Shared Services Implementation

Project Updates

September 2014
Project Updates

- Shared Services Implementation Plan
  - August 2014 Implementation
  - Winter 2015 Implementation
    - Build out approach
    - Faculty and Staff engagement
    - Process Sharing
    - Timeline
- Workforce Transition
- Unit Readiness
Shared Services Implementation Plan

- The first set of Shared Services Center (SSC) processes transitioned to the SSC on August 4, 2014.
- The next set of processes are slated to transition to the SSC in March or April 2015.
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August 2014 Implementation

- The U-M Shared Services Center (SSC) opened on Aug. 4, when about 110 staff members relocated to the newly renovated office building and began handling Accounts Payable, Accounts Receivables, and HR Benefits and Data Management transactional services.

- For more information about the SSC, and the current services it provides, visit sss.umich.edu
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Winter 2015 Implementation
Process Build-out Approach

- An iterative approach to detailed process design is being used to gather input from a variety of stakeholders

- In December, the AST executive sponsors and project leadership will confirm the approach and timing of transitioning in winter

Review draft with Advisory Committee → Workgroups → Process sharing sessions → Faculty & staff engagement → Executive approval to proceed

Revise
Winter 2015 Implementation
Faculty and Staff Engagement Objectives

- In order to ensure the winter implementation proceeds smoothly, faculty and staff across the university are being engaged.

- The engagement process will help faculty, staff and the AST project team develop a solid common understanding about the services under consideration and the potential impact on faculty and staff. The engagement objectives are to:
  - Increase understanding of which functions and activities will be done in the center and which will be done in the units.
  - Provide an opportunity to raise concerns and make recommendations about service center features (e.g., desired performance levels, functions of the customer call center, fast-track process for urgent requests, etc.).
  - Help units rebalance work and accommodate staffing changes as individuals move to the Shared Services Center.
Winter 2015 Implementation
Faculty and Staff Engagement Process

- Each school, college, and unit will lead its own process for faculty and staff feedback

- Processes to be discussed are Statement of Activity, Time & Leave Administration, Employment Processing (I-9s), and Travel and Expense Report processing

- Process sharing sessions were held throughout September for process experts to hear future business process details and give feedback

- Faculty engagement will occur in the schools and colleges in October and November 2014
Winter 2015 Implementation
Process Sharing Sessions

The purpose of faculty and staff process sharing sessions is to:

- Clarify SSC activities and unit-SSC interface/handoffs
- Provide opportunity for input, clarification, and discussion
- Assist unit leadership as they rebalance retained organization work
- Gather feedback on process features

Feedback and recommendations are collected by each college, school, and unit.

Feedback is also collected by the project team through process sharing sessions, open forums, online and from unit representatives.
Winter 2015 Implementation
Process Sharing Materials

- All documents and forms presented at the process sharing sessions are posted on the AST UTS CTools site. To access this site:
  - Login to ctools.umich.edu
  - Click Membership
  - Click Joinable Sites
  - Search AST UTS
  - Click Join

- Recordings of process sharing sessions are available on the AST Project website, Services for Units Page
# Winter 2015 Implementation Timeline

## Faculty / Staff Engagement
- **Work group engagement – Process design & build**
- **Unit engagement – Process sharing sessions**
- **Faculty engagement**
- **Executive approval**

## Unit Readiness
- **Plan Phase**
- **Design Phase**
- **Implement Phase (including unit facing training)**

## SSC people readiness
- **FTM engagement activities**
- **Hiring**
- **Training**

## Mpathways
- **Requirements definition**
- **Build and Test**

## Concur
- **Assessment, pilot groups**
- **Pilot mobile app, new user interface**
- **Implement (tentative)**

## SSC Service Management
- **Establish governance structure**
- **Revise and finalize chargeback model**

### Key Dates
- **Earliest target SSC winter implementation**
- **Target Leadership Readiness Sign-off**
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- SSC Workforce Transition
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Staffing the SSC is underway. About 110 staff members have already relocated to the new facility.

The future SSC staff will remain in their current jobs until their assigned transfer date to the SSC.

SSC open positions will be posted on the umjobs.org. The interview and selection process for those positions will follow standard university practice.
SSC Workforce Transition
SSC Future Staff Activities

- Meeting with the SSC executive director, teams, and supervisors
- Participating in team building activities
- Getting involved in SSC committees and focus groups
- Attending forums
- Participating in workshops
- Engaging in training activities
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Unit Readiness

- Periodic checkpoints and unit sign-offs
- Units will self-report high-level status: Engagement, Planning, Design, Implementation
- Self-reports will be also used to report staff and faculty feedback collected by unit representatives
- AST Community Engagement site is also available for direct feedback from faculty and staff
- Self-Reporting dates are aligned with key milestones and Executive Sponsor meetings, similar to August go-live reports
- Training on new processes will be available
Unit Readiness
Unit Transformation Services (UTS)

- The Unit Transformation Services (UTS) team will continue to support the university community in designing its future retained organization based on the next set of processes slated to transition to the SSC in Winter 2015.

- The UTS team has developed a comprehensive road map and toolkit to help guide and support unit readiness.
Resources

- AST Website
- Shared Services Newsletters
- AST Community Engagement
- Frequently Asked Questions
- University RECORD Articles
- SSC Website
- SSC Quick Reference