ADMINISTRATIVE TRANSFORMATION PROGRAM

UW-Madison Ambassadors Meeting | July 15, 2020

AGENDA

Welcome

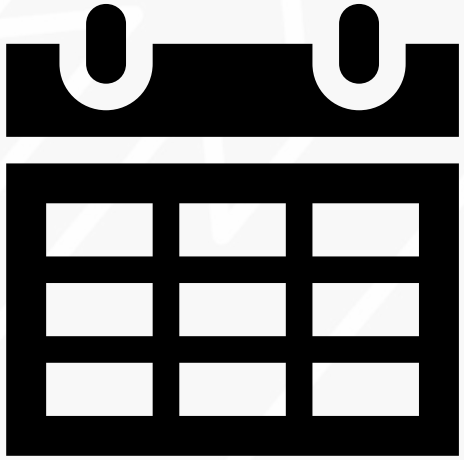
ATP & Related Project Updates

Micro-Learning

Guest Speaker

Questions + Feedback

Upcoming Meetings



Next Madison Ambassador Meeting

August 19, 2020

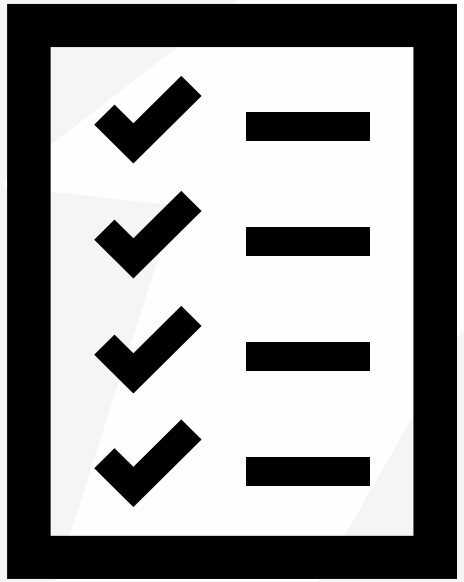
ATP Change Strategy Update

Nicole Anspach, Engagement Lead

ATP Update - Key Takeaways

Program-Level Updates

- **Preparation for October Board of Regents meeting**
  - Change Strategy Team readying a communications plan to engage state legislature
- **Procurement**
  - ERP software selection activities still on hold
  - Software-agnostic systems implementation (SI) vendor reference calls scheduled
    - Selected vendor will be scoped for remainder of Preplanning (through December 2020)
  - Finalized quality assurance (QA) vendor statement of work for P2P and ATP
    - Onboarding this week
- **ERP Future State**
  - Conducted informational call with Ohio State University last week on future-state team composition



ATP Update - Key Takeaways

Workstream Updates

- **Benefits Realization:** Continuing discussions on framework documentation
- **Data and Reporting:** Meeting with functional leads to refine the inventory and data element gathering process
- **Finance:** Developing a financial reporting workbook that highlights accrual accounting impacts for various funding sources
- **HR and Policy:** Working through mapping of hiring policy, and meeting with stakeholders for background and support on policy work
- **IT:** Continuing cleanup and review of ancillary systems inventory, and meeting with stakeholders for input
- **RAMP:** Wrapping up initial scoring for software vendors and preparing for demos

P2P Automation Project Update

- The first Design and Configuration session took place on 7/7
- 8,000+ stakeholders will receive project updates by email on a monthly basis
- Chief Financial Officers (CFOs) and Financial Leaders for each school, college and division have been requested to identify a P2P Transformation Partner to engage with as the project moves through design, configuration, testing, training and launch in April 2021
- A Learning and Development Co-Lead for UW-Madison was added to the team
- 873 staff have taken the Use and Satisfaction survey to date
- The quality assurance (QA) vendor will be onboarded this week. They will be providing project status reports to executive sponsors on a regular basis

Micro-Learning

Theresa Kim

Personal Resiliency

Personal Resiliency

Learning and Talent Development
OFFICE OF HUMAN RESOURCES
UNIVERSITY OF WISCONSIN–MADISON

Working with you to create a healthy, inclusive, engaging work environment

Theresa Kim
Program Manager Fully Prepared to Lead
theresa.kim@wisc.edu

Resiliency Variables

- Self-Awareness
- Self-Regulation
- Optimism
- Mental Agility
- Self-Efficacy
- Connection

Resiliency Variables

- **Self-Awareness**
- Self-Regulation
- Optimism
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Cortisol Wave

Resiliency Variables

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- **Self-Regulation**
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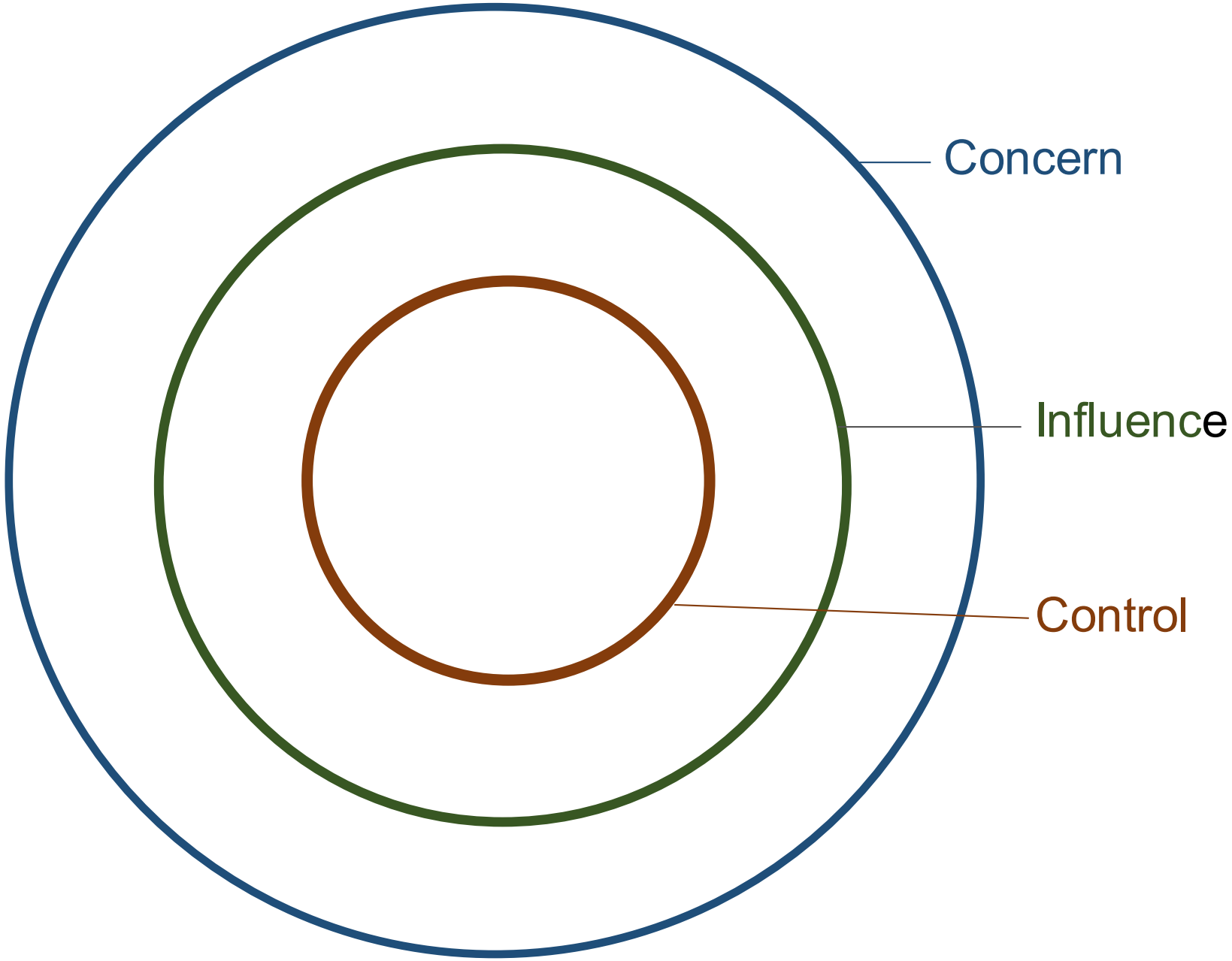
Concern
Influence
Control

Resiliency Variables

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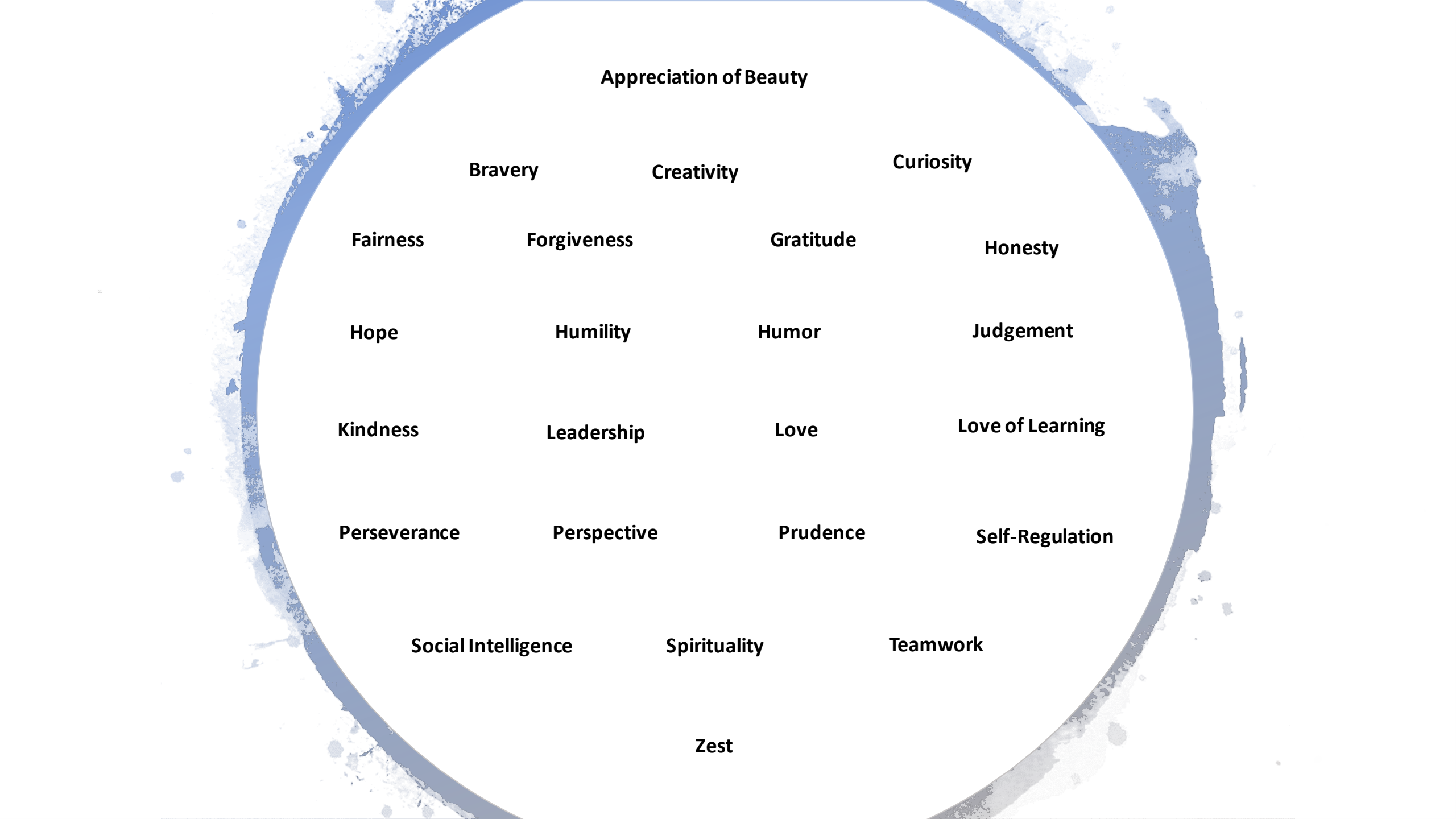
Appreciation of Beauty
Bravery
Creativity
Curiosity
Fairness
Forgiveness
Gratitude
Honesty
Hope
Humility
Humor
Judgement
Kindness
Leadership
Love
Love of Learning
Perseverance
Perspective
Prudence
Self-Regulation
Social Intelligence
Spirituality
Teamwork
Zest

Resiliency Variables

- Self-Awareness
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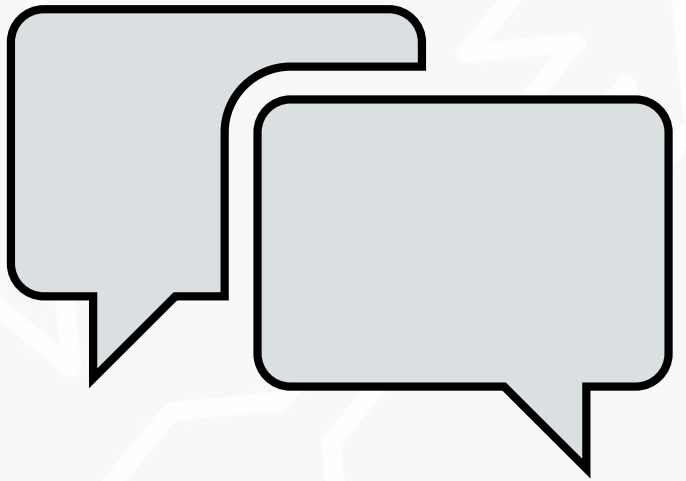
- **Connection**

Guest Speaker



Pat Toner

ATP Change Strategy Communications & Marketing Lead

Communications & Marketing

Communications & Marketing Team

James Leaver
Marketing Operations Manager

Kuhelika Ghosh
Student Comms. Assistant

Pat Toner
Communications & Marketing Lead

Sarah Probst
Creative Director/ Content Manager

Topics

1. **Communications Strategy**
   - Objectives
   - Principles
   - Timeline
   - Messaging
   - Voice/Tone
   - Audiences
   - Leadership
   - Listening
2. **Communications Plan**
3. **Bringing it Together**

Communications Objectives

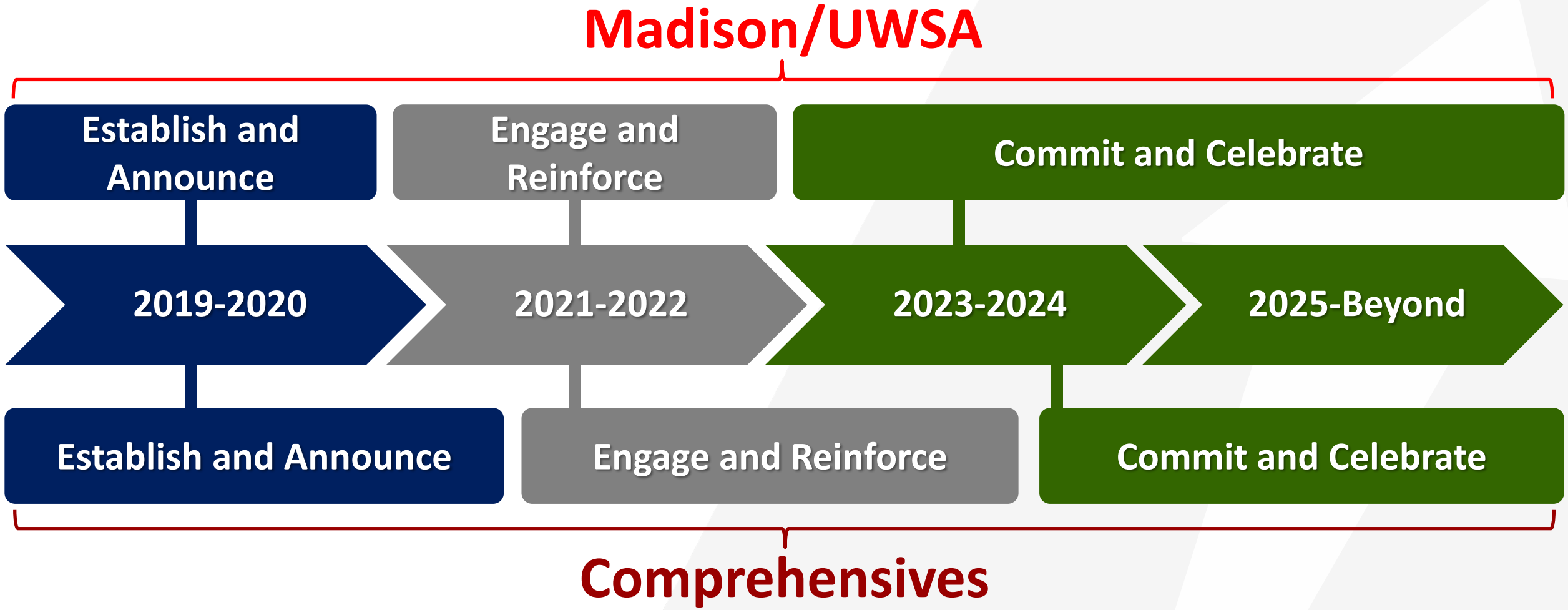
Support the positive adoption and implementation of a new enterprise resources planning system at all University of Wisconsin campuses

- **Establish and create awareness of ATP brand!**
- **Inspire excitement** about future state and the **benefits of our work**
- **Build engagement and trust**
- **Lay groundwork** for culture change
- **Establish expectations** about when we will deliver **meaningful change** and how we communicate updates

Communications Principles

- Think, act and speak UW System-wide
- Meet people where they are at
- Develop, deliver and promote high-touch, two-way communications
- Use a consistent voice to share consumable information
- Leverage existing communications channels
- Prioritize local, in-person or “live” communication exchanges
- Support grass roots level inputs and outputs

Timeline


Madison/UWSA
Establish and Announce
Engage and Reinforce
Commit and Celebrate
2019-2020
2021-2022
2023-2024
2025-Beyond
Establish and Announce
Engage and Reinforce
Commit and Celebrate
Comprehensives

Messaging: *Strategy*

Campaign approach

- Organized action plan aimed at achieving goals
- Recognizable ATP brand and theme

Dynamic and engaging website

- Targeted at users and leaders
- Single source of truth for latest information

In Person/Remote: Ambassador Change Champions; Manager/staff interaction

- Preferred method of receiving information
- Ideal for two-way communications AND conversations
- Provides opportunities for involvement and solution ownership
- Builds trust and engagement

Messaging: *Types*

High **1:1**	**Medium** ***1:Some***	**Low** ***1:Many***
• Conversations • Focused, small group meetings	• Larger group meetings • Presentations	• Emails • Newsletters • Website • Video

Messaging: *Voice and Tone*

Who is ATP?

Voice: *Who we are*

Describes our personality.

Consistent and unchanging.

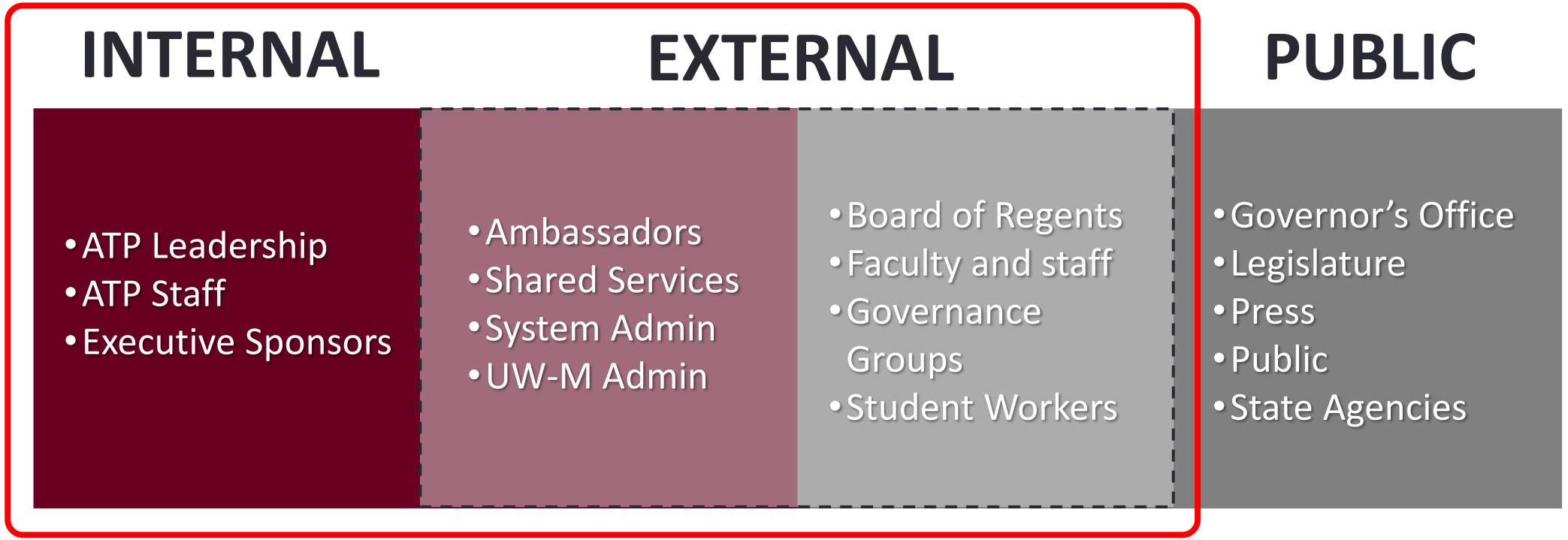
- **Approachable**
- **Future-focused**
- **Evocative**

Tone: *How we speak*

Adjusted based on message.

- **Email/Newsletters:** Optimistic, gratitude
- **Web content:** Persuasive, inspirational
- **News posts:** Straightforward with quotes

Audiences


INTERNAL
EXTERNAL
PUBLIC
•ATP Leadership
•ATP Staff
•Executive Sponsors
•Ambassadors
•Shared Services
•System Admin
•UW-M Admin
•Board of Regents
•Faculty and staff
•Governance Groups
•Student Workers
•Governor's Office
•Legislature
•Press
•Public
•State Agencies

Audience Groups

SENIOR LEVEL LEADERS

- **Board of Regents**
- **Executive Sponsors**
- **Governance Groups**

✓ Need to buy into AND commit to leading the change

✓ *Concerned with impacts to institutional goals and priorities*

MID-LEVEL LEADERS, CHANGE CHAMPIONS

- **Ambassadors**
- **ATP Leaders/Staff**
- **Shared Services**
- **System Admin**
- **UW-M Admin**

✓ Need to buy into the change because they will be involved in implementation

✓ *Concerned with how the change will affect their team's practices, performance, or morale*

END USERS

- **Faculty**
- **Staff**
- **Student Workers**

✓ Buy-in crucial to support smooth and swift change adoption through positive word-of-mouth

✓ *Concerned with how the change will affect them day-to-day*

Communication Channels

Leverage existing communications channels

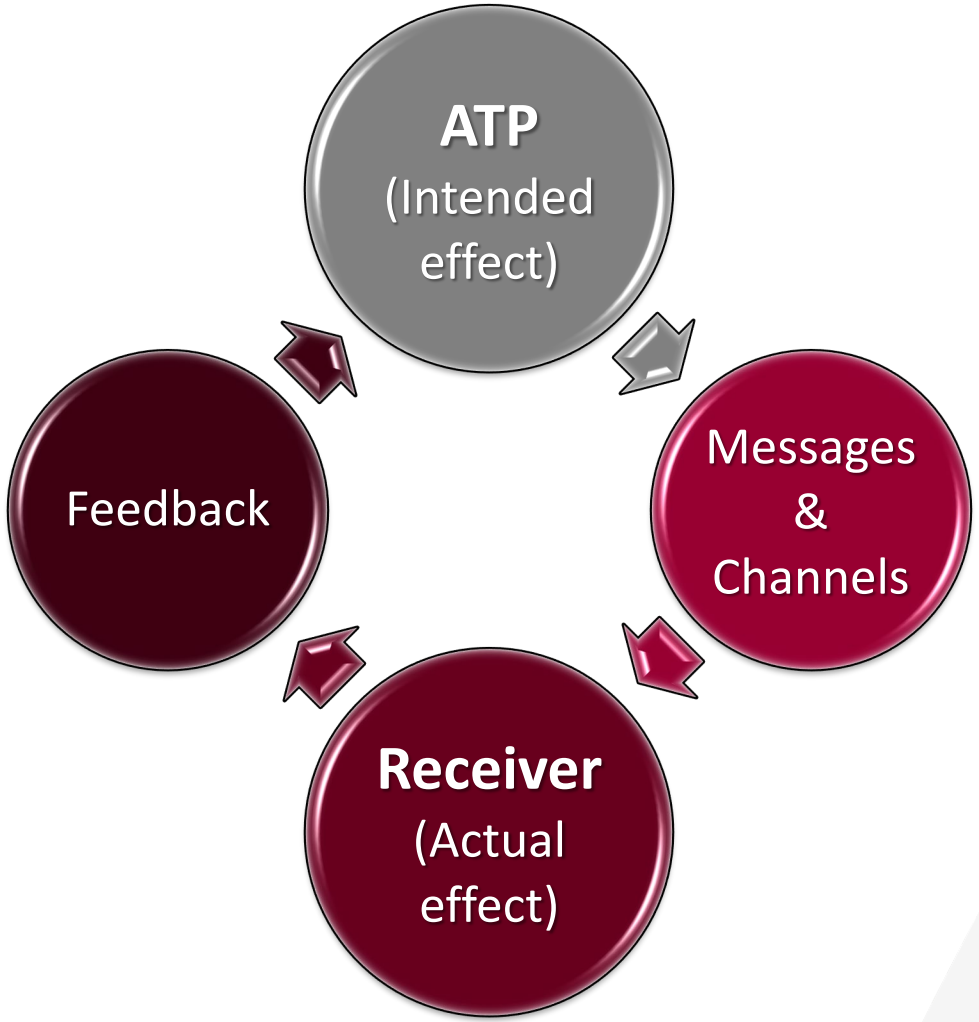
ATP Website	Email	Face-to-Face / Remote

• Articles
  • Program updates
  • Success Stories
• Dedicated content
  • Ambassadors
  • End users
  • Leaders (Toolkit)
• Important dates
• Infographics
• Recruiting content
• Strategic area content
• Timelines
• Training content
• Videos: Recorded and whiteboard
	• ATP-owned emails
	  • Ambassadors newsletter
	  • General ATP emails
	• Existing email channels
	  • Departmental and school newsletters
	  • Updates sent from UW-M and System level leaders
		• Ambassador meetings
		• Board of Regents meetings
		• Department, division, unit meetings
		• Executive Sponsor meetings, updates
		• Governance meetings
		• Quarterly ATP update presentations
		• Special events
		• Training

Leadership Engagement

- Manager led sessions reinforced with multimedia comms
- Help manage change resistance in real time
- Easy-to-use, relatable information that can be localized
- Standardized to ensure consistency
- Promote two-way communications
- Steady pace that builds momentum, enthusiasm

Listening



- **Ambassador and leader feedback**
- **Conversations “How are we doing?”**
- **Flash polls in emails, articles and newsletters**
- **Meeting agenda-items, etc.**
- **Online feedback form**
- **Targeted surveys to audiences**
- **Website analytics**

Communications Plan

Establish and Announce

All Internal and External Audiences

- **Announce ATP, goals and future vision** to all audiences
- **Develop** communications assets (website, mission, vision, etc.)
- **Create consensus** around the campaign theme
- Develop messaging that will be **shared** with audiences

Ambassadors, Mid-Level and Senior Level Leaders

- **Build a common understanding** of ATP's goals, future vision, communications strategy, and the **desired culture change**
- **Create expectations and accountability** for team-based communications
- **Build** Ambassador program and **establish** leadership connections
- **Develop and share messaging and tools** with Ambassadors and leaders

Engage and Reinforce

All Internal and External Audiences

- **Share ATP's goals and future vision** with audiences
- **Drive audience engagement** through regular communications
- Provide ongoing **training availability** communications
- **Leverage ambassadors and leaders** to foster two-way communications
- **Provide support** to ambassadors and leaders as necessary
- **Training opportunities** for end users

Commit and Celebrate

All Internal and External Audiences

- Implementation **progress updates**
- **Training opportunities** for end users
- ***Success stories:*** Steady stream of updates on how we are making progress towards established goals

Public, Government

Develop **targeted communications** to educate public and governmental audiences

Communications Plan: *Establish and Announce*

Audiences	Objectives	Messaging	Channels	Timing	Tactics
• **Faculty** • **Staff** • **Student Workers**	• Announce ATP, goals and vision • Answer foundational questions	• Who/what is ATP • What ATP is trying to do • How this affects you • ATP benefits! • This is the timeline	• ATP website • Email: From Admin • Email: Existing school, dept. emails • Verbally by leaders	• Start of Phase 1 - throughout duration • No more than quarterly	• Web content • Quarterly Updates • Video

• **Ambassadors**
• **ATP Leaders/Staff**
• **Shared Services**
• **System Admin Leaders**
• **UW-M Admin Leaders**
	• Announce ATP, goals and vision
	• Build Ambassador program
	• Build understanding of comms strategy and desired culture change
	• Establish leadership connections
		• How this project will be executed
		• This is the timeline
		• These are the expectations for your participation
		• How your involvement will contribute
		• How this project helps support our mission
		• Tell us what you're hearing from our end users
			• ATP Website
			• In-person meetings
			• Webex meetings
			• Video
				Weekly,
				Bi-Weekly,
				Monthly,
				As needed
					• Agenda items
					• Email
					• Presentations
					• Quarterly Updates
					• Toolkit
					  • Graphics
					  • Talking Points
					  • Presentations
					  • Videos
					  • Web highlights

• **Board of Regents** • **Executive Sponsors** • **Governance groups**	• Share the plan, goals, vision for culture/ operational change • Gain approval for project • Status and issues	• Why you should make this project one of our priorities • Why you should support it • Impacts on our system • These are the risks • These are expectations for your support	• Email • In-person meetings • Webex meetings	Weekly, Bi-Weekly, Monthly, As needed	• Agenda items • Email • Monthly status reports • Presentations • Quarterly Updates

Communications Plan: *Engage and Reinforce*

Audiences	Objectives	Messaging	Channels	Timing	Tactics
• **Faculty** • **Staff** • **Student Workers**	• Continue to share ATP's goals and future vision • Drive engagement through regular communications • Training opportunities	• How this affects you • ATP benefits! • Updated timelines • Training is now/soon available	• ATP website • Email: From Admin • Email: Existing school, dept. emails • Verbally by leaders	• As needed • Quarterly unless announcing changes	• Quarterly Updates • Web content • Video

• **Ambassadors**
• **ATP Leaders/Staff**
• **Shared Services**
• **System Admin Leaders**
• **UW-M Admin Leaders**
	• Continue to share ATP's goals and future vision
	• Drive engagement through regular communications
	• Training opportunities
	• Leverage ambassadors and leaders to foster two-way communications
	• Provide support to ambassadors and leaders as necessary
		• Enhanced goals and vision comms
		• Tell us what you're hearing from our end users
		• Here's some updated comms tools for you to use
			• ATP Website
			• In-person meetings
			• Webex meetings
			• Video
				Weekly, Bi-Weekly, Monthly, as needed	• Agenda items
					• Email
					• Presentations
					• Quarterly Updates
					• Toolkit
					  • Graphics
					  • Talking Points
					  • Presentations
					  • Videos
					  • Web highlights

• **Board of Regents** • **Executive Sponsors** • **Governance Councils**	• Progress updates • Issues and impacts • Costs, budget updates	• Things are progressing smoothly… • Costs are under control • We are seeing positive impacts • Training is going well	• Email • In-person meetings • Webex meetings	Weekly, Bi-Weekly, Monthly, as needed	• Agenda items • Email • Monthly status reports • Presentations • Quarterly Updates

Communications Plan: *Commit and Celebrate*

Audiences	Objectives	Messaging	Channels	Timing	Tactics
• **Faculty** • **Staff** • **Student Workers**	• Progress updates • Countdown to implementation • Share success stories • Ongoing training opportunities	• Implementation has begun • Good things are happening • Here's how you can learn the new system: training!	• ATP website • Email: From Admin • Email: Existing school, dept. emails • Verbally by leaders	• As needed • Monthly	• Web stories • Video stories • Timelines

• **Ambassadors**
• **ATP Leaders/Staff**
• **Shared Services**
• **System Admin Leaders**
• **UW-M Admin Leaders**
	• Success stories
	• Training opportunities
	• Progress updates
	• Staff communications tools
		• Implementation has begun
		• Good things are happening
		• Here's how you can learn the new system
		• Tell us what you're hearing from our end users
		• Here's some new comms tools for you to use
			• ATP Website
			• In-person meetings
			• Webex meetings
				Weekly, Bi-Weekly, Monthly, as needed	• Agenda items
					• Email
					• Presentations
					• Toolkit
					  • Graphics
					  • Talking Points
					  • Presentations
					  • Videos
					  • Web highlights

• **Board of Regents** • **Executive Sponsors** • **Governance Councils**	• Success stories • Progress updates • Costs, budget updates • Delays or issues	• Implementation has begun • Good things are happening • Potential challenges	• Email • In-person meetings • Webex meetings	Weekly, Bi-Weekly, Monthly, as needed	• Status reports • Agenda items • Email • Presentations

Communications Deliverables

Deliverable	Audience	Due Date
Change Strategy Intake tool	Functional and Strategy Leads	June
Website: Enhanced presence • Accrual Accounting, Ancillary Systems, HR, L&D, P2P, RAMP content • Events calendar • Message/tone/voice updated • Page reorganization • Training content • Updated ATP-branded colors and font • Videos (Updates, whiteboard)	ATP, Ambassadors, End users, Board of Regents, Public, Media	June and ongoing
Website: Leader's toolkit • ATP base PPT w/ speaker notes • ATP flier • Checklist and talking points • FAQs • Infographics • Timelines • Video links	UW leaders, presenters	July and ongoing

Bringing it Together

Infrastructure asset	Due Date
Shared editorial/events calendar	June
Identify communications channels (newsletters and governance meetings)	June
ATP Branding and Style Guide	July
Email list management process	July
ATP campaign theme and brand	August
System-wide communications advisory group	August
Stakeholder Engagement System	Sep
Email newsletter/marketing automation software	Sep
Communications Writer	TBD

Questions

Questions or
Feedback?

Ambassador Action Items

- ✓ Share slide content with unit
- ✓ Reflect on micro-learning and put concepts into practice
- ✓ Reflect on Ambassador role in ATP Communications and Marketing Strategy
- ✓ Submit feedback via Ambassador Feedback Portal, as applicable

THANK YOU
See you on August 19!