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**Change Agent Network
Monthly Meeting
March 2023**



What questions did your colleagues have?

(feel free to put your answer in the chat)

Agenda

- Foundation Data Model – FDM
- Testing
- Workday Communications Strategy
- Workday People Strategy
- Key Messages, Next Steps, & Questions

Foundation Data Model

Karen Mushong, Controller

Workday Role: Finance Overall Lead and
FDM Workstream Lead



Foundation Data Model (FDM)

What is the FDM?

- A framework to support all financial and management reporting across the organization
- The multidimensional structure of Workday accounting and financial reporting
- A flexible way to define dimensions which are relevant to different areas of the business
- Allows users to tag their transactions by business dimensions that are relevant to each area of the organization

Worktags

- The component of the FDM which allows users to tag their transactions by business dimensions that are relevant to each area of the organization
- Assigned to each transaction in Workday to indicate purpose
- Combined to accurately categorize transactions
- Chosen based on the business purpose to which the transaction is related OR
- May default in for accounting purposes
- **Will replace the Banner FOAP coding system and may correspond to one or more Banner FOAP* attributes**



*Think of a
worktag as a
hashtag!*

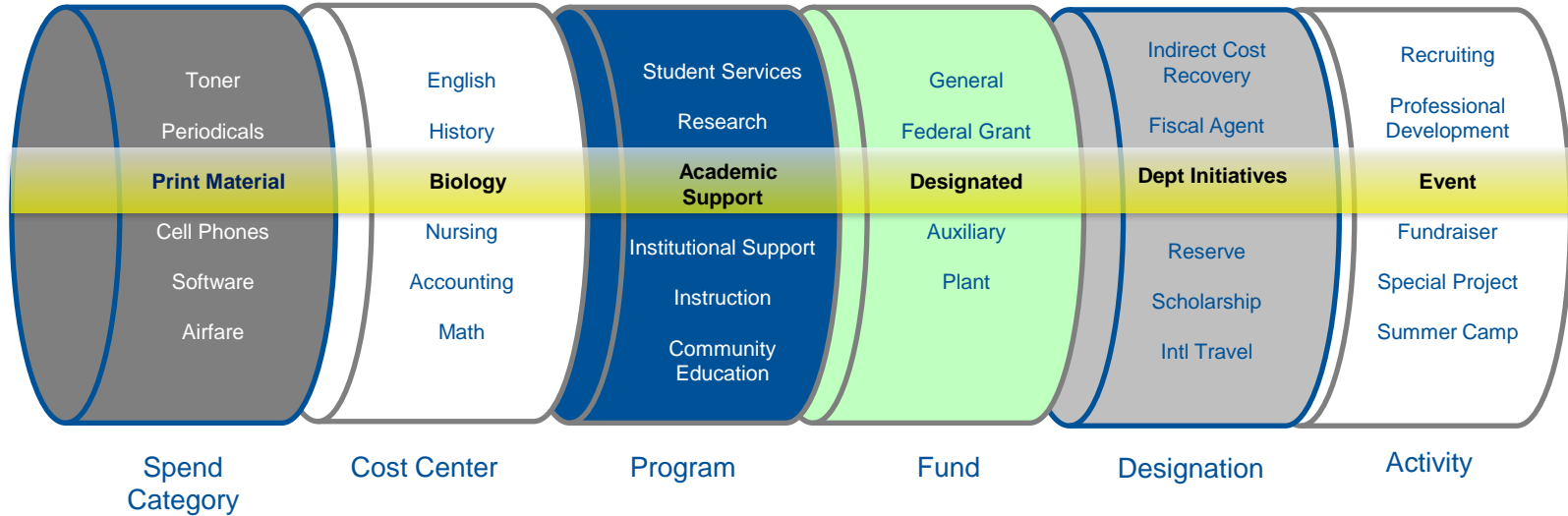
*Fund, Org, Account, Program code

FOP > FDM Examples

Banner				Workday							
Fund	Org	Program		Fund	Fund Name	Cost_Center ID	Cost Center Name	Designation ID	Designation	Program	Program Name
104018	33500	552	>	FD100	General	CC0194	Student Life Operations	DS0070	Student Organization Center	P55200	Social and Cultural Development
110000	32200	555	>	FD100	General	CC0224	Financial Aid Administration			P55500	Financial Aid Administration
110000	34003	441	>	FD100	General	CC0140	University Library	DS0123	Library Technology	P44100	Libraries
110000	40007	140	>	FD100	General	CC0033	CLAS Academic Advising Center	DS0167	CLAS Special Projects	P14000	Physical sciences
110000	40060	150	>	FD100	General	CC0035	CLAS Visual and Media Arts	DS0180	VMA Ceramics	P15000	Visual and performing arts
110000	40225	123	>	FD100	General	CC0041	CLAS English			P12300	English language and literature/letters
110000	56003	663	>	FD100	General	CC0245	Human Resources	DS0307	Perks Benefit Program	P66300	General Admin Services

FDM Example

Combining Worktags for Meaning



Mapping FOAP > FDM

Banner (FOAP)	Workday Worktags
Fund	Typically Designation, Grant, or Gift, and a Workday Fund
Organization	Cost Center
Account Code	Revenue Category or Spend Category
Program Code	Program
	New:
	Activity

Benefits of the FDM

- Minimize data entry
- Automated reporting
- Data transparency

- It answers the following questions:
 - Who is responsible for the transaction?
 - How is the transaction funded?
 - What is the money used for?



**What do you think of the FDM,
and what questions do you have?**

Types of Testing

- Unit Testing
- End to End Testing
- Integration and Report Testing
- User Acceptance / UX Testing
- Payroll Parallel Testing
- Regression Testing
- Data Validation
- Smoke Testing
- Related: Customer Confirmation Sessions

Two Big Testing Activities

Type	Purpose	What is tested?
Unit Testing (3/6-4/28)	<ul style="list-style-type: none">▪ Initial testing of the configured tenant to ensure the process will work during the subsequent test cycles▪ Logical and isolated test of independent processes and functions	<ul style="list-style-type: none">▪ Core configurations, business processes and delivered reports▪ Integrations and custom reports that are ready for testing▪ The data itself is NOT being tested since data conversions are still in progress.
End-to-End Testing (Planned 6/19 – 9/1)	<ul style="list-style-type: none">▪ To test whether the flow of an application is performing as designed from start to finish.▪ To simulate the real user scenarios, using actual production like data▪ To validate all components for integration and data integrity.▪ To validate security	<ul style="list-style-type: none">▪ Test whether the flow of an application is performing as designed from start to finish.

Roles for Testing

- Testing Leads (Accenture & GVSU)
- Project Team Leads
- Accenture Consultants
- Subject Matter Experts (SMEs)

Change Agents will receive access to a Training tenant in the fall.



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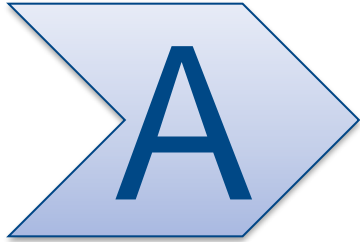
Workday Communications Strategy

Communications Strategy

- Key findings from organizational readiness efforts*:
 - Concise, simple
 - Consistent
 - Candid, transparent
 - Repetitive
 - Info housed on website to refer back to easily
- Approach: ADKAR campaigns
- Preferred senders: Sponsors and Managers

* Readiness Survey and Stakeholder Interviews

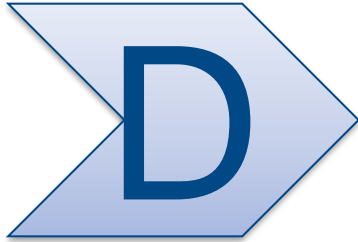
Change Management Approach: ADKAR



AWARENESS

...of the need
for the change

**I understand
why**



DESIRE

...to
participate
and support
the change

**I have
decided to**



KNOWLEDGE

...of how to
change

I know how to



ABILITY

...to
implement
required skills
and behaviors

I am able to



REINFORCEMENT

...to sustain
the change

**I will
continue to**

ADKAR Campaigns: The purpose of Workday communications will be to walk the GVSU community through the individual stages of change.

Communication Vehicles

- Workday @ GVSU website (gvsu.edu/workday)
- Monthly Workday email update
- Change Agents, Managers, and Sponsors

Primary

- Department websites (Finance, HR, IT, PMO)
- HR, IT, & Procurement newsletters

Secondary

- Town halls
- Change guides & info sheets
- GVSU Forum monthly newsletter & other U. Comm publications
- Social media
- Videos
- Printed materials (posters, fliers, etc.)
- Campus monitors
- Teams channels

- Will become increasingly important as we near go-live
- Based upon ADKAR campaigns

Standing Meetings

Meeting

President's Council

Senior Leadership Team (SLT)

University Technology Council (UTC)

Academic Technology (ATAC)

Provost's Cabinet (includes Deans)

Faculty Senate (ECS / UAS)

Asst/Assoc Deans meeting

CLAS Unit Heads

AP Committee

Budget Resource Group (BRG)



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TV Time-out





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Workday People Strategy

Table of Contents

- Change Agent Network Plan
- Manager Plan
- Sponsor Plan

Workday for Managers Overview

- **Workday Manager:** anyone who has at least one direct report
 - GVSU Executives, Deans, Directors, Managers, Supervisors, etc. (approx. 585)
- Managers of faculty/staff are the most effective senders of messages that impact employees personally.
- Goal is to equip managers to help their teams walk through the stages of individual change: Awareness. Desire. Knowledge. Ability. Reinforcement. (ADKAR)

Manager Roles during Change

Research indicates five roles: **CLARC**



Communicator



Liaison



Advocate



Resistance Manager



Coach

In addition to fulfilling day-to-day managerial duties, managers and supervisors must perform five critical roles.

Workday for Managers Monthly Meeting

- **Workday for Managers Kickoff** – Wed. 4/26 via Zoom
- Monthly meetings to occur the last Wed. of every month
- Scheduled for one hour: 30 mins of content, 30 mins for Q&A
- Will highlight changes most impactful to:
 - Managers (recruiting/onboarding, talent management, etc.)
 - Their teams (time entry, expense reports, etc.)

Sponsor Overview

- “Active and visible sponsorship is the single greatest contributor to the success of a change initiative.” (Prosci research)
- Sponsors include:
 - All formal Executive and Departmental Sponsors
 - Steering Committee Members
 - Project Leads to an extent

Sponsor Role in Change: Fulfill the ABCs to Drive Success

It's not just signing checks and charters



Actively and visibly
participate
throughout the project



Build a coalition
of sponsorship with
peers and managers



Communicate
directly with
employees

Key Messages

Foundation Data Model – FDM

- A framework to support all financial reporting across the organization
- New paradigm – no more FOAPs
- Made up of Company, Cost Center, Fund, and something called Worktags
- Think of a worktag as a hashtag - it's a way to tag a transaction to a particular project, grant, or other activity
- As part of the transition, we'll provide a crosswalk which shows 'current state' FOAPs aligned with 'future state' values



Next Steps

- Review follow-up email
- Review the monthly Workday newsletter
- Share key messages at team meetings, etc.
- Collect any questions from colleagues
- Next meeting:
 - April 12th & 13th
 - Two Zoom options



Questions?