.

3. Enable People with the capabilities they need to succeed.

One on one training when actual travel is happening meant allowing release time for the committee to be on call and working with other departments.

Teach only the portions that are needed at that moment.

Early adopter Faculty became ambassadors and mentors for their peers.

Online resource tools.

Weekly Travel Lab

TEAMS Chat group with College Support Staff

4. Instill a Culture of Continuous Learning.

5. Setting a Vision, a clear road map with milestones—and hold people accountable.

A common policy for all of the College of Arts & Letters that each department follows.

A Smooth Roll Out

One on One training—first with support staff and then with faculty.

Learning what you need to know when you need to know it.

Making tools accessible.

Weekly drop in Travel Labs where staff and/or faculty could bring travel they needed to work on and get one on one assistance.

Reinforcing the moments when things went as well or better than anticipated.

Utilizing the moments when things didn't work well as critical learning moments that help the University fix problems before the roll out goes campus wide.

We set expectations that gave permission to point out flaws in the system. Turns out that was very empowering and increased ownership and buy in.

It's all about people.