Texas Woman’s University
Information Services

Building and Servicing Change:
The Role of Change Management in
Texas Woman’s University’s
Oracle ERP Implementation

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Abstract

Texas Woman’s University began implementing the ERP Oracle Suite of Applications in the Fall of 2002. Change management was incorporated as fundamental to this implementation with the identification of a change manager in December of 2002. The change manager was under the direction of Instructional Support Services, a component of Information Services in charge of end user support, training, and Help Desk services. The primary role of the change manager was to serve as an integral presence and liaison with Information Technology Services in the development and roll out process to the TWU community. Information Technology Services provided the technical and programming role for the project. Although strategies and tools were substantial components of the change management role, an essential theoretical tenet was introduced which guided the change management process. Change management was shaped and driven for the end user to experience “a sense of growth and of being part of some greater entity” (M. Csikszentmihalyi, The Evolving Self, 1993). This presentation will discuss the strategies and tools utilized in the change management process at Texas Woman’s University but it will also focus on the broader ramifications of change management for the end user community in general. As Texas Woman’s University began its ERP implementation with the financial module, September 2, 2003, change management’s success became evident with end user’s positive responses, tolerance, and patience to the new environment. Ultimately, change management has now become an important concept and theoretical approach for any new and continuing technology development at Texas Woman’s University.
The Role of Change Management

• Background
  o Fall 2002 – TWU began implementation of the Oracle ERP Suite of Applications
  o Sept. 2, 2003 – GO LIVE with Oracle Financials
  o Nov. 17, 2003 – GO LIVE with Oracle Payroll and Human Resources
  o Phased approach for implementation – users would be impacted multiple times. Using a phased approach users experience an ongoing process of constant learning. This included naming the project and giving it an identity to the campus community.
  o Appointment of Change Manager – presence and liaison between technical work teams and the general user community. The Change Manager focused on facilitating communication through a variety of strategies and tools.

• Elements of the Change Management Process
  o Why? Acknowledge the complexity of the business processes needing to be explored, re-shaped, and re-discovered.
  o What? Identify system and people indicators that signal success or failure.
  o How? The goal is to create a flexible and adaptable change environment that empowers internal and external players and end users.

Who are Internal and External Players?

• TWU Information Services – technical developers, training services, change strategists, Help Desk

• Development Users – The University’s business units or departments implementing applications

• End Users – TWU campus community

• Consultants – contractual partners facilitating implementation

Framing the Cultural Climate
• Why Change Management? (proactive vs. reactive) Technology changes become more than just ‘new.’ Technology changes are opportunities to ‘grow’ the community.

• Context for Action (needs assessment and role definitions) Applying a broader view to all individuals involved from the system development to the business process impact. Question who is using technology in what capacity for what purpose.

• Course of Action (training plans and support strategies emerge and evolve)

 **Shaping the Organization for Change: Strategies for Communication Delivery**

• Precursors to the implementation project included Brown Bag seminars, conducted by technology staff, which introduced users to Information Services components. These Brown Bags, ultimately, stimulated an awareness of technology and the change inherent to technology. The Help Desk also disseminated weekly ‘technology tips of the week’ to the community.

• Strategies for introducing the end user community to the application included open forums with previews of screens, newsletters, web pages which included a glossary of terms, and email announcements. Communication to all campuses located in Dallas and Houston was critical. Videoconferencing facilities were instrumental in connecting all to the project.

• Behind the scenes development groups met regularly with the technical teams and consultants also attending open forums to communicate changes and developments. The change manager attended many of these meetings, not as a participant but as a gauge, perceptually acknowledging impact of changes.

• Change management focused on building partnerships with community groups such as Faculty Senate, support staff, and the Academic Deans and Chairs of Departments to facilitate communication and dialogue regarding the project’s goals and progress.

• End users were invited to meetings with the Chancellor of the University to share their experience with the application.

 **Implementing and Supporting Change**

• Activating ways to put service into practice is essential to effective adaptation.

• Training focused on strengthening general application skills and confidence offering classes and one-on-one sessions. Training reference resources were provided online with ‘quick tips’ documentation and tutorials.
• Help Desk services were instrumental for the end user community to report problems effectively. Help Desk staffing attended seminal training sessions on the new application.

• Help Desk and support staff, including consultants, walked campus offices on the first day of the Financial roll out to provide immediacy to questions and challenges. Reports to technical and development staff were expedited through this approach.

Confirming and Assessing Change

• Feedback from the organization is illuminating.

• Internal auditor conducted a survey for feedback on the new system. The survey gathered general information regarding users’ knowledge and use of the system.

• Follow up meetings were established with campus groups to garner feedback and continue to establish a chain of communication for users.

• Unsolicited comments were positive indicators that users felt confident sharing their perceptions and experiences.

• Work order histories from Help Desk logged system performance and user needs.

• Continued meetings with development groups for phased implementation of additions to modules in place.

Foundations for the Future

• Lessons Learned
  o Separate change management from training
  o Expand on successful strategies
  o Don’t get comfortable – assess and re-assess

• Expectation Management
  o Expectations are dynamic – priorities shift
  o Prepare for unanticipated shifts in work load
  o GO LIVE does not mean Finished
  o “New” system does not always translate to “Better” – perception is key
  o Expert user in existing environment becomes novice user in new environment

• Strategies for the Future
  o Identify gaps in change management strategies
  o Deliver more internal pre- and post-support for external training
  o Better identify change strategies to be implemented prior to conversion
End user support must be sustained through multiple learning cycles

Outcomes

- Keys to Success
  - Toss out the rule book and be creative
  - Decision makers must feel safe and supported
  - Create conditions that enable others to succeed

- Interventions
  - Shift the culture
  - Promote collaboration
  - Implement – adapt – evolve
  - Re-align organizational structures as needed
  - Evaluate for effectiveness

- Communication Delivery
  - Must vary over time as the threshold for communication acceptance varies
  - Stronger relationship between support staff and campus community
  - Increased opportunities for inter-departmental collaboration
  - Better appreciation of expertise available from support staff
  - Watch for technology fatigue
  - Lack of clarity between perception/expectation of work vs. reality of work may result in frustration or loss of confidence

- Conclusion
  - Oracle ERP Project at Texas Woman’s University is NOT about the technology – it is about the institution and the end user