

## 1 Meeting Logistics

Item	Description
Date(s)	6 half-days remote delivery: list days, dates, TBD
Time	TBD
Location	TBD

## 2 Attendees

Role	Name
Facilitator	Jeff Handa SunGard Higher Education Luminis™ Services Senior Process Consultant
Other Participants	TBD (Attendees Identified by Client)
Not in Attendance	TBD

## 3 Preparation

The following is needed to prepare for the remotely-conducted Luminis™ Platform Organizational Planning workshop:

- Identify participants for workshop activities.
- Schedule a meeting room arranged in a u-shaped or classroom layout to accommodate the anticipated number of participants for each session.
- Provide participants copies (printed or electronic) of the following documents prior to the workshop:
  - Organizational Information Gathering Analysis and related documents
  - Organizational Planning Matrix
  - Institutional project documents (e.g. vision, mission, expectations and goals, as well as existing communication, marketing, and training plans)
- Provide the following equipment and materials:
  - Workstation with an Internet connection and Data Projector
  - Display screen for Data Projector
  - Notepads
  - Pens
- Recommended option: If using the Raindance Virtual Classroom features for polling, then a training room with one Internet-connected workstation per participant will be needed.

## 4 Purpose

The Luminis™ Platform Organizational Planning workshop brings together decision-makers from across the institution to analyze the needs and expectations of key constituencies with regard to the Luminis™ portal. In particular, participants focus on the challenges involved in managing communal change throughout the implementation. During the workshop, participants begin to build high-level Training, Communications, and Organizational

Readiness Plans tailored to the requirements of each constituency. These plans are designed to ensure the community's acceptance of the portal. Specific objectives include:

- Review the *Organizational Information Gathering Analysis* and related documents, and any early-stage policy and process recommendations provided by the P&P Subcommittee.
- Discuss the project vision and goals defined by the institution's executive team.
- Explore issues surrounding organizational change and transition.
- Identify all stakeholders involved in the Luminis™ Platform implementation and develop strategies to encourage their engagement in the success of the Luminis™ Platform implementation.
- Develop full implementation communication and training strategies.
- Develop organizational readiness recommendations.

Following the Organizational Planning workshop, the institution will be prepared to work with its constituents to validate and finalize training, communication/marketing, and organizational-readiness plans. These plans should be completed prior to the Go-Live Support workshop.

## **5 Participants**

Participants for the Luminis™ Platform Organizational Planning workshop should include the core Luminis™ Platform Core and Organizational Project Teams, along with other participants invited for specific sessions. These session participants should include members of Subcommittees completing work in the designated area, and other staff who can speak to the organizational issues being addressed. These individuals should be sufficiently high-level to feel empowered to contribute to decision-making activities affecting the entire institution, but should also be well aware of business practices and issues at all levels of their particular areas.

Additionally, an institutional facilitator will be needed, preferably the project lead or organizational team lead, to coordinate and facilitate all sessions on-site, in conjunction with the remotely-located SunGardHE consultant.

## **6 Desired Outcomes**

The following are desired outcomes for the Luminis™ Platform Organizational Planning workshop:

- Common understanding among all project team members of transition issues and challenges related to the Luminis™ Platform implementation.
- Identified stakeholders and an analysis of their communication, training and organizational needs.
- Communication and training strategies.
- Critical content policy, process and permission considerations reviewed and addressed.

- Organizational readiness action items identified from the Client Action Plan.
- Organizational readiness recommendations based in best-practices.
- Decisions and action items documented in a follow-up report.

## 7 Deliverables

The following are deliverables for the Luminis™ Platform Organizational Planning workshop:

- **Organizational Planning Analysis and Matrix**

## 8 Agenda

### Day 1

Topic	Time	Owner	Notes
<b><u>Remote Workshop Set-Up</u></b>	8:00 – 8:30 am	Project Lead & SunGard HE Consultant (PPC)	<b><i>Recommended Audience:</i></b> SunGardHE consultant and Org Team Lead (or designated institutional facilitator) each prepare relevant workspaces.
<b><u>Organizational Change &amp; Transition</u></b> <ul style="list-style-type: none"> <li>• Define desired future state: <ul style="list-style-type: none"> <li>○ What does the client hope to accomplish via the portal, map backwards to identify high-level milestones needed for success.</li> </ul> </li> <li>• TBD</li> </ul>	8:30 am – 12:00 pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> Organizational project team members and other key staff.
<b><u>Breaks:</u></b> 9:30 – 9:45 and 10:45 – 11:00			
<b><u>Lunch</u></b>	12:00 – 1:00 pm		
<b><u>Developing an Organizational Readiness Plan</u></b> <ul style="list-style-type: none"> <li>• Conduct stakeholder analysis</li> <li>• Identify relevant stakeholder groups</li> <li>• Identify necessary changes in policy</li> <li>• Identify assumptions, dependencies and resource needs</li> <li>• Identify owners and timelines</li> </ul>	1:00 – 4:30pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> Organizational project team members and other key policy decision-makers, managers, and web developers. Maximum size for should not exceed 25 participants.
<b><u>Breaks:</u></b> 2:00 – 2:15 and 3:15 – 3:30			

***NOTE:** Half-day modules scheduled on days two and three may be interchanged if necessary for scheduling of staff.*

**Day 2**

Topic	Time	Owner	Notes
<b><u>Remote Workshop Set-Up</u></b>	8:00 – 8:30 am	Project Lead & PPC	<b><i>Recommended Audience:</i></b> <i>SunGardHE consultant and Org Team Lead (or designated institutional facilitator) each prepare relevant workspaces.</i>
<b><u>Building the Communication Plan</u></b> <ul style="list-style-type: none"> <li>• Best practices and considerations for change communications</li> <li>• Create key communication messages for each group</li> <li>• Determine communication/marketing methods for each group</li> <li>• Review and assign communication planning actions items</li> </ul>	8:30 am – 12:00 pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> <i>Communication subcommittee members and core project team members</i>
<b><u>Breaks:</u></b> 9:30 – 9:45 and 10:45 – 11:00			
<b><u>Lunch</u></b>	12:00 – 1:00 pm	All	
<b><u>Building the Training Plan</u></b> <ul style="list-style-type: none"> <li>• Prioritize list of groups to be trained</li> <li>• Identify training methods, needs &amp; resources for each group</li> <li>• Review and assign training planning actions items</li> </ul>	1:00 – 4:30 pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> <i>Core project team members, help desk personnel, instructional technologists, and trainers.</i>
<b><u>Breaks:</u></b> 2:00 – 2:15 and 3:15 – 3:30			

***NOTE:** Half-day modules scheduled on days two and three may be interchanged if necessary for scheduling of staff.*

**Day 3**

Topic	Time	Owner	Notes
<b><u>Remote Workshop Set-Up</u></b>	8:00 – 8:30 am	Project Lead & SunGard HE Consultant	<b><i>Recommended Audience:</i></b> SunGardHE consultant and functional project lead (or designated institutional facilitator) each prepare relevant workspaces.
<b><u>Content Policy &amp; Practice</u></b> <ul style="list-style-type: none"> <li>• Channel life cycle management</li> <li>• Channel quality standards</li> <li>• Channel quality monitoring</li> <li>• Channel update &amp; resolution processes</li> <li>• Group studio monitoring, quality, and administration</li> <li>• Announcement monitoring, quality, and administration</li> </ul>	8:30 am – 12:00 pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> Core project team members, content planners and policy/procedure planners.
<b><u>Breaks:</u></b> 9:30 – 9:45 and 10:45 – 11:00			
<b><u>Lunch</u></b>	12:00 – 1:00 pm	All	

**Day 3 (cont.)**

Topic	Time	Owner	Notes
<b><u>Building the Support Plan</u></b> <ul style="list-style-type: none"> <li>Identify end-user support needs</li> <li>Identify end-user support processes</li> <li>Review and assign support planning actions items</li> </ul>	1:00 – 2:00 pm	PPC and client facilitator	<b><i>Recommended Audience:</i></b> <i>Core project team members and help desk personnel.</i>
<b><u>Break:</u></b> 2:00 – 2:15			
<b><u>Organizational Project Team Meeting</u></b> <ul style="list-style-type: none"> <li>Review Organizational Planning sessions</li> <li>Review client action guide <ul style="list-style-type: none"> <li>Identify owners for tasks from Organizational Planning workshop</li> <li>Review status of Content Planning tasks</li> </ul> </li> <li>Identify additional action items</li> <li>Review project timeline, milestones, and tasks and future services schedule</li> <li>Review participants, agenda, and preparations for Content Administration Training</li> <li>Wrap Up / Q&amp;A</li> </ul>	2:15 – 3:45 pm	Project Lead & SunGard HE Consultant	<b><i>Recommended Audience:</i></b> <i>Organizational project team members.</i>
<b><u>Break:</u></b> 3:45 – 4:00			
<b><u>Core Project Team Meeting</u></b> <ul style="list-style-type: none"> <li>Review Organizational Planning sessions</li> <li>Review Project Status <ul style="list-style-type: none"> <li>Review Action Items</li> <li>Identify and Address Outstanding Issues</li> <li>Review Future Schedule</li> </ul> </li> <li>Schedule Follow-up Meeting</li> <li>Confirm Content Admin Training Workshop <ul style="list-style-type: none"> <li>Dates &amp; Time</li> <li>Agenda</li> <li>Participants</li> <li>Location</li> <li>Equipment &amp; Materials</li> </ul> </li> </ul>	4:00 – 5:00 pm	Project Lead & SunGard HE Consultant	<b><i>Recommended Audience:</i></b> <i>Core project team members.</i>

**9 Decisions**

Decisions will be documented in the Organizational Planning Follow-up Report.

**10 Action Items**

Action Items will be documented in the Organizational Planning Follow-up Report.

**11 Revision Record**

Number	Date & Sections	Author	Notes
1.0	TBD	Consultant	First version of this document.
1.1			
1.2			