Unit Transformation Services (UTS) Supports Transition to Shared Services

Catherine Lilly leads the AST Unit Transformation Services sub team to provide resources, tools and advisory services to units as they undertake the reorganization of their units.

A series of workshops is available to U-M managers involved in the transition to Shared Services, including:

Organization Redesign for Optimal Service - Learn the principles of optimal organizational design. By the end of this two-part workshop, participants will have a revised model for service provision within their units.

Process Mapping and Process Improvement - In this workshop, teams will focus on the retained unit processes and will work together to map key details of the process flows intersecting with services provided by the Shared Services Center.

Managing Knowledge Transfer - Best practices in "knowledge capture" are taught to better ensure that staff transitions will not affect unit work.

Communication Planning to Manage Change - This workshop focuses on learning templates to plan for effective communication during the transition to Shared Services.

Leading Others through Organizational Change - Learn and practice tools that should be in every manager’s tool kit for managing change.

For more information about Unit Transformation Services, including course descriptions and registration, visit the AST Shared Services website at: ast.umich.edu/uts.html

Unit Transformation with the Ross School of Business

We recently asked Sean O’Neil, chief financial officer, and Amy Byron-Oilar, chief people officer, from the Ross School of Business to share some of the experiences and insights they’ve encountered as they reorganize their unit.

Can you share some of the actions you’re planning or have undertaken to reorganize your unit?

It was important for us to begin by reviewing the context for change here at Ross. Looking back over the last few years, it was clear the guiding principles we put into place such as our new school mission, strategic plan and goals, vision for a positive work community, and a commitment to evidence-based decision making to achieve common goals would inform our decisions. In addition, earlier efforts to standardize finance and HR practices and processes (including creating some shared finance and HR services) combined with our recent community-wide efforts to balance our budget while ensuring the stewardship of our resources provided us with a strong foundation for change. Lastly, we had a win under our belt – we had proven our ability to engage in large-scale change to address our financial situation.

From this unique vantage point, we set out to design our retained organization in order to 1) capitalize on the AST processes and Shared Services Center (SSC) and 2) more importantly, advance the changes and strategic initiatives already underway at Ross. We believe AST provides a unique opportunity for us to work together to develop world class business processes that support our mission and strategic goals.

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Shared Services Center Facility Update

Remodeling is underway at the SSC facility as the Shared Services implementation moves forward. We asked April Pearsall, facility lead for AST, a few questions about the goals and renovation.

Will there be anything different about the SSC facility?

I wouldn’t say the facility is significantly different than other facilities at U-M. What is unique is that we were able to accommodate over 90 percent of focus group suggestions on what would create a productive and engaging work environment including location, amenities, parking, and overall design. The objective is to provide a professional, comfortable, and collaborative environment.

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Unit Transformation - Ross School of Business  

Having studied the distribution of work for trends and patterns, we found we could address the fractionalized nature of work here at Ross by creating a new Ross Administrative Corps to provide shared administrative support to our units by expanding both Ross Finance and HR to take on out-of-scope processes and perform these processes in a centralized manner for all Ross units.

As we talked about enacting these changes four imperatives emerged, further refining our approach. The Ross approach to AST implementation will:

- Enable world-class business processes
- Reshape our organization to better support the strategic goals of the university and the school
- Maximize career opportunities, options, and support for Ross staff
- Inform the design for our new physical workspace to support the way work will be performed at Ross.

As we now have a strong outline of our retained organization in place, we will soon begin to further engage our community in the important work of redesigning Ross processes, handoffs, etc.

Can you share some positive things you’ve discovered as you reorganize?

Of course we have had our share of challenges and difficult conversations. However, on the whole, as we work with the leadership of our school and units, our faculty and our staff, we have experienced the willingness to:

- Look forward to the possibilities inherent in AST
- Improve the way we work
- Share knowledge to address challenges
- Work through difficult conversations in order to make high-quality decisions.

Overall, we have found that when we have invited people to be part of the change process rather than imposing the change on them, they have been willing and able to work together toward a positive solution.

As you reorganize your unit, have you identified opportunities to improve services locally? If so, can you describe some?

Our new structure is rooted in our strategic plan and aligned with our community values and will enable world-class business processes, so that teaching, research, and outreach happen smoothly; innovations are easily adopted; and academic units, centers, and institutes are able to focus on the work of the school. By allowing our academic units, centers, and institutes to focus on what they do best, we allow them to improve the services delivered to our students, alumni, and corporate partners.

This requires the organization of finance, HR and general administrative structures, technology, and processes to share knowledge, develop and implement best-practices, and ensure work is done quickly and correctly the first time; realize opportunities to partner and provide support and to meet the needs and goals of others; and ensure our business processes match the excellence of students and faculty. So, AST is allowing us to create true centers of excellence in finance and HR that mirror the centers of excellence found in our academic units.

Although we still have much work ahead of us, we have seen early, anecdotal signs that our new structure will greatly facilitate the sharing of innovations that we believe will be critical to our success in the future.

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Do you have any tips for other units as they prepare for and engage in unit transformation?

Some things that have helped us so far include:

- Inviting individuals throughout the organization to both broadly shape our thinking and to solve specific challenges we have encountered. We have found great benefit in drawing on the expertise of individuals able to help us think about how best to reshape our organization.
- Communicate frequently about the change. To make communication effective, we try to determine what concerns members of the community currently have and structure our communication to address those concerns as well as more technical issues such as what tasks will be changing and detailed change timelines.
- Emphasizing that, while this change is difficult, we can be successful if we work together. We draw on our recent success in addressing budget challenges as an example of this principle.

How do you plan to interact with the Shared Services Center?

The successful implementation of the SSC is integral to our overall success; therefore, we must establish a robust partnership with the SSC. Because all true partners hold one another accountable, we will champion the change effort here at Ross and in return we expect excellent customer service, efficiency, and expert business services from the SSC.

SSC Facility Update (continued from page 1)

What will the interior look like?

The building has four floors, with a large two-story atrium. The floor plans are very open and the cubicles will be located adjacent to the exterior windows. There are very few offices, which will be located on the interior of each floor. The floors have large glass windows, so natural light will be available to all staff. The cubicle walls will be low (46”), which will contribute to the feeling of openness. There will be privacy rooms, huddle rooms, collaboration areas, and conference rooms on each floor. The facility is designed for people to work together as teams.

The facility will have a large lunchroom on the first floor, which can also serve as a training room. There will be kitchenettes on each floor, as well as a fitness room with showers located centrally in the building. Conference rooms will be equipped with LCD screens and at least one conference room will have both audio/video conferencing capabilities. A white noise system will be installed in cubicle areas, and sound-proofing insulation above all conference, huddle, and privacy rooms will help keep conversations private and contribute to productive working environment.

Will the Shared Services Center have a “University of Michigan” look and feel?

Absolutely. We are working with Michigan Creative, a unit of the U-M Office of the Vice President for Global Communications, to assist with interior design. They are developing a U-M theme to emphasize the connection and importance of the SSC to the university. There will be a mix of concept walls, art, photography and graphics throughout the building. They are also developing U-M themed names for all the conference and huddle rooms.

Watch for SSC facility updates in future issues of the newsletter!

We welcome your feedback and questions. To subscribe to this newsletter or to contact us, please email at - ast-contact@umich.edu or visit our website at ast.umich.edu/index.html.