# Financial Management Business Transformation (FMBT) Overview

October 8, 2020

# Agenda

- Financial Management Business Transformation (FMBT)
- Why Now?
- Customer Experience and Hypercare
- Key Success Metrics
- Lessons Learned
- Questions

# Financial Management Business Transformation (FMBT)

**FMBT**
Financial Management
Business Transformation

## FMBT Program Vision

Provide a modern integrated financial and acquisition management solution with transformative business processes and capabilities that enables VA to meet its goals and objectives in compliance with financial management legislation and directives, ultimately enhancing service to those who serve Veterans.

## FMBT Program Mission

The FMBT program is increasing the transparency, accuracy, timeliness, and reliability of financial information across VA, resulting in improved fiscal accountability to American tax payers and increased opportunity to improve care and services to those who serve our Veterans.

**iFAMS**
integrated Financial and Acquisition Management System

## FMBT Values

### Service to Veterans
Transforming the way we respond to Veterans' needs through accessible and transparent management systems

### Innovation
Modernizing and standardizing financial management and acquisition tools enabling effective VA business processes and analytics

### Data Integrity
Making VA data accurate, robust, and available in real time

# Why Now?

- 30+ year old unsupported legacy system
  - VA cannot meet the federal financial regulations and mandates, including the intent of the DATA Act
  - Long standing audit findings due to inherent security vulnerabilities
- VA made two previous unsuccessful attempts to replace its legacy financial system
  - VA must succeed; the current system may not have 5 to 7 years of functional operation left
- Implementing a modern system will bring VA operations into the 21$^{st}$ century and improve services to those who serve the Veteran

# FMBT Customer Experience (CX)

In alignment with VA Strategic Goals, VA is transforming business operations by modernizing business systems and providing world-class customer service to those who serve Veterans

### ABOUT CX
The FMBT Customer Experience team helps prepare VA employees for iFAMS implementations. This includes organizational change management (OCM), training, and customer support activities.
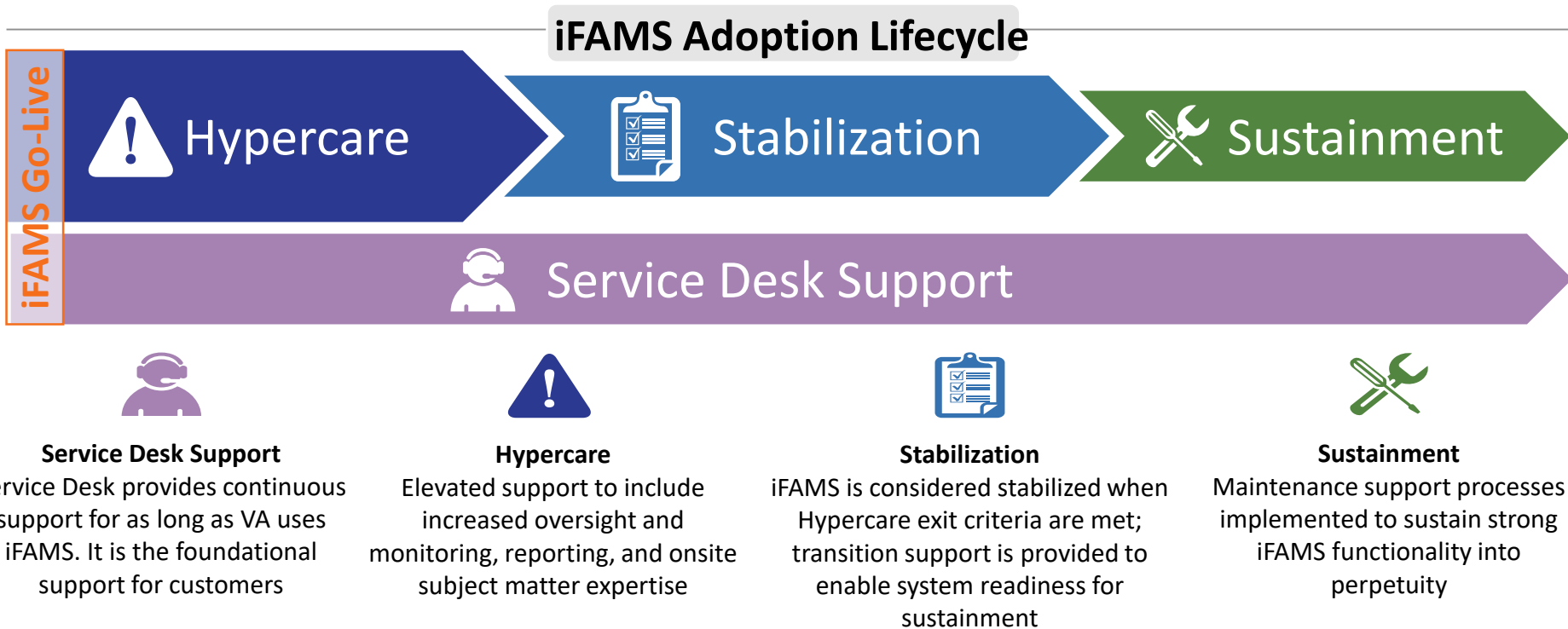
### SYSTEM-FOCUSED TRAINING
iFAMS-focused training will enable users to confidently navigate and complete their tasks in the new system. Sustainment training will support user refresh training, system release training, and new user training.

### HYPERCARE SUPPORT
FMBT will provide Hypercare support, service desk, onsite support, quick reference guides, and establish an iFAMS community of practice.

# Hypercare Support

- Hypercare is the time immediately following go-live where FMBT provides an enhanced level of support to our customers
  - Hypercare leverages the foundational customer support (service desk) capability
  - Hypercare includes additional oversight, monitoring, reporting, and subject matter expertise immediately after Go-Live to mitigate any difficulties
  - It is a partnership between FMBT and VA's Financial Services Center (FSC) as we transition from implementation to operations

## iFAMS Adoption Lifecycle

**iFAMS Go-Live**

Hypercare → Stabilization → Sustainment

Service Desk Support

**Service Desk Support**
Service Desk provides continuous support for as long as VA uses iFAMS. It is the foundational support for customers

**Hypercare**
Elevated support to include increased oversight and monitoring, reporting, and onsite subject matter expertise

**Stabilization**
iFAMS is considered stabilized when Hypercare exit criteria are met; transition support is provided to enable system readiness for sustainment

**Sustainment**
Maintenance support processes implemented to sustain strong iFAMS functionality into perpetuity

# NCA Customer Experience: Baseline Success Metrics

## Metrics Definition

The customer experience related NCA Baseline Success Metrics are a measure of user satisfaction with the current financial systems across five different dimensions

## Current System Baseline Values

| Dimension | Question | Value | |
|---|---|---|---|
| Ease of Use | How easy is the current financial system to use? | **70%** | "Easy" or "Very Easy" |
| Operational Needs | The current financial system meets my daily operational needs | **74%** | "Agree" or "Strongly Agree" |
| Managing Funds | I am able to manage allocated funds efficiently within the current financial system | **61%** | "Agree" or "Strongly Agree" |
| Business Intelligence | How would you rate your experience with financial reporting capabilities in the current system? | **45%** | "Satisfied" or "Very Satisfied" |
| Period Close | How satisfied are you with period end close processes in the current system? | **48%** | "Satisfied" or "Very Satisfied" |

# NCA Notional Dashboards



The notional drafts of the Hypercare Dashboards below will pull in key data and metrics necessary to track progress during the Hypercare period after NCA Go-Live.

**iFAMS Performance Dashboard**

**iFAMS Customer Support Performance Dashboard**

# Lessons Learned from Prior Efforts

VA made two previous attempts to replace its legacy financial system, neither of which were successful. However, those prior modernization efforts resulted in valuable lessons learned that FMBT has factored into program operations, including:

| The Government must lead the implementation | There must be clear lines of authority and decision making | Buy-in can only be gained through robust change management, communication, and stakeholder engagement | The accounting system must be tightly linked to the logistics system to ensure ordering, delivering and payments are seamless | There must be an Integrated Master Schedule and transparency into the activities |

# Lessons Learned from FMBT

**FMBT has also identified and incorporated lessons learned since program inception, including:**



**Pre-wave initiation activities with VA organizations must be defined, conveyed, and tracked in a schedule**

**Admin-level roles and commitment are greater than we realized**

**Admins have their own set of internal workforce readiness activities**

**Users must have opportunities to interact with the system in advance of and in addition to formal training**

**Training content must be reviewed by the core audience who will receive that training**

**The successful adoption of iFAMS requires additional core competencies compared to FMS**

**The case for change comes from leaders within the Administrations**

**Implementation activities do not end at go-live**

**Aligning with Admins on metrics is critical to success**

# Questions

# Backup

# **Lessons Learned Slides**

# Lesson Learned: Pre-Wave Initiation

- Pre-wave initiation activities with admins must be defined, communicated and tracked in a schedule

| | 24-12 Months | 6-12 Months | <6 Months | Day 0 |
|---|---|---|---|---|
| | **ENGAGE PROGRAM** | **BEGIN TO DEFINE WAVE SCOPE** | **WAVE INITIATION PREP** | **WAVE INITIATION** |
| **Administrative / Staff Office** | ■ Executive Leaders attend (as needed):<br>  - Monthly Program Management Review (PMR)<br>  - Monthly Executive Steering Committee (ESC)<br><br>■ Super Users/SMEs participate in program enterprise-level activities (e.g., testing, trainings)<br><br>■ General program information is gained from FMBT public SharePoint, newsletters, etc. | ■ Begin regularly attending Weekly Program Advisor Meetings<br>■ Participate in architectural roadmap discussions<br>■ Participate in ACS efforts | ■ Stakeholders begin to attend:<br>  - Familiarization Sessions,<br>  - Town Halls<br><br>■ Customer and FMBT Joint Activities:<br>  - Begin gathering stakeholder data to inform scope of wave | ■ Customer and FMBT Joint Activities:<br>  - Develop Project Charter, Scope, etc.<br>  - Identify needs for planning phase that will inform IPS<br>  - Identify initial stakeholders for analysis |
| **FMBT Program Staff** | ■ Identify program POC for customer outreach/questions<br>■ ACS | ■ Identify Admin/Staff Office Rep(s)<br>■ Begin recurring touchpoints<br>■ Begin Architectural Roadmap Discussion<br>■ ACS | ■ Coordinates planning session & wave summit prior to wave initiation<br>■ Establish program specific meetings or activities | |
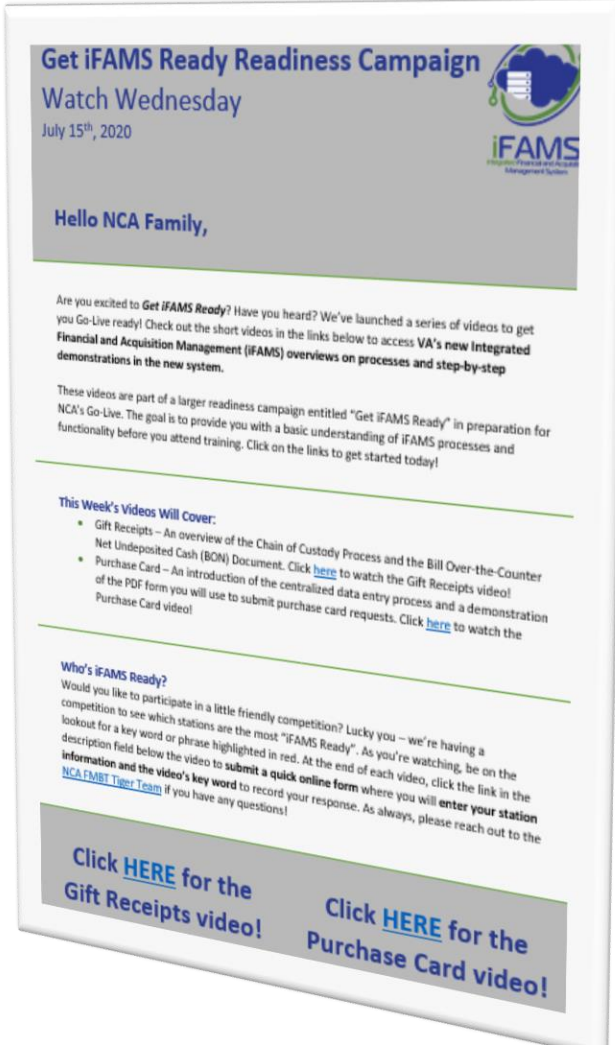
# Lesson Learned: Admin Roles and Commitment

**FMBT**
Financial Management
Business Transformation

- Admin level roles and commitment are greater than we realized

## FMBT Program

| FMBT Wave Lead | Technical Lead |
|---|---|
| SI SME / Solution Lead | Program Manager |
| Scrum Masters | Workstream Leads |
| Testing Team | Staff |
| Change Managers/ Ambassadors | |

## Administration

| Administration Executive Leader | Administration Implementation Lead |
|---|---|
| Program Advisor(s) | Product Owner(s) |
| Subject Matter Experts (SMEs) | Assistant Product Owner(s) |
| Change Champions | End Users |
| Testers | Other Stakeholders |

## Service Organizations

**Service Organization Leads:**

- **Financial Services Center (FSC)**
- **Office of Acquisitions and Logistics (OALC)**
- **Debt Management Center (DMC)**
- **Office of Information & Technology (OI&T)**

# Lesson Learned: Admin Readiness

- Admins have their own set of internal workforce readiness activities
  - Customer activities that drive readiness must be tracked in an IPS
  - In the same way, service providers must also track their individual readiness activities

# Lesson Learned: System Interaction

- Users must have multiple opportunities to interact in the system in advance of and in addition to formal training
- Interactive System Reviews enable VBA GOE staff to perform common tasks in the iFAMS sandbox



**Register for IFAMS Sandbox Sessions**
Part of the VBA GOE
Interactive System Review Series

iFAMS

The VBA iFAMS implementation team is excited to provide system users an opportunity to have **direct access in iFAMS** to explore common tasks via **iFAMS Sandbox Sessions.*** Read below for details about the iFAMS Sandbox Sessions and make sure to register for the first sessions happening at either 11AM or 2PM EDT during the July 2 Interactive System Reviews!

**REGISTER**
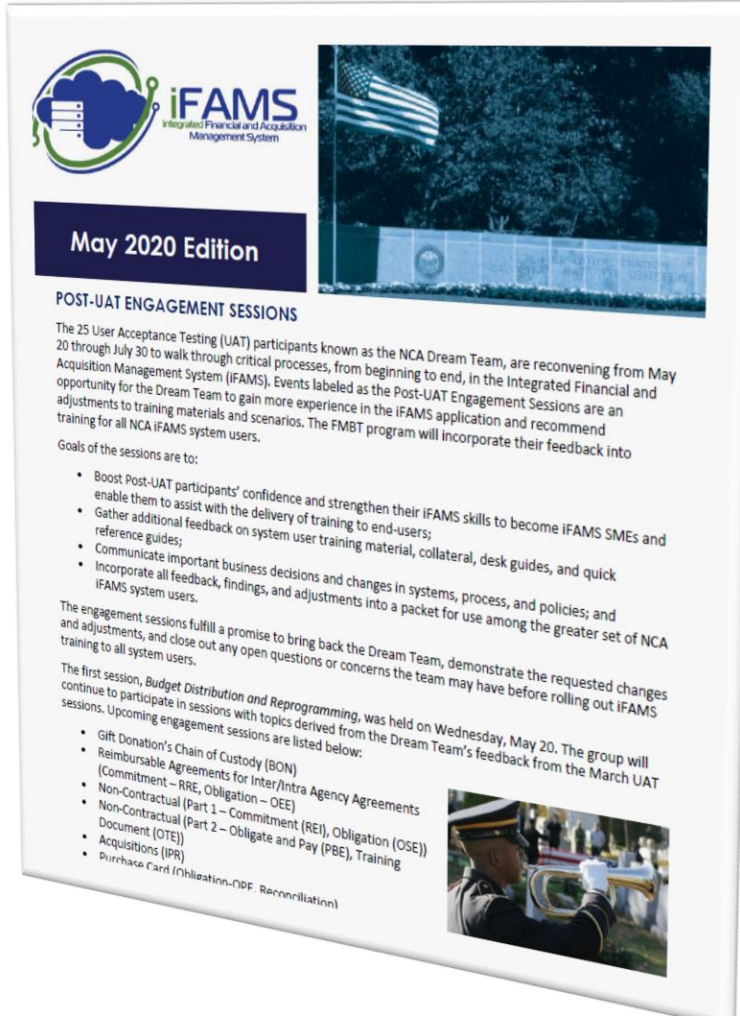
- Registered users will be provided temporary iFAMS access to complete a system task, via Zoom breakout rooms, during the VBA Interactive System Reviews (ISR)
- An iFAMS system expert will walk registered users through the steps of the task, and can answer any questions related to the task
- All other users should join the guided demo (of the same task) by a system expert during the ISR, via the Zoom main room
- Registration is capped at 92 users for each ISR session happening at either 11AM or 2PM EDT, and is **first-come, first-serve**
- Registration closes on Wednesday, July 1 at 12PM EDT
- Registered users will receive an email confirming their Sandbox Session time, along with a user ID and password, prior to the ISR
- Those that are unable to register for the upcoming Sandbox Session during the July 2 ISR, will have additional opportunities during future ISRs
- For any questions, please contact vafmbtvbateam@va.gov

**REGISTER**

*Please note that ISR Sandbox Sessions are NOT formal training sessions

# Lesson Learned: Training Materials

- Training content must be reviewed by the core audience that will receive that training
- NCA established Post-UAT Engagement (sandbox) Sessions to gather input from field level staff on training materials

# Lessons Learned: Core Competencies

- **An effective financial transformation is not just about adopting iFAMS**
  - Core competency is key to VA's financial management modernization
  - Encourage attendance to Federal Financial Management training and other core competency training beyond what is offered by FMBT

# Lesson Learned: Case for Change



- The compelling case for change ultimately comes from leaders, supervisors and SMEs within the Administrations and Staff Offices
  - Staff want to know from within their own organization why decisions are made, processes are changed, etc.
  - We must be cautious in presenting iFAMS benefits when employees may not perceive it as an improvement

- It is advantageous for Administrations to lead their own communications with program assistance

# Lesson Learned: Partnership does not end at go live

- Implementation activities do not end at go live – they continue through the Hypercare phase
  – The FMBT program and O&M teams are tightly integrated
  – Customers are key participants

*Integrated Hypercare Operations*
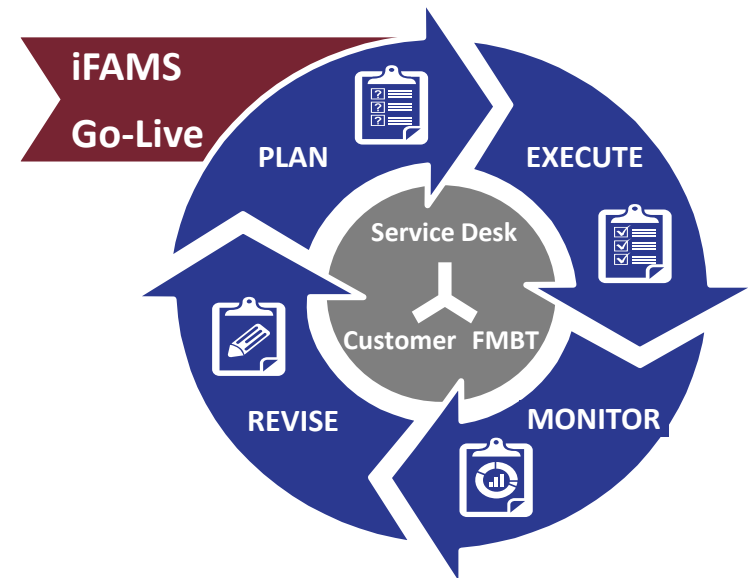
# **Customer Experience Metrics**

# Lesson Learned:
# Wave-Level Success Metrics

*Aligning with Administrations on metrics has been critical to success*

- Wave-level Success Metrics are:
  - Customer strategic goals for the wave
  - A mechanism for comparing pre and post go-live performance
  - Milestones enabling the program to achieve its longer-term strategic goals

**Timeline of Wave Events**

**Wave go-live**

| STEP 1 | STEP 2 | STEP 3 | STEP 4 | STEP 5 |
|---|---|---|---|---|
| **INITIATION** | **PLANNING** | **PRODUCT** | **DEPLOYMENT** | **HYPERCARE** |

*Define Wave-level Success Metrics*

*Capture current state baseline metrics*

*Measure post-go live Success Metrics and communicate impact to stakeholders*

# Voice of Customer
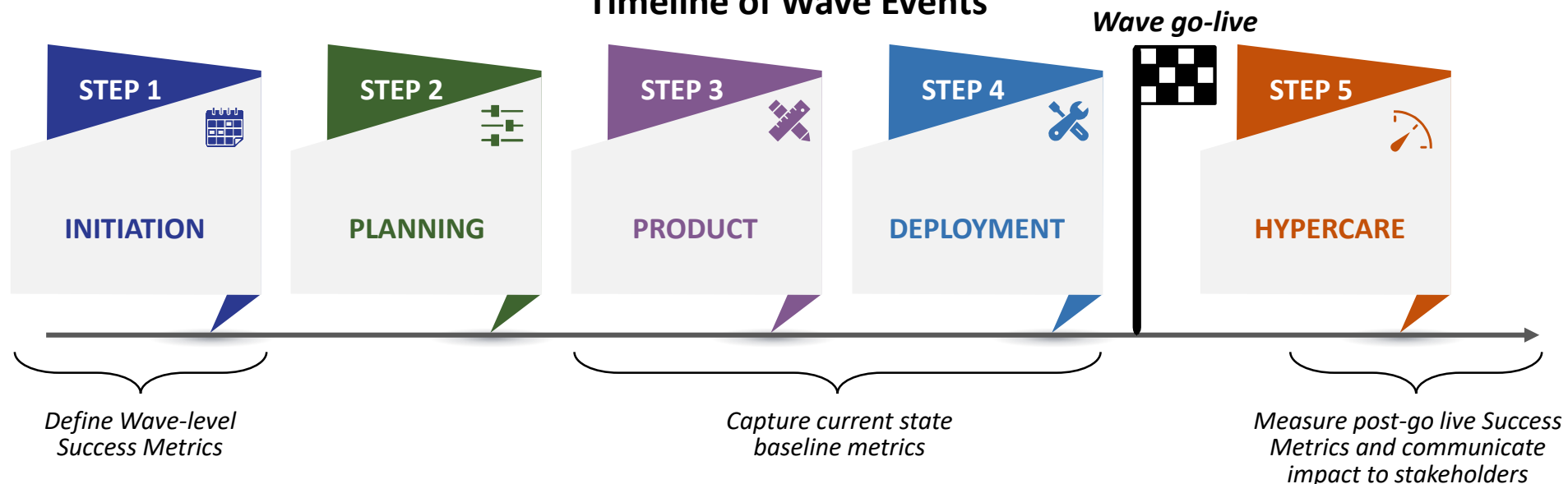


Quality: I found this interaction to be a worthwhile use of my time
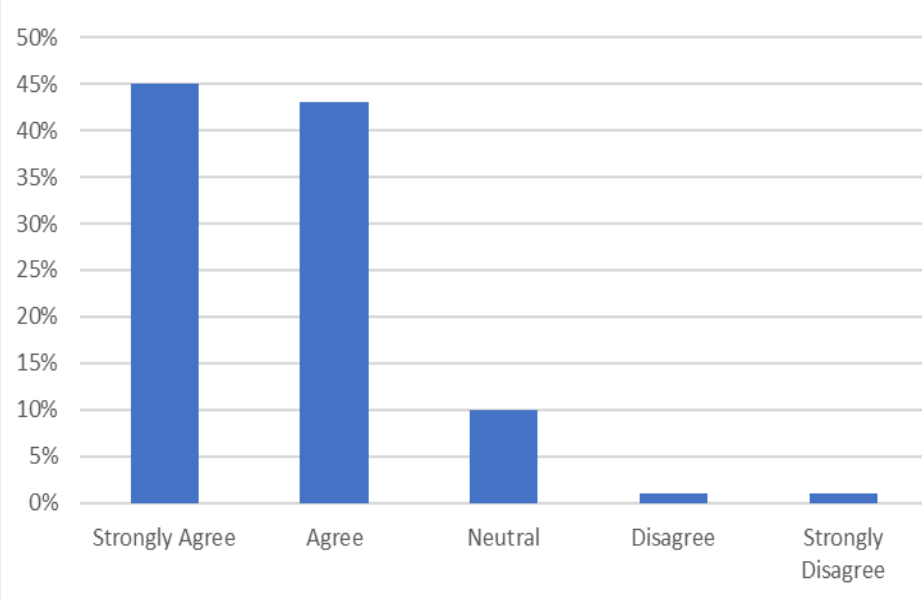


Satisfaction: Overall I am satisfied with this interaction with FMBT
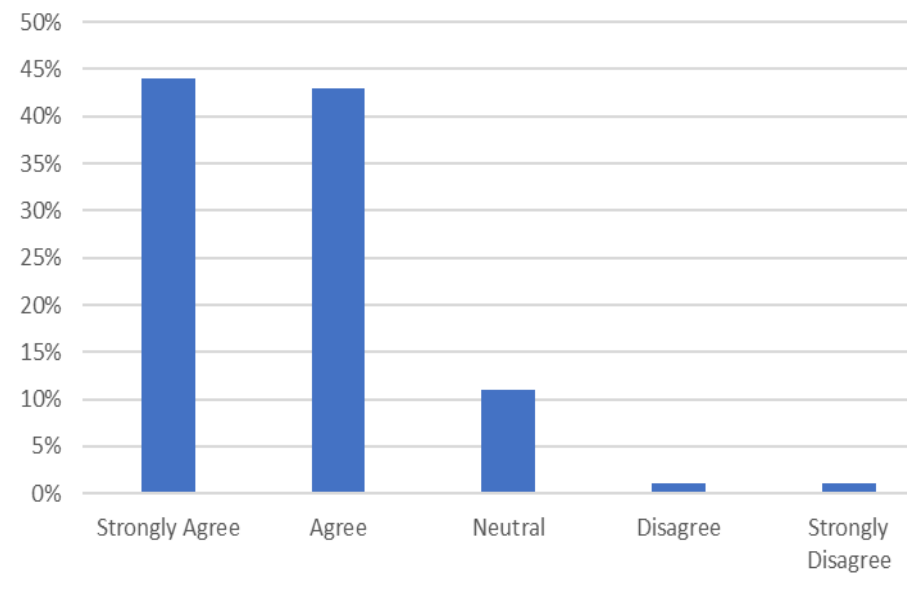
Total Responses: 1326
Response Rate: 72%
Total Events: 25

# Organizational Change Management & Training Activities for NCA

**FMBT** Financial Management Business Transformation

Over the last 18 months, we engaged end users through various channels and platforms to gather feedback and to build their knowledge and familiarity with the iFAMS and underlying processes.

## 20
**Site visits conducted** with hundreds of end users from across NCA. Site visits were conducted both in-person and virtually and occurred in a variety of venues, including district conferences, district offices, and select national cemeteries.

## 12
**Interactive Process Reviews and System Reviews** introduced iFAMS and walked through some of the key changes to processes and functionality with end users from across NCA.

## 13
**Change Champion Network Meetings** were conducted with over 50 end users from across NCA's districts and offices to discuss upcoming activities, increase awareness, and encourage two-way communication.

## 11
**Get iFAMS Ready Videos** reviewed changes in processes in the new system and provided a system demonstration for key functions in iFAMS.

## 37
**Desktop Guides (12), Quick Reference Guides (16), iFAMS Collateral documents (9)** were developed to further support end users as reference material during training and post Go-Live.

## 52
**iFAMS System Training** classes held to train NCA central office and FSC staff based on their roles in iFAMS.

## 89%
**Overall Training Satisfaction Score** for iFAMS system training conducted to date

# Organizational Change Assessment #2: NCA/VBA Comparison

| ADKA Stage | Question | NCA | Stage Average | VBA GOE | Stage Average | +/- | Change |
|---|---|---|---|---|---|---|---|
| Awareness | I understand the purpose of the FMBT program | 4.14 | 4.04 | 4.58 | 4.62 | +0.58 | ⬆ |
| | I understand the benefits of iFAMS for my organization | 3.90 | | 4.64 | | | ⬆ |
| | I understand why VA is implementing a new financial system (iFAMS) | 4.09 | | 4.65 | | | ⬆ |
| Desire | I believe that iFAMS will be an effective solution for my organization | 3.60 | 3.61 | 4.52 | 4.49 | +0.88 | ⬆ |
| | I am confident that iFAMS will help more effectively achieve VA's mission of serving Veterans | 3.52 | | 4.44 | | | ⬆ |
| | I am excited about VA's new financial and acquisition system and how it will benefit me and my work | 3.72 | | 4.51 | | | ⬆ |
| Knowledge | I am regularly informed on the program's progress, processes, and the iFAMS solution | 4.18 | 4.03 | 4.57 | 4.49 | +0.46 | ⬆ |
| | I know where to access information about iFAMS | 3.87 | | 4.40 | | | ⬆ |
| Ability | I receive information that is useful in understanding iFAMS | 3.88 | 3.85 | 4.53 | 4.46 | +0.61 | ⬆ |
| | The information I receive adequately explains project status and updates | 3.81 | | 4.39 | | | ⬆ |

# iFAMS System Training Survey Results



iFAMS Training by Percentage

Legend: ■ Strongly Agree/Agree  ■ Neutral  ■ Disagree/Strongly Disagree

| Question | Strongly Agree/Agree | Neutral | Disagree/Strongly Disagree |
|---|---|---|---|
| The objectives of the training event were clearly communicated | 92% | 6% | 2% |
| The training event length and pace was appropriate | 91% | 7% | 2% |
| The training methods used (lecture, files, exercises) positively enhanced my learning | 90% | 7% | 3% |
| The training content was clear and understandable | 90% | 7% | 3% |
| Course exercises were relevant and useful | 88% | 9% | 3% |
| Performing exercises throughout the course reinforced my knowledge and understanding of iFAMS | 83% | 13% | 4% |
| I could successfully complete the exercises following the instructions provided in the materials | 84% | 14% | 2% |
| Overall, this training event increased my knowledge and comfort level with iFAMS | 88% | 7% | 5% |
| Overall, I am satisfied with this interaction with FMBT | 89% | 8% | 3% |
| I found this interaction to be a worthwhile use of my time | 87% | 8% | 5% |

# Hypercare Activities for NCA


**FMBT**
Financial Management
Business Transformation

**3**

**Virtual Microsoft Teams Support Rooms established**

**12**

**Training courses attended by Customer Support Staff**

**95**

**Hours of training courses attended by Customer Support Staff**

**iFAMS is Live Guide(s) developed for FSC and NCA**

**Hypercare Recurring daily meetings identified, roles and participants determined**

**Weekly & Monthly Hypercare Dashboard developed**

# Customer Support Activities for NCA

**150+** Knowledge Articles developed

**10** Dedicated Tier 1 Staff Members hired and trained

**Phone System** updates implemented for iFAMS call routing

**2** Customer Support Dry Runs conducted Tier 0 – Tier 3

**72** CRM Enhancements for NCA iFAMS implemented