

Action Planning Template

Functional Group Name	Business Operations	
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Organization/Business Unit	Business Services, Fiscal, HR, Payroll	
Functional Group Purpose and Value Proposition		
By engaging with our peers, this functional group will be able to collaborate more effectively, pinpoint information gaps, share knowledge from subject matter experts, and use consistent information in our various business functions. All of this will foster an open and collaborative environment and make problem-solving quick and work more efficient.		
Functional Group Link to Organizational Strategy and Business Objectives		Guiding Principles
In order to better facilitate the use of centralized business functions, this F.G. will seek to: <ul style="list-style-type: none"> • Create best practices and create efficiency that flows from departments through payroll, HR, fiscal, etc. • Map key content areas and identify “Subject Matter Experts” that can aid other members within the FG with issues or problems 		<ul style="list-style-type: none"> • Make knowledge easily accessible • Connect people to people, and people to information • Establish strong, trust-based relationships
What is IN SCOPE?		What is OUT OF SCOPE?
<ul style="list-style-type: none"> • Identifying best practices • Identifying SME’s • Provide training and support in problem areas (i.e. software BAM, FAMIS, CitiDirect, new policies/procedures.) • Keeping and maintaining motivation within the group 		<ul style="list-style-type: none"> • Not listening to other members of the group • Committing money to single research projects • Over committing to activities that take away from current job responsibility
Functional Group Objectives		
<ol style="list-style-type: none"> 1. Identify people’s roles in various business fields 2. Identify experts in our various business fields 3. Identify certification/training opportunities 4. Identify action plan for communication within the FG 5. Identify major, common problems, and best ways to solve them 6. Mentorship among peers 		
Critical Success Factors		Performance Indicators
<ul style="list-style-type: none"> • Identify additional FG engagement leaders • Meet expectations of peers • Increasing efficiency • Stay on course with the mission • Getting disengaged employees, engaged 		<ol style="list-style-type: none"> 1. Participation at events and training 2. Growth and buy-in of FG 3. Gaining support from immediate supervisors

Barriers & Challenges

Cultural- departments/divisions/centers all have processes that are different

Time - everyone is busy, doing more with less

Relationships - some people may not be happy to work with people they don't like

Diversity - We have an extremely diverse group with drastically different roles.

Utilizing the new centralized services - Com, IT, Business services (there are confusing lines)

Functional Group Roles and Members *(Who will be represented by this group?)*

All members are in some business function (HR, Payroll, Fiscal, Travel)

Key Milestones	Deliverables
Kick-off Meeting: 10/27 11:30-1pm @ Equine Center	Skill specific trainings for members
	List of all FG members and what they do
	List of TEES centers and how they use business services

Engagement Plan:

Identify the status of the following change management activities:

Engagement Activity:	Planned	Not Planned	Complete
a. An engagement plan is in place to support the activities of the FG.	In progress		
b. Education and training will be available to members on tools and approaches.	In progress		
c. The FG has a plan to recognize success of the FG and/or its individual members.			✓
d. Current state assessment of successes and problems about knowledge sharing that is relevant to this FG will be completed.		✓	
e. A plan to improve and/or eliminate the barriers to knowledge flow and collaboration will be developed.	In progress		
f. Best practices are investigated for adoption.	In progress		
g. Senior leadership / sponsors are involved with the FG and act to facilitate and support engagement as required.	In progress		