iTRAK - Change Management
An Agency Adapting to Change

B&O Committee May 2015
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The iTRAK Change Management Strategy framework considers three overarching objectives, supported by nine key activity areas:

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<th>Activity Area</th>
<th>Summary of Actions and Benefits</th>
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<td>1. Lead and Build Buy-In</td>
<td>Change Strategy</td>
<td>• Define vision and drivers for change and develop strategy for change</td>
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<td>• Establish clear need for change and direction for implementing change</td>
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<td>Change Leadership</td>
<td>• Support leadership early and throughout the project in managing change</td>
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<td>• Maintain consistent leadership advocacy and celebrate successes</td>
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<td>Stakeholder Engagement</td>
<td>• Engage stakeholders early and throughout the project</td>
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<td>• Develop a feeling of being invested in the new system and process</td>
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<td></td>
<td>Communications</td>
<td>• Deliver the right messages at the right time through the right channels</td>
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<td>• Build buy-in to change and understanding of new roles and responsibilities</td>
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<td>2. Understand Impact and Build Capability</td>
<td>Business Process</td>
<td>• Assess how iTRAK will affect business processes</td>
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<td>• Enable adaptation of processes and development of process training</td>
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<td></td>
<td>Workforce</td>
<td>• Assess how iTRAK will affect workforce roles and responsibilities</td>
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<td>• Enable adaptation of organization/workforce and development of training</td>
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<td>Training</td>
<td>• Train workforce in new system, business processes, and roles</td>
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<td>• Enable workforce to successfully operate once iTRAK is deployed</td>
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<td>3. Measure and Manage</td>
<td>Performance Management</td>
<td>• Measure change progress and evaluate change management performance</td>
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<td>• Enable continual improvement of change management approaches</td>
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<td>Project Management</td>
<td>• Integrate change management activities into the overarching iTRAK project</td>
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<td>• Enable effective management of change management efforts</td>
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Call To Action!

- Developed activities to address key changes from iTRAK that affect staff roles, workload, and required skillsets, as well as new policies.

- Analyzed organizational impacts from two organizational perspectives:
  - Heavy users of iTRAK for multiple core financial functions – daily processing of financial transactions
  - Infrequent users who perform financial functions such as entering requisitions, incoming IAAs, receipts, etc.

- Implemented Change Management, Communication, and Training Activities:
  - **Pre-Deployment**: Preparation before iTRAK goes live
  - **Post-Deployment**: Activities to focus on initial operational capability, supporting users through the change, and adjust organizationally for long term efficiency.
Change Management, Communication, and Training Activities

- **Pre-Deployment** – *Prepare users for transition, analyze organizational impacts, and anticipate issues*
  - Provided *targeted messages* to users through various communication medias
  - Established *Change Champions* and *Subject Matter Experts*
  - Define new *policies*, guidelines, *processes*, and protocols that enable the change to iTRAK
  - Developed and implemented *iTRAK training* (Over 500 users trained in over 100 class room sessions)
  - Conducted *Town Halls* that demonstrated system capabilities and changes to business processes
  - Identified and *managed risks*
  - Conducted multiple *surveys* and used the results to help shape outreach efforts

- **Post-Deployment** – *Adjusting change management activities to focus on helping users through the change*
  - Provided *more detailed information* to users through specific communication medias
  - Established iTRAK *Super User* groups
  - Implemented *advance training* and transaction focused *coaching sessions*
  - Conducted *Town Halls* on specific system functionality and access to financial data
  - Conducted post-deployment *survey*
  - Established *Policy Council*; assessing policies and guidance to determine impact
Lessons Learned and Challenges

- Used lessons learned from other Federal Agencies and survey responses to help form change management activities throughout the project lifecycle:
  - Strong Executive Sponsorship
  - Robust change management and communications using multiple media tools
  - Standardize processes as much as possible
  - Rigorous system training
  - Users have a voice throughout the project

- Challenges
  - Transitioning from a custom system built to fit the users needs to a Commercial-Off-The-Shelf (COTS) system with standard business processes used to gain efficiencies
  - Mature Financial Reporting Model
  - Revise financial policy to align with new business processes
  - Standardized processes within NSF
What we need from the B&O

- Provide feedback on change activities that were deployed and how to increase effectiveness of the methods being used to hold the users accountable.

- How should the Change Management Team demonstrate that these changes should be part of the NSF culture and are necessary to better support the NSF mission?