

- Background – Common Challenges
- Framework for Technology Change Management
- Best Practices from the field
- Pre- Implementation
- During Implementation
- Post-Implementation

Part-Theory; Part-Case Study

Agenda

APPA
PCAPPA & BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO



Employee Engagement Through Technology Transition How To Prepare Your Team For Successful Technology Adoption

APPA
PCAPPA & BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO



Challenges - Environment

Tucson Unified School District

- Huge district, limited budget.
- A lot of schools have closed and classroom sizes have grown
- Transient district with students being able to move freely from one school to another at any point in time during the year

Navigating Through Technology Transitions

- Unengaged or uncoordinated Stakeholders
- Too many geographically or functionally disparate stakeholders
- Unclear strategy or timeline
- Slow User Adoption
- Lack of transparency over decisions
- Resistance to Change



Challenges – Old Processes

- Departments didn't share information effectively with each other, and the ingrained use of paper-based processes leads to employees constantly reproducing the same work over and over again: "Rarely is work captured once, and then leveraged in the future."

- TUSD's operations are also hampered by "shadow systems," multiple tracking spreadsheets and databases that can't be accessed in a centralized place.

accruent

"Department employees are more comfortable with paper, and therefore have done little to change the status quo with regard to how information travels throughout the District... between 25% and 30% of TUSD's administrative workload is wasted on the inefficiencies inherent in paper-based systems."

Report Presented To TUSD's Governing Board

accruent

APPA
PCAPPA & BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO

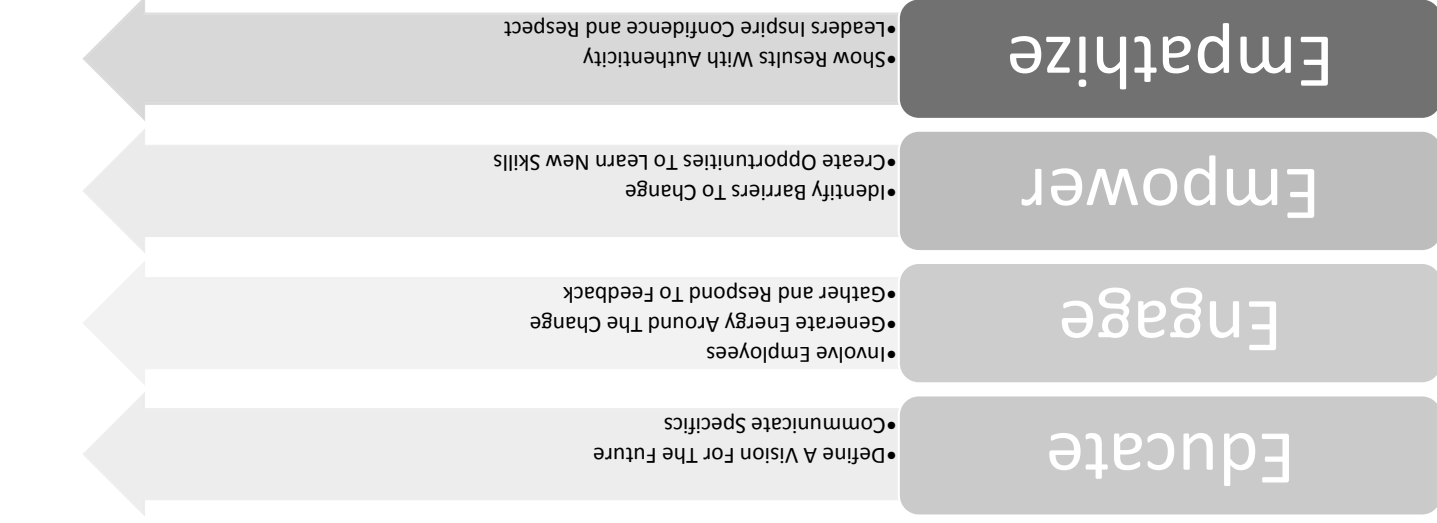
Visit us in booth #312



APPA
PCAPPA & BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO

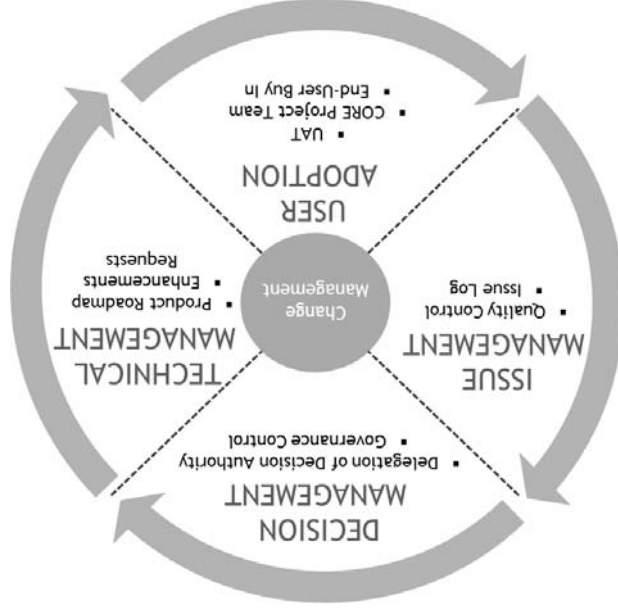
Fundamentals of Transitional Leadership

accruent



PCAPPA BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO

Change Management



PCAPPA BayAPPA
ANNUAL CONFERENCE & EXHIBITION
JULY 21-23 | 2017
HILTON SAN FRANCISCO

accruent

What do you do today, and why do you do it?



What are your critical reports?

What's working well, and what's not?

Who is involved? And what are the decision points?

Document your workflow as it is today



Pro-Tip: Don't wait for the technology implementation to begin change management

Pre-Implementation

Business Process Review

What do you want to do in your new system?

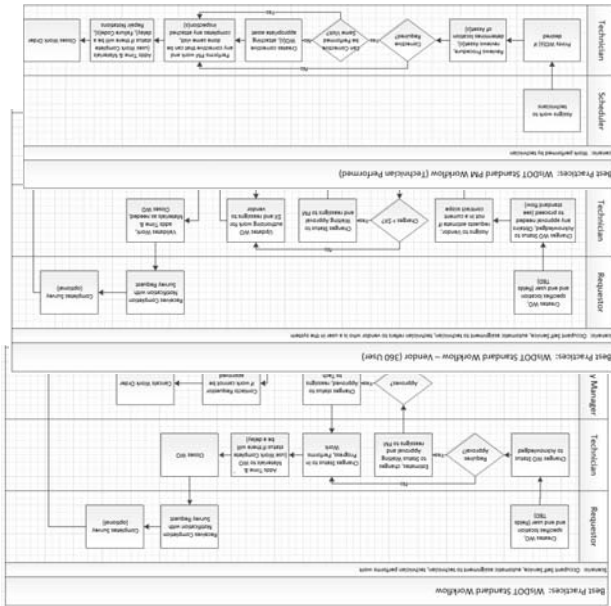
Design your go-forward workflow

Be critical of today's inefficiencies

Define the "needs" in detail and know the "nice-to-haves"

Does a mobile workforce change your approach?

Here's where Accruent or a consulting partner could help



accruent



Saw what they had and defined what they wanted

Formed committees and worked from top to bottom

Found 81 opportunities to improve their business

"Have a picture of where you're going, but you have to clean up house before you can get there"

- Loranda Iverson, Director of Business Process, Rice University

accruent

Stay involved and steer the project

Consider your deployment options

Invest the time to gather data, make decisions

Remember your critical success factors

How to keep your project on track

During Implementation



Pro-Tip: Engage All Stakeholders and Keep Showing ROI

During Implementation



Use Cost-Effective Technologies

- APIs - To meet your engagement goals, you can't have employees who are frustrated because they use disparate systems all day. If this is an issue, APIs can streamline user processes and increase efficiency by connecting your systems.

● Mobile Applications

accruent

Control the Scope

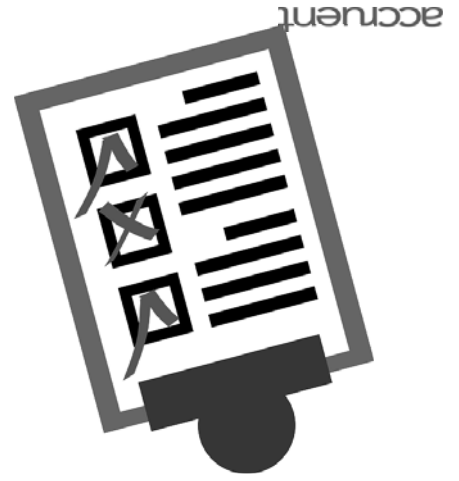
Remember What's Critical to your Success

Engage all stakeholder but caution: a wider audience means new requests
Stay clear on the needs versus nice-to-haves

Focus on the end goal

Be flexible on how you get there

Make it clear where you need to get to, and let your vendor consultants and project managers help you find the best way there



accruent

APPA
PCAPPA & BayAPPA
ANNUAL CONFERENCE & EXHIBITION
MILITON, SAN FRANCISCO
JULY 21-23 | 2017



Break It Up

Consider phased deployments for user adoption

You don't have to do it all at once, and may find more success biting off smaller bits at a time

Can make change management and adoption easier

Get faster ROI on sections of the system

BUT don't lose momentum after first go-live.

Stay Engaged

Remind your team why you're doing this

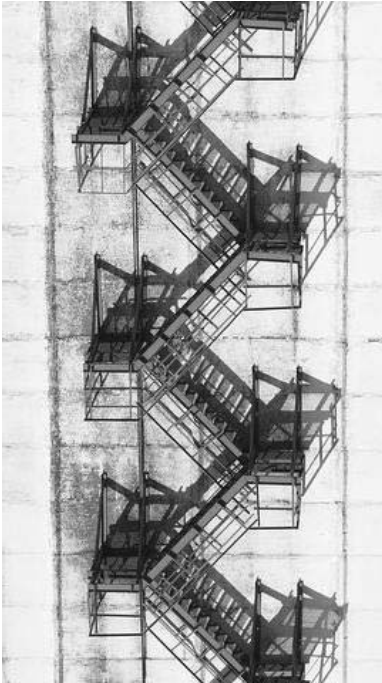
Moving from an on-premise system?
No more major updates or patches

Moving from excel or paper?

Think of the efficiencies and data you're getting out of this!

Your Vendor Implementation team doesn't always know the "why"

Be there to steer.



System Dependencies

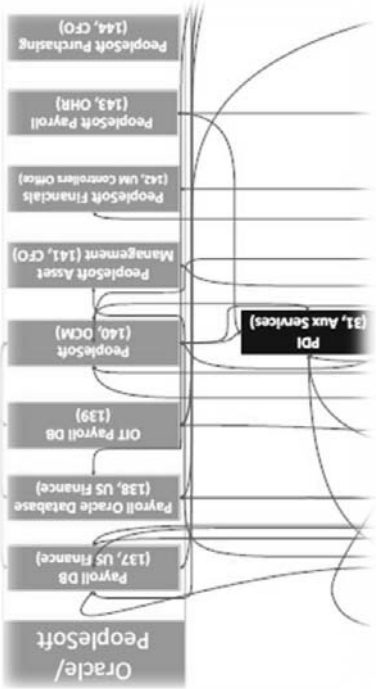
Know how this project ties into others

Will this implementation be dependent on other roll-outs?

Where will your data come from?

Where will your data go?

accruent



Columbus City Schools



“As the Director, the biggest challenge for me becomes striking a balance

between meeting the expectations of the customers and engaging a team that is unsure of where they fit in the organization.

So my vision for our team is market the value of our services to our customers and educate our staff on the value of our contributions to the organization through data analytics. I want our team to view data as tool to highlight the value of our efforts.”

- DeJuan Hood, Director of Maintenance, Columbus City Schools

accruent

Post - Implementation

Pro-Tip: The best vendors will continue to work with you after the project is done, so pick a right vendor partner.



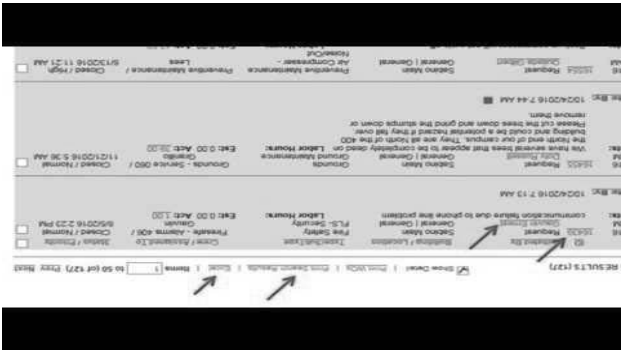
Stay Authentic

Adopt familiarity In Midst of Change

Training Sessions and Videos

Gamification, Incentives

Bring it back to the fundamental mission



Stay Connected With Your Vendor

The best vendors are there to work for you!



Training for new team members

Could your setup use some optimization?

Ready for more modules or new

features?

Training or other use-case webinars

Webinar Recordings

- Streamline Requests and Connect Operations and Services**
 - Live Webinar: Friday, April 21 10:00-10:30AM (CT) | Improve efficiency and performance in real-time healthcare. Join Accruent for a live discussion on strategies related to operational efficiency and performance improvements.
 - Tags: healthcare
- Webinar | Building an Environment For Student Success**
 - Learn how the Colorado Department of Education guides their state's public school facility managers on educational adequacy standards using VFAs portfolio assessment and capital planning tools.
 - Tags: capital planning, education k-12, facility condition assessment, adequacy standards, education
- Using Multiple Strategies to Manage Your Capital Budget**
 - With VFAs Funding Buckets feature, you can more easily and effectively implement your capital budgeting strategies to maximize the effectiveness of your campus' capital funding.
 - Tags: vfa facility, capital planning, capital budgets, education, budgeting strategy
- Tracking And Managing Your Space Just Got Easier!**
 - Simply your space management system with the enhanced FAMIS Space system, and increase the ROI on your space.
 - Tags: vfa facility, capital planning, capital budgets, education, budgeting strategy

accruent

Tucson Unified School District

A model example of post-implementation engagement

Went live February 2014

Dedicated System Admin stays informed on latest features

Owns configuration updates, drives user adoption

"We are very interested in the new features coming up in FAMIS and possibly participating in the development process! It all sounds super exciting! The integration between FAMIS and VFA will also be super valuable to our team when it's ready for us"

- Debbie Shoemaker, System Administrator, TUSD

accruent

- The periods BEFORE and AFTER your implementation are as critical as during the transition
- Introduce policies and incentives for technology adoption
- Be honest about your business processes
- Leadership is key

Summary



- The district also moved away from on-premises servers and toward a more cloud-based SaaS model that drove all of their technology purchases.
- These systems are at the heart of TUSD. These major upgrades allow TUSD to move forward with new enhancements to their daily routines, including hiring processes, payroll, budget controls, procurement processing, assets management, governance, state and federal reporting, and time and attendance clocking systems.
- TUSD first had to streamline their infrastructure and processes. First was the upgrade of the Enterprise Resource Planning and Student Information System.

Outcomes

Tucson Unified School District



Supporting the Stewardship of Education Physical Investments

Decades	Years	Quarters	Months	Weeks	Days	Hours	Minutes	Seconds
SHAPE	DRIVE	MANAGE			CONTROL			



CAPITAL PLANNING
MARKET PLANNING
STRATEGIC PLANNING
RESOURCE PLANNING



PROJECT MANAGEMENT
TRANSACTION MGMT
SPACE PLANNING
SITE MANAGEMENT



FACILITY MANAGEMENT
LEASE ADMINISTRATION
SPACE MANAGEMENT
ENERGY / SUSTAINABILITY



MOBILE FIELD SERVICE
MANAGEMENT
IoT