



FMBT

Financial Management
Business Transformation



Financial Management Business Transformation (FMBT) Overview

October 8, 2020



Choose **VA**

VA



U.S. Department
of Veterans Affairs

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

Financial Management Business Transformation (FMBT)



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.



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 21st 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

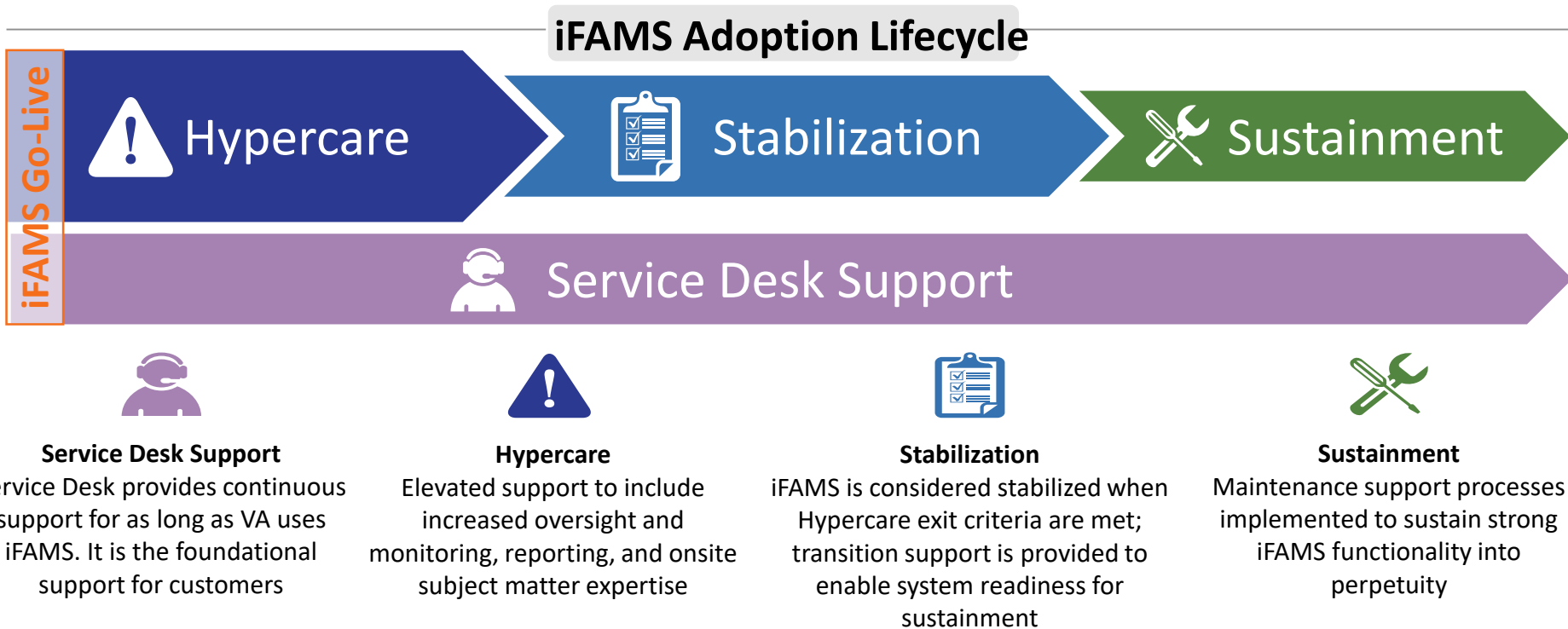
iFAMS-focused training will enable users to confidently navigate and complete their tasks in the new system. Sustainment training will support user refresh training, system release training, and new user training.

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



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

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%

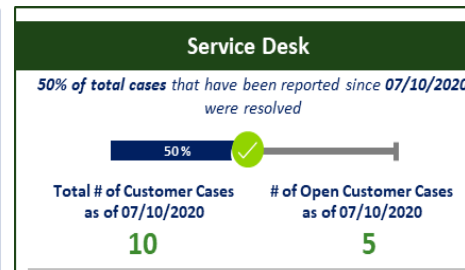
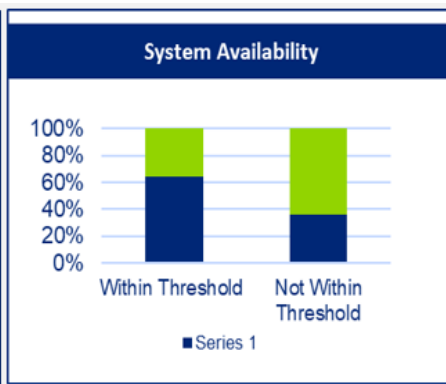
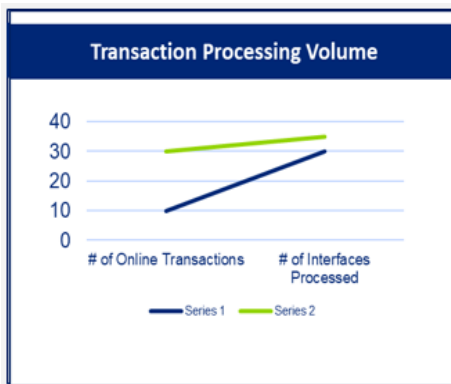
"Satisfied" or "Very Satisfied"

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

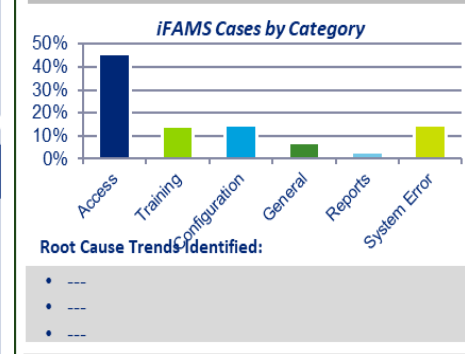
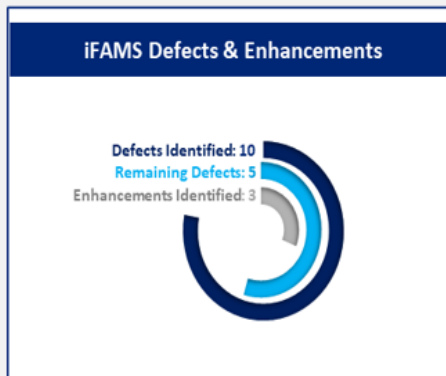


Customer Adoption

NCA District Adoption:

- # of User Logged in vs. # of Users Active in iFAMS
- # of Misc. Vendor Codes
- # of Payments Accrued Interest
- # of New Commitments
- # of New Obligations
- # of Interface Transactions Processed

List of Interfaces	Interface Stability
CAATS	Stable
eCMS	1-2 Failures
ConcurGov	2+ Failures
PCS	Stable
CIR	Stable
FSC Data Depot	Stable
IPPS	Stable
PCS Travel	Stable
FSC Vendor Portal	Stable
Frontier	Stable
HHS-PMS	Stable
CCS/US Bank	Stable



Continuous Customer Support

Users granted access: 110+

Additional ad-hoc learning sessions to support customer adoption through Quick Reference Guides, eLearning Modules, or Knowledge Base

FSC Article	Stafford	Districts
1	2	2

Additional Knowledge Articles: 5

Targeted Support delivered onsite or mobile to either FSC, Stafford or the Districts to provide additional training

Onsite	Mobile
2	4

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

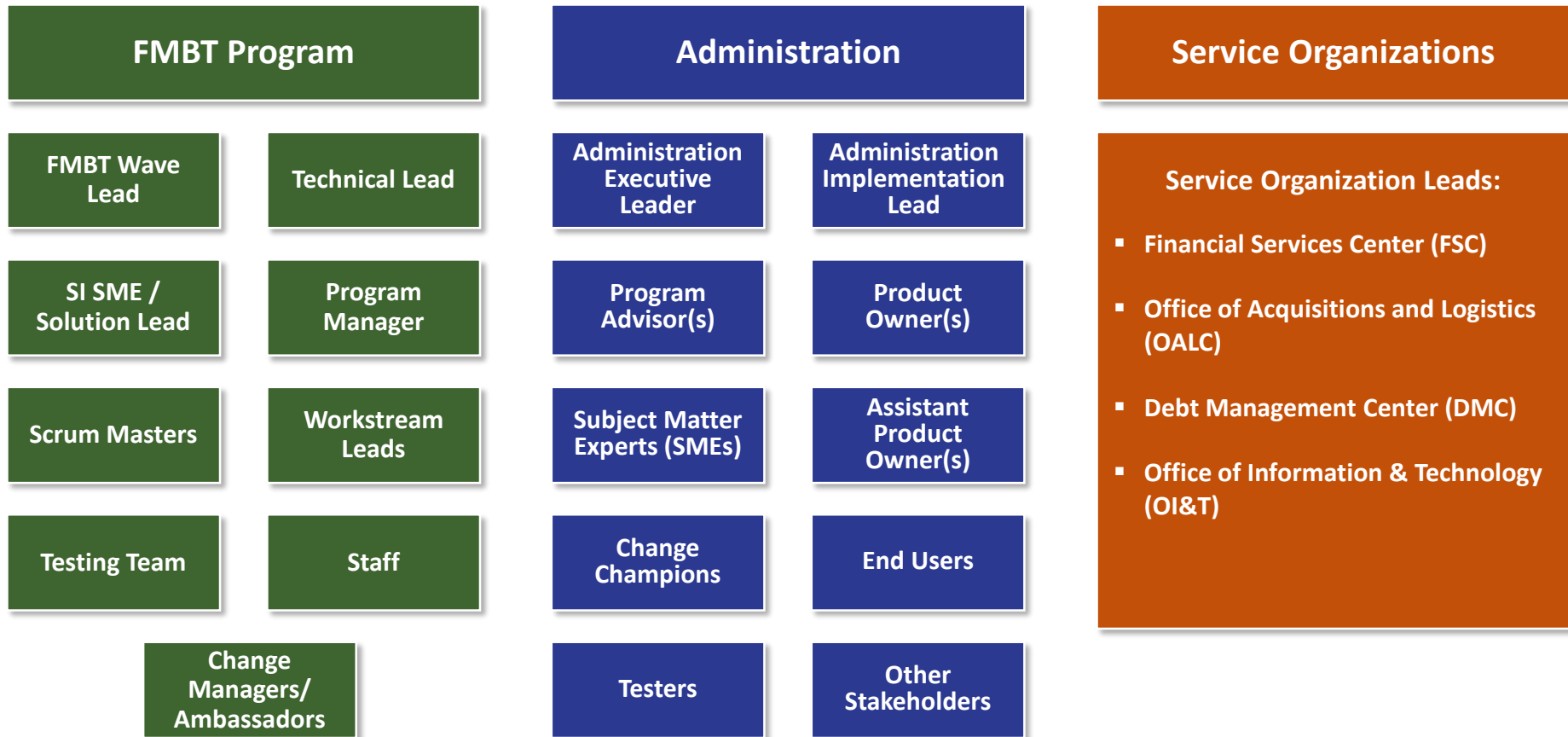


- Pre-wave initiation activities with admins must be defined, communicated and tracked in a schedule

	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	<ul style="list-style-type: none"> Executive Leaders attend (as needed): <ul style="list-style-type: none"> Monthly Program Management Review (PMR) Monthly Executive Steering Committee (ESC) Super Users/SMEs participate in program enterprise-level activities (e.g., testing, trainings) General program information is gained from FMBT public SharePoint, newsletters, etc. 	<ul style="list-style-type: none"> Begin regularly attending Weekly Program Advisor Meetings Participate in architectural roadmap discussions Participate in ACS efforts 	<ul style="list-style-type: none"> Stakeholders begin to attend: <ul style="list-style-type: none"> Familiarization Sessions, Town Halls Customer and FMBT Joint Activities: <ul style="list-style-type: none"> Begin gathering stakeholder data to inform scope of wave 	<ul style="list-style-type: none"> Customer and FMBT Joint Activities: <ul style="list-style-type: none"> Develop Project Charter, Scope, etc. Identify needs for planning phase that will inform IPS Identify initial stakeholders for analysis
FMBT Program Staff	<ul style="list-style-type: none"> Identify program POC for customer outreach/questions ACS 	<ul style="list-style-type: none"> Identify Admin/Staff Office Rep(s) Begin recurring touchpoints Begin Architectural Roadmap Discussion ACS 	<ul style="list-style-type: none"> Coordinates planning session & wave summit prior to wave initiation Establish program specific meetings or activities 	

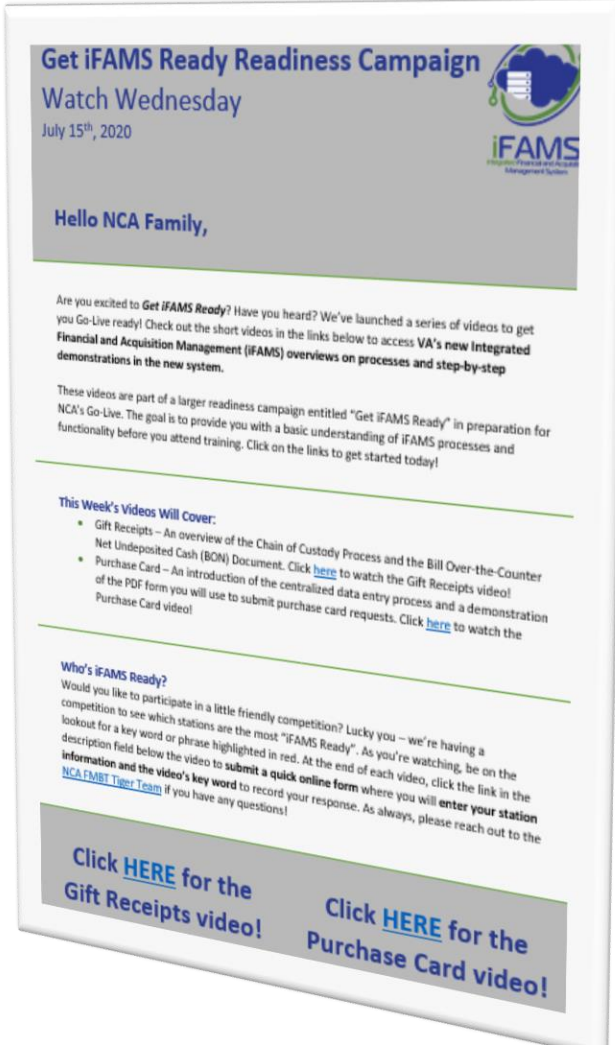
Lesson Learned: Admin Roles and Commitment

- Admin level roles and commitment are greater than we realized



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



Get iFAMS Ready Readiness Campaign
Watch Wednesday
July 15th, 2020

Hello NCA Family,

Are you excited to **Get iFAMS Ready**? Have you heard? We've launched a series of videos to get you Go-Live ready! Check out the short videos in the links below to access VA's new **Integrated Financial and Acquisition Management (iFAMS)** overviews on processes and step-by-step demonstrations in the new system.

These videos are part of a larger readiness campaign entitled "Get iFAMS Ready" in preparation for NCA's Go-Live. The goal is to provide you with a basic understanding of iFAMS processes and functionality before you attend training. Click on the links to get started today!

This Week's Videos Will Cover:

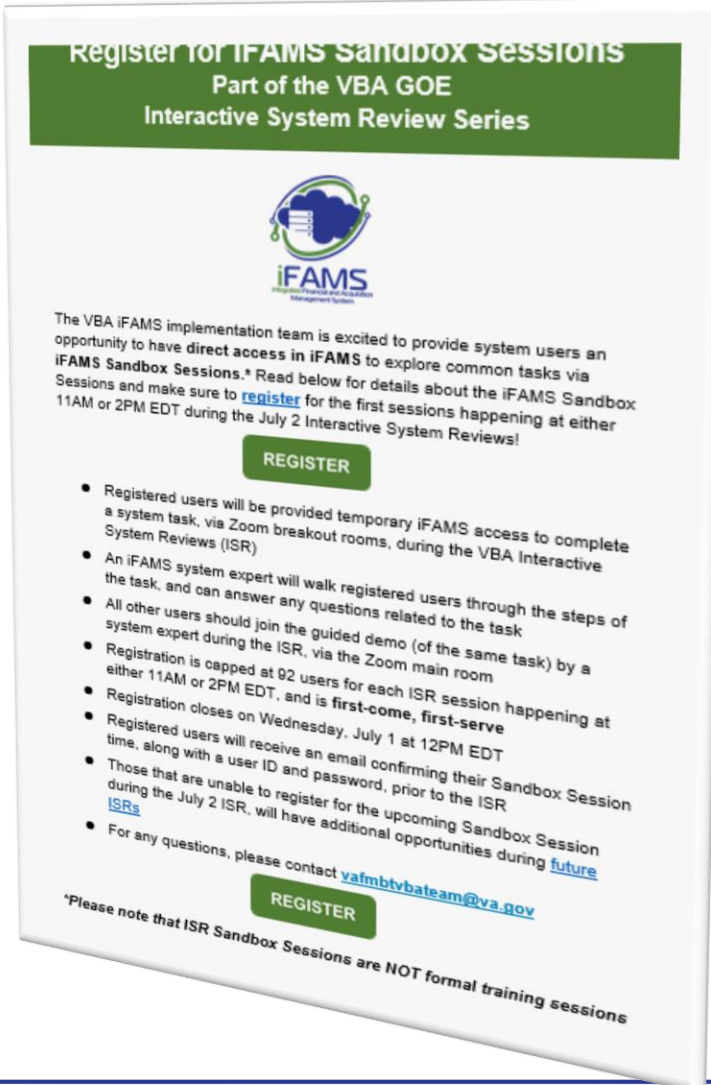
- Gift Receipts – An overview of the Chain of Custody Process and the Bill Over-the-Counter Net Undeposited Cash (BON) Document. Click [here](#) to watch the Gift Receipts video!
- Purchase Card – An introduction of the centralized data entry process and a demonstration of the PDF form you will use to submit purchase card requests. Click [here](#) to watch the Purchase Card video!

Who's iFAMS Ready?
Would you like to participate in a little friendly competition? Lucky you – we're having a competition to see which stations are the most "iFAMS Ready". As you're watching, be on the lookout for a key word or phrase highlighted in red. At the end of each video, click the link in the description field below the video to **submit a quick online form** where you will **enter your station information and the video's key word** to record your response. As always, please reach out to the [NCA FMBT Tiger Team](#) if you have any questions!


Click [HERE](#) for the Gift Receipts video!
Click [HERE](#) for the Purchase Card video!

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



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

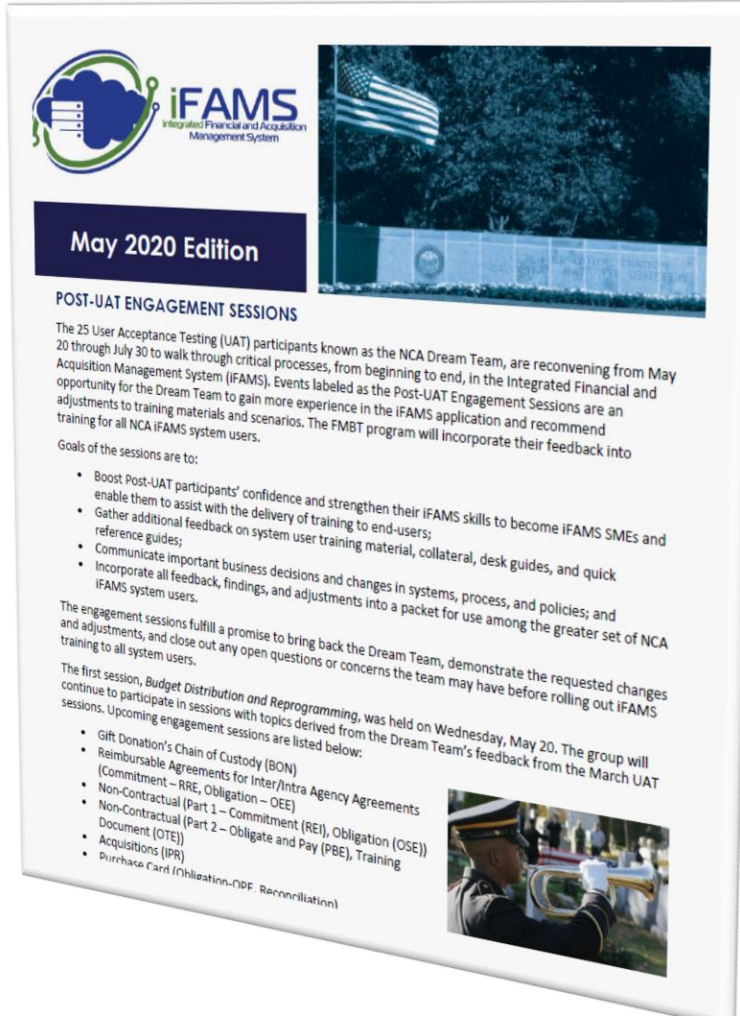
- Registered users will be provided temporary iFAMS access to complete a system task, via Zoom breakout rooms, during the VBA Interactive System Reviews (ISR)
- An iFAMS system expert will walk registered users through the steps of the task, and can answer any questions related to the task
- All other 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 vafmbtvtbteam@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



**May 2020 Edition**

POST-UAT ENGAGEMENT SESSIONS

The 25 User Acceptance Testing (UAT) participants known as the NCA Dream Team, are reconvening from May 20 through July 30 to walk through critical processes, from beginning to end, in the Integrated Financial and Acquisition Management System (IFAMS). Events labeled as the Post-UAT Engagement Sessions are an opportunity for the Dream Team to gain more experience in the IFAMS application and recommend adjustments to training materials and scenarios. The FMBT program will incorporate their feedback into training for all NCA IFAMS system users.

Goals of the sessions are to:

- Boost Post-UAT participants' confidence and strengthen their IFAMS skills to become IFAMS SMEs and enable them to assist with the delivery of training to end-users;
- Gather additional feedback on system user training material, collateral, desk guides, and quick reference guides;
- Communicate important business decisions and changes in systems, process, and policies; and
- Incorporate all feedback, findings, and adjustments into a packet for use among the greater set of NCA IFAMS system users.

The engagement sessions fulfill a promise to bring back the Dream Team, demonstrate the requested changes and adjustments, and close out any open questions or concerns the team may have before rolling out IFAMS training to all system users.

The first session, *Budget Distribution and Reprogramming*, was held on Wednesday, May 20. The group will continue to participate in sessions with topics derived from the Dream Team's feedback from the March UAT sessions. Upcoming engagement sessions are listed below:

- Gift Donation's Chain of Custody (BON)
- Reimbursable Agreements for Inter/Intra Agency Agreements (Commitment – RRE, Obligation – OEE)
- Non-Contractual (Part 1 – Commitment (REI), Obligation (OSE)) Document (OTE)
- Acquisitions (IPR)
- Purchase Card (Obligation-OPF, Reconciliation)

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



FMBT Learning Opportunities

The FMBT program has developed a comprehensive and multi-faceted approach to training and learning opportunities to ensure a successful roll out and adoption of iFAMS.


LEARNING EVENT	WHAT IT IS ✓	WHAT IT IS NOT ✗
Introduction to the System – Familiarization Sessions, Process Brown Bags, and Interactive System Reviews help users get an overall familiarity with iFAMS in advance of formal system training.	• Webinar session to demonstrate iFAMS capabilities and functionalities • Enterprise-focused	• It is not the formal iFAMS system training • It is not Administration-specific
Process Brown Bags (PBBs) / Interactive System Reviews (ISRs)	• PBBs are high-level overviews of process and policy changes • ISRs dive deeper into various system functionalities	• It is not the formal iFAMS system training • It is not intended as instruction on how to use iFAMS
Core Competency – Refresher on fundamental financial management accounting recommended prior to formal iFAMS system training.	• Virtual Instructor Led-Training (vILT) targeted for iFAMS non-core user • High-level introduction of financial management topics	• It does not include any iFAMS-specific information or system training • It is not VA-specific accounting or data
Federal Financial Management 100	• 1-day Instructor-Led Training (ILT) or 2-day vILT, targeted for iFAMS core users • Refresher on fundamental financial management and accounting principles	• It does not include any iFAMS-specific information or system training • It is not VA-specific accounting or data
Federal Financial Accounting 201	• 2-day ILT or vILT, covers advanced topics in financial management and accounting • Intended for audiences that perform accounting tasks in their daily roles	• It does not include any iFAMS-specific information or system training • It is not VA-specific accounting or data
iFAMS System Training – Role-based and delivered just-in-time to prepare users for iFAMS. Required for iFAMS system access.	• Tailored, instructor-led classroom and virtual role based training • Prepares users to perform their functions in the new system • Training will continue to be offered post-go-live	• It is not the final training available!
iFAMS User Training	• Overview of layout and functionality of the iFAMS desktop environment	• It is not the final training available!
iFAMS Navigation (7MS-453722)	• Reviews the differences between forms and documents in iFAMS and how transaction data is organized	• It is not the final training available!
iFAMS Forms vs Documents (7MS-452941)		

iFAMS Training SharePoint

ChaseVA VA U.S. Department


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



VBA FOCUS
July 2020

A Message from Sarah Haddock, VBA iFAMS Implementation Lead

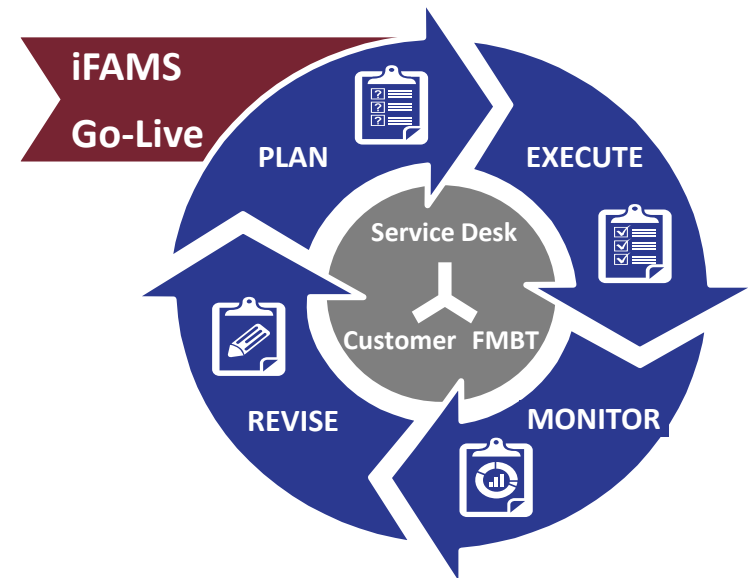


The past several weeks have been very busy for the VBA GOE iFAMS user community, especially our Pilot station users. First, I want to thank everyone who participated in VBA GOE's Organizational Change Assessment (OCA)—your feedback guides my team in how we best engage users with iFAMS. Read below about the first OCA's results and how users are feeling about the overall change. Second, the first of several iFAMS Power Hour sessions—Process Reviews (formerly Process Brown Bags) and Interactive System Reviews (ISRs)—have launched our Pilot station users with great success. Not only are many users making time in their busy schedules to attend Power Hour events, but those who attend are reporting high satisfaction levels with the quality and value of the content being presented. Additionally, my team and I are really excited to offer users a chance to try out iFAMS through the ISR Sandbox Sessions. Read more about the Power Hour activities below, and make sure to join in if you're a Pilot station user! For the GOE Phase 2 stations, I hope you're excited about what's to come when your Power Hour sessions launch in October!

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



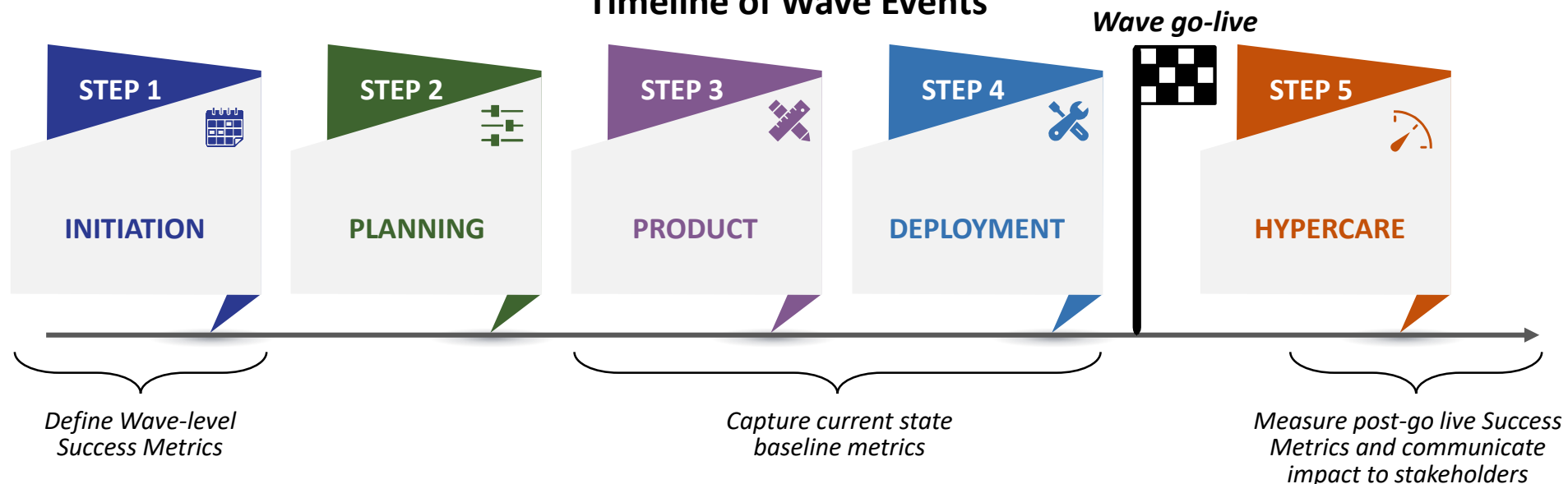
Customer Experience Metrics

Lesson Learned: Wave-Level Success Metrics

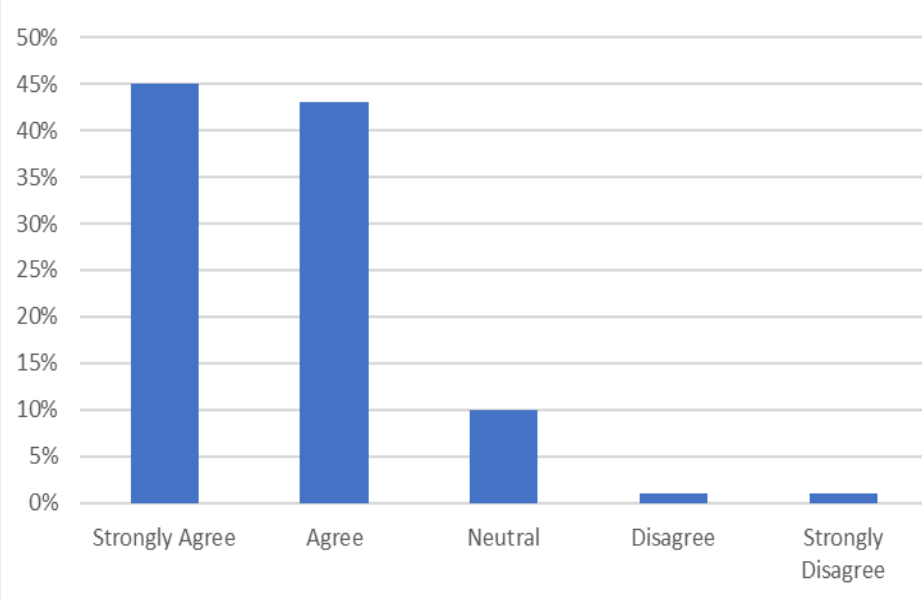
Aligning with Administrations on metrics has been critical to success

- 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

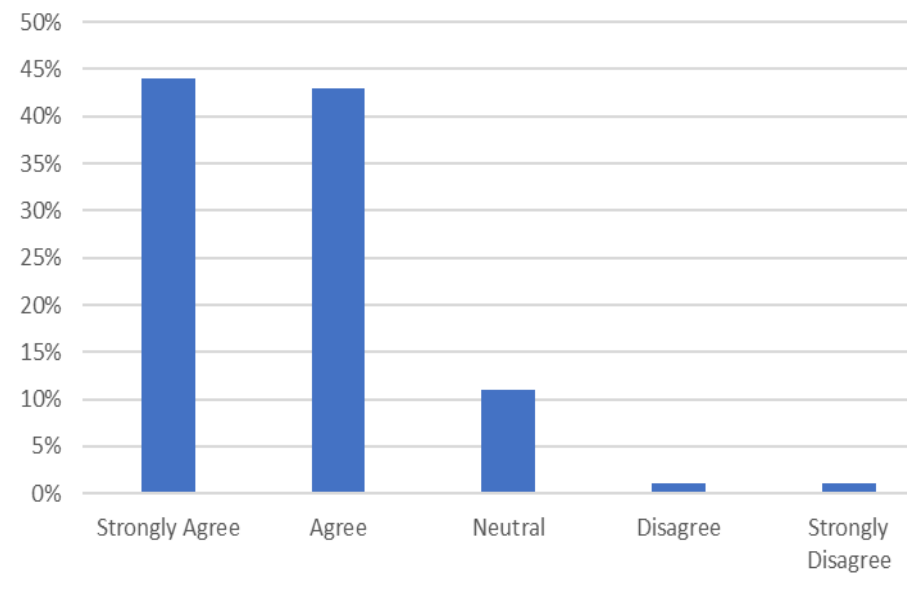
Timeline of Wave Events



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

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  **89%**

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

Overall Training Satisfaction Score for iFAMS system training conducted to date

Organizational Change Assessment #2: NCA/VBA Comparison

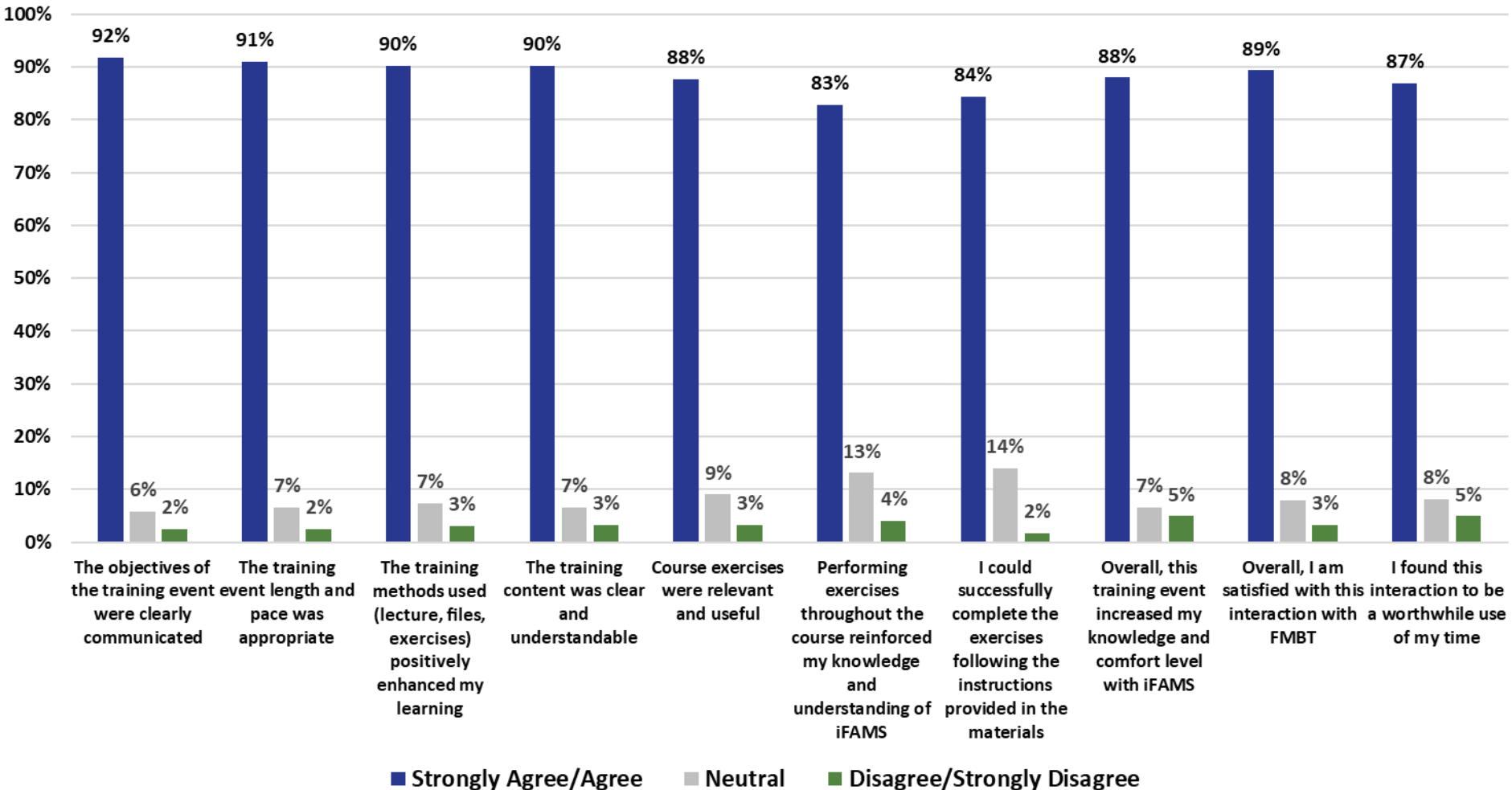


ADKA Stage	Question	NCA	Stage Average	VBA GOE	Stage Average	+/-	Change
Awareness	I understand the purpose of the FMBT program	4.14	4.04	4.58	4.62	+0.58	↑
	I understand the benefits of iFAMS for my organization	3.90		4.64			↑
	I understand why VA is implementing a new financial system (iFAMS)	4.09		4.65			↑
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



Hypercare Activities for NCA

3 

**Virtual Microsoft
Teams Support
Rooms established**

12  **95**

**Training courses
attended by Customer
Support Staff**

**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