

A photograph of the Iowa State University campus, featuring a large domed building on the left and a large tree in the foreground. The entire image is overlaid with a semi-transparent red filter. Two thin horizontal lines are visible: one above the text and one below it.

IOWA STATE UNIVERSITY

Division of Operations and Finance



Improving Finance Service Delivery

CACUBO Best Practices

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September 25, 2022*

Agenda

- Who we are
- Our journey to shared services
- Our team structure
- Lessons Learned
- Q&A session



Who We Are

- Finance Service Delivery (FSD) is comprised of teams of financial specialists who support colleges and units across Iowa State University by providing services such as procurement of goods and services, expense reimbursement, financial management, reporting, and post-award support.
- The goal of FSD is to enhance Iowa State University's finance operations by building upon our culture of service, fostering increased collaboration, and ultimately advancing ISU's mission.
- Service delivery went live in July 2019, at which time selected employees joined teams in one of three dedicated specialist roles – finance specialist, grants finance specialist, or procurement and expense specialist. Service delivery teams are supported by supervisors and operational leadership with the goal of ensuring access to consistent training and resources with a focus on cultivating a collaborative team-based approach to providing financial services.

Workday Journey

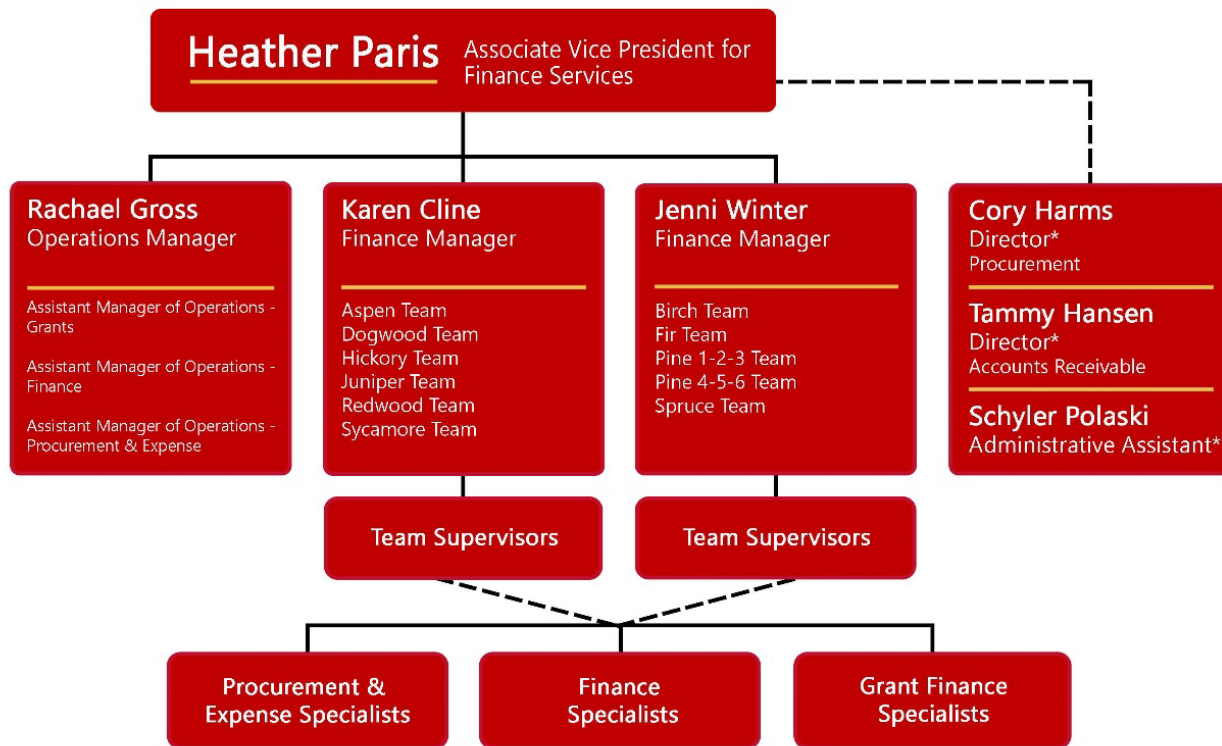
2021	WorkCyte Phase II project begins to implement the Workday Student and Receivables software. The WorkCyte program's continuous improvement plan for Phase I applications is established.
2020	Workday Planning application is deployed. Customer portals with how-to articles, also called "knowledge bases," are established for University Human Resources, Finance and Planning, and Information Technology
2019	Workday HCM, Finance and Payroll go live on July 1. Improved Service Delivery model implemented with Finance delivery and HR delivery teams. ServiceNow is available as a customer service tool for incident management, used by service delivery teams and ITS.
2018	The Okta identify management platform and single sign-on tool is available
2017	Implementation of Workday HCM and Workday Finance begins.
2016	Iowa State contracts for complete Workday suite of products. WorkCyte Phase I project planning stage begins.
2015	Discovery stage of legacy enterprise systems. Request For Proposal (RFP) finalized and published.
2014	Board of Regents ISU TIER recommendation to modernize. Deloitte study support service model.
2013	Iowa State conducts the initial service model study.

Finance Service Delivery Journey

- 2016 – Workday was chosen as the enterprise software system of choice, and implementation begins
- Fall 2018 – Service delivery model is announced campus-wide
- February-March 2019 – Service teams staffed through the internal hiring process
- April-June 2019 – Training for specialists
- July 1, 2019 – Workday Go Live
- July 2019 – Present – Ongoing measurement and reporting of KPIs, training of specialists, and continuous improvement

Our Structure

IOWA STATE UNIVERSITY Division of Operations and Finance



*Denotes other AVP direct reports outside of Finance Service Delivery

Top 5 Lessons Learned

1. Engage key stakeholders
2. Measure early and often
3. Build a structure that supports education
4. Create a culture of engagement
5. Invest in continuous change management

Lesson #1: Engage Key Stakeholders

- Service Delivery Advisory Committee represents a diverse group of stakeholders that establishes accountability and serves as a link for campus engagement.
- Reviews key performance indicators and evaluates the effectiveness and efficiency of delivery teams, identifying areas for improvement.
- Meets quarterly and issues annual reports to campus

Service Delivery Advisory Committee

ISD Advisory Committee Member	Appointed By	Term (years)	Initial Term (years)	Initial ISD AC Member	Current Member	Term Ends
HR Service Delivery and Strategy Lead	VPHR	Permanent		Dwaine Heppler	Dwaine Heppler	
Finance and Support Services Lead	SVPOF	Permanent		Heather Paris	Heather Paris	
Council of Deans Representative	Deans	3	1	Dan Grooms	Dan Grooms	6/30/2023
Faculty Senate Representative	Faculty Senate	3	2	Rob Wallace	Rob Wallace	6/30/2024
Department Chairs Representative	Dept Chairs Cabinet	3	3	Chad Gasta	Caroline Hayes	6/30/2025
P&S Council Representative	P&S Council	3	2	Amy Ward	Jamie Sass	6/30/2024
Merit Staff Representative	UHR	3	3	Beth Wing	Jenifer Berge	6/30/2025
Research Representative	VPR	3	1	Jerry Zamzow	Jerry Zamzow	6/30/2023
Academic Affairs Representative	SVPP	3	1	Dawn Bratsch-Prince	Dawn Bratsch-Prince	6/30/2023
Student Affairs Representative	SVPSA	3	3	Bonnie Whalen	Rachel Boenigk	6/30/2025
Operations and Finance/President's Unit Representative	SVPOF/Pres	3	2	Ellen Rasmussen	Kayt Conrad	6/30/2024
Communications Representative	President	Permanent		Megan Landolt	Megan Landolt	
Workday Technical Advisor	CIO	Permanent		Megan Jensen	Nathan Hannover	

Lesson #2: Measure Early and Often

Establish key performance indicators and report results to demonstrate accountability to campus

Category	Key Performance Indicators
Customer Satisfaction	<ul style="list-style-type: none">• Customer Satisfaction Survey• Quarterly feedback from SD leadership and unit leadership
SD Employee Engagement	<ul style="list-style-type: none">• SD attrition and internal turnover• SD Employee Satisfaction
Operational Efficiency	<ul style="list-style-type: none">• Transaction processing times (aggregated at unit/service team level)• Transactions processed per FTE• Number of re-opened resolved cases• Number of open cases per SD employee

Customer Satisfaction | FY 2022

KPI	Finance
Customer Satisfaction Survey	<p>1,341 responses in FY22 (13.2% response rate)</p> <ul style="list-style-type: none"> • 94% satisfied/very satisfied • 3% neutral • 3% dissatisfied/very dissatisfied • 98% indicated interaction with FINDL was personal, professional and courteous • 98% stated their concern was accurately addressed

"Everyone always takes special care to accurately review the details of the travel and make sure it is handled properly and credited appropriately. Many thanks!"

- June 2022

"You are all so quick and very responsive. I always appreciate your willingness to help me."

- June 2022

"I have had excellent service every time!"

- June 2022

"Finance has been fantastic about answering all of the random/odd questions I come up with, and are unfailingly patient and kind when I make mistakes. :-)"

- June 2022

"As always, top-notch customer service! So very helpful, kind, and amazing."

- June 2022

Employee Engagement | FY 2022

KPI	Finance
Attrition, Turnover and Talent Development	<ul style="list-style-type: none">• 4 FINDL employees left ISU in FY22 (4.0%)• 11 FINDL employees left for another ISU position in FY22 (11.0%)• All 11 FINDL employees who left for another ISU position were promotions. 6 were promotions to central finance departments (4 Controllers, 1 AR and 1 Procurement)
Employee Engagement	4.22

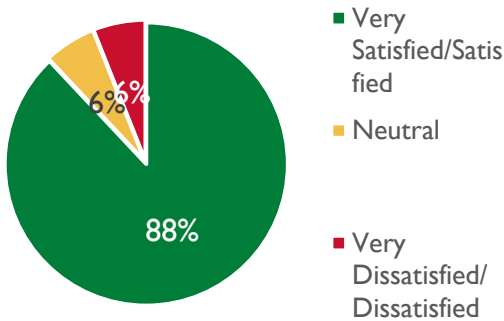
Operational Efficiency | FY 2022

KPI	Finance
Transaction processing times (aggregated at unit/service team level)	<p>Workday Finance Transactions</p> <ul style="list-style-type: none"> • 484,706 transactions • Avg Days to Complete: 4 days • 7,401 effort certifications processed at avg of 20 days • 44,961 supplier invoices at avg of 3 days – began 2/1/22 <p>ServiceNow Incidents and Requests</p> <ul style="list-style-type: none"> • 86,342 assigned to FINDL • Avg Days to Resolution: 0.80 days • Avg Opened per Day: 237 incidents
Transactions processed per FTE	<p>Workday: 5,102</p> <p>ServiceNow: 908</p>
Number of re-opened resolved cases	<p>Re-opened Resolved SN Incidents and Requests</p> <ul style="list-style-type: none"> • 68,092 total incidents resolved • 2.7% (1826) reopened once • 0.2% (121) reopened twice • 0.03% (20) reopened three times

Three Year Comparison | Finance Delivery

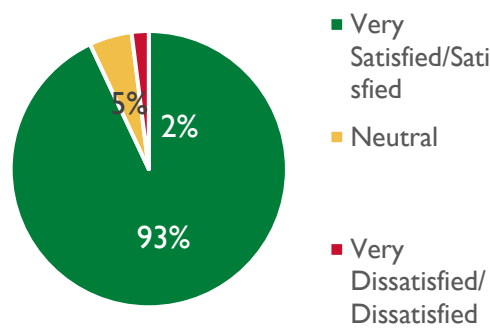
FY 2020

Satisfaction



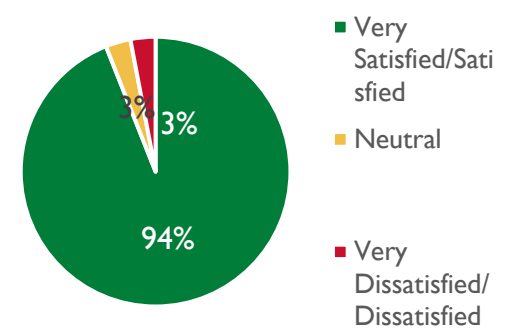
FY 2021

Satisfaction

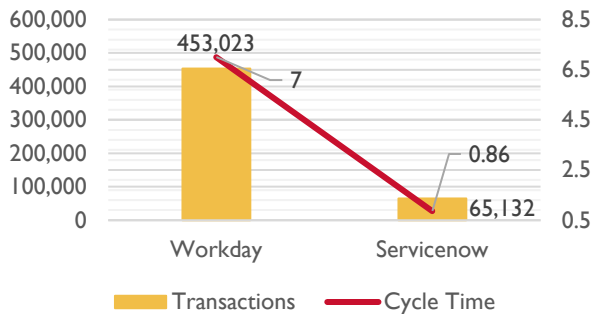


FY 2022

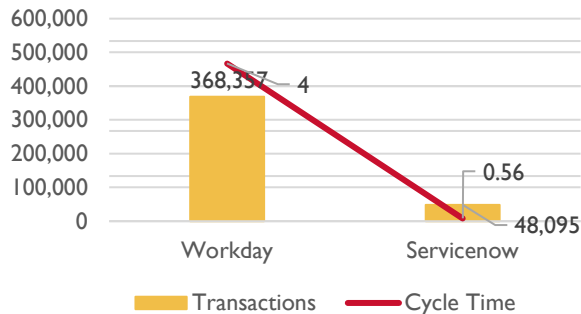
Satisfaction



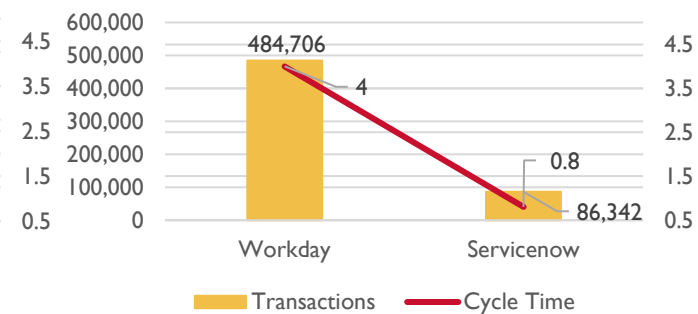
Transactions



Transactions



Transactions



Lesson #3: Build a Structure that Supports Education

- Operations Team
 - Assistant Manager of Operations dedicated to supporting each of the three specialist roles; Finance, Grants finance, and Procurement and expense
 - AMO is responsible for training and business process review. They meet bi-weekly with Central Finance to identify opportunities for improvement and discuss new changes (Workday Release).
- Centralized location for training resources in digital format, managed by the AMO
- Bi-weekly training sessions held by AMO to provide training and process updates. Additional “pod” training to cover unit-specific topics.
- Competency-based education
 - Post training knowledge checks and surveys

**Over 15,000 contact hours of education provided over a three-year period*

Lesson #4: Create a Culture of Engagement



Lesson #4: Create a Culture of Engagement

Employee Standards

Act with **INTEGRITY**

- Follow ISU Principles of Community & Purpose, Divisional Values & Foundation of Finance Delivery
- Uphold strong moral principles on policies & procedures
- Conduct oneself in a professional manner
- Respect & show appreciation for others

Be **OBJECTIVE**

- Avoid bias
 - Identify your own biases*
- Remove personal judgment
 - Approach work with neutrality & fairness
 - Seek other viewpoints & resources
- Treat everyone equitably & without prejudice
- Utilize the Direct Problem Resolution model*

Continuously **LEARN**

- Attend educational & professional development sessions for current role
 - Be accountable for information provided in sessions as required by leadership
- Practice metacognition & mindfulness*
- Welcome coaching as a learning opportunity

Display **TRUST**

- Be honest & open with your team & yourself
 - Assume people have the best intentions in their work
- Support leadership direction & decisions
- Be reliable
 - Completed tasks in a timely manner with follow-up as needed
 - Demonstrate exceptional customer service when communicating or problem solving*
- Be mindful of professional etiquette*
- Display confidence when working with customers & teammates*

Engage with **PRIDE**

- Embrace positivity*
- Work with a sense of ownership & commit to doing your best
- Find meaning, bring passion & share enthusiasm in our work
- Promote team identity

Foster **COLLABORATION**

- Cultivate an alliance with other teams & departments throughout the university*
- Support innovative ideas
- Be flexible & adapt to environments & circumstances
- Share & celebrate team & individual accomplishments
- Provide advance notice for schedule conflicts, cancellations & attend meetings on time

Grow **RELATIONSHIPS**

- Approach customer requests with consistency
- Establish communication to the appropriate resource to ensure a positive customer experience (i.e., soft hand-off)
- Apply service recovery when appropriate*
- Provide outreach to departments & customers
 - Be courteous & responsive to requests
 - Confirm preferred communication channels (i.e., virtual or in-person)
- Show interest & engage with customers

*Denotes a professional development training topic

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Lesson #5: Invest in Continuous Improvement and Change Management

- Knowledgebase and Service Request Forms
 - Centralized location for job aids to assist the customer and FSD
 - Easily fillable forms to guide customers on the minimum information required for a request
- Faculty Reporting
 - Customized reports with the intent to provide a novice user with a quick balance
 - Customized Faculty Workbooks to provide multiple funding in one location leveraging live data feeds
- FORT dashboard
 - Provided a single source within workday to access reports, tasks, and relevant policies.
- Finance Report Request process
 - Developed a consistent methodology for reviewing and approving changes to existing reports
- Cost Center Manager training



Question and Answer Session

Contact Us

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