

FloridaPALM

Planning, Accounting, and Ledger Management



PROJECT MANAGEMENT LIAISON FORUM

OCTOBER 30, 2024



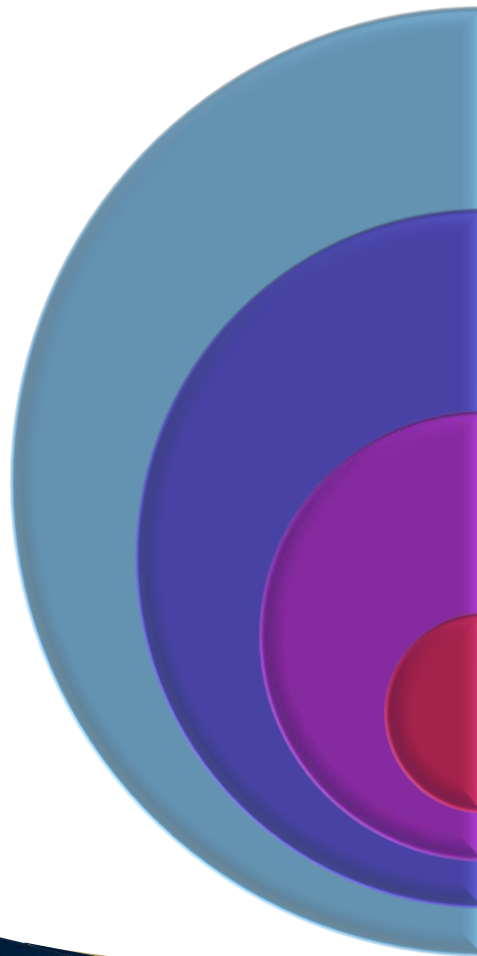
Project Management Liaison Forum

Welcome!

*Mingle and chat with others.
We'll begin shortly!*



Agenda



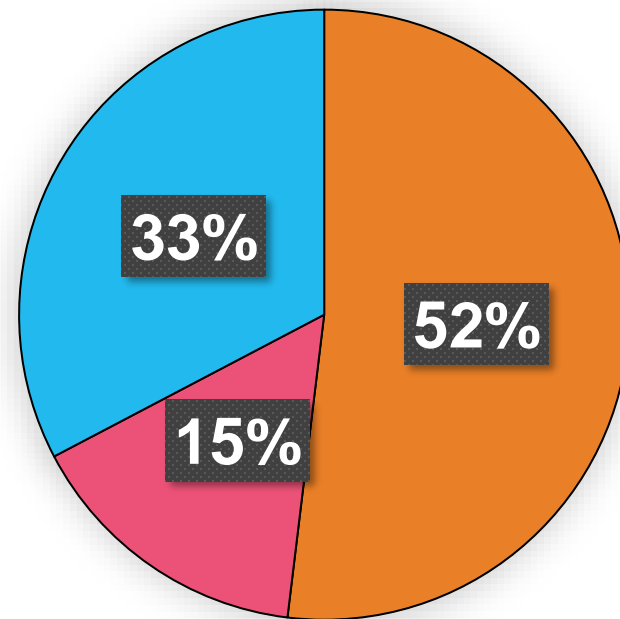
<h2>PML Roles and Introductions</h2>	<ul style="list-style-type: none">• Survey Results• PML Perspective• Table Discussion
<h2>Tool Kit: Welcome Aboard the CCN</h2>	
<h2>Collaboration Tools and Stories of Success</h2>	<ul style="list-style-type: none">• Survey Results• PML Perspective• Table Discussion
<h2>PML role for UAT</h2>	<ul style="list-style-type: none">• Survey Results• PML Perspective• Table Discussion



Brief Introductions

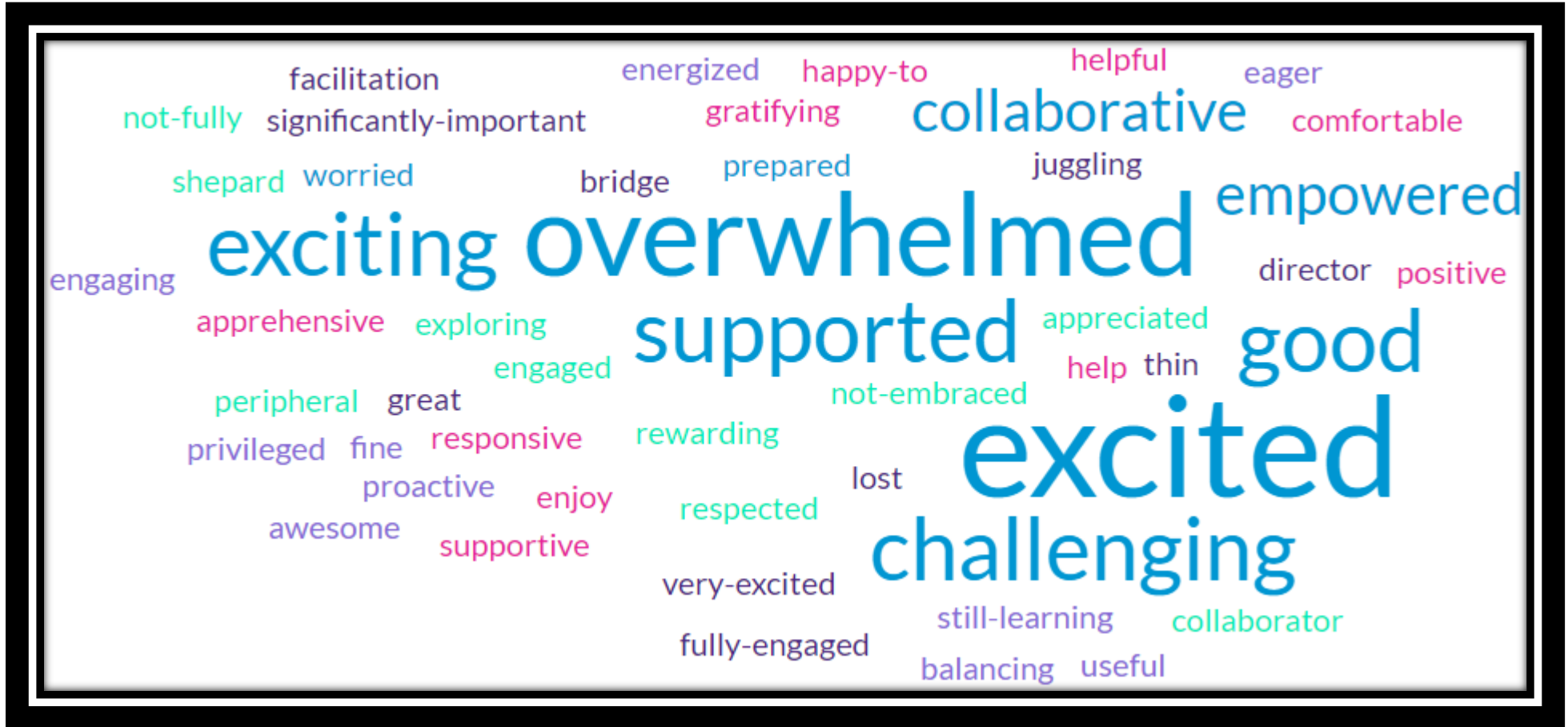
- ▶ Name
- ▶ Agency
- ▶ Favorite Candy

How long have you been engaged with Florida PALM at your Agency?



- Less than one year.
- More than four years.
- One to four years.

Survey Results



- ▶ Describe how are you feel about your role as a Project Management Liaison on this project.



Survey Results

- ▶ What are the top two challenges you face as a Project Management Liaison?

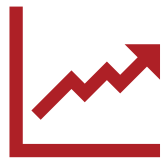
People

- Staff Shortages
- Communicating the right things to the right people at the right time
- Corralling SME's to provide task updates while they also do the work they were hired to do.
- Getting end users comfortable with actual system functionality
- Knowledge Transfer, Learning gap
- Stakeholders don't ask for help
- Lack of interest, getting buy-in, overcoming resistance
- Getting people to take ownership
- Team culture/dynamics, getting teams to work together
- Leadership engagement



Survey Results

▶ What are the top two challenges you face as a Project Management Liaison?



Process

Establishing PALM-adjacent processes
Correlating current to Florida PALM processes
Resistance to Process changes



Data

Ensuring information provided to Florida PALM is accurate.



Technology

Availability of technical information

Survey Results

What are the top two challenges you face as a Project Management Liaison?

General

- Budget
- Aligning agency timeline with Florida PALM timeline, schedule
- The unknown variables
- Time
- Distance - affects ability to attend meetings in person
- Meeting task due dates
- New to agency/learning new role
- Missing Enterprise/A&A/Treasury Non-RW tasks
- Lack of understanding payroll changes with PeopleFirst



Becky Morris, APD Project Management Liaison



Project Management Keys to Success Clarity – Control - Direction

Your **ATTITUDE**
is your key to success. We
all face challenges, how
we handle those is the

KEY.

Kevin Hall, author "Aspire"



Unique Benefits of Project Management



Clear Communication

- Keeps everyone on the same page
- Aligns objectives
 - Maintains momentum

Risk Management

- Avoid Delays
 - Mitigate complications
 - Smoother execution

Strategic Resource Allocation

- Optimize available resources
- Avoid Bottlenecks
- Ensure Tasks are completed and on time

Quality Control

- Reducing Rework
 - Meeting and Exceeding Expectations

Scope and Change Management

- Focus on Objectives from PALM
- Maintain control over timelines and deliverables

Channels for Communication

Team Collaboration Opportunities

Feedback Sessions

Timeline Expectations

Update Stakeholders/Sponsors Early and Often

Promote and Cultivate

Connect Tasks to the Big Picture



Ideas for Project Management Success

10 Take Away Tips

1 Listen actively

2 Build relationships

3 Focus on the project's "why"

4 Embrace learning

5 Use project management tools

6 Celebrate wins

7 Delegate effectively

8 Proactively manage risks

9 Lead by example

10 Say no

Table Discussion

- ▶ How do you introduce yourself and define your role to various stakeholders?
- ▶ Share best practices for reframing your role at your agency.



CCN Toolkit: Welcome Aboard the CCN!

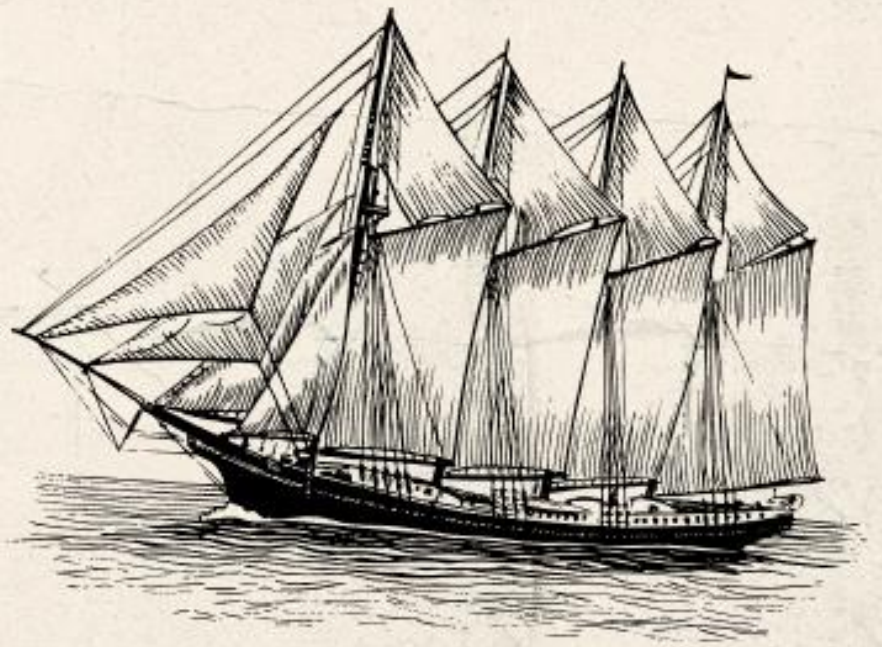
- ▶ New Tool for faster onboarding of CCNs
- ▶ Agencies encouraged to customize.



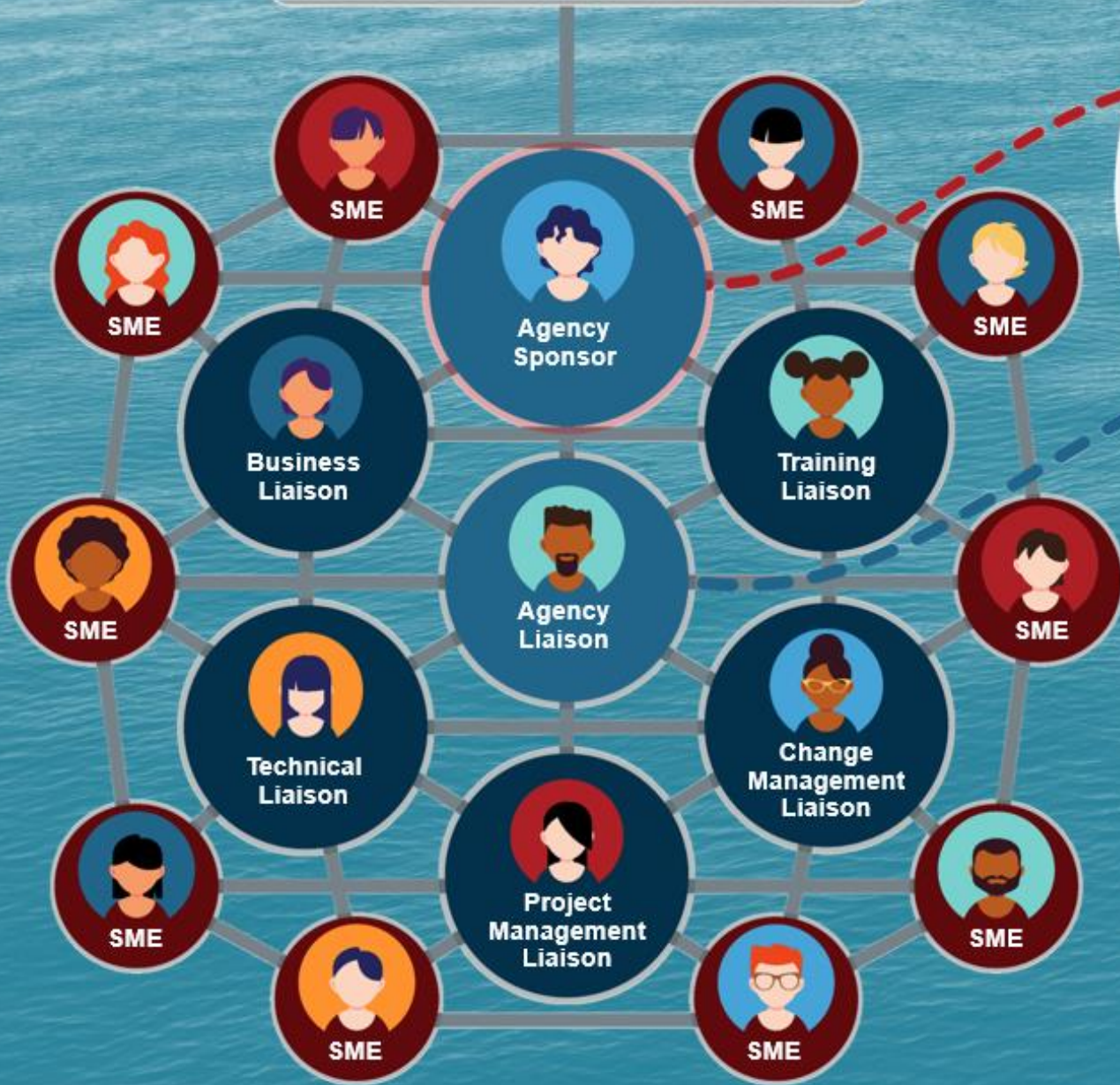
Welcome aboard the

CCN!

Change Champion Network Onboarding Toolkit



Agency Mission



Florida PALM

Planning, Accounting, and Ledger Management

Executive Sponsor

Director & Deputy Director

Readiness Coordinator

The **Change Champion Network** is a team of designated individuals responsible for coordinating Florida PALM activities at your agency together.

Recognize your Role

- Review [CCN Roles and Responsibilities](#) for your role as [insert CCN role].
- Agency-Specific responsibilities:
 - Add Any additional Agency-Specific roles or responsibilities here.
 - Add Any additional Agency-Specific roles or responsibilities here.





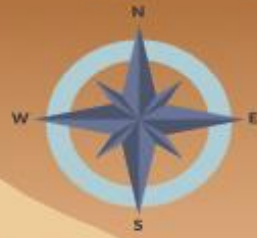
Chart Your Course

Florida PALM Managed Resources:

- [Readiness Workplan \(Job Aid\)](#)
- [Agency Implementation Roadmap](#)
- [Timeline](#)
- [Florida PALM Website Site Map](#)

Agency Managed Resources:

- [Project Charter \(Task 500\)](#)
- [Agency-Specific Implementation Schedule \(Task 501\)](#)
- [Risks and Issues Management Plan \(Task 502\)](#)
- [Workforce Readiness Plan \(Task 503\)](#)



You are Here



UAT Stage Gate

Training



Deploy and Go Live Stage Gates

User Acceptance Testing



Major Implementation Go-Live

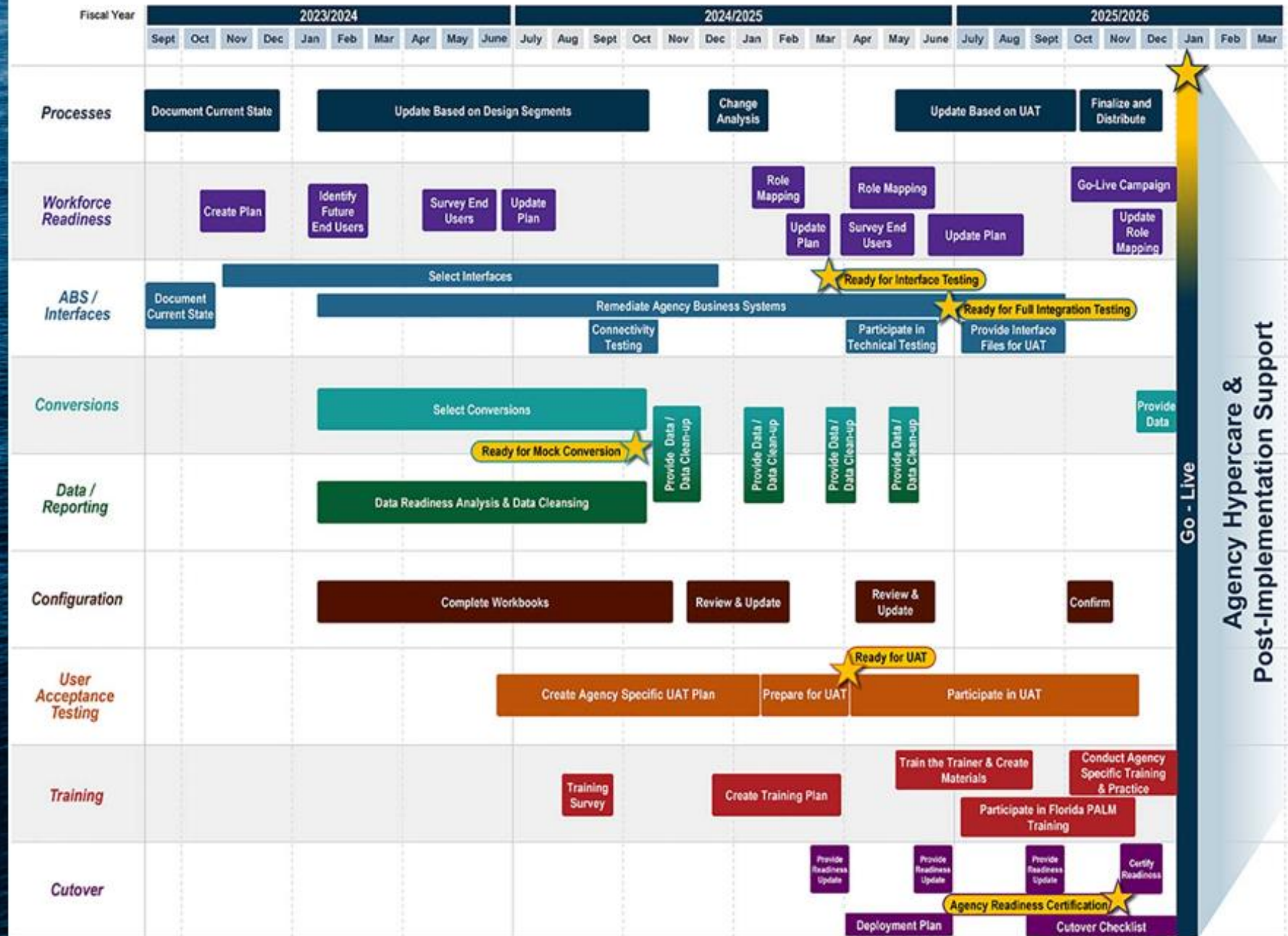


Hypercare

Next Major Implementation

Financials and Payroll Waves
and Data Warehouse/Business Intelligence

Agency Implementation Roadmap



Go - Live
Agency Hypercare & Post-Implementation Support

Gather Your Tools



Agency-Specific Resources

- Explanation/Link to internal agency documents or communications tools, such as:
 - Teams channel
 - SharePoint
 - PowerBI Dashboards
 - Internal Drives

Florida PALM Agency Smartsheet Workspace

- [Agency can insert Workspace link here.]
- [Smartsheet Dashboard User Guide](#)
- [Understanding Your Dashboard](#)



Find Your Rhythm

Florida PALM Meetings

Weekly

Thursday Task Talks

- Thursdays at 10:00 a. m.
- Register to view and participate live on [Meetings and Workshops](#) page.
- You can also review materials and past presentations.

Monthly

Advisory Council (AC)

- The AC includes agency representatives and advises the ESC.
- View scheduled meetings and review materials on the [Meetings and Workshops](#) page. Prior materials can be found on the same page.

Monthly

Executive Steering Committee (ESC)

- The ESC is the Project's oversight body providing guidance and support for Project and agency implementation efforts.
- Scheduled meetings can be found on the [Meetings and Workshops](#) page. Prior materials and recordings can be found on the [ESC/Oversight](#) page.

Intermittent

- Meetings, Workshops, Town Halls, and other Florida PALM meetings can be found on the [Meetings and Workshops](#) page.



Internal Agency Meeting Cadence

Timeframes	Meeting Name	Audience	Topic
Monthly	Florida PALM Touchpoint	CCN, SMEs	Monthly Florida PALM Touchpoint with your Readiness Coordinator and Technical Readiness Team
Daily, Weekly, Biweekly, Monthly, Quarterly, As needed	Add Internal meetings here	CCN, Executive Leadership, SMEs, bureaus or sections, agency-wide, etc.	Task preparation/review, executive updates, RAID (Risk, Action Items/Assumptions, Issues, Decision Points/Dependencies) reviews, technical ABS remediation, functional process change review, implementation schedule updates, etc.



Explore!
Learn more about
Florida PALM

The Knowledge Center

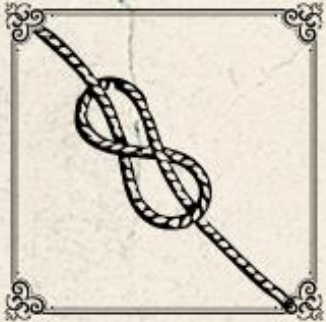
Glossary
Business Process Models
Reports
Interfaces
Configurations
Conversions
Demo Videos
Chart of Accounts

The Florida PALM Website

END USER SUPPORT	AGENCY READINESS	ESC/OVERSIGHT
TRAINING	MEETINGS & WORKSHOPS	AGENCY REPORTING
CHART OF ACCOUNTS	BUSINESS PROCESSES	REPORTING
SECURITY	INTERFACES	KNOWLEDGE CENTER
PROJECT MANAGEMENT	COMMUNICATIONS	PALMcast
PROJECT TEAM	FloridaPALM @MyFloridaCFD.com	FREQUENTLY ASKED QUESTIONS



Succeed Together



Connect

- [CCN Contacts](#)
Reach out to your counterparts at other agencies.



Compare

- [Agency Readiness Reporting Page](#)
View Dashboard Dials, Bimonthly reports, Past Due RW Tasks, and future Certifications.



Listen

- [PALMcast](#)
Listen to Florida PALM leadership and fellow agencies.



Share

- [Agency Exchange Library](#)
Access resources shared by agencies for agencies.
- [Agency Question Log](#)
Browse questions posed by agencies that could benefit other agencies.

Where are we now?

Tasks Past Due

- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date

Current Tasks

- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date

Future Tasks

- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date
- Task #, Task Name, Due Date



Collaboration Tools and Stories of Success

▶ Survey Results:

- Name two tools you use to keep stakeholders informed and break down silos.

Most Mentioned:

- Meetings
- Microsoft Teams
- Email
- Communication
- Smartsheet

- Microsoft Project, Planner, SharePoint
- Status Reports, Newsletters
- Shared document space
- DevOps
- Infographics, visuals
- Dashboards

Additional Insights:

Collaboration Tools and Stories of Success

▶ Survey Results:

- Name a recent win you've contributed to at your agency in your role as Project Management Liaison.

Hiring additional staff to support UAT

Introducing a RAID Log and a Documentation Tracking Tool.

Building SpeedKey reference tool for end users.

Gaining support of key person with significant sway who is now advocating and pushing project forward.

Obtaining a Smartsheet License

Presenting the expectations for the UAT phase to the stakeholders

Organizing an Enterprise Miniseries



Tulani Honablew, Commerce Project Manager



FLORIDACOMMERCE



FloridaPALM
Planning, Accounting, and Ledger Management

PROJECT COMMUNICATION

It's importance, impact, and implementation

IMPORTANCE



Clarity and Conciseness

Avoids misunderstandings and ensures alignment



Active Listening

Helps us to understand needs of team and stakeholders



Empathy and Emotional Intelligence

Helps building trust and resolving issues more effectively



Persuasion and Influence

Gaining buy-in from stakeholders and motivating teams are crucial to project success



The background features a close-up, grayscale image of several interlocking metal gears. A prominent red speech bubble shape is overlaid on the left side of the image, containing white text. The overall aesthetic is industrial and technical.

IMPLEMENTATION

TOOLS

Micro-engagements

Work Sessions (PAWS)

Microsoft Teams Channels

Share:

- One strategy you implemented in your agency to drive agency readiness
- One collaboration tool



communication is the **secret ingredient** that can make or break a project's success.

■ Table Discussion

Project Management Liaison Forum

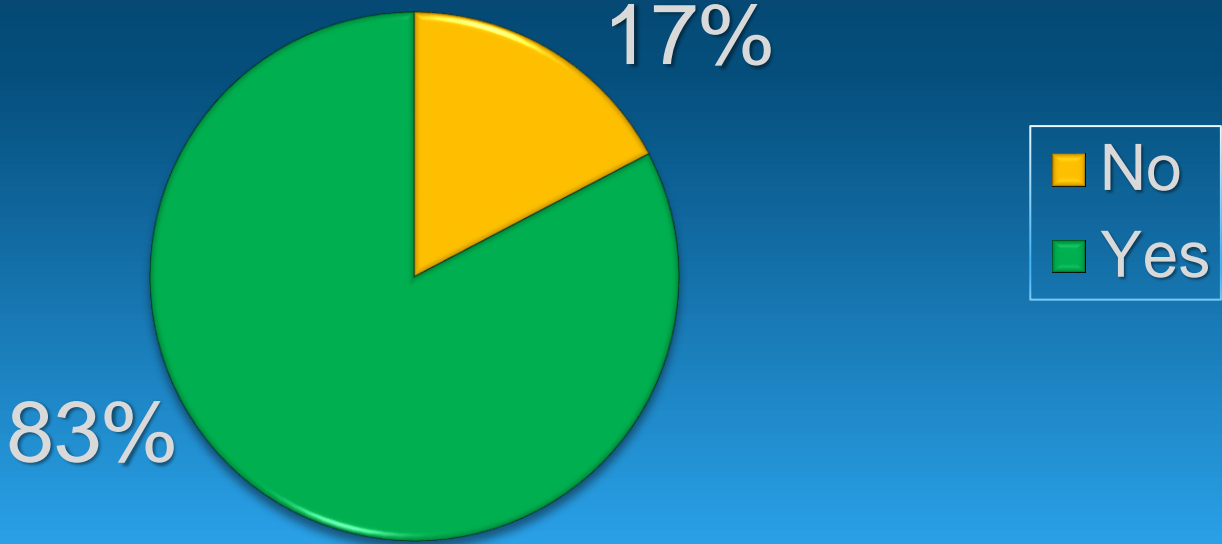
Break and Networking Opportunity

*Mingle and chat with others.
We'll begin shortly!*



Topic: Project Management Liaison role in User Acceptance Testing

Do you have any experience in supporting UAT for system implementation projects?



PML Role in UAT: Survey Theme

What obstacles do you anticipate in your role as PML in UAT planning and execution?

People

- Shortage of staff
- Getting the right people involved
- Getting new users acclimated to new environment
- Defining roles and responsibilities
- Retirement of knowledgeable staff
- Apathy
- Managing and meeting expectations
- Conflicting priorities of SMEs

Process

- Missing processes or reports

Data

- Data and test script readiness prior to UAT start
- Data cleansing issues may result in significant UAT failures



PML Role in UAT: Survey Theme

Test script execution tracking without a dedicated tracking tool.

Completing 'Negative path' acceptance

Need clear acceptance criteria

Identifying the correct tests needed

Determining pass and fail initiatives

Late requirements discovery and defect management

Being able to have all the Agency Business Systems available on time for testing.

Enterprise and agency business system dependencies/remediation

**Technology/
Other**

Inadequate planning

No/limited experience with managing UAT



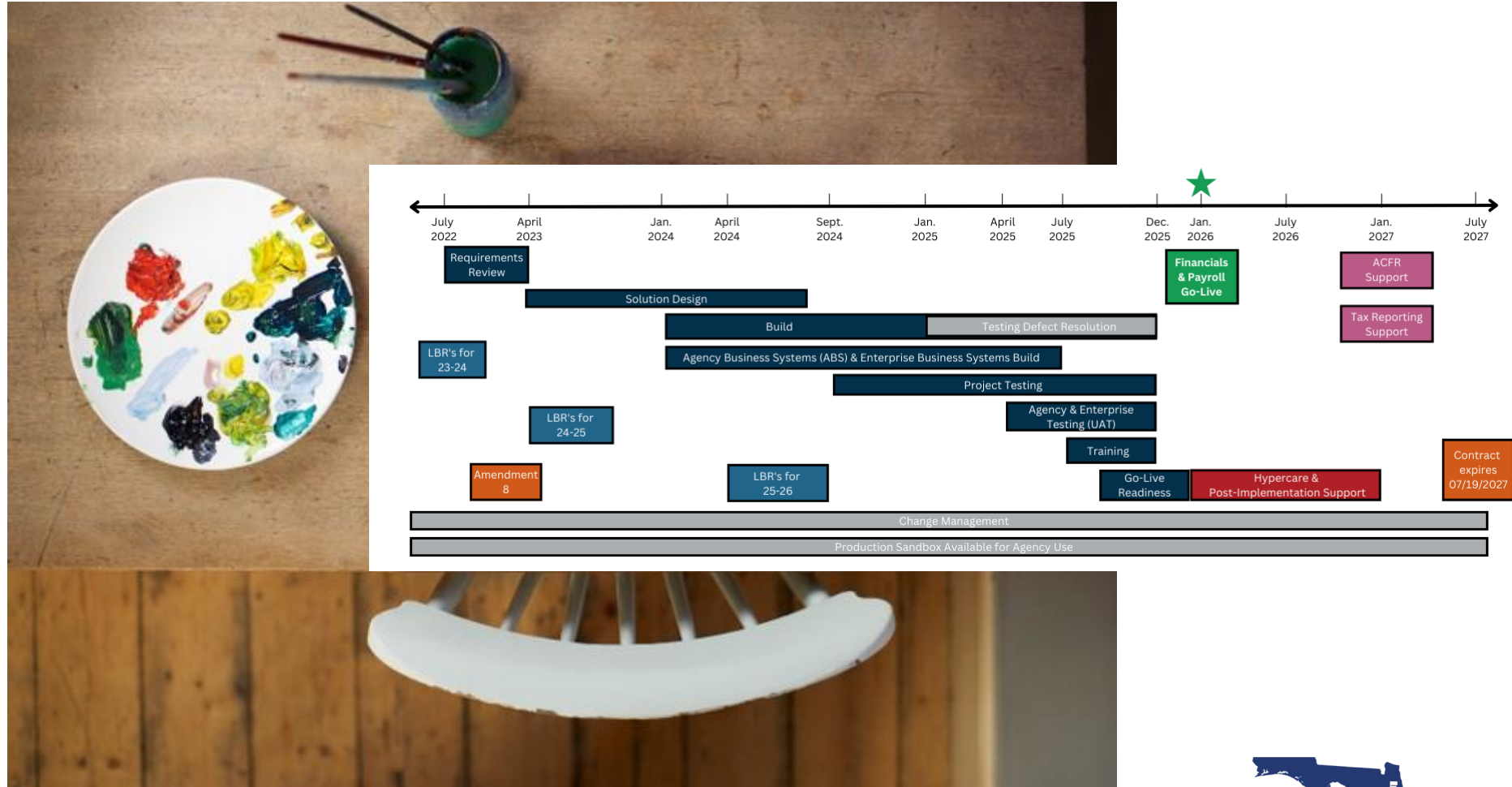


Managing and Sustaining Relationships

Evelyn Harrison | Enterprise Project Manager
Office of the Secretary



Introduction



Agency Sponsor: Lance Dyal

Enterprise Partners

People First Sponsor Tony Lloyd	STMS Sponsor Gerard Steele	FRS Sponsor (Leadership) Kathy Gould	FRS Liaison (Leadership) Amber Burns
People First Liaison Stephen Eaton	STMS Liaison Riley Ashmore	FRS Liaison (IT) Linda Allbritton	FRS Liaison (Accounting) Kathryn Parker
MFMP Sponsor / Liaison Tyler Brown	FRS Liaison (Payroll) Kelly Recio	FRS Liaison (IT) Mel Mascarenhas	FRS Liaison (Enrollment & Contributions) Joyce Morgan
	FRS Liaison (Payroll) Willis McDaniel	FRS Liaison (IT) Steve Tanton	FRS Liaison (IT) Dave Sweeney
			FRS Liaison (PM) Megan Biederman

Enterprise Super Users

Tyler Brown MFMP	Kurt Bonhamer STMS	Mel Mascarenhas FRS (IT)	Alisa Golden FRS
Ashley Palelis MFMP	Cheri Holliday People First	Linda Allbritton FRS (IT)	Cindy Bennett FRS
Ashley Sellars MFMP	Alissa Martz People First		Beth VanEsselstine FRS

DMS Change Champion Network

Agency Liaison/PM Evelyn Harrison	Change Mgmt Liaison Eric Thiele	FMS Business Liaison / Advisory Council Stephen Russell	Technical Liaison Richard Evans	Security Liaison Ryan May
HR / Training Liaison DeAnn Doll	Change Mgmt Liaison Kedra Lewis	Budget Business Liaison Mary Bell	Technical Liaison John Ross	Technical Liaison Goldie McCloud
Training Liaison Kyndal Rucker		DSGI Business Liaison Sherrie Wyrick		

DMS Change Champion Super Users

Connie Tompkins F&A - Budget	Sandy Watson FMS Disbursements	Charlotte Alguire FMS Payroll	Abril Tipton OIT IDP SME	Sherrie Wyrick DSGI
Donna Cohea F&A - Budget	Michael Gordon FMS Disbursements	Shelby Taylor FMS Revenue	Blake Woolsey OIT IDP SME	Jason Ottinger DSGI
Donna Carmack F&A - Budget	Linda Smart FMS Disbursements	Cassandra Gainer FMS Revenue	Ann Filloon DivTel	Susan Sweet DSGI
Pam Donaldson F&A - HR Liaison	Danita Gallmon-Johnson FMS Disbursements	Jennell Peebles FMS Revenue	James Sanders DivTel	Merna Parrish DSGI
Ronald Hill FMS Property	Allison Kelly FMS Disbursements	Devetrianna Wright FMS Revenue	Rose Planner DivTel	Toletha Sylvester DSGI
Kedra Lewis FMS Financial Reporting	Sara Tecle FMS Disbursements	Austin Paschal FMS Revenue	Shannon Martin REDM	
Heather Sharron FMS Financial Reporting	Samuel Holligan FMS Disbursements	Daniel Fonseca FMS Revenue		
Natasha Williams FMS Financial Reporting	Melinda Williams FMS Disbursements	Lonnie Paige FMS Disbursements		

Revised: 10-16-24

Relationships



THERE IS AN
EMPLOYEE OUT
THERE WHO STILL
THINKS OF YOU
BECAUSE YOU WERE
KIND TO THEM.

NEVER STOP BEING
THAT LEADER.

CHRIS DONNELLY



Leadership First

“A PERSON WHO
FEELS GENUINELY
APPRECIATED WILL
ALWAYS DO MORE
THAN WHAT IS
EXPECTED.”

@giffordthomas

Relationships



RANDOMLY SCREAMING TO
SEE HOW MY HUSBAND
REACTS 🤪🤪🤪



Communication

"The most important thing in communication is hearing what isn't said."

- Peter Drucker

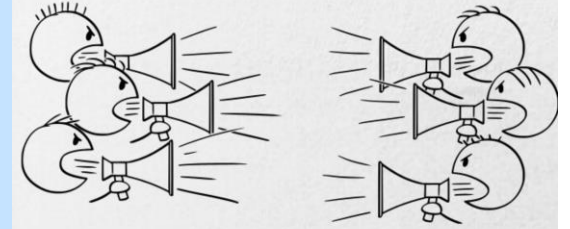


**LISTENING TO
RESPOND**



**LISTENING TO
UNDERSTAND**

**People Don't Burn Out From Work
Here's what burns them out**



Poor Communication.

Communication

LEADERSHIP FIRST

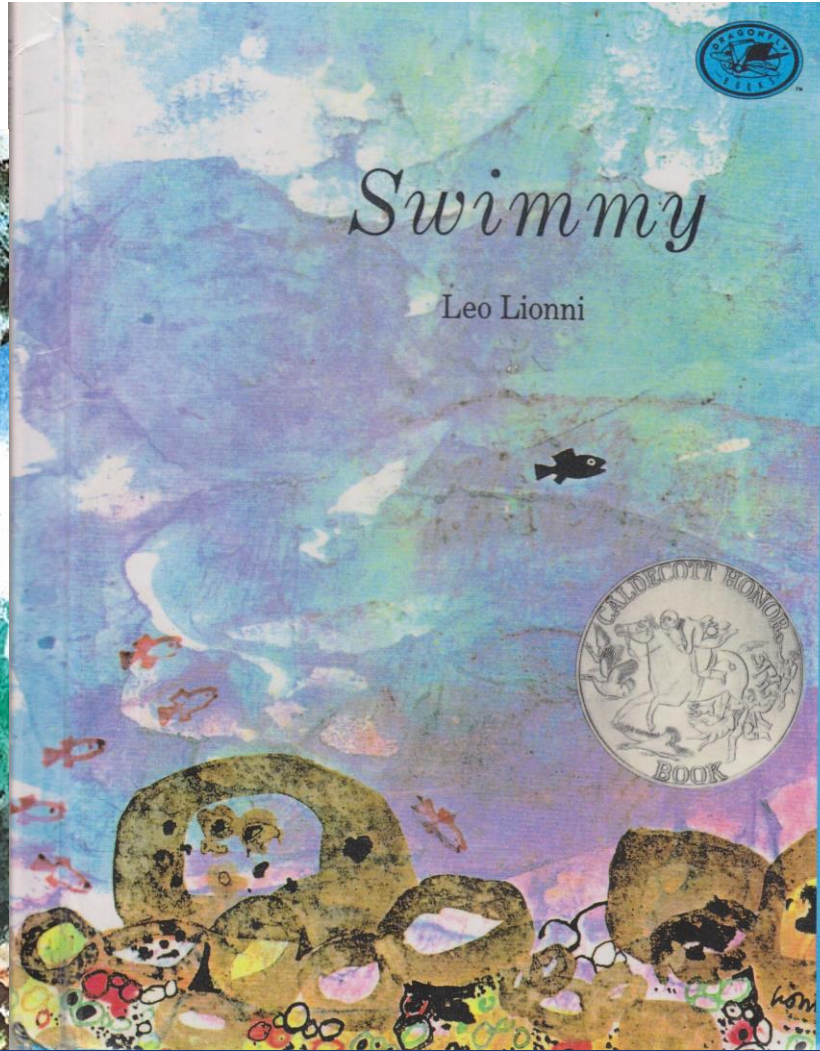
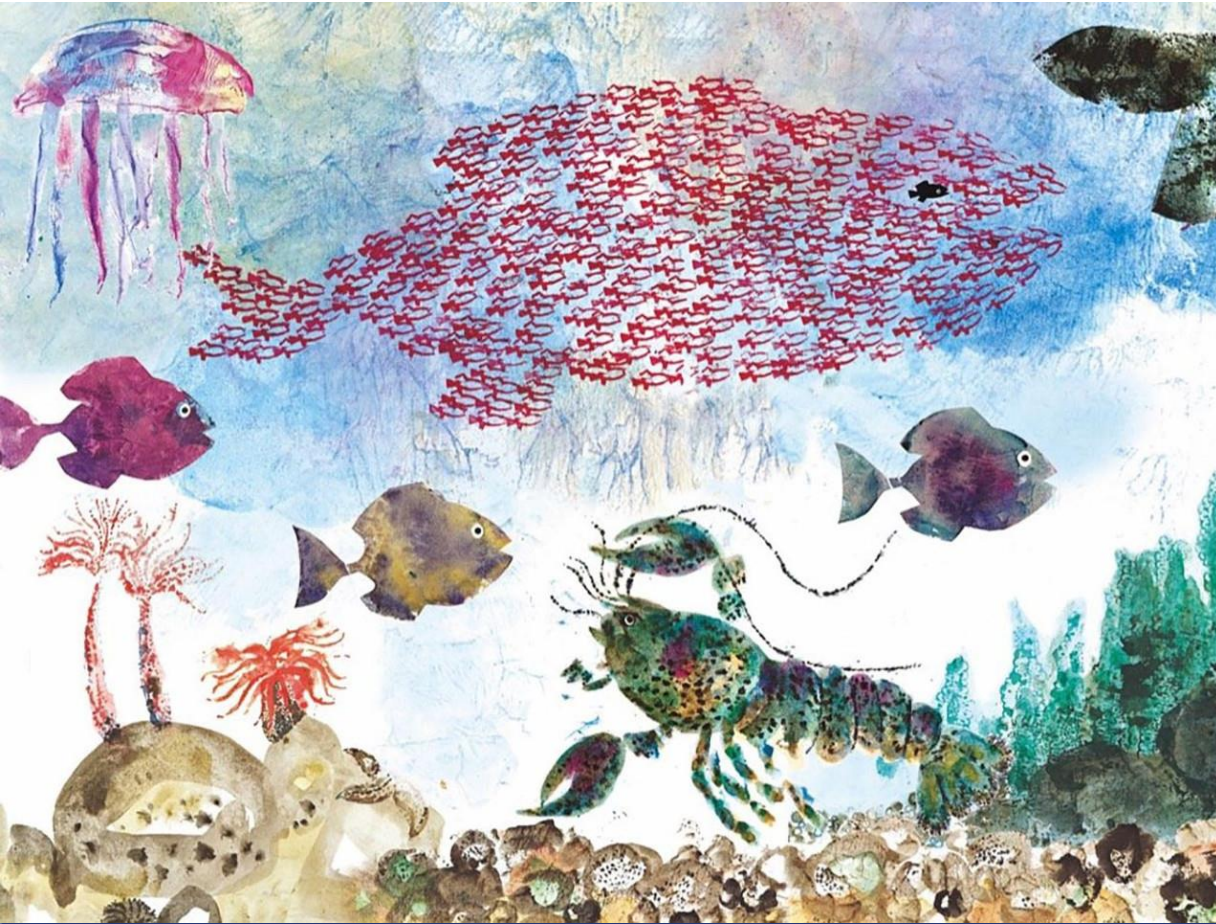
**GREAT LEADERS ARE NOT
THE BEST AT
EVERYTHING. THEY FIND
PEOPLE WHO ARE THE
BEST AT DIFFERENT
THINGS AND GET THEM
ALL ON THE SAME TEAM.**

@GIFFORDTHOMAS



“Where all men think alike, no one thinks very much.” ---George Bernard Shaw

Scope Management



Scope Management





Additional Feedback:
Tulani Honablew
Becky Morris

Executive Steering Committee Meetings

Materials from the Project's Executive Steering Committee meetings will be posted here. These materials may include presentations, meeting minutes, and other documents used or referenced during committee meetings. Materials are organized chronologically starting with the most recent event. Select the meeting date below to view associated documents and information.

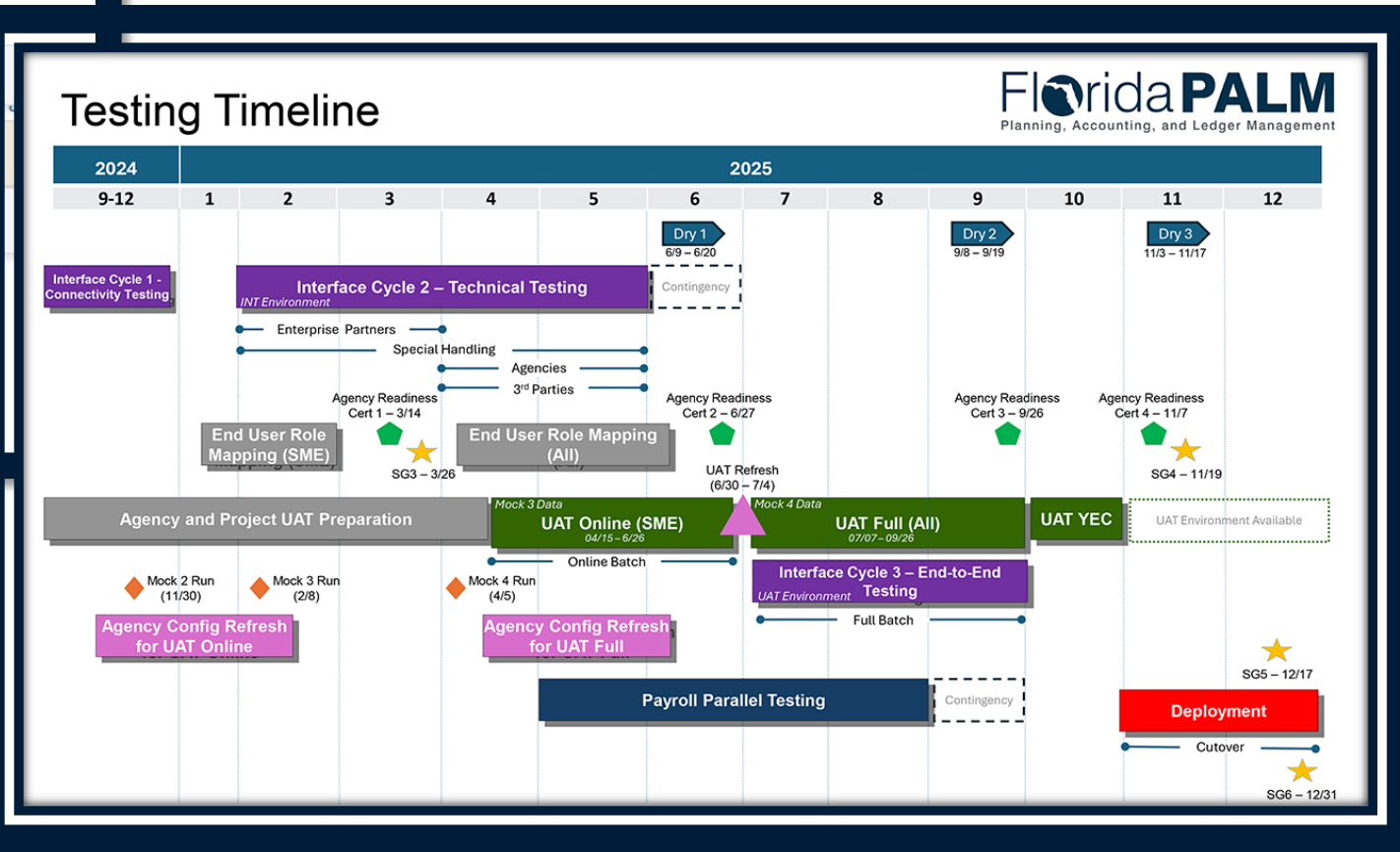
Fiscal Year 2024 - 2025

October 30, 2024

October 8, 2024

- Public Notice of Meeting
- Meeting Agenda
- Meeting Presentation
- Meeting Video
- Meeting Minutes

UAT Resources



UAT Resources

The screenshot shows the Knowledge Center website interface. The main content area is titled "Interface Standards for Agencies" and includes an "Overview" section. The overview text states: "Florida PALM will interface with agencies, enterprise partners, and third parties (e.g., banks). Interfaces refer to data exchanges between Florida PALM and other systems. Interfaces will be exchanged with our interface partners via the Florida PALM Managed File Transfer (MFT) server. Florida PALM has developed standards for interface file folders and file names. Interface partners (e.g., any entity sending or receiving information with Florida PALM) must ensure interface files meet Florida PALM standards, as defined for each specific interface. Table 1 reflects the general standards for interfacing with Florida PALM. The standards applied to each interface (e.g., fixed length, delimited or XML format) are specified for the individual interface." Below the text is "Table 1: Florida PALM Interface Standards" with the following data:

Interface File Type	Format*	Transfer Protocol	Process Method
Flat File	Fixed, Delimited, XML	SFTP	Batch

*Defined by the individual interface

Below the table, the heading "Naming Standards" is visible.

A video thumbnail with a dark blue background and white text. The text reads "How to Read a Flat File Interface Layout". A pink play button icon is positioned over the word "Interface".

Agency Collaboration

This section includes helpful links for agency CCN members looking to learn from or connect with other agency CCNs.

CCN CONTACTS

AGENCY EXCHANGE LIBRARY

AGENCY NAMES & ACRONYMS

AGENCY QUESTION LOG



Task 536

Task ID	Task Name	Task Description	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)
536	Create Agency Specific User Acceptance Testing Plan	Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes.	06/17/24	01/31/25
536-A	Create Agency Specific User Acceptance Testing Plan	Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes. Establish testing objectives, scope, key activities and agency roles and responsibilities.	06/17/24	08/16/24
536-B	Create Agency Specific User Acceptance Testing Plan	Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes. Identify key components of test execution including test management.	08/19/24	10/11/24
536-C	Create Agency Specific User Acceptance Testing Plan	Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes. Confirm business processes to be tested and identify UAT success criteria.	12/09/24	01/31/25

Agency Readiness

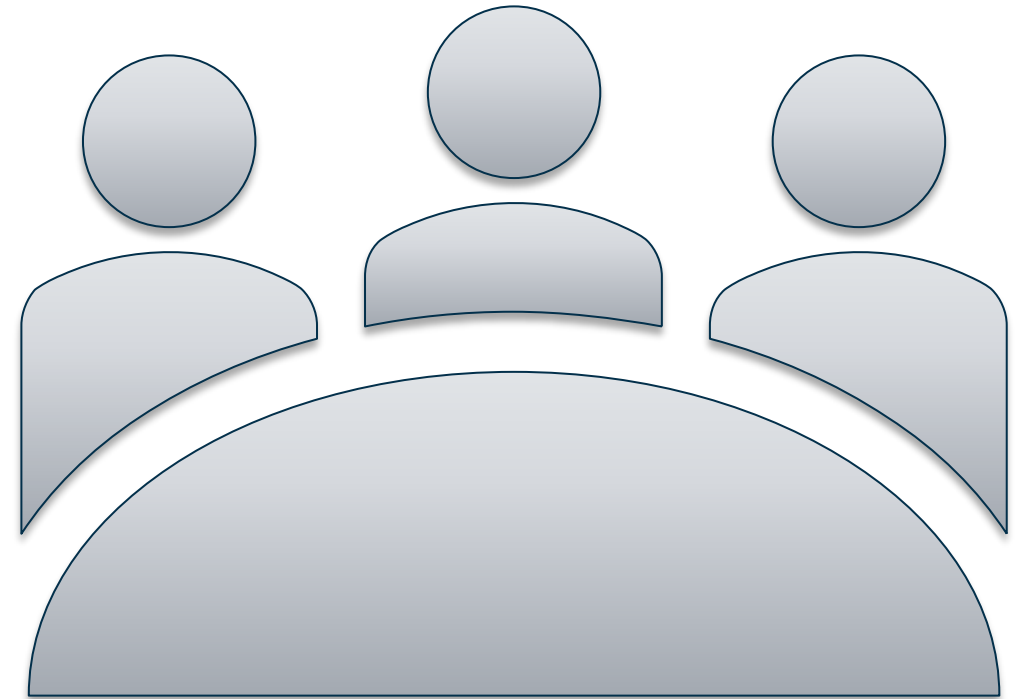
Actions

	Name
<input type="checkbox"/> ☆	Agency Contacts
<input type="checkbox"/> ☆	Agency Engagement
<input type="checkbox"/> ☆	DEMO Readiness Workplan Task Tracker
<input type="checkbox"/> ☆	DEMO UAT Planning Questions



Table Discussion

- ▶ Discuss the evolution of your (PML) role during UAT.



CONTACT US

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

WWW.MYFLORIDACFO.COM/FLORIDAPALM/

KNOWLEDGE CENTER

[HTTPS//:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO](https://:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO)

