

TASK 524: COMPLETE END USER READINESS SURVEY ANALYSIS

FLORIDA PALM READINESS PROJECT

DEPARTMENT OF FINANCIAL SERVICES

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TABLE OF CONTENTS

- 1.0 EXECUTIVE SUMMARY 4
 - 1.1 Overview 4
 - 1.2 Document Summary 4
- 2.0 Identifying Survey audience 4
 - 2.1 Survey Audience Analysis of All Combined Groups..... 4
 - 2.2 How We Developed, & Distributed Assessment Survey 5
- 3.0 Method of Measurement & Analysis 7
 - 3.1 Type of Measurement System Used and Scoring Conducted..... 7
 - 3.2 Analysis of Results..... 8
 - 3.3 Total Awareness and Desire Scores 10
 - 3.4 Analytics in Awareness and Understanding 10
 - 3.5 Analytics in Desire, Acceptance and Commitment..... 11
 - 3.6 Individual Group Score Analytics 13
 - 3.7 Areas of Opportunities 21
 - 3.8 Survey Questions and Florida PALM Survey Domains 22
 - 3.9 End User Awareness Summary Awareness Expectations: 24
 - 3.10 End User Understanding/Desire/Commitment 25
 - 3.11 End User Acceptance: Acceptance Expectations: 26
 - 3.12 End User Commitment: 28
 - 3.13 Survey Insights and End User Comments:..... 29
- 4.0 Use of DATA Collected & Next Steps 31
 - 4.1 Agency Use of Data 31
 - 4.2 Next Steps..... 32
- 5.0 APPENDIX 34
 - 5.1 Florida PALM Road Show Awareness & Desire (A&D) Assessment 34
 - 5.2 Florida PALM Road Show Grouping and URLs..... 35
 - 5.3 DFS_Survey Results_All 10 Groups Combined..... 35
 - 5.4 Road Show_Presentation_Base Script_Final 35
 - 5.5 OCM- Communications Plan Blueprint..... 35

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1.0 EXECUTIVE SUMMARY

1.1 Overview

Florida PALM is a statewide business transformation that requires each agency to plan and execute activities necessary to ready their agency across the four critical operational elements: people, processes, technology, and data. Florida PALM issued *Readiness Task 524, End User Readiness Survey Analysis* which this task focuses on people. The Department of Financial Services (DFS) cannot successfully transition to Florida PALM if our end users are not ready. To successfully ready our people and follow the change management expectations (Table 1) described in the [Implementation Timeline and Agency Activities](#), DFS must focus on those most directly impacted by the change; the end users.

Agency Current State Analysis	Agency Transformation Planning	★ Agency Systems Build	Agency Testing, Training and Go Live Readiness	Agency Utilization of Florida PALM
<p>End users should understand:</p> <ul style="list-style-type: none"> ✓ What they are doing today in FLAIR ✓ Florida PALM is coming 	<p>End users should understand:</p> <ul style="list-style-type: none"> ✓ Why they do what they do in FLAIR ✓ Basic differences between Florida PALM and FLAIR 	<p>End users should understand:</p> <ul style="list-style-type: none"> ✓ New Terminology ✓ Benefits of Florida PALM ✓ Anticipated process changes with Florida PALM, including agency business systems 	<p>End users should understand:</p> <ul style="list-style-type: none"> ✓ Changes in their job functions ✓ How to complete their job in Florida PALM ✓ Agency specific values and processes 	<p>End users should understand:</p> <ul style="list-style-type: none"> ✓ How to continue to access training ✓ How to practice in the Sandbox ✓ Where to go for help

Table 1: End User Expectations for the Implementation Timeline and Agency Activities

1.2 Document Summary

The purpose of this document is to establish in writing the approach, methodology results and actions gained with awareness, understanding, acceptance and commitment of organizational change management with DFS, OIR, & OIR (DFS) stakeholders.

2.0 IDENTIFYING SURVEY AUDIENCE

2.1 Survey Audience Analysis of All Combined Groups

Our analysis for Readiness Task 524 started with the same stakeholders identified in Readiness Task 512; *Identify Future End Users*. DFS has approximately 20 Division/Offices. We organized the division/offices within DFS where stakeholders would either have direct input, or directly load transaction to Florida PALM and those stakeholders who shared similar processes, and those stakeholders, who

will be accessing Florida PALM for Data, Reports, Statuses. DFS grouped stakeholders into ten (10) groupings, six (6) divisions were identified as having direct input into Florida PALM who will be entering transactional data elements directly or will have an Agency Business System interface:

- Division of Accounting and Auditing,
- Office of Finance and Budget,
- Division of Risk Management,
- Division of Unclaimed Property,
- Division of Workers Compensation, and
- Division of Treasury.

The remaining division/offices were identified as accessing Florida PALM for Data, Reports, Transaction Statuses, or use Chart of Accounts for other enterprise systems.

The groupings also served as an engagement session to conduct 17 End User Road Shows where at the conclusion of each the road show the Change Champion Network (CCN) conducted our *Awareness & Desire, Assessment Surveys*; that contained the Florida PALM domains of Awareness, Understanding, Acceptance and Commitment of Florida PALM.

Sessions were conducted in small, intimate setting sizes not exceeding 30 end users, to help encourage the stakeholders to engage and ask questions that would be of interest to the entire Road Show group.

After each Road Show, the in-person stakeholders were given a completely anonymous paper survey and a computer electronic (for those based externally from the meeting).

2.2 How We Developed, & Distributed Assessment Survey

Working with our certified Prosci and CCMP (Certified Change Management Professional) along with our CCN team, DFS used the Prosci Portal Dashboard. This is a specific website area that houses the Prosci identified questions for ***Awareness, Desire, Knowledge, Ability and Reinforcement (ADKAR)***. Within the Awareness and Desire questions also captured questions to assess ***Understanding, Acceptance, and Commitment*** that Florida PALM identified as domains. Using the Prosci based Awareness and Desire (A & D) questions for the anonymous survey, gave DFS more amplitude to understand where the groups, and our DFS stakeholders are at in their current state, and how they are thinking about the future state using Florida PALM.

DFS identified ten (10) questions that were clear, concise, and designed to achieve the intended outcomes of both the Florida PALM, and DFS change management improvements. Each question was scored using a 1 – 5 scale: one (1) being lowest and a five (5) being the highest understanding. Each survey was anonymous, helping people to be more open and honest with their score and comments, and it was also provided on the computer with separate electronic (URLs) for the ten (10) unique groupings. If people wanted, they could answer the questions on the computer which went directly to the Prosci portal, but 95% of the stakeholders chose to fill out their answers on paper. The CCN team collected the paper face down, so stakeholders knew their answers were completely secret.

Two hundred and sixty-eight (268) assessments were collected but only two hundred and fifty (250) assessments were used for the analysis of 1,250 responses. The CCN did not use responses that were not complete. The survey results received were neither bad nor excellent. The Road Show was a new concept for both the stakeholders, CCN, as well as for the management teams. The survey being completed on-sight and immediately at the conclusion of the Road Show was also an original approach that DFS incorporated in this endeavor.

Overall, what came through was that there are breakdowns in the up and down communications between the end users and the Point of Contact (POC) management teams (SMEs) who oversees each division/office, which can easily be understood in both A & D assessments scoring and results.

The questions DFS utilized came from the Prosci Organization, and the entire scoring was also part of an Prosci upgrade to the ADKAR methodology Dashboard. The questions DFS used are the following:

Awareness	
I understand why Florida PALM is being implemented.	
I could explain why Florida PALM is being implemented to a colleague.	
I understand how Florida PALM will impact me, my work, and my division/office.	
All the questions I have about the implementation of Florida PALM have been answered.	
Prior to today, I have been involved in communications with my department leaders, and have been receiving updates about Florida PALM	
Awareness Totals	
	Average / person
Desire	
I have been able to voice my questions and opinions regarding Florida PALM, and I feel that my voice has been heard.	
I am supportive and committed to the implementation of Florida PALM.	
I believe my supervisor is supportive of Florida PALM.	
I look forward to the new, changed environment after Florida PALM is implemented.	
I know What's in It for Me (WIIFM), and my division/office.	
Desire Totals	

Table 2: Assessment Questions

3.0 METHOD OF MEASUREMENT & ANALYSIS

3.1 Type of Measurement System Used and Scoring Conducted

DFS utilized the *Likert Measurement Scale*. The *Likert Scale* is a rating scale used to measure **opinions, attitudes, or behaviors**. It consists of a statement or a question, followed by a series of five answer statements. Respondents choose the option that best corresponds with how they feel about the statement or question. The *Likert Scale* is simple to use for the subject and provides the CCN with a clear indication measure and acts as a great barometer for future results. The Likert Scale is considered a highly accurate measurement system.

DFS used a 1-5 rating scale which is also what people tend to be familiar with people who remember their school days. The highest positive score is a five “5” which equates to an “A” or “Excellent” score and is represented with a dark green. A four “4”, equates to a “B” or “Good” score and is represented as a lighter green.

However, as musician Paul Simon wrote “*Bridge over Trouble Waters*”, a “3” equates to a “C”. Scoring a “3” is not where an organization wants to achieve when measuring change readiness, especially at critical junctures of a project. This is because scoring a “3/C” is a statistical marker that normally moves down, or up, but seldom remains at a “3/C”.

Continuing with the score explanations, organizations will enter an unfamiliar territory who Jeff Hiatt, former Motorola engineer and founder of the individually based Prosci methodology identified in his analysis. Hiatt’s first theory principle of the ADKAR change methodology is that all change happens at the *individual level*. Hiatt stated that any score that is a “3” or below is what he termed a **Barrier Point**. Therefore, scoring a “3” is in **Yellow** and any scores below a 3 are **always in Red**. Naturally, a 2 equates to a “D”, and a 1 equates to an “F”. But what must be understood is that when the reader reviews the DSF numbers anything not in green is a concern and left on its own will more than likely become a “Go Live” people issue.

Lastly, when viewing this report, the reader must realize that if a person has a score in the lower tiers of green, although passing (like in a test), that person *must be seen in the context of the whole project cycle*. If a person has a total score in the lower green area, or multiple low scores, they are more likely to drop significantly when they get to the next stages of either the process or software changes which could be more challenging to the end user. A passing score today has a higher tendency to drop significantly once the actual processes or software changes are presented to the end user. At that point in time, the end users find it harder to save, because DFS will have less time to spend on the few, rather than the whole group. Nevertheless, if we try to work with the end users today, as our plan on “Next Steps” will indicate, DFS will have a substantially higher rate of success for these lower scoring end users and our DFS team as a whole. It is

critical to maximize our resources and time and save as many of our well trained DSF stakeholders as possible.

In this example, the first fourteen (14) end user average desire scores show that six (6) end users are at risk of readiness for Florida PALM implementation.

Row Labels	1	2	3	4	5	6	7	8	9	10	11	12	13	14
I have been able to voice my questions and opinions regarding Florida PALM, and I feel that my voice has been	3	5	4	4	5	4	5	4	4	3	3	4	4	3
I am supportive and committed to the implementation of Florida PALM.	3	5	4	3	2	4	5	4	5	3	3	4	4	5
I believe my supervisor is supportive of Florida PALM.	4	5	4	3	4	4	5	3	5	1	2	5	4	5
I know What's in It for Me (WIIFM), and my division/office.	4	4	3	3	2	4	5	4	3	2	3	3	3	3
I look forward to the new changed environment, after Florida PALM is implemented.	2	5	3	5	3	4	5	4	5	2	3	5	5	4
Desire	3.2	4.8	3.6	3.6	2	4	5	4	4	2	3	4	4	4

Table 3: Illustration of End Users Scoring an average of 3 or below in Desire (Yellow and Red)

Another illustration, using the total barrier point numbers in both Awareness and Desire shows seventeen (17) end users are at high risk of readiness for Florida PALM implementation.

Row Labels	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56
I could explain why Florida PALM is being implemented to a colleague.	5	4	3	5	4	5	5	3	3	4	4	5	4	4	5	3	5	2	3	5	5	4	5	3	4	5	4	3	5	5	4	3	5	4	5	5	3	5	4	5	4	4
All the questions I have about the implementation of Florida PALM have been answered.	5	4	4	4	5	5	4	3	4	4	5	3	4	3	3	4	4	5	3	4	4	5	4	4	4	4	4	3	5	4	4	1	4	5	5	4	3	5	4	4	3	
Prior to today, I have been involved in communications with my department leaders, and	4	5	5	3	4	5	5	4	5	5	3	5	4	5	4	5	1	3	4	5	4	4	4	5	4	4	4	5	4	5	5	3	4	5	5	5	4	4	4	4	4	
I understand why Florida PALM is being implemented	5	5	5	5	5	5	4	5	5	5	4	5	5	4	5	5	3	5	5	5	5	5	5	5	5	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4
I understand how Florida PALM will impact me, my work, and my division / office.	4	3	3	5	4	4	4	3	4	3	3	5	3	4	5	5	4	4	4	5	5	5	4	4	5	5	2	3	4	3	3	5	4	4	4	3	3	5	5	5	4	
Awareness	4.6	4.2	4	3.8	4.2	4.8	4.8	4	3.6	4.2	4.20	4.60	3.8	4.2	4.6	4	4.4	2	3.4	4.6	5	4.6	4.6	4	4.6	4.6	4.4	3.4	4.2	4.6	4.2	4	3.8	4.2	4.8	4.8	4	4	5	4.6	4.4	3.8
I have been able to voice my questions and opinions regarding Florida PALM, and I feel th	4	5	3	3	4	5	5	3	3	5	4	4	5	4	4	3	3	4	5	3	4	4	5	3	4	5	4	4	3	4	5	3	3	4	5	3	3	4	5	3	5	5
I am supportive and committed to the implementation of Florida PALM.	5	5	5	4	3	5	3	3	5	4	3	2	4	5	4	5	3	3	4	4	5	3	4	5	5	4	4	5	5	5	5	4	3	5	3	5	5	5	5	3		
I believe my supervisor is supportive of Florida PALM.	5	5	5	5	3	5	5	4	5	4	3	4	4	5	3	5	1	2	4	5	5	4	5	5	5	4	5	5	5	5	5	3	5	5	5	5	2	5	5	3	4	
I know What's in It for Me (WIIFM), and my division/office.	4	4	3	5	4	5	5	3	4	4	3	3	2	4	4	3	2	3	4	5	5	4	4	5	5	3	3	3	4	4	3	5	4	5	5	3	3	5	4	4	4	
I look forward to the new changed environment, after Florida PALM is implemented.	4	5	4	5	4	5	4	2	5	3	5	3	4	5	4	5	2	3	4	4	5	4	4	5	5	5	4	4	5	4	5	4	5	5	4	5	4	3	5	5	3	
Desire	4.4	4.8	4	4.6	4.4	4	5	4	3.2	4.8	3.6	3.6	3.2	4	5	3.8	4.4	2.2	2.8	4	4.6	5	4.4	4	5	4.8	4.2	4	4.4	4.8	4	4.6	4.4	4	5	4	3	5	4.4	4.4	3.8	

Table 4: Illustration of End Users Scoring an average of 3 or below in both Awareness and Desire (Yellow and Red)

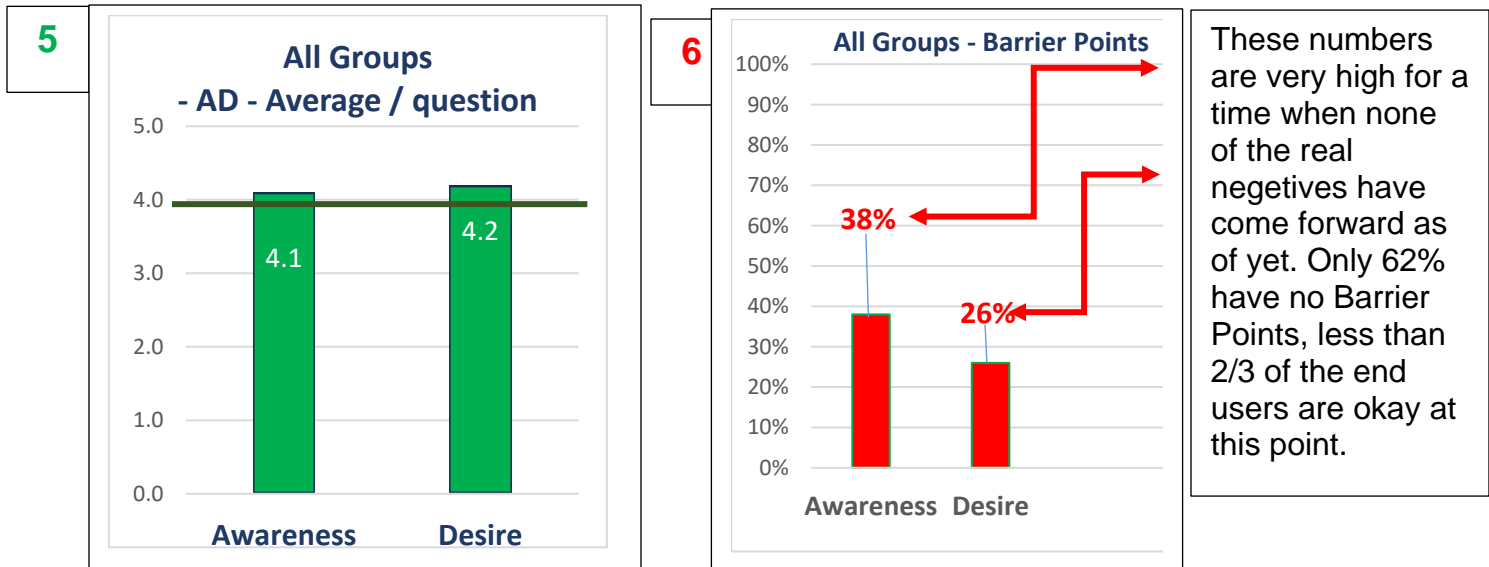
Out of 250 end users who took the Awareness portion of the assessment 59 stakeholders have red scores contained within their answers. That represents **27%**. Not to mention the number of responses that scored **3's (over 160)** indicated with yellow. What is equally important is to exam which questions scored the lowest and are detailed further in the report.

3.2 Analysis of Results

Initially, looking at the combined scores, the CCN team thought that the numbers were strong, showing a score of 4 “green”, however the scores were low 4’s on the scoring spectrum and therefore we feel DFS has an opportunity to improve these scores with targeted communication. Contained in the *Appendix 5.2 DFS_Survey Results_All 10 Groups Combined “Detailed results tab”*, there are close to 300 yellow and red scores in Awareness alone indicating potential issues.

What drives the overall numbers upward is that many subjects rated other awareness questions with 4's & 5's. This is good if you are seeking a higher median score. However, since each person is important to a successful "Go Live" the underlying's issues affect about 35% of the people. If Florida PALM was implemented right now DFS could be driving an army where **only 67% of the stakeholders** are on-board. A good analogy would be a football team playing 6.5 players instead of 11 on their defense.

The best news is that the areas that need the most assistance are easiest for DFS to assist on, because they are under the **auspices of Awareness and Communications**. The questions that scored the lowest (or negative scoring) are questions that offer the CCN the best chances to address and correct the related issues on *Awareness or Communications*. This happens to be an easier problem to gain positive traction on. Whereas if the lowest scores were in Desire, that is a more difficult issue to address. As you can see below, the CCN measured by both the scoring and by projecting issues forward at the same time.



Tables 5 & 6: Illustration of End Users cumulative average score and Barrier Points for Awareness and Desire

Numbers can be misleading indicators:

- In table five (5), the scores are actually low but passing as a lower green, which is a C+-. One could assume that a score of 4 out of 5 is great, however when looking at questions in totality, there are many scores of 1, 2, and 3s.
- In table six (6) illustrates that **only 62%** have no Barrier Points for Florida PALM Implementation.
- 62% is extremely low and this percentage must increase for the successful implementation of Florida PALM.

Normally trouble begins when stakeholders see their changes, start learning the new software, and or processes and it is at that moment the end users are faced with a new

reality. At this point it becomes very real to the end user and statistically the scores will be lower. It is essential that DFS address the awareness issues collected during the survey to ensure success at retaining or improving the scores and reducing the barrier point percentage. Knowing that there will be 16% of end users who will not change, a more appropriate barrier point should be around 20%.

3.3 Total Awareness and Desire Scores

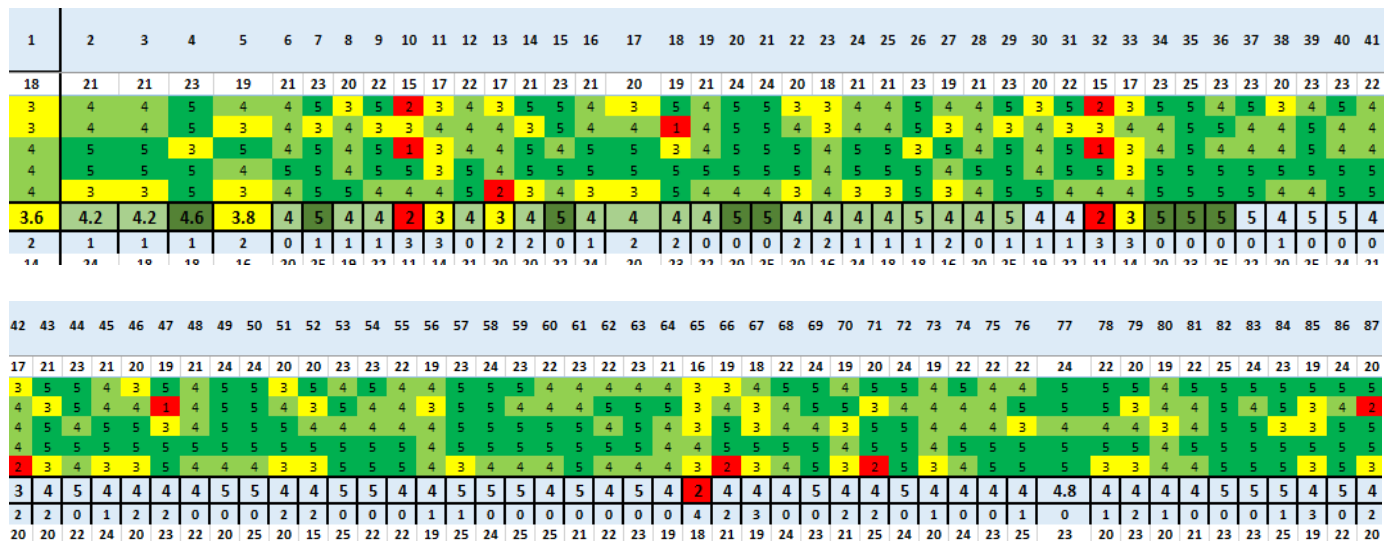
Row Labels	Average / question	% 1s	% 2s	% 3s	% 4s	% 5s	Barrier Point	1s	2s	3s	4s	5s	Total # answers
Awareness													
I could explain why Florida PALM is being implemented to a colleague.	4.3	0%	2%	14%	38%	46%		0	6	34	95	115	
All the questions I have about the implementation of Florida PALM have	3.9	1%	4%	24%	48%	23%		2	10	61	119	58	
Prior to today, I have been involved in communications with my departm	4.1	2%	5%	13%	40%	40%		6	13	32	99	100	
I understand why Florida PALM is being implemented	4.8	0%	0%	2%	18%	80%		0	0	5	46	199	
I understand how Florida PALM will impact me, my work, and my divid	3.9	1%	4%	25%	42%	28%		2	9	63	105	71	
Awareness	4.1	1%	3%	16%	37%	43%	23%	10	38	195	464	543	1250
Desire													
I have been able to voice my questions and opinions regarding Florida P	4.3	0%	2%	12%	44%	42%		0	5	31	110	104	
I am supportive and committed to the implementation of Florida PALM.	4.4	0%	1%	13%	29%	56%		0	3	33	73	141	
I believe my supervisor is supportive of Florida PALM.	4.5	1%	1%	12%	23%	63%		2	3	29	58	158	
I know What's in It for Me (WIIFM), and my division/office.	4.0	1%	4%	22%	38%	36%		2	10	54	94	90	
I look forward to the new changed environment, after Florida PALM is in	4.3	0%	3%	14%	36%	47%		0	8	34	91	117	
Desire	4.2	0%	2%	14%	34%	49%	18%	4	29	181	426	610	1250

Table 7: End Users cumulative average score and Barrier Points for Awareness and Desire

3.4 Analytics in Awareness and Understanding

As responses were collected, DFS created a scoring heat chart to visually identify end user responses, looking vertically down.

Total 250 Individual Group Scoring Heat Chart – Awareness



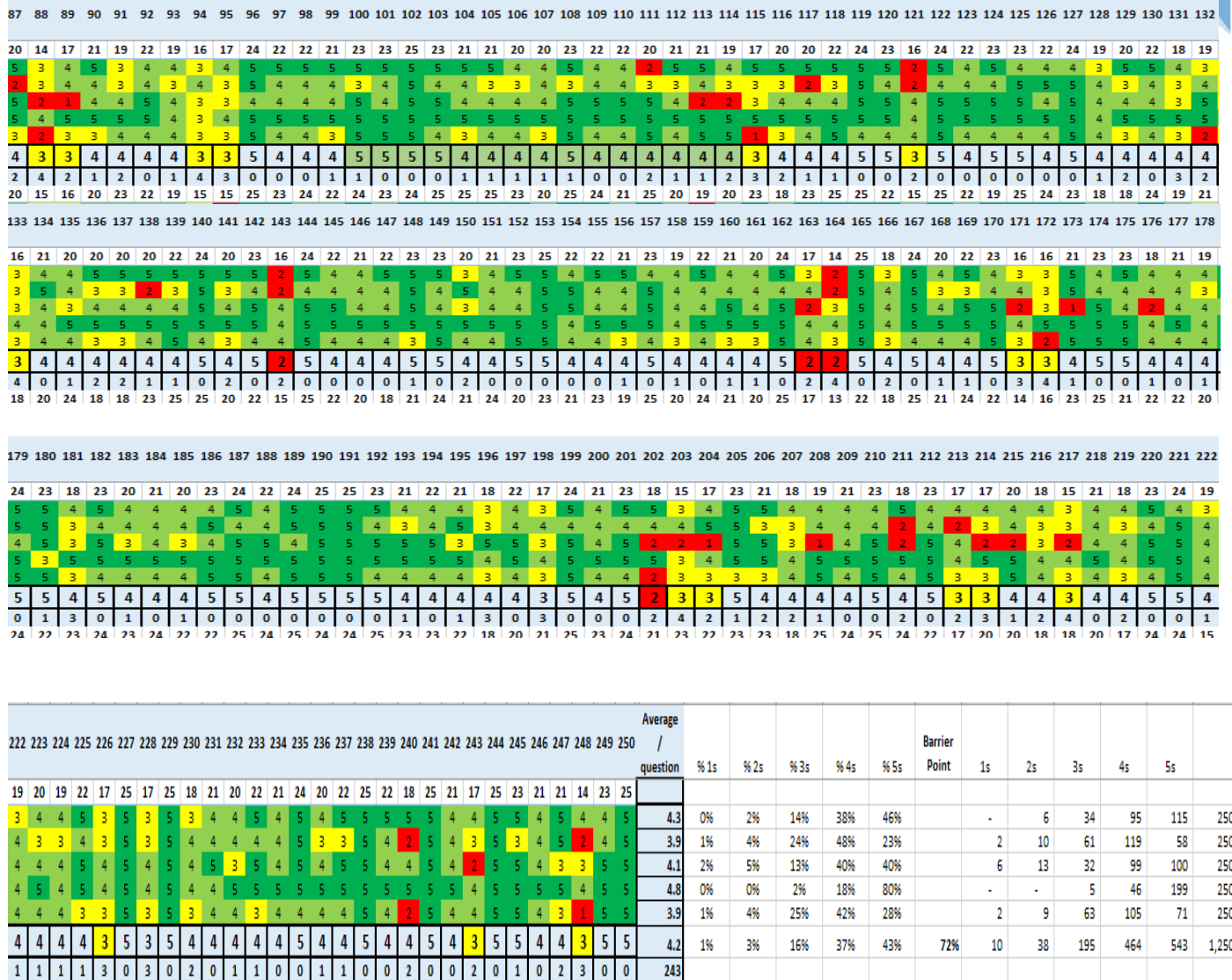


Table 8: End Users Heat Map Awareness

3.5 Analytics in Desire, Acceptance and Commitment

As responses were collected, DFS created a scoring heat chart to visually identify end user responses, looking vertically down.

81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	Average / question				
22	22	22	24	22	20	19	22	25	24	23	19	24	20	14	17	21	19	22	19	16	17	24	22	22	21	23	23	25	23	21	21	20	20	23	22	22	20	21	21	19	17	4.8				
5	5	5	5	5	5	4	5	5	5	5	5	5	5	4	5	5	5	5	4	3	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4.3	
5	4	4	5	5	5	4	5	5	5	5	5	5	5	3	4	5	3	4	4	3	4	5	5	5	5	5	5	5	5	5	4	4	5	4	4	2	5	5	4	5	5	5	4.0			
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4	4	5	5	5	3	4	4	4	5	4	5	4	2	3	4	4	3	4	4	3	4	3	4	3	5	4	4	4	3	4	3	4	3	4	4	4	3	3	4	3	3	3	4.1			
4	4	3	4	4	4	3	4	5	5	3	5	5	2	1	4	4	5	4	3	3	4	4	4	4	4	5	4	5	5	4	4	4	5	5	5	5	4	5	5	4	2	2	3	4.2		
4	4	4	5	4	4	4	4	5	5	5	4	5	4	3	3	4	4	4	4	3	3	5	4	4	4	5	5	5	4	4	4	4	4	4	5	4	4	4	4	4	4	4	3	4.2		
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4	4	5	4	4	5	4	4	5	5	5	5	4	4	3	3	4	4	4	4	3	2	5	5	4	4	5	4	5	5	5	4	5	5	4	5	4	5	4	5	4	2	4	5	4.4		
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5	5	5	5	4	5	4	4	5	5	5	4	4	4	3	3	4	5	4	4	3	3	5	5	5	4	5	5	5	5	5	5	5	5	5	4	5	5	4	5	4	4	4	5	4.3		
0	0	0	0	1	1	0	0	0	1	0	3	0	1	5	4	0	0	0	0	1	5	4	0	0	0	1	0	0	0	0	0	1	1	0	0	0	0	0	1	1	0	0	0	0	114	

Table 10: A&A End Users Heat Map Awareness & Desire

Group 2 – Bureau of Financial Services, Disbursements, Revenue and Receipts

The heat maps below represent two (2) separate sessions presented to the Office of Finance and Budget. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	4%	3%	94%
Average / question	4.2	4.5	

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	Average / question
22	18	17	16	21	23	22	23	22	23	24	19	22	23	23	20	4.8
5	5	5	4	4	5	5	5	5	5	5	4	5	5	5	5	4.2
5	4	3	3	4	4	4	4	4	5	5	4	4	5	4	5	3.9
4	3	2	3	4	4	4	5	4	4	4	4	5	5	5	3	4.1
4	3	4	3	5	5	5	4	4	5	5	3	4	4	5	3	4.1
4	3	3	3	4	5	4	5	5	4	5	4	4	4	4	4	4.2
4.4	3.6	3.4	3.2	4.2	4.6	4.4	4.6	4.4	4.6	4.8	3.8	4.4	4.6	4.6	4	4.2
0	3	3	4	0	0	0	0	0	0	0	1	0	0	0	2	13
14	19	23	18	20	25	24	25	25	25	24	19	23	22	25	18	4.6
5	4	5	4	4	5	5	5	5	5	4	5	5	3	5	4	4.4
4	4	5	3	4	5	5	5	5	5	5	3	5	5	5	3	4.6
5	3	5	4	4	5	5	5	5	5	5	4	4	5	5	5	4.5
5	4	5	4	4	5	4	5	5	5	5	3	5	5	5	3	4.3
5	4	3	3	4	5	5	5	5	5	5	4	4	4	5	3	4.3
4.8	3.8	4.6	3.6	4	5	4.8	5	5	5	4.8	3.8	4.6	4.4	5	3.6	4.5

Table 11: OFB-1 End Users Heat Map Awareness & Desire

Group 2 – Office of Budget, Bureau of Financial Services, Reconciliation and Reporting, Revenue and Receipts.

By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	2%	3%	95%
Average / question	4.3	4.3	

1	2	3	4	5	6	7	8	9	Average / question
20	20	22	24	23	16	24	22	23	
5	5	5	5	5	4	5	5	5	4.9
5	5	5	5	5	2	5	4	5	4.6
3	4	5	4	4	4	5	4	4	4.1
3	2	3	5	4	2	4	4	4	3.4
4	4	4	5	5	4	5	5	5	4.6
4	4	4.4	4.8	4.6	3.2	4.8	4.4	4.6	4.3
2	1	1	0	0	2	0	0	0	6
14	23	25	25	22	15	25	22	19	
4	5	5	5	5	4	5	4	5	4.7
3	5	5	5	5	4	5	5	3	4.4
5	5	5	5	5	3	5	5	5	4.8
3	4	5	5	4	2	5	4	3	3.9
3	4	5	5	3	2	5	4	3	3.8
3.6	4.6	5	5	4.4	3	5	4.4	3.8	4.3

Table 12: OFB-2 End Users Heat Map Awareness & Desire

Group 3 – Division of Risk Management

The heat map below represents two (2) separate sessions presented to the Division of Risk Management and have been combined. All future end users identified attended one of the scheduled sessions. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	7%	8%	97%
Average / question	4.2	4.0	

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	Average / question	
21	22	23	23	20	21	23	25	22	22	21	23	19	22	21	20	24	17	14	25	18	24	20	22	23	16	16		
5	5	5	5	5	5	5	5	4	5	5	5	4	5	5	5	5	4	4	5	4	5	5	5	5	4	5	4.8	
4	5	5	5	3	4	5	5	4	5	5	4	4	5	4	4	5	3	2	5	3	5	4	5	4	3	3	4.2	
4	4	3	5	4	4	5	5	4	4	3	4	3	4	3	3	5	4	3	5	3	4	4	4	5	3	2	3.9	
4	4	4	5	4	5	4	4	5	5	4	4	5	4	4	4	4	4	2	5	4	5	3	3	4	4	3	4.1	
4	4	4	5	4	3	4	4	5	5	4	4	5	4	4	5	4	2	3	5	4	5	4	5	5	2	3	4.1	
4.2	4.4	4.6	4.6	4	4.2	4.6	5	4.4	4.4	4.2	4.6	3.8	4.4	4.2	4	4.8	3.4	2.8	5	3.6	4.8	4	4.4	4.6	3.2	3.2	4.2	
0	0	1	0	2	0	0	0	0	0	1	0	1	0	1	1	0	2	4	0	2	0	1	1	0	3	4	24	
14	18	21	24	21	24	20	23	21	23	19	25	20	24	21	20	25	17	13	22	18	25	21	24	22	14	16		
4	4	4	5	4	4	4	5	4	5	4	5	4	5	4	5	4	5	4	2	5	3	5	4	5	5	3	3	4.2
4	2	4	4	4	5	4	3	4	4	4	5	4	5	5	5	5	3	3	4	4	5	5	5	3	3	4	4.1	
4	4	4	5	4	5	3	5	4	4	4	5	3	5	4	4	5	3	3	5	3	5	5	5	5	3	3	4.1	
4	4	4	5	4	5	4	5	4	5	4	5	4	5	3	4	5	3	2	4	4	5	3	5	5	3	3	4.1	
4	4	5	5	5	5	5	5	5	5	3	5	4	5	4	3	5	4	3	4	4	5	4	4	4	2	3	4.2	
4	3.6	4.2	4.8	4.2	4.8	4	4.6	4.2	4.6	3.8	5	4	4.8	4.2	4	5	3.4	2.6	4.4	3.6	5	4.2	4.8	4.4	2.8	3.2	4.2	
0	1	0	0	0	0	1	1	0	0	1	0	1	0	1	1	0	3	5	0	2	0	1	0	1	5	4	28	

Table 13: DRM End Users Heat Map Awareness & Desire

Group – 4 Division of Unclaimed Property

The heat map below represents one session presented to the Division of Unclaimed Property.

	Awareness	Desire	No Barrier Point
Barrier Points	3%	1%	97%
Average / question	4.2	4.5	

1	2	3	4	5	6	7	8	9	10	11	12	13	Average / question
21	23	23	18	21	19	24	23	18	23	20	21	20	
5	5	5	4	5	4	5	3	5	5	5	5	5	4.7
5	4	5	4	4	4	5	5	4	5	4	4	4	4.4
5	5	5	4	4	4	5	5	3	4	4	4	4	4.3
5	4	4	4	4	3	5	5	3	4	4	4	4	4.1
1	5	4	2	4	4	4	5	3	5	3	4	3	3.6
4.2	4.6	4.6	3.6	4.2	3.8	4.8	4.6	3.6	4.6	4	4.2	4	4.2
1	0	0	1	0	1	0	1	3	0	1	0	1	9
14	25	21	22	22	20	24	22	23	24	23	24	22	
5	5	4	3	4	4	5	5	4	4	4	5	4	4.3
5	5	4	5	4	4	5	5	5	5	5	5	4	4.7
3	5	5	5	5	4	5	3	5	5	5	5	5	4.6
5	5	4	5	5	4	4	4	5	5	5	5	5	4.7
5	5	4	4	4	4	5	5	4	5	4	4	4	4.4
4.6	5	4.2	4.4	4.4	4	4.8	4.4	4.6	4.8	4.6	4.8	4.4	4.5
1	0	0	1	0	0	0	1	0	0	0	0	0	3

Table 14: DUP End Users Heat Map Awareness & Desire

Group 5 – Division of Workers Compensation

The heat map below represents two (2) separate sessions presented to the Division of Workers Compensation. All future end users participated in an offered session. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	3%	1%	96%
Average / question	4.4	4.6	

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	Average / question
23	24	22	24	25	25	23	21	22	21	18	25	22	21	22	23	21	22	17	24	21	
5	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	3	5	4	5	5	4.8
4	5	4	5	5	5	5	4	4	4	3	5	4	4	4	5	5	4	3	5	4	4.3
5	5	4	5	5	5	4	4	4	4	3	5	5	5	5	4	4	4	3	5	4	4.4
5	4	4	5	5	5	4	3	4	5	3	5	3	3	4	4	5	4	4	4	4	4.1
4	5	5	4	5	5	5	5	5	3	5	5	5	4	4	5	4	5	3	5	4	4.5
4.6	4.8	4.4	4.8	5	5	4.6	4.2	4.4	4.2	3.6	5	4.4	4.2	4.4	4.6	4.2	4.4	3.4	4.8	4.2	4.4
0	0	0	0	0	0	0	1	0	1	3	0	1	1	0	0	1	0	3	0	0	11
14	25	24	25	24	24	25	23	23	22	18	24	23	19	22	24	23	20	21	25	23	
5	5	5	5	4	4	5	4	5	4	4	5	4	3	4	5	5	3	4	5	4	4.4
5	5	5	5	5	5	5	5	4	5	4	5	5	4	5	5	5	5	4	5	5	4.8
4	5	5	5	5	5	5	5	5	5	4	5	5	4	5	5	4	4	5	5	5	4.8
4	5	5	5	5	5	5	5	4	5	4	4	4	4	4	5	5	4	4	5	5	4.6
4	5	4	5	5	5	5	4	5	3	2	5	5	4	4	4	4	4	4	5	4	4.3
4.4	5	4.8	5	4.8	4.8	5	4.6	4.6	4.4	3.6	4.8	4.6	3.8	4.4	4.8	4.6	4	4.2	5	4.6	4.6

Table 15: DWC End Users Heat Map Awareness & Desire

Group 6 – Treasury

The heat maps below represent one session presented to the Division of Treasury. It should be noted that 30 future end users were invited to the road show and only 13 attended, so the scores may not represent the full picture for this Division. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	9%	2%	92%
Average / question	3.9	4.5	

1	2	3	4	5	6	7	8	9	10	11	12	13	Average / question
23	18	15	17	23	21	18	19	21	23	18	23	17	
5	5	3	4	5	5	4	5	5	5	5	5	4	4.6
5	5	3	4	5	5	4	4	4	4	5	4	4	4.3
4	2	3	3	3	3	4	5	4	5	4	5	3	3.7
4	4	4	5	5	3	3	4	4	4	2	4	2	3.7
5	2	2	1	5	5	3	1	4	5	2	5	4	3.4
4.6	3.6	3	3.4	4.6	4.2	3.6	3.8	4.2	4.6	3.6	4.6	3.4	3.9
0	2	4	2	1	2	2	1	0	0	2	0	2	1.8
14	21	23	22	23	23	18	25	24	25	24	22	17	
4	4	4	5	5	5	3	5	4	5	5	4	2	4.2
5	4	4	5	5	5	3	5	5	5	5	5	4	4.6
5	5	5	4	5	5	4	5	5	5	5	5	5	4.8
5	4	5	3	3	4	4	5	5	5	5	4	4	4.3
5	4	5	5	5	4	4	5	5	5	4	4	2	4.4
4.8	4.2	4.6	4.4	4.6	4.6	3.6	5	4.8	5	4.8	4.4	3.4	4.5

Table 16: TRS End Users Heat Map Awareness & Desire

Group – 7 Office of Insurance Regulation, Office of Financial Regulation, and the Office of General Counsel

The heat map below represents one session presented to the Office of Insurance Regulation, Office of Financial Regulation, and the Office of General Counsel. It should be noted that 19 future end users were invited to the road show and only 6 attended, so the scores may not represent the full picture for these three Offices. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	4%	2%	95%
Average / question	3.6	3.8	

	1	2	3	4	5	6	Average / question
	17	20	18	15	21	18	
	5	5	4	4	5	4	4.5
	4	4	4	3	4	4	3.8
	3	5	4	3	4	3	3.7
	3	4	3	3	4	3	3.3
	2	2	3	2	4	4	2.8
	3.4	4	3.6	3	4.2	3.6	3.6
	3	1	2	4	0	2	1.2
	14	20	18	18	20	17	
	4	4	4	3	4	3	3.7
	4	5	4	4	4	4	4.2
	4	3	3	4	4	4	3.7
	4	4	3	4	4	4	3.8
	4	4	4	3	4	2	3.5
	4	4	3.6	3.6	4	3.4	3.8

Table 17: OIR, OFR, OGC End Users Heat Map Awareness & Desire

Group 8 - Investigative Fraud, Public Assistance Fraud and State Fire Marshall

The heat map below represents one session presented to the Investigative Fraud, Public Assistance Fraud and State Fire Marshall. It should be noted that 20 future end users were invited to the road show and only 5 attended in person and 12 attended remotely from the fire college and only two fire college attendees completed the electronic survey. These scores may not represent the full picture for these three Divisions. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	0%	3%	97%
Average / question	4.1	4.2	

	1	2	3	4	5	6	7	Average / question
	23	24	19	20	19	22	17	
	5	4	3	4	4	5	3	4.0
	5	5	4	5	4	5	4	4.6
	4	5	4	4	4	3	3	3.9
	5	5	4	4	4	5	4	4.4
	4	5	4	3	3	4	3	3.7
	4.6	4.8	3.8	4	3.8	4.4	3.4	4.1
	0	0	1	1	1	1	3	7
	14	24	15	24	21	22	16	
	5	5	4	4	5	5	4	4.6
	4	4	3	5	4	3	3	3.7
	5	5	3	5	4	5	3	4.3
	5	5	3	5	4	5	3	4.3
	5	5	2	5	4	4	3	4.0
	4.8	4.8	3	4.8	4.2	4.4	3.2	4.2

Table 18: DIFS, PAF, SFM End Users Heat Map Awareness & Desire

Group 9 - Bureau of Human Resources, Division of Administration, Division of Rehabilitation and Liquidation, and Office of Information Technology

The heat map below represents one session presented to the Bureau of Human Resources, Division of Administration, Division of Rehabilitation and Liquidation and Office of Information Technology. It should be noted that 22 future end users were invited to the road show and only 13 attended in person and 2 assessments were rejected due to being incomplete. These variables may not represent the full picture for these four Divisions. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	4%	1%	96%
Average / question	4.2	4.4	

1	2	3	4	5	6	7	8	9	10	11	Average / question
22	21	24	20	22	25	22	18	25	18	16	
5	4	5	4	5	5	5	5	5	4	4	4.6
3	4	4	4	4	5	4	2	5	4	4	3.9
4	4	5	3	3	5	4	2	5	4	3	3.8
5	4	5	4	5	5	4	4	5	2	2	4.1
5	5	5	5	5	5	5	5	5	4	3	4.7
4.2	4.2	4.8	4	4	5	4	3	5	4	3	4.2
1	0	0	1	1	0	0	2	0	1	3	9
14	23	25	20	24	23	21	18	23	20	24	
4	4	5	4	5	5	4	4	5	4	4	4.4
5	5	5	4	5	5	4	5	5	4	5	4.7
5	5	5	4	5	3	5	5	4	4	5	4.5
5	5	5	4	5	5	4	3	5	4	5	4.5
4	4	5	4	4	5	4	1	4	4	5	4.0
4.4	4.6	5	4	5	5	4	4	5	4	5	4.4

Table 19: HR, ADM, R&L, OIT End Users Heat Map Awareness & Desire

Group 10 – Office of the Consumer Advocate, Division of Funeral and Cemetery, Division of Consumer Services, and Division of Insurance Agents and Agency

The heat map below represents one session presented to the Office of the Consumer Advocate, Division of Funeral and Cemetery, Division of Consumer Services, and Division of Insurance Agents and Agency. It should be noted that 17 future end users were invited to the road show and only 7 attended in person. These variables may not represent the full picture for these four Divisions. By looking at the color response patterns, will identify areas of communication needed to improve the overall score as we continue with the Florida PALM Readiness activities.

	Awareness	Desire	No Barrier Point
Barrier Points	2%	1%	97%
Average / question	4.3	4.5	

1	2	3	4	5	6	7	Average / question
25	23	21	21	14	23	25	
5	5	5	5	4	5	5	4.9
5	5	4	5	4	4	5	4.6
5	5	4	3	1	5	5	4.0
5	3	4	5	2	4	5	4.0
5	5	4	3	3	5	5	4.3
5	4.6	4.2	4.2	2.8	4.6	5	4.3
0	1	0	2	3	0	0	6
14	25	21	25	17	22	24	
5	5	4	5	3	5	5	4.6
5	5	4	5	4	5	5	4.7
4	5	5	5	4	3	4	4.3
5	5	4	5	3	4	5	4.4
5	5	4	5	3	5	5	4.6
4.8	5	4.2	5	3.4	4.4	4.8	4.5

Table 20: CA, CS, DFC, IAAS End Users Heat Map Awareness & Desire

3.7 Areas of Opportunities

By analyzing the responses to each question, the CCN can now use this as an opportunity to communicate to the end users by question.

Row Labels	Average / question	% 1s	% 2s	% 3s	% 4s	% 5s	Barrier Pt	1s	2s	3s	4s	5s	Total # answers
Awareness													
could explain why Florida PALM is being implemented to a colleague.	4.3	0%	2%	14%	38%	46%		0	6	34	95	115	
All the questions I have about the implementation of Florida PALM have been answered.	3.9	1%	4%	24%	48%	23%		2	10	61	119	58	
Prior to today, I have been involved in communications with my department regarding Florida PALM.	4.1	2%	5%	13%	40%	40%		6	13	32	99	100	
I understand why Florida PALM is being implemented	4.8	0%	0%	2%	18%	80%		0	0	5	46	199	
I understand how Florida PALM will impact me, my work, and my division/office.	3.9	1%	4%	25%	42%	28%		2	9	63	105	71	
Awareness	4.1	1%	3%	16%	37%	43%	23%	10	38	195	464	543	1250
Desire													
I have been able to voice my questions and opinions regarding Florida PALM.	4.3	0%	2%	12%	44%	42%		0	5	31	110	104	
I am supportive and committed to the implementation of Florida PALM.	4.4	0%	1%	13%	29%	56%		0	3	33	73	141	
I believe my supervisor is supportive of Florida PALM.	4.5	1%	1%	12%	23%	63%		2	3	29	58	158	
I know What's in It for Me (WIIFM), and my division/office.	4.0	1%	4%	25%	42%	28%		2	10	54	94	90	
I look forward to the new changed environment, after Florida PALM is implemented.	4.3	0%	3%	14%	36%	47%		0	8	34	91	117	
Desire	4.2	0%	2%	14%	34%	49%	18%	4	29	181	426	610	1250

Tables 217: Areas of Opportunity to address specific Awareness and Desire questions

For instance, the CCN has three areas that can be easily addressed in future communications.

- “All the questions I have about the implementation of Florida PALM have been answered.”
 - This cumulative score was 3.9 and is circled above in purple. The CCN can address the yellow and red respondents, and this will potentially correct

29% of our end users who may not believe that they have been provided answers to their questions.

- “I understand how Florida PALM will impact me, my work, and my division/office.”
 - This cumulative score was also a 3.9 and is circled above in blue/teal. The CCN can address yellow and red respondents, and this will potentially correct 30% of our end users who are still unclear how Florida PALM will impact them.”
- “I know What’s in It for Me (WIIFM), and my division/office.”
 - This cumulative score was also a 4.0 and is circled above in black. The CCN can address yellow and red respondents, and this will potentially correct 27% of our end users who may not believe that they don’t quite understand what’s in it for them.

3.8 Survey Questions and Florida PALM Survey Domains

The CCN created questions using the Prosci ADKAR methodology and all of the selected DFS questions could be categorized within the four (4) domains that Florida PALM requested the questions to be grouped and analyzed under. Those domains are:

- ❖ **Awareness** of Florida PALM
- ❖ **Understanding** of Florida PALM readiness activities
- ❖ **Acceptance** that Florida PALM will impact their jobs
- ❖ **Commitment** to participate in the change and learn how to complete job duties in Florida PALM.

Of the 10 Awareness and Desire ADKAR questions used, below are the questions and score tied to Florida PALM domains:

- **Awareness:** Scored 4.2
 - I understand why Florida PALM is being implemented.
 - I could explain why Florida PALM is being implemented to a colleague.
 - I understand how Florida PALM will impact me, my work, and my division/office.
 - All the questions I have about the implementation of Florida PALM I have been able to ask.
 - Prior to today, I have been involved in communications with my department leaders and have been receiving updates about Florida PALM.

Out of 1,250 answers (250 stakeholder multiplied by five questions); 231, or 18% responses were either red (score 1 or 2) or yellow (score 3).

The purpose of the Road Shows was to bring awareness to the end users on Florida PALM and provide the ability to answer questions. The CCN have added

more communication solutions, which will be used to increase the awareness score. It is intended that when the CCN, and POCs distribute the survey results to the groups, the plan is to continue the face-face engagement during these sessions. Over the next 3-months, the CCN has identified over 10 communication events scheduled to strengthen awareness to the stakeholders. Lastly, when the results are distributed to the groups the CCN intended to use the opportunity to further engage stakeholders to open and share concerns do not address in the May Road Shows.

- **Understanding:** Scored 4.8
 - *I understand why Florida PALM is being implemented*

This question scored the highest, with no individual scores of 1 or 2 and only 2% of the total responses had a scored a 3 to this question. It is evident that the end user, understand the reasoning for the implementation of Florida PALM.

DFS addressed the acceptance and commitment domains using the Desire questions from Prosci ADKAR.

- **Acceptance:** Scored 3.9 & 4.0 Respectively
 - I understand how Florida PALM will impact me, my work, and my division / office.
 - I know what is in it for me (WIIFM) and my division.

Out of 1,250 answers (250 stakeholder multiplied by five questions); 150 responses are yellow (score 3) and 41 responses are 2's and 1's. for a cumulative total of 191 responses that the CCN can easily address. Although these are very good scores, the CCN will continue to make sure these score remain high as the project progresses. Again, the CCN believes our plan offers the correct fixes and the lower scores are all easy address through targeted communications.

DFS can and will fix the People Side of Change for Florida PALM with relative ease. The Road Shows helped set the stage for better things to come. The CCN also plans to repeat this same survey again in the fall, to make sure that the numbers move up.

As additional process documentation is received from Florida PALM we will utilize our communication efforts to target and provide content to specific group areas which will illustrate, and how the end users will be affected, and believe these scores will actually increase as information is provided thru the conclusion of Segment IV of the design phase.

The second question listed with acceptance is closely associated with the first question and will be addressed in our multi-level communications and training plans once Segment IV Recap is completed in October.

- **Commitment:** Scored 4.4 & 4.3 Respectively

- I am supportive and committed to the implementation of Florida PALM.
- I look forward to the new changed environment, after Florida PALM is implemented.

When the CCN, and POC distribute the results to each of the 10 groups, the intent is to continue our face-face engagements. The CCN has also identified over 10 additional communication events scheduled to continue in just in in the next 3 months. The CCN hopes that once the results are distributed to the groups the CCN can use this as an opportunity to get more stakeholders to open and share concerns.

3.9 End User Awareness Summary

Awareness Expectations:

The DFS CCN Team thought that the numbers in the green were strong success indicator, but the scores were in the lower end of the passing spectrum, and therefore we feel that we need to improve Awareness.

The questions we utilized came from the Prosci organization, and in fact the entire scoring was also part of an upgrade to the ADKAR methodology Dashboard, and the Prosci Organization. Our Prosci-ADKAR Awareness & Desire survey gave far more amplitude to understanding where the groups are at in their current-state thinking.

Remember that ADKAR is a change methodology based on individual change, and not on organizational change.

The fact that the CCN conducted 17 extensive 2-hour Road Shows provided the agency a large amount of Frequently Asked Questions (FAQs), and dialogue with the CCN innovators assigned to the Florida PALM Implementation which has resulted in a great deal higher Awareness. However along with Awareness, come the questions from the stakeholders. How will this move to Florida PALM affect me, how will it affect my team, and our ability to perform our jobs.

Since many of these questions cannot be answered because the Project is still in the design phase. Therefore, many stakeholders were a bit unhappy. On one hand we are saying, *“we have this new great Florida PALM system, but we don’t know yet how it will exactly affect you.”*

Groups with the highest and the lowest levels of Awareness:

The CCN grouped liked processes together for the purpose of both the Road Show and the survey as explained in *Section 2.1 Survey Audience Analysis of All Combined Groups*.

- Group 2 - *OFB, Finance & Budget* scored the **highest** with a score of 4.4 on the 5pt scale.

- Group 7 composed of (OIR, OFR, OGC), had the lowest score of 3.6 on a 5pt scale.

Steps DFS plans on performing to increase user Awareness:

The CCN has created a multi-level plan, that begins with the CCN and division leadership and POC delivering the results to each group which will carry on an open dialogue between the CCN, POC, division leadership and the groups. The CCN is planning to share the FAQs from the 17 Road Shows which will provide increased awareness.

We have detailed Communications and Training Plans that will be specific to each group.

3.10 End User Understanding/Desire/Commitment

Understanding Expectations:

The levels of *Understanding* were higher than the CCN anticipated. This can be seen in the *Desire and Acceptance* scores. The total score for *Desire* was 4.2 and *Understanding* was 4.8 (on a 5pt Prosci Likert scale).

There is no doubt that now after the extensive Road Shows and the surveys that DFS is looking forward to the Florida PALM happening. Everyone even knows the start date of January 6, 2026. At several of the Road Shows the Agency Liaison suggested that end users start thinking about questions and process scenarios they want to perform in their UAT time in the “sandbox”.

Groups with the highest and the lowest levels of Understanding:

The CCN grouped liked processes together for the purpose of both the Road Show and the survey as explained in *Section 2.1 Survey Audience Analysis of All Combined Groups*.

The following groups scored the highest:

- Group – 5 Workers Compensation scored a 4.6 on the 5pt scale.
- Group – 2 Finance & Budget scored 4.5 on the 5pt scale.
- Group – 6 Treasury scored a 4.5 on the 5pt scale.
- Group – 4 Unclaimed Property scored 4.5 on the 5pt scale.
- Group – 7 Office of Insurance Regulation, Office of Financial Regulation and the Office of General Counsel scored the lowest with a 3.8 on the 5-pt. scale.

Remember, DFS conducted 17 Road Shows, that included all the CCN Innovators, from the Deputy CFO Fennell, Chief/Agency Liaison Alexandra Weimorts and all the CCN members to talk with the groups and be available to ask any question. This method showed commitment from the top, side, and bottom stakeholders. Explaining everything

to 268 DFS stakeholders provided an opportunity to be very successful on bringing Understanding to the end users.

We still plan to continue with our Communications and Training plans. We are even planning on repeating the same survey after we implement some communication solutions in place. The CCN wants to measure and to make what we do for both Awareness and for Understanding and Desire are the correct things, and we will have real numbers to validate progress.

Steps DFS plans on performing to increase User Understanding:

The CCN has created a multi-level plan, that begins with the CCN and division leadership and POC delivering the results to each group which will carry on an open dialogue between the CCN, POC, division leadership and the groups. The CCN is planning to share the FAQs from the 17 Road Shows which will provide increased awareness.

We have detailed Communications and Training Plans that will be specific to each group. Additionally, the CCN plans to repeat the same survey after we put our solutions into effect.

We are planning to utilize an on-line information SharePoint site that is being built by DFS Web team, and will have games, pictures of the teams in training and all sorts of materials to attract and keep all DFS Stakeholders informed.

We may not use all 27 ways to communicate but we will be using at least 15 methods to communicate.

3.11 End User Acceptance:

Acceptance Expectations:

The CCN team were a bit surprised because all the CCN members gathered to answer questions on how Florida PALM would help and what it would do. Each CCN member explained to the groups what was happening, and how and when. Members went through the Timeline and gave a complete overview. The CCN realized that the main question several stakeholders were having issues with was “How will this affect my job, my processes, and my team’s processes. The CCN answered by stating that many of the specifics have been fully designed. For instance, many end users wanted to know how MFMP, PF, Works, STMS & FACT would be changing. This kind of frustrated many of the end users.

Another aspect was the WIIFM, they rightly were concerned about their specific changes, which are natural and explained once the system is building and we participate in 9-months of User Acceptance testing will help answers their questions.

When the CCN starts obtaining the answers to these areas we will have another Road Show, and we will have the CCN, the POC, OCM professionals helping deliver this

message. At a future point we will again use Pulse surveys, and The Prosci Assessments.

We are planning to utilize an on-line information SharePoint site that is being built by DFS Web team, and will have games, pictures of the teams in training and all sorts of materials to attract and keep all DFS Stakeholders informed.

We may not use all 27 ways to communicate but we will be using at least 15 methods to communicate.

Groups with the Highest and the Lowest levels of Acceptance:

The CCN grouped liked processes together for the purpose of both the Road Show and the survey as explained in *Section 2.1 Survey Audience Analysis of All Combined Groups*.

- Group 9 - Bureau of Human Resources, Division of Administration, Office of Information Technology & Division of Rehab and Liquidation scored the highest with a 4.7 out of 5 pt.
- Group – 7 Office of Insurance Regulation, Office of Financial Regulation and the Office of General Counsel scored the lowest with a 2.8 out of 5 pt.

Steps DFS plans on performing to increase User Acceptance:

The CCN has created a multi-level plan, that begins with the CCN and division leadership and POC delivering the results to each group which will carry on an open dialogue between the CCN, POC, division leadership and the groups. The CCN is planning to share the FAQs from the 17 Road Shows which will provide increased awareness.

We have detailed Communications and Training Plans that will be specific to each group. Additionally, the CCN plans to repeat the same survey after we put our solutions into effect.

We want to measure and to make sure that what we do for Acceptance are the correct things, and we will have real numbers to validate progress. As we are utilizing the Prosci Methodology, we want to utilize multi-channel communications and some even out of the box solutions, including celebrations to continue the higher scores.

We are planning to utilize an on-line information SharePoint site that is being built by DFS Web team, and will have games, pictures of the teams in training and all sorts of materials to attract and keep all DFS Stakeholders informed.

In addition, the CCN is planning to do email blitzes, lunch & learns, we may even start using weekly (start with one day a week) 15 minute Agile & Six Sigma standup meetings, along with our highly designed communications plan.

We may not use all 27 ways to communicate but we will be using at least 15 methods to communicate.

3.12 End User Commitment:

Commitment Expectations:

Our numbers for every group were extremely high in *Desire and Commitment*. We used the Prosci A&D (Awareness & Desire) assessment, and the Prosci Portal and Dashboard.

In this survey we used two questions that go right to the heart of commitment. The first question was *“I am supportive and committed to the implementation of Florida PALM”*, and the second question was *“I look forward to the new changed environment after Florida PALM is implemented”*.

These two questions received an average score of 4.4 on a 1-5 pt. *Prosci Likert* scoring system. We are not going to assume the numbers will stay high, we intend to perform targeted communications, even where the scoring was high. We firmly believe that we can keep the *desire and commitment high*; we will find ourselves in a good place. We are even having teams today starting to think about UAT and questions and testing they want to be able to do. They are excited about the extended “sand box.”

Again, our results were high, but we knew by spending 3-weeks, and performing 17 separate, 2-hour Road Shows, and implemented complete multi-tiered feedback and information solution was going to pay large dividends.

We now know that all the critical DFS employees who will be entering information into the new Florida PALM system understand two of the three critical questions:

- Why is Florida PALM happening,
- Why Now (or January 6, 2026).

The only question we could not address at this time, was

- How does this affect me and my team.

In fact, you would have to search out someone from DFS who does not know the anticipated Go Live date. When we add the CCN, and POC giving constant updates on the survey and new information, plus the communications and training plans and using an on-line information sight that is being built by DFS, with games, pictures, and updated information for the teams will keep all DFS Stakeholders informed, committed and with a high desire to reach to January 6, 2026

Groups with the Highest and the Lowest levels of Commitment:

The CCN grouped liked processes together for the purpose of both the Road Show and the survey as explained in *Section 2.1 Survey Audience Analysis of All Combined Groups*.

Almost every group scored high in *Commitment and Desire* and was between 4.3 and 4.7 on the 1-5 pt. Likert scale. The good news is that these are not currently an issue. The only negative questions in these groups dealt with not having real hands-on information prior to the Road Shows, and not getting or gaining an understanding of how and if their individual processes, and or systems will change.

The activities and communications mediums that DFS is planning on implementing will only improve these numbers. In fact, the CCN believes that DFS may come close to having all the 87% of the end users adapting and demonstrating Commitment and Desire according to the *Law of Diffusion of Innovation*. Developed in 1965 and has been a hot topic by motivational change manager Simon Sinek. Therefore, there was no low or high, they all groups scored very high in this area of change management. The heat maps show that there were few yellows and reds, just answers were in the light and dark greens.

3.13 Survey Insights and End User Comments:

Survey Insights:

DFS published a survey in October 2023 to all DFS, OIR, OFR, to collect data from employees on Florida PALM Awareness. What we later learned was that our survey lacked targeted Awareness questions of *Why and Why Now*, followed by *Does/Will it affect me*. Our initial questions were good, but not designed with Change Management or ADKAR statistical measures in mind. The only real measure that DFS was able to leverage was Awareness; 76% of the agency was **not** aware of Florida PALM. However, this is in line with the number of end users, 275 or 11% of the agency, that have some level of state financial management awareness, so in reflection, having **25%** of the agency being aware of Florida PALM is consistent with our future end users.

Since the October survey DFS has taken a very proactive stance regarding the people-side of change. The CCN has been training SME's and POCs on Organizational Change Management (OCM) so that those in the divisions/office can identify and help with OCM process. For Task 524, we utilized the Prosci ADKAR System, their Dashboard, and the Prosci Awareness & Desire questions scored using the *Likert Measurement Scale*.

As a result of the proactive approaches, we have exact numbers of where our internal groups are at this point in the Florida PALM implementation. From the October survey we have validated the right end user awareness percentages. Additionally, we have planned activities in our communications, training, resistance management, and assessments, which we believe will continue DFS on the correct path to a very strong "Go Live".

End User Comments from Survey:

Below are some comments from each survey group:

Group 1 – Accounting and Auditing

- I am a bit concerned about the implementation. Although we are hearing about training now, I still don't expect adequate training. Everything is ambiguous right now!
- I have concerns re: the level of resources (#) devoted to triage the issues related to cutover. After go-Live
- I don't have a lot of experience with Flair, but I understand why PALM
- I cannot wait for the implementation of PALM
- Wonderful information. WE Need More Like THIS!
- Concerned about how it will affect Auditing - Will there be less Audited payments?
- have more questions, but they may be answered during the testing phase
- I am happy to see the change as I believe it will be efficient for staff and users.

Group 2 – Office of Finance and Budget

- I am getting frustrated waiting to see and play in PALM
- How will we enter budget codes in People First?
- My work will change with segment. not much information has been portrayed yet
- I wanted to know which group I would contact for any IT issues, or new suggestions I have.
- This was GREAT! I now have a better understanding of PALM from this session than the digital communications via email and recorded conferences

Group 3 Risk Management

- I am happy to see the change as I believe it will be efficient for staff and users
- Please start the PALM on 08/01/26 because I retire on 7/30/26
- We thank the team for sharing all that they must prepare us all!
- Who will handle security issues.

Group 4 – Unclaimed Property

- No Comments or questions

Group 5 – Workers Compensation

- I am happy to see the change as I believe it will be efficient for staff and users
- We thank the team for sharing all that they have to prepare us all!
- Great Presentation

Group 6 – Treasury

- Looking forward to UAT. Thanks for the Info

Group 7 – OIR, OFR, OGC

- Really good meeting, excellent update on why replacing FLAIR, how important for POC and SME involved and updated on timelines for the project. Also, I got to hear what my SME needs to know. Great Job!

Group 8 – DIFS, PAF, SFM,

- As in anything, I'm a hands-on and visual learner. So, I am saying this, and I mean it! I am excited and looking forward to this implementation NOW, but with the system in hand, We'll See
- Would like to see a demo of proposed program
- Unsure what it will.

Group 9 – HR, ADM, OIT, R&L

- Wonderful information and great enthusiasm, information was slightly
- The training has stayed in the theoretical realm and has not touched on how it will affect my day-to-day work!
- How will the new account codes be implemented in MFMP and Works?
- Will there be a drop-down menu similar to now?
- How will we use / generate reports?

Group 10 – CA, DFC, IAAS, CS

- Interested to see how our business systems such as ALIS & e-Aappt will be impacted and how these systems will pay client payment data in
- Need to train front-line staff on Excel - starting with basic
- To be able to play in the sandbox is critical

4.0 USE OF DATA COLLECTED & NEXT STEPS

4.1 Agency Use of Data

By leveraging the *Likert Measurement Scale* scoring method, for the Awareness and Desire Assessment Survey, and the use of the Prosci Portal and Dashboard questions, the scoring matrix are all things that other agencies can use. We further believe that the Florida PALM Team can use this highly accurate methodology and scoring system as well to understand what DFS is doing. The templates DFS used can be copied and repeated for future Florida PALM surveys and other projects as well. This scoring system is accurate to 0.3%. That is exceptionally high.

We believe the key and critical salient point here is it is all about focused **communication**. When Yan Carlson took over Scandinavian Airlines in the 1980's it was close on its way to being out of business. Scandinavian Airlines had the worst on-time, and customer service issues of any major airline in the western world. Under Carlson's leadership for 3 years the airline was No: 1 in Customer Service and No: 1 in On-time. When asked what he did he said, his method was as follows "*my idea is not to*

improve 1 thing a 1,000%, but rather 1,000 things 1%! That is all it will take, and the DFS “Go Live” from the people side of change will be easy.

4.2 Next Steps

As the analysis is completed by DFS segmented groups, the CCN will review the collected response scores with Division/Office leadership as well as the designated Point of Contacts (POCs) within each division/office group.

Each group will receive a report on how they did as a group. Our basic plan is to have as part of Next Steps a continuing and ongoing communications, the CCN, division directors, & POCs will then give their respective groups a rundown of how they scored in their own group assessments, and then continue the dialogue started at the Road Shows and assessments. By reaching out to the stakeholders in this approach, the CCN can continue to develop routine and relevant dialogue and discuss with their groups about their responses, especially where they indicated that they were not able to ask all the questions they had. The CCN members believes because of the events of the Road Shows and our Prosci based A&D Assessment, now would be the perfect time to ask, for their leadership, POC, CCN to further the conversation specifically about their responses to the question about not being able to ask all their questions about Florida PALM, especially, since the Road Show concept was to bring all the CCN innovators to each meeting to answer questions immediately.

Additionally, the CCN has identified six (6) methods to address the lower scores.

1. Utilize multiple methods to communicate with end users, including road shows and face-to-face communications, separate messages for distinct and diverse groups that are specialized for the group DFS is targeting. DFS has the advantage of having done the same type of scoring and heat maps, for each one of the ten (10) segment DFS groups and breakdowns for each DFS group. (I would attach in the report to the state)
2. Follow up on Teams meeting with all two-way feedback sessions. “Lunch and Learns” are good but tend to do more in the training than communications.
3. Impact Assessment must continue to be completed and be coordinated with the specific issues of the road show groups and with other endeavors happening in the project.
4. Involve and engage people (using things like the “From-To” representing every part of the organization, building a committed non-leader, and reaching every corner of the organization.
5. Re-do the assessments to measure if the actions taken from the May Road Shows move the needle. If the second assessment improves, then the CCN will continue the approach of creating communications that target the group. However, if the planned actions on communication do not change the scores,

then the CCN will try something else. It is the intent of the CCN to make the necessary changes to the solution tree for a successful readiness implementation.

6. Utilize new and unique communications techniques, such as celebrations, games, and getting all 300 DFS stakeholders involved in the solution implementation. The CCN will be researching other approaches such as Agile/Six Sigma. i.e., 15 -minute stand-ups.

5.0 APPENDIX

5.1 Florida PALM Road Show Awareness & Desire (A&D) Assessment



Florida PALM Road Show Awareness & Desire (A&D) Assessment

On behalf of the Department of Financial Services (DFS) Change Champion Network (CCN), please complete the following Road Show A&D Assessment regarding Florida PALM implementation. This assessment has been created to gain a better understanding of the people being impacted by this project.

Please note: The answers you provide (on paper and online) will remain completely anonymous.

-DFS Change Champion Network



Florida PALM Roadshow A&D Readiness Assessment Group XX		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
		1	2	3	4	5
1	I understand why Florida PALM is being implemented.					
2	I could explain why Florida PALM is being implemented to a colleague.					
3	I understand how Florida PALM will impact me, my work, and my division/office.					
4	All the questions I have about the implementation of Florida PALM are being answered.					
5	Prior to today, I have been involved in communications with my department leaders and have been receiving updates about Florida PALM.					
6	I am supportive and committed to the implementation of Florida PALM.					
7	I understand What's in It for Me (WIIFM) and my division/office.					
8	I believe my supervisor is supportive of Florida PALM.					
9	I look forward to the new, changed environment after Florida PALM is implemented.					
10	I have been able to voice my questions and/or opinions regarding Florida PALM and I feel that my voice is being heard.					
Please include any comments, additional questions, and/or issues you have about Florida PALM implementation:						

5.2 Florida PALM Road Show Grouping and URLs

DFS CCN Road Show A&D Readiness Assessment URLs & Group #s (revised-05-17)

http://adkar.prosci.com/surveys/view/MjQ0Nzk%3D/anonymous:1	Group-1 A&A (Accounting and Auditing)
http://adkar.prosci.com/surveys/view/MjQ1NTg%3D/anonymous:1	Group-2 OFB (Finance and Budget)
http://adkar.prosci.com/surveys/view/MjQ1NjE%3D/anonymous:1	Group-2-B, C
http://adkar.prosci.com/surveys/view/MjQ0ODE%3D/anonymous:1	Group-3 DRM (Risk Management)
http://adkar.prosci.com/surveys/view/MjQ0ODI%3D/anonymous:1	Group-4 DUP (Unclaimed Property)
http://adkar.prosci.com/surveys/view/MjQ0ODM%3D/anonymous:1	Group-5 DWC (Workers Compensation)
http://adkar.prosci.com/surveys/view/MjQ0ODQ%3D/anonymous:1	Group-6 TRS (Treasury)
http://adkar.prosci.com/surveys/view/MjQ0ODU%3D/anonymous:1	*Group-7 OIR/OFR/OGC
http://adkar.prosci.com/surveys/view/MjQ1NTk%3D/anonymous:1	Group-8 DIF/ OFR/SFM
http://adkar.prosci.com/surveys/view/MjQ0ODc%3D/anonymous:1	*Group-9 Adm/HR/OIT/DRL
http://adkar.prosci.com/surveys/view/MjQ0ODg%3D/anonymous:1	*Group-10 CA/DFC/IAAS/CS

GROUPS

A&A (Accounting and Auditing) =1	DRL (Rehab and Liquidation) =9
OFB (Finance and Budget) = 2	CA (Consumer Advocate) = 10
DRM (Risk Management) = 3	DFC (Funeral and Cemetery) = 10
DUP (Unclaimed Property) = 4	IAAS (Insurance Agent and Agency) = 10
DWC (Workers Compensation) = 5	CS (Consumer Services) =10
TRS (Treasury) = 6	
OIR (Office of Insurance Regulation) = 7	
OFR (Office of Financial Regulation) = 7	
OGC (Office of General Counsel) = 7	
DIFS (Div. Investigative Fraud) = 8	
PAF (Public Assistance Fraud) =8	
SFM (State Fire Marshal) =8	
Adm (Administration) =9	
HR (human Resources) =9	
OIT (Information Technology) = 9	

5.3 DFS_Survey Results_All 10 Groups Combined



DFS_Survey Results_All 10 Groups

5.4 Road Show_Presentation_Base Script_Final



Road Show_Presentation_

5.5 OCM- Communications Plan Blueprint



OCM - Communications Plan