Change Network
CRM and MA Program
Meeting #2

19 March 2021
Agenda

• Welcome
• Update on the CRM and MA Program
• Change Readiness Survey
• How we will work together
• What’s in a name
• Let’s talk
• Next Steps

From the CX Program…

Jeremy Medina
Head CX, Marketing and Digital

Umer Syed
Program Manager

Alison van der Wiel
Change Manager
What did you take-away from our on-boarding session?
CRM and MA solution update

Umer and Alison
CRM MA solution - where we are in the ITO process

Next steps:

- Final decision on supplier
- Steering Committee endorsement of final supplier
- Finalise and sign contract
- On-boarding IP
- Planning for Design Validation phase
- After Design Validation we will make final selection of the technology platform

What have we done:

- Clarifications with 2 suppliers
- Technical workshops with 2 suppliers
- Referee checks
- Final offers presented by suppliers and negotiations
- Briefed Steering Committee
- Briefed the Selection Panel on the preferred supplier (planned for this afternoon)
Design Validation

**What we know**

- We will be planning the design validation (DV) stage with the IP as soon as they are confirmed (expected next week)
- IP are expected to start early April with on-boarding and knowledge transfer
- We will plan out the design validation phase with the IP
- We will need SMEs from each team – both Future Students and CX MA team. The resourcing of this has been discussed with relevant team leaders
- We also need people from the Data and Data Governance working group to validate the systems integration plan

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**What is design validation?**

Where the project team reviews all work to date with the Implementation Partner. We will hold workshops with SMEs from the business to ensure they fully understand the project brief

**Outcomes of Design Validation**

- Deep understanding and agreement of project scope
- Joint agreement on solution design
- An implementation plan, with agreed milestones
- A resourcing plan

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**What we are working on**

- The exact date of when Design Validation will start
- What the duration of design validation will be – it will be between 4 or 8 weeks – it will depend on SME availability
- The amount of SMEs time is estimated, and yet to be confirmed
CRM MA Program Phase 1 indicative timeline*

**Notes:**
- *This timeline is subject to change once the implementation partner is on-board and agreement on timing and releases*
- Timing TBC – subject to resourcing and finalisation of scope with the implementation partner
- Release of functionality – timing TBC

**Working Groups in past month:**
- Planning
- Designing and on-boarding new members
- Designing workshops

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Change Readiness Survey

<table>
<thead>
<tr>
<th>Design Validation</th>
<th>Build and Deliver</th>
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</thead>
<tbody>
<tr>
<td>CRA Survey 1</td>
<td>CRA Survey 2</td>
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<tr>
<td><strong>When:</strong> prior to start and incrementally through phase 1 (TBC)</td>
<td><strong>When:</strong> prior to Phase 1 build</td>
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<tr>
<td><strong>Audience:</strong> Leadership – SteerCo, Change Leaders, Champions, CX WG (~40 pax)</td>
<td><strong>Audience:</strong> Phase 1 participants, CX Working Group</td>
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</table>
| - Identifies level of awareness for the need for change  
- Tests agreement to the vision  
- Understand the effectiveness of communication  
- Confidence in team to deliver  
- Forms the basis of the engagement and communications plan | - Confirms awareness and desire for the change  
- Understand the effectiveness of communication  
- Forms the basis of the engagement and communications plan | - Tests the outcomes and strategies for improved change awareness identified in Survey 1  
- Identifies any pre-Go-Live change activities that need to occur  
- Identifies any areas of concern that need to be targeted in ad hoc communications | - Identifies how prepared the impacted stakeholders were  
- Identifies how impacted stakeholders perceive benefits were realised  
- Forms part of measurement of program benefits |

- 11 questions  
- 2 free text to get qualitative feedback  
- Segment by stakeholder group

Will repeat survey down the track to see if there is any change in results
How we will work together

What we will cover

- Program progress update
- Two-way feedback on how the CRM and MA program is going and how it's being received
- Understanding the change framework for the program, and planning how to approach implementation
- Identifying resistance and strategies to manage
- Answer questions and myth-busting
- Build confidence in managing change

Engagement

- Meet monthly
- Email updates on anything new between meetings
- Establish a group Zoom channel for questions and immediate feedback
- One on one catch-ups to help manage issues
- Meet with those involved in releases more regularly to understand how the team is going

Your expectations of us

How I will contribute
What’s in a name?

Change Network

Change Champion

Change Leader
Let's talk…

- Burning questions
- Myth busting
- Feedback
- Bouquets
Key Messages for your team

• The CRM and MA Program is nearly finished procurement for the Implementation Partner

• The Implementation Partner has extensive experience implementing CRM and MA systems and will give us the technical expertise to implement the solution well.

• Once a contract has been agreed with the Implementation Partner, we will announce our partner

• In April we on-board our Implementation Partner and plan out the design validation phase.

• Design Validation will be with the Implementation Partner, phase 1 business SMEs and members of the Data and Data Governance working group (to validate the integrations we need to get a single view of customer)

• Following Design Validation, we will have agreed scope, implementation plan and resourcing

• Working Groups to co-design the solution have been in a planning and design phase over the past month due to the project team focused on procurement
~ Emma ~

Good bye and good luck!

We will miss you
Next Steps

We will…

• The leadership change readiness survey will be shared with this group

• Send communication to advise who our implementation partner will be

Could you please…

• Share they key messages of the project with your team members

• Gather feedback from you people to share at next meeting

• Think about what you would like from these sessions
Thank you!

Alison van der Wiel
Change Manager
CRM and MA Program
Our Change Framework

Alison
WILLINGNESS TO CHANGE

Will your end-users help or hinder your change?
Recognise any of these characters in your project?

**INNOVATOR**
EAGER BEAVER

Like an eager beaver, the innovator excitedly embraces anything new. Wants to get involved. Sees the positives. Is your advocate. These are your change champions.

**EARLY ADOPTER**
GOOD DOGS

Enthusiastic pups. Happy to come when on-board. Will respond positively and are glad to be involved. Supporters of the change. Their tails are wagging for your change.

**EARLY MAJORITY**
SHEEP

Will follow the crowd. Will follow the crowd that shouts the loudest, whether positive or negative. Needs more communication and attention.

**LATE MAJORITY**
ALOOF CAT

Your change is probably an inconvenience. They'll adopt and change when they're good and ready. They'll want the change delivered on their terms. And will need more care and attention.

**LAGGARD**
STUBBORN MULE

The stubborn old mules. Prefers to stay put. You'll need to push them uphill. Will only change when they are forced to.

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What does change adoption and resistance in your team look like?

What can we do about it?
HOW WE SUPPORT YOU

01. We partner and value relationships

02. We support leaders to lead the change – change is visibly led by UQ senior managers

03. We look for opportunities to provide choice and autonomy

04. Improving customer experience is at the front; staff experience is a very close second

05. We encourage open and collaborative engagement and creativity

HOW WE COMMUNICATE

Change activity is purposeful always focusing on what’s in it for the business

Messages are fit-for-purpose, timely, succinct and appropriate. Communication is direct wherever possible limiting the use of cascading as a channel

OUR MINDSET

01. Celebration and good news stories are a big part of our success

02. Our change process is consultative, not telling

03. We own our lessons and learn from ongoing reflection

04. UQ values and missional intent are evident in the way that the change is implemented and embedded.
Our Change Methodology - ADKAR

**AWARE**
You are aware of what is coming. Given a heads up – a taster.
Initial communications, face to face engagement and emails.

**DESIRE**
Do you want this change? Do you understand the consequences of not adopting this change?
We will communicate the WHY. Showcases to get people excited about the change. Be part of co-design.

**KNOW**
Get the knowledge to enable you to execute the change.
We will provide training videos, courses, online learning and train Power Users from your team.

**ABILITY**
Can you do it when you are back at work?
We will test your ability. We will track your learning modules. We will check you are able to log on and use the new processes.

**REPEAT**
We will embed the messages. Include new processes to re-enforce the message and repeat the instructions.
We will hold regular follow ups with the teams to ensure its working.

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The Change Network

Alison
Change Leaders

- The Sponsor/s are the key driver of internal messaging
- Formal influencers in the business
- Directly influence team process, practices and ways of working
- Confident communicators with a passion for preparing the organisation for the future
- Manage the change and impacts facing their staff

Change Champions/Change Advocates

- Are informal influencers
- Grasp new technologies easily
- Are natural connectors and coaches
- Create a crucial feedback loop between the project team and the needs of staff as they navigate the changes

CX Steering Committee

- Provide strategic oversight, governance, direction and resourcing to the CX Program and the CRM and MA Project.

Working Groups

- Senior leaders and subject matter experts providing broader strategic focus and identification of whole organisation impacts, opportunities and barriers.
- Co-design of cross-UQ challenges needing to be solved for the new solution

Power Users

- Good at technical use of systems and will upskill themselves in the use of the solution and changes to business processes
- Personable and approachable
CHANGE LEADERS
What will you do?

01 SPONSOR
Sponsor the change within their business area. There is no doubt the change is lead by the Sponsor.

02 ROLE MODEL
Demonstrate the behaviours, mindset and culture that is required to implement the change effectively.

03 ENGAGE
Provide the motivation to change & get people involved. Create a sense of urgency, show commitment & passion about getting things done.

04 MAKE DECISIONS
Make decisions on resources such as people, budgets and equipment to enable the change.

05 BE ACCOUNTABLE
They walk the talk. They don’t let people get away with not changing. They understand to remove obstacles.

FS Change Leaders
- Alison Jenkins
- Colleen Stillman-Cheng
- Ping Khoo

MA Change Leader
- Loretta Porche
CHANGE CHAMPIONS
What will you do?

01 UNDERSTAND YOUR TEAM
And the impact the project will have. Help us understand and work with us to develop solutions that work for them.

02 COMMUNICATION
Two way communication - from project and from your team. Be positive about the benefits, and help with the WIIFM*

03 EARLY ADOPTER
Be part of testing, showcases and training. Be curious. Use the new functionality & help others to do the same.

04 SUPPORT YOUR TEAM
Provide help and support to your team and to on-board new users.

05 PROJECT LIAISON
Attend CN meetings. Pass on feedback, incidents and keep project team updated.

*What’s in it for me?

FS Change Champions
FS Int. Marketing & Recruitment
• Kate Hughes
• Adriana Velez
• Sylvia Streichhan
FS Aust. Recruitment
• Emma O’Mahony

FS Int. Admissions
• Chase Hardy
• Mia Zhang

MA Change Champion
• Charlotte White