



workday @ SLU

Open Forum

May 7 & May 8, 2019

Agenda

- Opening Remarks - David Hakanson
- Program Overview - Jackie Manikam
- Organizational Change & Training (OC&T) - Cherish Hoffman
- HR Key Changes in Workday - Mickey Luna
- Q & A



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Opening Remarks

Strengthen the University by implementing innovative, best-in-class tools and processes aligned with our academic, research, and patient care excellence.

GUIDING PRINCIPLES	Standardize	Promote Innovation	Simplify	Empower Accountability
GOALS	Provide consistent, integrated data and processes across the enterprise to support effective and efficient operations	Enable change in University operations to better respond to future challenges and opportunities	Deliver a straightforward, user-friendly solution to facilitate rapid adoption and sustained usage	Create an environment which enables faculty, staff, and students to take part in and gain insight from business operations
SUCCESS MEASURES	<ul style="list-style-type: none"> • Create enterprise definitions to ensure clear communications that enhance data integrity. • Automate business process operations where possible, reduce duplicative activities or manual interventions for data, processes, or reports. • Create collaborative, integrated, transparent processes that are consistent across business lines. • Limit process differences, granting them only with an approved business case. 	<ul style="list-style-type: none"> • Enable University operations staff to reallocate time from manual processing to more modern and innovative activities. • Create a flexible infrastructure that is easy to configure and maintain. • Make technology, data, and information available to allow employees to be more productive. • Allow HR to use a talent management process to help develop the SLU workforce. 	<ul style="list-style-type: none"> • Promote, broad and on-going adoption by providing employees with an easy-to-use, flexible system. • Reduce the need for complicated system training, centralized training, and support resources. • Reduce error correction and rework through ease of use and clear logic built into system. • Increase mobile adoption to accommodate employees wherever they are working. 	<ul style="list-style-type: none"> • Promote self-sufficiency among both employees and managers. • Provide information to employees that allows for timely, data-driven decisions. • Create simplified and transparent approval processes. • Provide centralized policies and procedures that are readily available to users, particularly managers.
VALUE STATEMENTS	<p>Faculty and staff can reduce time on administrative tasks by using optimized processes in a single system.</p> <p>University leaders have easy access to data that they can trust.</p>	<p>Faculty and staff will have access to better career development tools support their future growth within SLU.</p> <p>University leaders will have access to state of the art reporting tools that provide the data to aid in strategic decisions as well helping to identify creative solutions to ongoing challenges.</p>	<p>The University can reduce costs by removing complex processes and technology that are expensive to maintain.</p> <p>Faculty and staff can complete tasks faster by using a simple and intuitive interface.</p>	<p>Faculty and Staff can have transparency into status of processes.</p> <p>Managers can more effectively lead their teams through real-time access to better data.</p> <p>University leaders can expect clear supporting data for decisions made by their teams.</p>

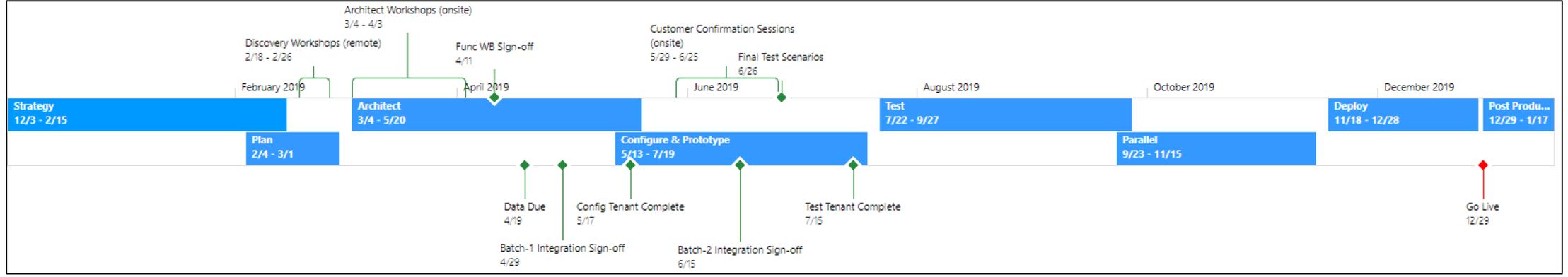


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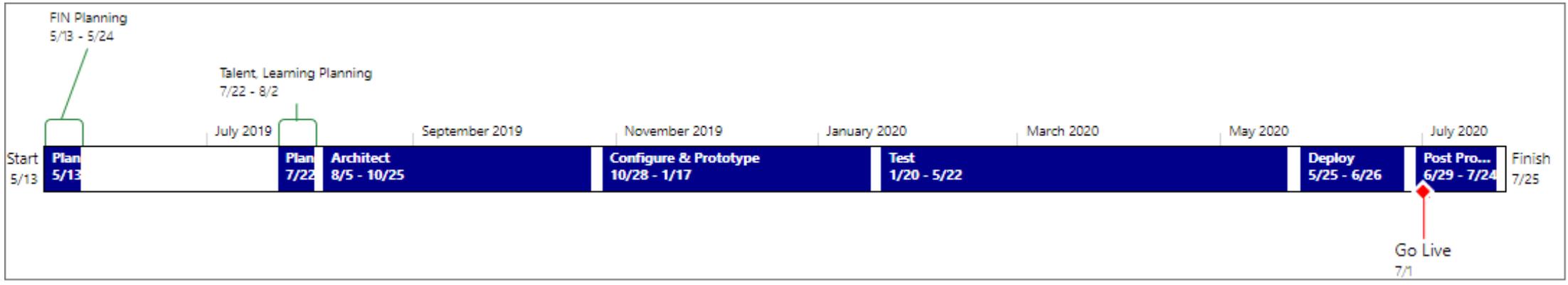
Program Overview

Project Timelines: WORKDAY

Phase 1: HCM Project Timeline



Phase 2: Finance & Talent Learning Project Timeline





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**Organizational Change & Training
(OC&T)**

Change Management Strategy & Execution



- 
Identification and Analysis
 - Stakeholders
 - Change Impacts
- 
Communications
 - Project Identity
 - Planning & Execution
- 
Workday Champion Network
 - Extension of the Organizational Change & Training Team
- 
Resistance Management
 - Readiness Assessments
 - Strategy & Execution
- 
Training
 - Needs Analysis & Curriculum Plan
 - Delivery
- 
Go-Live and Beyond
 - Go-Live Preparation & Communication
 - Reinforcement & Sustainment

Community Engagement

Focus Groups

- Sessions to learn about the structure and business processes that will become Workday for SLU
- Help the Change Management team understand, communicate changes and mitigate any resistance anticipated



Workday Champion Network

- Collect, relay insights, questions & feedback
- Contribute to communications, testing, training, reinforcement & sustainment
- Assist with gauging organization & individual readiness
- Acts as trainers and resources to peers



Open Forum

- An opportunity to explain & demonstrate Workday functionality and changes to end-users (faculty, staff, managers).
- Invitations to the forums will be extended to the entire community (North Campus and South Campus)



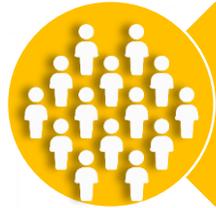
How You Can Help



Help communicate Workday



Become a Workday Champion



Attend Open Forum



Give us your feedback



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HR Key Changes in Workday

HR Key Changes Occurring in Workday

• Recruitment Key Process Changes

- Internal Applicant Only site
- Sophisticated parsing feature for applicants
- Prospect Feature – requesting someone to apply
- The entire Recruitment and Onboarding process will be in Workday



RESUME

FIRST & LAST NAME

EMAIL@EMAILPROVIDER.COM | 123.456.7890 | LINKEDIN.URL

EXECUTIVE ASSISTANT

Executive assistant with over 25 years of experience in office management, administrative support, and HR that thrives in a demanding, fast-paced environment. Contributed to successful operations of various private sector companies by streamlining processes to increase productivity. Knowledgeable in handling confidential matters and proprietary information.

Core strengths include:

- Administrative Support
- Operations Management
- Presentation Preparation & Delivery
- Sales & Expense Reporting
- Invoice Processing & Billing
- Document & Correspondence Preparation
- Travel Coordination
- Handling Proprietary Information

PROFESSIONAL EXPERIENCE

Executive Assistant to the CEO, COMPANY ♦ City, ST (YYYY – YYYY)

Provide the highest level of support to the CEO. Oversee company operations. Responsible for numerous administrative functions, including the management of all correspondence, daily scheduling, tracking expenses, and developing productivity reports.

- Oversee all operations and administration for a start-up business, managing every aspect of development, from vendor selection to furniture orders. Established an efficient and accessible organization and filing system.
- Perform overflow support to the CFO and COO, as well as other executives as needed.
- Ensure that all confidential information in an appropriate manner.
- Collaborate with the sales team to manage customer contracts.
- Obtained Certified Notary credentials.

Executive Assistant to the CTO, COMPANY ♦ City, ST (YYYY – YYYY)

Responsible for a variety of office management duties such as scheduling, producing reports and creating presentations. Managed customer and administration request.

- Acted as liaison between customers and the development team to ensure a positive experience for customers.
- Managed budget during rapid staff growth to maintain overhead cost while allocating resources into training a talented, performance-driven team.
- Collaborated with the Operations Team to improve workflow processes for document development.

Executive Administrative Assistant to the President/CEO, COMPANY ♦ City, ST (YYYY – YYYY)

Performed a wide variety of administrative tasks, including management of all correspondence, travel coordination, time sheets and schedule maintenance.

- Acquired a more demanding Human Resources role by explaining benefits, fielding questions and addressing concerns or complaints.
- Maintained confidentiality while dealing with sensitive proprietary information in a discreet and professional manner.
- Utilized extensive prior experience to act as a liaison and perform scheduling duties for Senior Advisors.

OFFICE MANAGER, COMPANY ♦ City, ST (YYYY – YYYY)

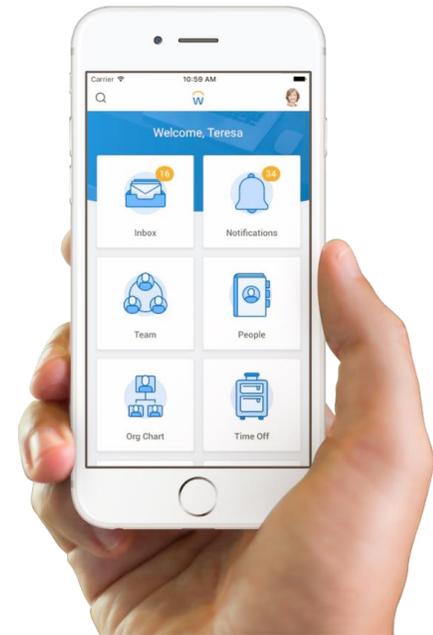
Responsible for the daily operations of a fast-paced corporate office. Corresponded to incoming communication, including phone calls, creating client letters and agreements and incoming and outgoing mail on a daily basis. Performed a host of duties including the management of office supplies, facilities coordination, time sheet management, and processing invoices, ensuring billing accuracy.

- Provided invaluable support to the office, researching relevant information and presenting results in a coherent and concise manner.
- Prepared client presentations and reports, maintained client files, compiled relevant documents, and entered information into internal database, confirming the inclusion of important and correct information.
- Utilized communication and administration skills to sustain positive relations with vendors.

HR Key Changes Occurring in Workday

• Payroll/Time/Absence Key Process Changes

- Kronos Time Clocks not to be used – Union employees to use Workday time tracking
- Time Entry auto calculations – OT, shift differential
- Time approver supervisory organization manager/supervisor, manager can delegate
- Time Off appears on exempt paystubs – Total Rewards
- Integration with vendors for automation



• Benefits Key Process Changes

- Eliminate paper forms – elections in Workday
- Integration with vendors for automation
 - Outbound eligibility files
 - Inbound Wellness credit and retirement elections



Saint Louis University Benefits Enrollment Form

Information About You

Name:	Employee ID Number:
Date of Birth:	Date of Hire:
Salary:	Department:

Instructions

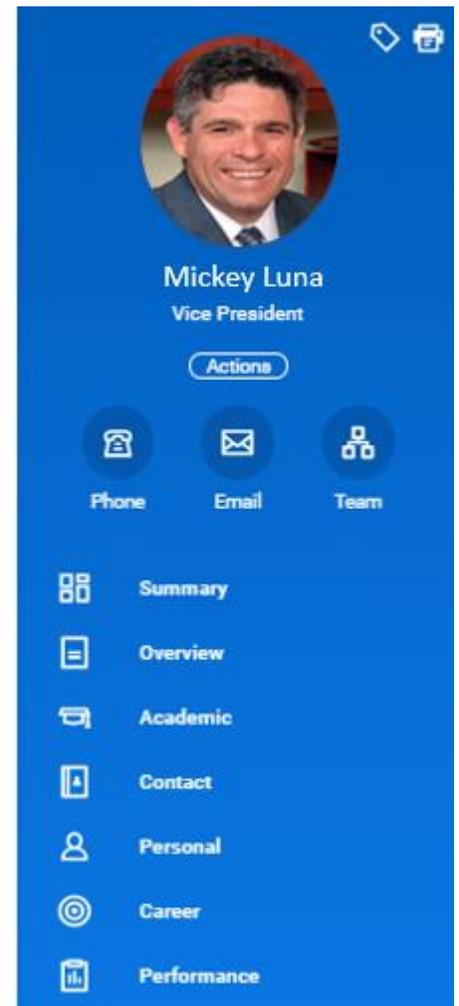
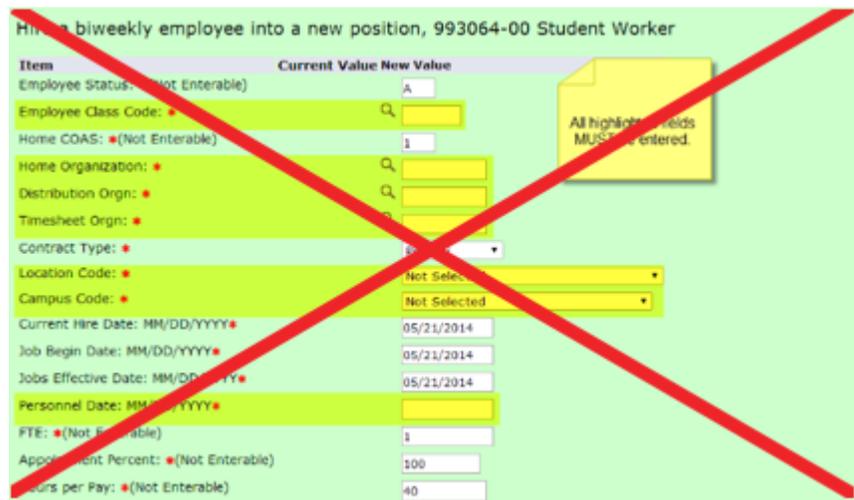
Please enter all required information clearly so that there will be no question as to your meaning.

- **Step 1:** Please enter or check your coverage elections and details. You may only elect – and will be covered for – levels of coverage included in your employer's contract.
- **Step 2:** Please sign, date and return this form to the Benefits Office.

HR Key Changes Occurring in Workday

- **Position Management/EPAFs**

- SLU will use Position Management in Workday – no pooled positions, all will have a unique position number
- Employee photos will appear in Workday
- Role Based Security will be tied to primary position
- No more EPAFs!



HR Key Changes Occurring in Workday

• Performance Management Key Process Changes

- Streamlining the process
 - Moving away from a 4-point rating scale and reducing number of core values
 - Elimination of Supervisor +1 approval and Department Reviewer steps

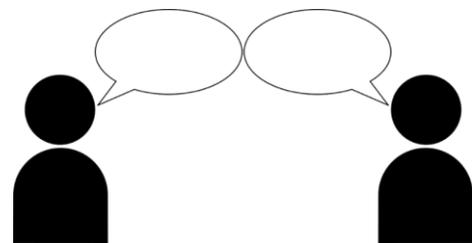
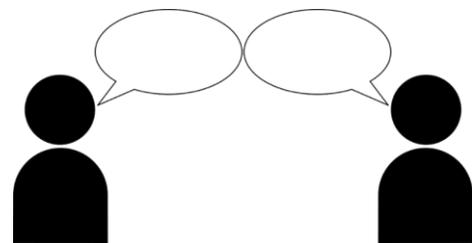
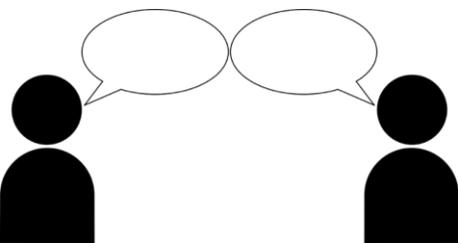
- Driving a culture where performance management is an ongoing process rather than a one-time event
 - Giving leaders the option to conduct mid-year reviews
 - Anytime feedback available upon request
 - Goals to be assigned and tracked in real time

Core Performance Values

Please review the employee's performance based on the core performance values. Individual ratings and examples for each Core Performance Value are not required. The Overall Assessment on Core Performance Values rating and the explanation is required as indicated by the red asterisk.

Core Performance Value	Core Performance Value Description	Rating	Rating Description
Mission	<i>Integrates the shared values for the common good: competence, conscience, compassion, community and commitment (5C's) into work; integrates the standards of conduct that promote the common good within the work unit and University community; treats others with respect, courtesy, honesty and compassion; participates and facilitates the participation of others in service related activities.</i>		
Customer Service	<i>For both internal and external customers demonstrates good listening skills, assesses customers' needs and takes timely action to respond to those needs; provides follow up on all issues and builds rapport; anticipates customer needs and contributes to improving processes and services.</i>		
Collaboration and Partnership	<i>Reports to work regularly, on time and is accountable during the workday; cooperates and interacts with employees inside/outside the work unit contributing to improved operations; demonstrates self-control; aligns individual efforts with team goals.</i>		
Communication	<i>Represents the University and the work unit in a professional manner relating to all verbal, non-verbal, and written communication; demonstrates good listening skills; conveys information clearly and concisely; uses proper grammar, correct spelling, and proper tone in all written and verbal communication.</i>		
Technical Skills and Knowledge	<i>Applies knowledge, skills, and mastery of job processes to achieve results; continuously develops and advances technical capabilities.</i>		
Quality and Productivity	<i>Delivers products and services with little or no rework required; strives for continuous quality improvements; uses time and resources effectively and efficiently; produces value added contributions.</i>		
Problem Solving	<i>Interprets data from various sources; generates effective solutions to problems; makes sound decisions; generates alternative approaches to problem solving; demonstrates awareness of consequences or implications of judgment.</i>		
Leadership	<i>Leads tasks and people effectively; guides, coaches, inspires, and motivates others to improve skills and achieve goals; takes independent action; seeks out opportunities for professional development; solicits and considers other opinions; demonstrates strong work ethic and sense of urgency to meet commitments; recommends system/procedure improvements.</i>		
Diversity	<i>Demonstrates commitment to creating an inclusive community and environment that respects, embraces, and celebrates all expressions of diversity and identity that are in keeping with the Ignatian tradition of being men and women for others.</i>		

Overall Assessment on Core Performance Values





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Q & A