Step 5: Celebrate!

- Document achievements
- Document lessons learned
- Recognize accomplishments
- Publicize positive outcomes
- Continuously improve
DOCUMENT

ACHIEVEMENTS
Document Achievements

- Take time to reflect on the experience and make an honest assessment of how it went
- Ongoing, continuous improvement of change management ultimately leads to better results
- Engage the entire team to get broad input and perspective
Achievements Examples

- Ways in which you met your original goals
- List of requirements from customers that were met
- Summary of key results that you tracked and measured in the Implement phase
- Survey of stakeholders
**Achievements Sample**

### F3 by the numbers

**People**
- 350+ people contributed as Champions, UPlan Control Point Coordinators, FAS Think Tank members, SOM Think Tank members, and MyReports SME’s and Volunteer Testers
- 80 total project team members over 2 years
- 10,000+ UCSF personnel affected

**Training**
- 5,630 people made 17,008 visits to the F3 Training site
- 29 training modules & 69 job aids created
- 2,685 people took online training for COA, MyReports, and UPlan
- 295 people took in-class UPlan training
- 361 pages written to create the UPlan training manual

**Conversion**
- 36 systems
- ~1000 spreadsheet files for COA mapping
- 3,400 program codes
- 7,200 DPAs
- 15,000 funds
- 34,000 chartstring combos
- 3,000,000 ledger records

**Design**
- 157 pages of COA functional specifications
- 215 pages of UPlan functional specifications
- 1,092 pages of MyReports functional specifications

**Communications**
- 23 Champion Meetings totaling 46 hours and 1,230 slides
- 8 Town Halls
- 1,585 people made 3,177 visits to the Department Readiness tool
- 209 readiness items in DR Tool
- 8 dedicated distribution lists
- 4 dedicated help desk resources
DOCUMENT LESSONS LEARNED
Document lessons learned

• Avoid blame – this exercise is intended for learning to prevent errors and improve future outcomes
• Be transparent – share your outcomes with those who can learn from them
Lessons Learned Activity

• What worked well?

• Challenges – what could be improved?

• Get specific by mentioning key areas

  Examples:

  – Tools
  – Participants
  – Approach
  – Team dynamic
  – Data collection
  – Implementation
  – Communication
  – User support
## Lessons Learned Samples

### UPlan Team Debrief Results April 2014

<table>
<thead>
<tr>
<th>Worked</th>
<th>Challenges, could be improved</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Focused SME group on specific topics. Helpful to team as would have been better with better attendance.</td>
<td>• Aligning the resources – very small team for such a huge project.</td>
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<tr>
<td>• Engaging the Control Point Coordinators group in pre-launch activities helped push the responsibility for launch onto them – They took on coordination role.</td>
<td>• Infrastructure team wasn’t ready to take on responsibility and support so developers were needed to help them.</td>
</tr>
<tr>
<td>• Scoping exercise helped us weigh the major options against each other; defining them was huge but important.</td>
<td>• Coordinating our implementation timeline with other projects, esp. given downstream of CDA. Especially affected:</td>
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<tr>
<td>• Writing requirements document helped break up into components and improved management</td>
<td>o Design nothing was certain</td>
</tr>
<tr>
<td>• Project Team owned much of change management – took responsibility for training using CMIT for supplements and support</td>
<td>o Testing in hindsight tried to get our 2 testing cycles in, but they were driving conversion logic. 1st test cycle thus short but only option given the timeline. Too much of our testing was really about CDA conversion</td>
</tr>
<tr>
<td>• Training: Hiring an outside consultant who could focus exclusively on training, freeing team for testing activities</td>
<td>o Build – huge difficult impact on HPP plan</td>
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<tr>
<td>• Training: big bang approach got us out of the way, allowing for more focused efforts later.</td>
<td>o Didn’t test with every big issue</td>
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<tr>
<td>• Glad we all had to do the training/learned. Get team out there with users. Same is true for lab support. 1:1 with planners helped.</td>
<td>o Could have brought in external consultant beyond UGF and not to review design. But also know it’s hard to compare given uniqueness. And it was difficult to accept advice of consultants we had who encouraged us to keep it simple. Additional consultants may not have helped.</td>
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<tr>
<td>• User communication very useful and important</td>
<td>• Need to manage post implementation expectations: 1:1 helped create user expectations that we are there for them all the time.</td>
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<tr>
<td>• The team was great, worked well with lots of gray areas. Assembling the team was ongoing; it changed and morphed as need arose</td>
<td>• Didn’t start with end results – reporting came after the design.</td>
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<tr>
<td>• Specific resource needs identified early and often – whenever we needed help, identified and got it fast</td>
<td>• Department involvement was challenging – many didn’t show up at SME input</td>
</tr>
<tr>
<td>• Functional team very responsive to Tech Team; Decisions made pretty quickly. Got a lot of support from Mike, Dan, Len, Brian; patient with “stupid” questions from tech team.</td>
<td>• Lots of stoning around project tools – too often tried to find the perfect at the expense of the good</td>
</tr>
<tr>
<td>• Team Attitude and Commitment: All doing best we can – get it right – give benefit of the doubt. Willing to change if needed, even if in requirements. Lots of nuance that were not understood in the beginning</td>
<td>• Many types of presentations were necessary.</td>
</tr>
<tr>
<td>• Maintaining an issue list was helpful.</td>
<td>• On campus peer review would have been helpful – more of it.</td>
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<tr>
<td>• Tech team didn’t start something without written requirements.</td>
<td>• Consultation structure – FAS, COM, SME and lack of ownership on that side. Struggled with lack of department/school advocates/partners during the design phase.</td>
</tr>
<tr>
<td>• Even though we had everything in place, need to remember to test every time something big is done</td>
<td>• Need L&amp;T to sign off on functionality. Could have helped us catch some issues e.g. RM, FP integration and may have made different decisions</td>
</tr>
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</table>
RECOGNIZE ACCOMPLISHMENTS
Recognize accomplishments

- Recognizing early successes and wins promotes ongoing change and future efforts
- Recognizing individual and group effort acknowledges the value of their extra effort
- Celebration acknowledges that something positive occurred
- Celebration breaks the routine and sparks creativity
- Accomplishments are easier to remember when marked with celebrations
Recognize accomplishments - ideas

- Take time in a team meeting or larger venue to acknowledge a milestone or outcome
- Establish ongoing department award
- Send written card or email to an individual or team from manager
- Bring food or drink to a meeting
- Give UCSF Bear Hug award
- Have parties

‘Chartfield Charlie’ given by Chart of Accounts team to training participants
PUBLICIZE POSITIVE OUTCOMES
Publicize positive outcomes - ideas

- Ensure your customers know the outcome and the impact on them
- Email to large group summarizing the outcomes (e.g. Dean email to entire school)
- Publish article in a relevant newsletter
- Post on website (department and/or BPI)
- Set a poster with results located in key places
- Prepare paper or presentation for colleagues
Tips for leaders recognizing success

- **Keep a record.** Pay attention to each success on your team and recognize efforts. Identify and reward achievements accordingly.
- **Make recognition sincere.** Ensure that the recognition you are giving is coming from a genuine place and comes across as so. Be specific with your praise.
- **Match the reward to the achievement.** It’s important to scale your rewards – better rewards for bigger accomplishments. If the same reward is given for minor and major successes alike, it can breed discontent and hurt motivation.
- **Be spontaneous.** When rewards become too predictable or expected, it diminishes their effectiveness.
- **Hold yourself accountable.** As a leader, it’s your responsibility to help keep your employees motivated and engaged.
CONTINUOUSLY IMPROVE
Continuous improvement does not end!

- Continue to monitor the changes made during the implementation step
- Return to the improvement list and tackle additional changes
- Do regular reviews of the process to increase value and decrease waste