

FloridaPALM

Planning, Accounting, and Ledger Management



LEADING CHANGE

JANUARY 2021



Agenda

- ▶ Why Am I Here? Why Me? Why Now?
- ▶ What Are Change Discussions?
- ▶ What Do I Need to Do?
- ▶ What's Available to Me?
- ▶ How Do I Plan for Change Discussions?
- ▶ How Do I Conduct Change Discussions?
- ▶ What's Next?



Why Am I Here? Why Me? Why Now?



You are a member of your agency's **CCN**, a **super user**, or a supervisor of a Florida PALM **end user**



Your Team **Trusts** you and looks to you for **information** and **guidance**



Your team needs to be **prepared** for their **transition** to Florida PALM and understand how it will **affect** their work



What are Change Discussions?

What are Change Discussions?

- Discussion between direct supervisors and CMS Wave end users to understand:
 - Change impacts
 - Florida PALM role(s)
 - Training
 - Support

Why are they important?

- Supports end users in preparing for their transition to Florida PALM



What Do I Need to Do?

Prepare Yourself

- Read communications from or about Florida PALM
- Regularly check the Florida PALM website
- Take advantage of the resources available
- Leverage your Change Champion Network
- Review/complete the Change Discussion toolkit

Prepare Others

- Prepare end users for upcoming changes
- Encourage positive behaviour
- Empower others to learn and seek out answers
- Embrace new processes



What is Available to Me?



Change Discussion Checklist



Change Discussion Guides



Key Terms



Important Dates



End User Reference Sheet



Resources



Change Discussion Checklist



- ☐ Review Change Discussion Toolkit and agency documentation
- ☐ Communicate Florida PALM roles
 - ☐ Share the Florida PALM role(s) assigned to the end user
 - ☐ Review relevant business process areas
- ☐ Share the Change Discussion Guides
 - ☐ Review processes relevant to your business area(s)
- ☐ Share Important Dates
 - ☐ Florida PALM Training
 - ☐ Agency Specific Training
 - ☐ Florida PALM Go-Live
 - ☐ End User Support Labs
- ☐ Review Resources
 - ☐ Share the agency plan for Florida PALM end user training registration and attendance
 - ☐ Share the address for the Florida PALM website:
 - ☐ <https://www.myfloridacfo.com/floridapalm/>
 - ☐ Provide awareness of agency documentation
 - ☐ Change Impact Tool
 - ☐ Journey Maps
 - ☐ Role Mapping Handbook
 - ☐ Agency CMS Wave documentation
- ☐ Discuss Questions and Concerns
- ☐ Document open items and questions, follow up with your Agency Liaison, and communicate answers to your team





CHANGE DISCUSSION GUIDE: [BUSINESS PROCESS GROUPING] <ACRONYM>

JANUARY 2021



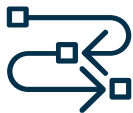
<Business Process Grouping> Overview



Overview

The business process consists of the following key activities:

- [Activity 1]
- [Activity 2]
- [Activity 2]



Processes

The following business processes will be implemented in the CMS Wave:

- [Business Process 1] [DFS Only]
- [Business Process 2]



Business Process Model



Overview

- [Business Process Model Overview]

Florida PALM End User Roles

- [Florida PALM End User Roles]

Global Change Impacts

- [Global Change Impact 1]
- [Global Change Impact 2]



Agency-Specific Change



Changes to Roles and Responsibilities

- [CHANGES TO ROLES AND RESPONSIBILITIES]



Changes to Processes and Procedures

- [CHANGES IN PROCESSES AND PROCEDURES]



Changes in Communication

- [IMPACTED AREAS] – [ACTIVITY THAT HAS CHANGES IN COMMUNICATION]

Other Agency Changes

- [IMPACTED AREAS] – [ACTIVITY THAT HAS CHANGED]



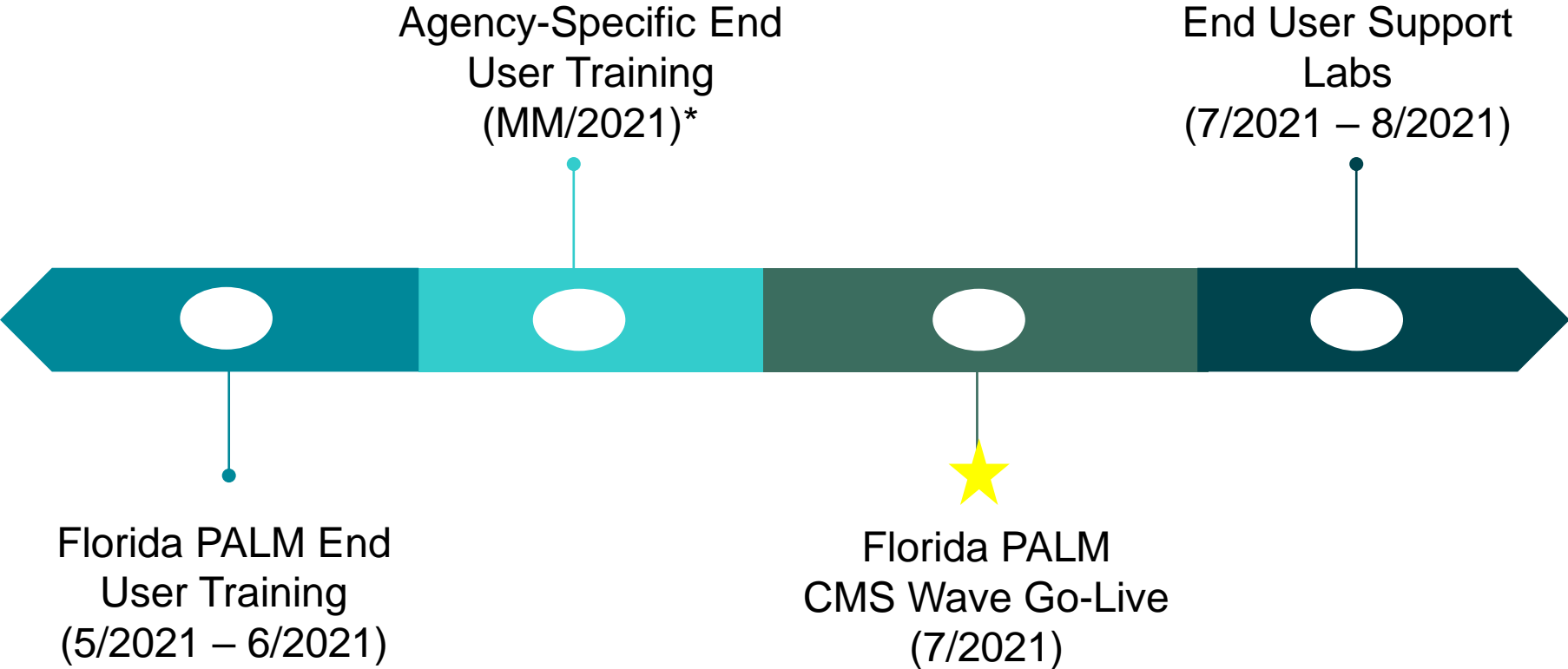
Key Terms – Business Process Grouping



- ▶ **[Term 1]** – Term 1 definition
- ▶ **[Term 2]** – Term 2 definition
- ▶ **[Term 3]** – Term 3 definition



Important Dates



Florida PALM CMS Wave End User Reference Sheet



Florida PALM Roles

Key Terms

Key Change Impacts



<Role Name>



<Role Name>



<Role Name>

<New Term>

1

<Key Impact>

2

<Key Impact>

3

<Key Impact>

4

<Key Impact>

<New Term>

<New Term>

Important Dates

<New Term>

Support Information

Agency-Specific
Training
(MM/2021)*

User Support Labs
(7/2021 – 8/2021)



Florida PALM
Training
(5/2021 – 6/2021)

Florida PALM
Go-Live
(7/2021)

<New Term>

<New Term>

<New Term>



Agency Liaison: <email>



Training Liaison: <email>



Agency Super User(s): <email>



Florida PALM Inbox:
floridapalm@myfloridacfo.com

Resources



Project-Provided Reference Materials

- ▶ [CMS Wave Business Process Models](#)
- ▶ [CMS Wave Office Hour Materials](#)
- ▶ [COA Configuration Workbook](#)
- ▶ [COA Design Structure Overview](#)
- ▶ [Agency Role Mapping Handbook](#)

Agency-Updated Reference Materials

- ▶ Agency Procedures, Policies, and Documentation
- ▶ Change Impact Tool
- ▶ CMS Wave Journey Maps
- ▶ End User Role Mapping Worksheet



How Do I Plan For Change Discussions?



Before



During



After



How Do I Conduct Change Discussions?



Preparing for a Change
Discussion



Conduct a Change
Discussion



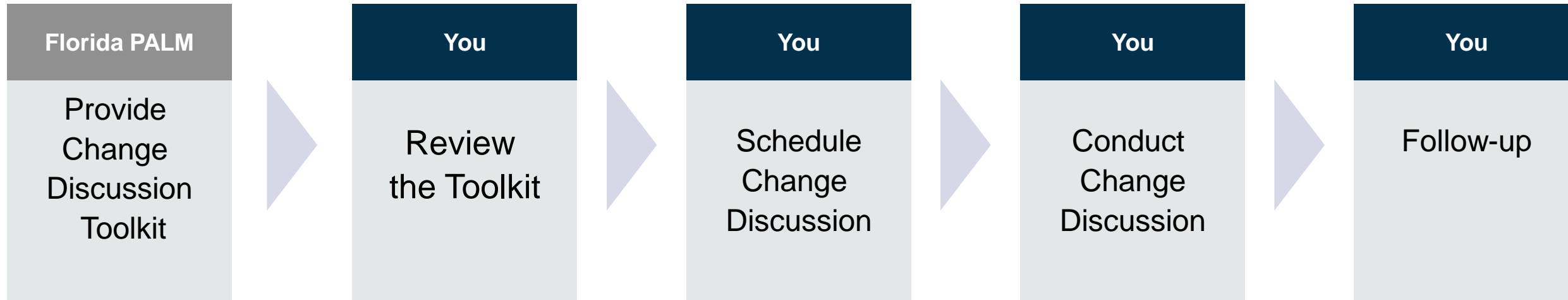
Change Discussion Checklist



- ❑ Review Change Discussion Toolkit and Agency Documentation
- ❑ Communicate Florida PALM Roles
- ❑ Share the Change Discussion Guides
- ❑ Share Important Dates
- ❑ Review Resources
- ❑ Discuss Questions and Concerns
- ❑ Document Open Items and Questions



What is Next?



CONTACT INFORMATION

CONTACT US

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

WWW.MYFLORIDACFO.COM/FLORIDAPALM/

