Change Management Makes the Difference in Chesterfield County

By Patsy J. Brown

A well-planned change management strategy can help make a major transition successful. Finance staff can tailor the change management initiatives to the organization's culture to ensure success.

Changing administrative processes is difficult, especially when most of the jurisdiction's employees are directly affected. And when that change affects paychecks, the anxiety level is going to be high. When Chesterfield County, Virginia replaced several standalone legacy systems and an internally developed time and attendance system with an off-the-shelf human resources and payroll system, county officials knew a change management strategy would be essential.

Under the new system, employees would enter their timecards online, and the information would be routed and approved electronically; before, each department used paper timesheets. This process change affected more than 3,000 employees, including 600 supervisors and their back-up approvers. The roles and responsibilities of the 60 timekeepers and their back-ups also changed tremendously. A secondary challenge involved developing processes to ensure that non-exempt employees, who would now be entering their hours in the system, would be paid accurately. In addition, many of these employees lacked computer skills.

TEAMS AND PARTNERSHIPS

When the county implemented its new timecard online system, it assembled a team to manage the change management strategy and the necessary training. Team members used several techniques to lead the organization through the experience: making sure stakeholders were involved; collaborating with key departments to build on existing processes; drawing up communications plans; and creating a well-thought-out training plan. This approach worked with the county's culture and values, which include a customer focus, employee involvement, open communications, data-driven decisions, and teamwork.

The change management and training team comprised the financial systems manager, the payroll manager, the financial systems security coordinator, a payroll subject management expert, and a representative from the county's learning organization, Chesterfield University. As they formulated their approach to change management and training, the team considered the county's culture, the expectations for high-quality training, and the need for a seamless transition to the new system.

The county also formed a change agent network to get stakeholders involved. Each customer department named a liaison to the network, and each member had several responsibilities, including providing input on training needs; gathering information required for the security set-up; observing and commenting on process demonstrations; coordinating training, practice sessions, and parallel processing within their respective departments; and communicating concerns and offering solutions. The change agent network included directors, managers, and timekeepers, depending on the size and complexity of the customer departments; some of the larger departments had three or four representatives.

The county formed a partnership with its information systems technology and Chesterfield University to use training and help desk processes that were already in place. The change management and training team agreed that Chesterfield University staff would draft as many of the training materials as possible and review all materials for quality, but subject matter experts would be heavily involved and would deliver the training in the classroom. Chesterfield University also gave a project team member access to the training registration system, allowing that person to serve as the training registrar for the system classes. The information system technology help desk provided support for problems reported by the implementation team, practice sessions, and parallel processing, before the county moved to the new system.

COMMUNICATIONS AND TRAINING

Communications planning made a significant contribution in getting the workforce to accept the changes. The initial communications plan was substantially different from the final version; it was revised continuously as the change management and training team formulated their plan, learned more, and received input — as did methods of communication, which included a survey, newsletters, change agent network meetings, an intranet site that provided updates, e-mails, and department sessions and meetings. The change management and training team also shared and gathered information about the ongoing security processes to help with training.

Planning for training was critical to the overall success of the program. The timekeepers' role was changing significantly in the new system, so this group was targeted for an early round of training, about 13 months before the new system was implemented. In addition, an initial survey revealed that approximately 20 percent of county employees didn't have the necessary computer skills to use the electronic timesheet, so the change management and training team worked with Chesterfield University to develop and deliver a three-hour course on the fundamentals.

Then, the change management and training team used information from the timekeeper to put together the remainder of the training plan. The full project team completed extensive system training and testing, and then developed training for the timekeepers. It was important for the timekeepers to be invested in the project, since they were the first line of support for several of the departments. System credibility would be based on how well the project team knew the system and processes, and on the quality of the training materials. An extensive training document presented step-by-step instructions, which were reviewed by two timekeepers, and the trainers, including the payroll subject-matter expert, documented suggestions for reports and process improvements.

Once the timekeepers understood the process changes and discussed some of them with others within their departments, the change management and training team met with the change agent network to disseminate information about training and to request assistance with ensuring that all employees attended training sessions. The change management and training team proposed the following training plan, assuming that all employees would be familiar with Windows, could navigate online using a web browser, and had exposure to spreadsheet rows and columns, as covered in the fundamentals course. These training sessions were conducted over a four-month period:

1. Timecard Online Seminar, a lecture course for all employees, including a detailed document handout that explains the differences between the legacy process and the new process.
2. Time Online for Supervisors, an additional course required for all supervisors and back-up online timecard approvers.
3. Hands-on Employee Timecard Online, for employees who weren't sure of their skills and ability to sign on and navigate the system after attending the Timecard Online Seminar.
4. Department Director Training, hands-on timecard online and human resource process training that was combined into one session.

After training (see Exhibit 1 for training class statistics), employees were allowed to sign onto the system for practice transactions. Help desk pro-

Exhibit 1: Workforce Training Statistics

Employee Group	Number of classes	Number of employees trained
Timekeeper	11	143
Timecard Online Group Seminar	45	2,976
Timecard Online for Supervisors	60	630
Hands-on Employee Timecard Online	11	143
Director Session	6	70

cesses needed to be in place first to provide assistance with whatever area an employee was actively working with in the system: production, training and practice, or Q&A. And since employee information would be displayed during the practice sessions, security information needed to be collected and loaded into the system. Most employees gained confidence once they worked with the practice system.

At their next meeting, team members provided additional reports that were now available, based on requests they'd received. The change management and training team also shared all the work and results the payroll project team had completed to ensure the payroll system's processing accuracy with the test transactions. The change management and training team provided timeframes for updating security to reflect all supervisor changes, defined a three-week timeframe for departments to schedule online timecard practice sessions, explained what was expected from the two parallel test runs before the system went live, and fielded questions.

The final change agent network meeting was held the week before the parallel test runs began. The agenda for this fairly brief meeting was more of a question and answer session to address any final concerns.

During the the first parallel test run, more than 300 issues were reported and tracked through the help desk. Four system changes were made, resolving about 285 of the issues. All but seven issues were resolved before the second parallel test run, which had about a dozen issues that could not be immediately corrected. All but two outstanding display issues were resolved before the county officially moved to the new system.

CONCLUSIONS

When the transition was complete, 3,000 employees successfully used the timecard online system with only six payroll check errors the first pay period. The change management strategy and activities made the actual transition a non-event for the workforce and for payroll.

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