



UNIVERSITY LANDS

THE UNIVERSITY of TEXAS SYSTEM

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**Friends of the
Family (FoF)
Program
Kick-Off Meeting
July 23, 2013**

FoF Program Kick-Off Meeting Agenda

TOPIC	PRESENTER(S)	TIMING
Welcome and Introductions <ul style="list-style-type: none"> • <i>Participants Introduce Self (Scott)</i> • <i>Discuss Role of Facilitator (LJ)</i> 	Scott Mims and LJ Moody	20 minutes
Review Goals and Meeting Outcomes	Scott Mims	5 minutes
Review Meeting Rules of the Road	LJ Moody	5 minutes
Discuss Initiative Drivers – <i>What is driving the need for change?</i>	Scott Mims	10 minutes
FoF Program Overview and Q&A: <ul style="list-style-type: none"> • <i>Approach</i> • <i>Roles</i> <ul style="list-style-type: none"> • <i>Customer, UL, and Opportune</i> • <i>Expectations</i> 	Latisha Williams	25 minutes
Next Steps: <ul style="list-style-type: none"> • <i>Determine Bi-Weekly Meeting Schedule</i> • <i>Review Any Action Items</i> <ul style="list-style-type: none"> • <i>Parking Lot</i> • <i>Confirm Who, What, and By When</i> 	LJ Moody	15 minutes
Wrap-Up	Scott Mims	10 minutes

FoF Program Kick-Off Meeting

Introductions

- **Each participant please share:**

- Name**

- Company**

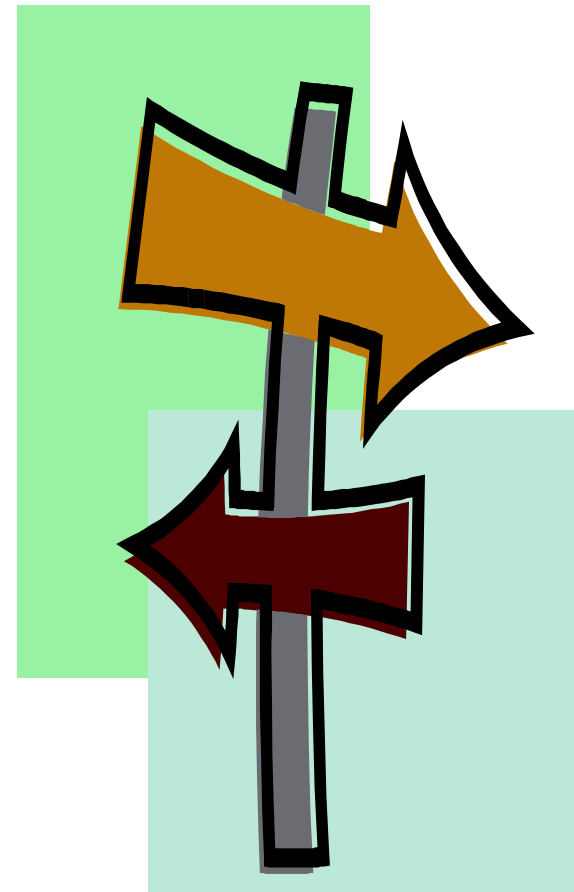
- Position**

- What are you hoping to gain by participating in the FoF Program?**

HELLO
my name is

FoF Program Kick-Off Meeting *Role of Facilitator*

- **The role of the facilitator is to:**
 - Keep the meeting on track**
 - ✓ **Ensure we start and end on time**
 - ✓ **Ensure we move thru the agenda**
 - ✓ **Ensure we adhere to the Ground Rules**
 - Ensure meeting minutes and all action items are captured**



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FoF Program Kick-Off Meeting *Program Goals*

Compass Initiative Goal

The goal of the University Lands' Compass portal initiative is to implement tools that enable customers to more effectively manage their University Lands assets and streamline royalty reporting.

FoF Program Goal

The goal of the University Lands' *Friends of the Family (FoF) Program* is to engage Operators and Payors in the portal development and implementation efforts to ensure early adoption of the new Compass tool and reporting process changes.

FoF Program Kick-Off Meeting *Outcomes*

During today's meeting we will:

Ensure Participant Understanding of Program Expectations

- Customer participant role
- UL Analyst role
- What is the “ask” of customer participants?
 - ***Can everyone commit?***

Determine Communication Preferences and Frequency

- Preferred delivery method:
 - ***E-mail, Website, Newsletters?***
- Is there such a thing as “over communicating”?
- Any unique customer participant requirements?

Establish Bi-Weekly Meeting Schedule

- Preferences on day of week
- Preferences on time of day
- Any days during the month to avoid?
 - Other than 5th and 15th

FoF Program Kick-Off Meeting *Rules of the Road*

To ensure our meetings are productive:

- Encourage everyone to participate - *your input is very important!*
 - *Meeting intended to be interactive*
- Request one person speaks at a time
- Request no side conversations
- Please turn-off cell phones and other forms of technology during meeting
- Facilitator will help us stick to the agenda
 - Other issues noted in **Parking Lot** (this is considered a way to “park” the other issue to be discussed for follow-up at a different time)*
- Please consider all ideas and feedback
- Facilitator will help us start and end on time



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FoF Program Kick-Off Meeting

What is driving the need for change?



- There are several factors driving the need for change:

- Outdated systems**

- ✓ Mandatory move off UT mainframe
- ✓ Replacing eCare

- Royalty Reporting**

- ✓ Shift of process ownership from UL to Operators and Payors
- ✓ Access to more robust and improved quality of data for Operators and Payors

- This is not the last change...more to come to ensure system and process efficiency and effectiveness**

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FoF Program Kick-Off Meeting

What is driving the need for change?

**We recognize these changes will impact all of you,
and we know that change is never easy.**

***The project team is here to support you to help
ensure a successful implementation.***



FoF Program Kick-Off Meeting

Program Overview

Program Management roles are:

UL Program Leads

- ***Oil & Gas Team***
 - Scott Mims
 - Latisha Williams
- ***Cash Management Team***
 - Leslie Smith
- ***Technical Team***
 - Sunny Sunderland
 - Wil Vark

UL Project Team

- ***Oil & Gas Analysts***
 - Latisha Williams
 - Vicki Cain
 - Julia Scott
 - Ann Quaid

Opportune Project Team

- ***Change Management Lead and Facilitator***
 - LJ Moody
- ***Functional Lead***
 - Wade Becker

FoF Program Kick-Off Meeting *Program Overview*

UL Program Management roles and expectations are:

Oil & Gas Team Leads *Scott Mims and Latisha Williams*

- Act as overall program managers
- Participate in training customers and the UL team on new tools/functionality and process
- Called upon as Subject Matter Experts (SME's) as needed
- Participate in bi-weekly FoF calls

Cash Management Team Lead *Leslie Smith*

- Called upon as Subject Matter Experts (SME's) as needed
- Participate in testing of new tools/functionality and process
- Participate in training customers and the UL team on new tools/functionality and process

Technical Team Leads *Sunny Sunderland and Wil Vark*

- Address technical issues
- Participate in bi-weekly FoF calls
- Participate in testing of new tools/functionality and process

FoF Program Kick-Off Meeting

Program Overview

UL Project Team roles and expectations are:

Oil & Gas Analysts

Assigned to Specific FoF Participants

- Provide frequent communication with assigned FoF participants
- Escalate/route issues to the project team
- Enter/log questions and issues into project database
- Provide updates to project team and UL team members
- Provide feedback on proposed project communications (newsletters, e-mails, website postings, etc.)
- Participate in testing of new tools/functionality and process
- Participate in bi-weekly FoF calls
- Participate in training customers and the UL team on new tools/functionality and process

FoF Program Kick-Off Meeting *Program Overview*

Opportune Project Management roles and expectations are:

Change Management Lead

LJ Moody

- Compile FAQ's for customers and UL team
- Monitor and manage the issues/questions database
- Create key messages and talking points for use with customers
- Participate in training customers and the UL team on new tools/functionality and process
- Provide updates to project team
- Facilitate bi-weekly FoF calls

Functional Lead

Wade Becker

- Participate in bi-weekly FoF calls
- Participate in training customers and the UL team on new tools/functionality and process
- Assist with issue resolution
- Act as SME on FAQ's

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FoF Program Kick-Off Meeting *Program Overview*

Customer participant's most important roles?



**Be engaged as the representative
“*voice of the customer*” as we
progress toward go-live.**

**Serve as the project Sponsor within
their organization – *Be an advocate
for the new tools and process.***

FoF Program Kick-Off Meeting *Program Overview*

How do participants communicate with the Project Team?

1. The preferred vehicle is to send an e-mail to the ULNews@utsystem.edu.
 - The Project Team will monitor this site and route questions/issues to the appropriate team member.
 - This allows us to provide coverage regardless of team member's individual schedules.*
2. Post a question in the FAQ database.
 - This option allows participants to enter questions/issues directly into a tracking tool.
 - Launching in August – more to come.***
3. Contact assigned Oil & Gas Analyst directly.



FoF Program Kick-Off Meeting

Program Overview

Customer participant's roles and "asks" are:

Feedback

- Serve as the representative "voice of the customer" as we progress toward go-live
- Solicit feedback and questions from their team members
- Provide feedback on design concepts around reporting functionality

Communication

- Share project communications with their team members – ensure messages are cascaded to all stakeholders in their organization
- Help the project team identify and track FAQ's and issues/concerns

Testing

- Review quality of their converted data
- Participate in testing of new tools/functionality and process

Training

- Assist in the system and process training materials and go-live efforts
- Provide feedback on proposed project communications (newsletters, e-mails, website postings, etc.)
- Participate in training their organization on new tools/functionality and process

FoF Program Kick-Off Meeting *Next Steps*

- **Determine Bi-Weekly FoF Program Meeting Schedule**
 - *Propose starting week of July 29th*
 - *Days to avoid other than 5th and 15th of month?*
 - *Time of day preferences?*
- **Review Action Items**
 - *Confirm Who, What, and By When*
 - *Any Parking Lot Items?*



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FoF Program Kick-Off Meeting *Wrap-Up*

Wrap-Up