Date	02/16/2016	**Time**	9 :00 a.m. – 10:30 a.m.
Location	Department of Management Services 4050 Esplanade Way, Room 235K		
Objective	To discuss the People First organizational change management (OCM) strategy		
Attendees	Allyson Adolphson (DFS); Sean Cooley (DFS); Jimmy Cox (DMS); David DiSalvo (DMS); Stephen Eaton (DMS); Julian Gotreaux (DFS); Melissa Turner (DFS); Cheri Van Gundy (DMS)		
Attachments/ Related Documents	N/A		
Action Items	Provide examples of communications and branding used for People First rollouts showing how the People First team leveraged themes and unique communications for each rollout. – Jimmy Cox Schedule the next OCM coordination meeting – Julian Gotreaux		

- **Introductions & Agenda: Facilitated by Julian Gotreaux (DFS)**

- **High Level Florida PALM Project Summary: Facilitated by Melissa Turner (DFS)**

- **People First Organizational Change Management Approach: Facilitated by Jimmy Cox (DMS)**

    - Jimmy Cox and David DiSalvo provided background on People First OCM efforts starting with the development of People First
    - People First replaced COPES (Cooperative Personnel Employment Subsystem) as the State's Human Resources and information system in the early part of the 2000's
    - 2003 – 2004
        - Development was being completed by a small number of staff, many of whom were sub-contractors
        - There was a lack of State employee representation during the development of People First
        - During training rollout, the focus was "how do we get going as fast as possible"
        - The initial training was provided:
            - in large group, auditorium venues with half day training sessions;
            - with volumes of information and little, hands-on application training;
            - with no training aids or resources (e.g., quick reference guides or information sheets)
        - Implementation was literally "flipping a switch." One day staff used COPES, the next they used People First
        - During the transition, agencies cut approximately one-half of the HR workforce. This limited the support agencies could provide to their staff when learning the new system
        - These items helped contribute to several key issues:
            - Agency and staff "buy-in" was limited at best, and led to low adoption rates
            - Agency staff had questions and concerns about agency structure and position changes as a result of the implementation of People First

- Agencies and staff expectations were not managed
- 2005
  - A team was created to handle communications associated with two types of application upgrades;
    - Minor-behind the scenes modifications/upgrades that the users do not see
    - Major-modifications/upgrades that may impact the way users interface and use the application
  - Some of the members of this team still work in the People First group
- 2012
  - The People First team:
    - Began an advisory group that:
      - Had a defined charter;
      - Met once a week;
      - Consisted of ten agency members
    - Members of the advisory group became "spokespersons" for People First in their respective agencies
    - Worked to Increase agency engagement and encourage people outside of the People First team to present/discuss information about upcoming People First application modifications and upgrades. This increased agency and staff buy-in
    - Focused efforts on Identified and removing/mitigating "pain points" helping to eliminate distractions for users
    - Created an agency readiness tool that included:
      - A checklist of items and information that staff and agencies needed to use the People First application
      - Monitoring tools to help agencies evaluate their readiness
  - Since 2012, the People First Team's key strength has been in project management, not OCM
  - Each new upgrade rollout for People First has had its own branding and communication
  - Users do not always see the "technical" upgrades
  - When providing upgrades, the general practice is to build and implement the technical upgrades first, then build and roll the functional upgrades
- Lessons learned
  - Employ change management efforts from the start of the project
  - Providing "knowledge" rather than steps of use is essential to understanding why an application performs a function and how its accomplished
  - When training, focus on small groups.
  - Training is not a single session event, but rather an on-going effort
  - Leverage development and user acceptance testing (UAT) for building training
  - Use a multiple media approach when providing training
  - Leverage existing groups and meetings to provide an audience for you messaging (e.g., CPO, CIO, and CTO workgroups)
  - Stay up to date on browser technology, domain names, and website URLs
  - Be careful when customizing. Avoid them if possible. This may mean that a user group may not get what they want

        - The team must be able to evaluate the overall benefit/cost for the requested customization
        - Make sure that you have people participating who are knowledgeable about the process
        - Do not be afraid to evaluate agencies' proposed subject matter experts (SME) and recommend alternatives if the SME will not be able to contribute effectively
        - Engage industry experts and ask what works best for specific needs. This also helps the team to stay current with changing technology
        - Employ user controls to help people navigate through the application to their intended location
        - Document everything as you go
    - Some possible future People First OCM efforts are:
        - People First newsletter providing key service dates, monthly discussion topics, and links to web resources
        - An Increase in the use of social media to communicate with People First users
        - Continued evaluation and improvement of their processes
    - People First may use staff augmentation and contractors to provide training assistance

- **Open Discussion**

    - Several question were asked of the group during the open discussion:
        - What are your suggestions for dealing with agencies that do not provide comments and questions until very late in development of the ERP, and how would you deal with potential conflicts that may arise when some needs may not be able to be met:
            - The People First team said that support from leadership is crucial. Leadership can deal with critical issues while the team continues development
            - Regardless of the timing, when a problem is identified, the team should first identify the cause of problem, before determining whether to address it or not. It may turn out that the cause is a misunderstanding or one that is easily fixed.
        - Does People First utilize virtual training?
            - At this time, training efforts are limited due to resources, however, It is an option that the team is exploring
        - How does People first identify potential issues?
            - People First users provide question and comments to the team by email or phone call to individual team members and the support center
        - Is training tracked?
            - People First does not track who is trained
            - Agencies are responsible for making sure that their staff are trained
    - The group agreed that future meetings would be helpful and may be held on an as needed basis.