“We’re Moving Your Cheese!”
Communicating IT Change

Academic Web Technologies
Office of Information Technology
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Session Agenda

- General Introduction
- Getting Ahead of the Message
- Developing a Communication Strategy
- Executing a Communication Strategy
- How’d It Go?
- Questions
General Introduction
What is “moving cheese”?

- A parable about change
- Change takes many forms
- Change is necessary
- Change impacts users
Why should we care?

- Acceptance
- Buy-in
- It’s the right thing to do
Takeaways

- Who
- What
- How
- Our mistakes
Our case study: LMS Transition

- Small dev team
- Beloved, but aging, homegrown Learning Management System (EEE)
- Campus-wide impact if changed
- Two projects, one approach
  - 1-year Pilot
  - Multi-year transition
Guiding Principles

● Challenges
  ○ Controversial, poorly understood, easily confusing
  ○ Anxiety and resistance
  ○ “But...”

● Goals
  ○ Transparency
  ○ Unified and consistent
  ○ Clear and complete
  ○ Retain trust
The Communications Team

- **Tips**
  - Whole lifecycle
  - Writing, speaking
  - User focused

- **Our Team**
  - Project Initiator (Briandy)
  - Development Team Manager (Kelsey)
  - Development Team User Experience Architect (Ray)
Getting Ahead of the Message
The Pre-strategy Strategy

- Craft a “change is coming” message
- Identify obvious initial audiences
- Proactively engage ahead of the project
The Pre-strategy Strategy

● Content
  ○ Explain “why”
  ○ Demonstrate thoughtfulness
  ○ Be honest about impacts

● Format
  ○ Concise
  ○ Mostly Q&A
The Pre-strategy Strategy

● Pros
  ○ Promote inclusiveness, transparency
  ○ Identify champions
  ○ Uncover concerns
  ○ Get intel for messaging

● Cons
  ○ The game of “telephone”
Developing a Communication Strategy
Process

- Define goals
- Audience discovery & definition
  a. Brainstorm audience list
  b. Define attributes of audiences
  c. Group like audiences together
  d. Refine audiences
  e. Combine and continue to refine audiences
  f. Outline audience communication methods & concerns
  g. Decide upon communication frequency
Suggested Working Style

● Collaborative with 2 or 3 people

● 10-20-10-20 active working meetings:
  ○ 10 minutes to review and plan the next 50 minutes
  ○ 20 minutes of independent work
  ○ 10 minutes to collaborate and discuss
  ○ 20 minutes of independent work
  ○ 2 minutes to plan next meeting (put this in your calendar invite)

● Use collaborative software (we used Google spreadsheets)
Establish Goals

- Come up with a few goals for your communication effort
- Refer back to these goals **constantly**
- Example from LMS Transition:
  - Promote on-going engagement in the entire learning technology ecosystem.
  - Increase the opportunities for ensuring that this is a cooperative effort.
  - Build confidence & understanding around decisions through transparency and demonstration of responsiveness.
  - Inform expectations through education.
  - Reduce fear and misunderstanding.
1 - Brainstorm audience list

● Brainstorming, aka “The Kitchen Sink”
  ○ Who and why?

● Refine
  ○ Importance (critical, somewhat critical, or n/a)
  ○ Communication so far (effective, not effective)
  ○ Perspective (unaware, resistant, neutral, supportive, leading)

● Rank
  ○ 1 = critical to project success
  ○ 5 = impacted, make sure they’re aware

● Columns: Who, Why
2 - Define audience attributes

- What to think about
  - Importance (critical, somewhat critical, or n/a)
  - Effectiveness of communication so far (effective, not effective)
  - Perspective (unaware, resistant, neutral, supportive, leading)

- Criticality ranking
  - 1 = critical to project success
  - 5 = impacted, make sure they’re aware

- Columns: Importance, Effectiveness, Perspectives, Ranking
3 - Grouping

- What to think about
  - Affinity groupings
  - General groups with subgroups as needed
  - Naming groups

- Output: Groups, subgroups, and audiences organized appropriately
4 - Refinement & Definition

● What to think about
  ○ Why is this audience important?
  ○ What do we want from this audience?
  ○ How should we communicate with this audience?

● Tips
  ○ Don’t worry if you think of new audiences; just add them
  ○ Don’t worry if you discover similarities; keep grouping things together
  ○ Make liberal use of the “Hide column” feature in your spreadsheet app

● Output: New columns: Why important, What we want, Tone
5 - Combine & Refine

● What to think about
  ○ Is this audience still important?
  ○ Is this audience categorized appropriately?
  ○ Goal is to create a manageable, focused list of audiences

● Tips
  ○ Either delete or move audiences away
  ○ Merge as needed
  ○ Keep a consensus mindset when considering removing entries

● Output: A more focused, manageable list
6 - Communication methods & concerns

● What to think about
  ○ What are likely the key concerns for this audience with regard to this change?
  ○ What are typically the best ways to reach this audience?
  ○ How frequently should we engage this audience given the various channels?

● Tips
  ○ This can get tedious, so don’t do it all at once

● Output: Columns: Probable concerns, Preferred communications mechanisms
7 - Frequency

● What to think about
  ○ How frequently should we talk to this audience?
  ○ Should the frequency vary based on communication method?

● Tips
  ○ Consider multiple frequencies based upon communication method
  ○ This can get tedious, so don’t do it all at once

● Output: Columns: Frequency
The Whole Enchilada

- **Who**
  - Priority audiences
  - And everybody else
- **Why**
  - Helpful especially later, when you don’t remember why an audience is listed
- **How**
  - Methods and frequency of communication
  - Contents of communication
- **Tone**
- Then, you can synthesize the data into an actionable form, such as a *quarterly calendar*
Templates & Assets

http://sites.uci.edu/e16uci/cheese/

● Presentation deck
● Blank templates (Google spreadsheets, but easily imported into Excel)
● Outline/template of the plan outlined in the previous slides
Executing the Communication Strategy
Execution Planning

- Implementing based on development
- Mapping to project phases
- Scheduling
Hello,

Early results from the year-long Canvas Pilot are trending in favor of Canvas adoption. While surveyed students are split roughly evenly between EEE, Canvas, and no preference, 66.7% of participating instructors preferred Canvas compared to 19.1% for EEE and 14.3% with no strong opinion.

The Canvas Pilot (http://sites.uci.edu/canvaspilot/) to assess the usefulness of the Instructure Canvas learning management system will run through Winter 2016. Participating is your opportunity to try Canvas, find out what you like, what you don't like, and provide your feedback (primarily through short online surveys) to help guide the future of learning management technologies at UCI.

If adopted, Canvas may come to replace common learning management system functionality (e.g. quiz and messageboard), but unique EEE tools developed specifically for UCI would be retained.

All Fall 2015 instructors are invited to participate and can get started today. Full details are provided below.

Dana Roede  
CIO & Associate Vice Chancellor  
Office of Information Technology

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To set up your Canvas course space for your Fall 2015 classes, visit:  
https://grandcentral.eee.uci.edu

To help you during the Canvas Pilot, we provide:
• Automatic links from students’ MyEEE pages to Canvas  
• Automatic updates to match Registrar enrollment  
• Integration with Turnitin.com and UCI Google Apps for Education  
• Easy final grades transfer from Canvas to the Registrar’s WebGrades  
• Support via phone, email, and workshops (just like for EEE)

Canvas is a popular LMS used within the UC system and by other research universities nationwide. It features useful tools and services (examples: student group management, multimedia embedding, rubric & outcome-based grading features, seamless gradebook integration across the tools) and offers future opportunities to integrate third-party tools.
## Workshops

- In-person group training sessions
- Multiple approaches: broad vs. topic-focused
- Low attendance
- High efficacy
- Handouts

### UCI | Canvas Pilot Quick Reference

<table>
<thead>
<tr>
<th>I need to...</th>
<th>Canvas Tool(s)</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish course information in a syllabus</td>
<td>Syllabus</td>
<td>2</td>
</tr>
<tr>
<td>Provide content in a webpage like format</td>
<td>Pages</td>
<td>2</td>
</tr>
<tr>
<td>Embed a video into a page</td>
<td>Rich Text Editor</td>
<td>1</td>
</tr>
<tr>
<td>Organize course materials</td>
<td>Modules</td>
<td>6</td>
</tr>
<tr>
<td>Begin an asynchronous conversation</td>
<td>Discussions</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Inbox</td>
<td>6</td>
</tr>
<tr>
<td>Begin a synchronous conversation</td>
<td>Conferences</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>Chat</td>
<td>8</td>
</tr>
<tr>
<td>Conduct online office hours or web conferences</td>
<td>Conferences</td>
<td>8</td>
</tr>
<tr>
<td>Collect files from students</td>
<td>Assignment</td>
<td>5</td>
</tr>
<tr>
<td>Provide feedback on an assignment</td>
<td>SpeedGrader</td>
<td>4</td>
</tr>
<tr>
<td>Distribute files to students</td>
<td>Files</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Pages</td>
<td>2</td>
</tr>
<tr>
<td>Record who is present in class</td>
<td>Attendance</td>
<td>10</td>
</tr>
<tr>
<td>Conduct a survey</td>
<td>Quizzes</td>
<td>4</td>
</tr>
<tr>
<td>Conduct a quiz</td>
<td>Quizzes</td>
<td>4</td>
</tr>
<tr>
<td>Create weighted categories in a gradebook</td>
<td>Assignments</td>
<td>5</td>
</tr>
</tbody>
</table>

### Important Note

Always be sure to publish the materials in your Canvas course space. Students will not be able to access items that are unpublished.

- Indicates an item is unpublished
- Indicates an item is published

### Text Editing Tools

Format content throughout your course space
Postcards

- Send to -all- eligible instructors (~1,200)
- Surprisingly affordable!
- Surprisingly effective!

Learn more about using EEE Canvas

The EEE Team is here to help!

We offer:
- Self-service help: https://help.eee.uci.edu/
- Personal consultations (phone or in-person)
- Scheduled training sessions
- Customizable workshops for your program or department

Sign up for workshops or learn more: http://sites.uci.edu/canvas/

UCI is adopting Instructure Canvas

Following the 2015–16 UCI Canvas Pilot, the campus is adopting Canvas.

Get started with Canvas for your classes:
1) Go to https://grandcentral.eee.uci.edu
2) Create a course space
3) Start using Canvas!
   EEE tools will remain available for your course

Learn more about Canvas:
http://sites.uci.edu/canvas/

Learn how to use Canvas:
http://sites.uci.edu/canvas/learn/
Executive Reports

- Biweekly to director
- Monthly to CIOs
- Easy to assemble from wall calendars
- Aligns on message
- Provides leadership with shareable info
Info Sessions

- Separate sessions for audiences: students, TAs, instructors
- Poor attendance
- Some misunderstanding of purpose, content - we were flexible
- Good feedback from those who did attend
- Able to show we offered multiple ways to learn about the project
Surveys

3. As compared to EEE, what do you like about Canvas?

4. As compared to EEE, what do you dislike about Canvas?

5. Do you think that the use of Canvas had an impact on the quality of the class?
   - Yes, and Canvas had a positive impact
   - Yes, but Canvas had a negative impact
   - No
   - No opinion

6. Given your experience with Canvas, if you had the opportunity to take the exact same class/instructor but had to choose one system, which would you choose?
   - EEE
   - Canvas
   - Doesn't matter to me

7. Please indicate which of the following you used to access Canvas during this quarter.
   - Laptop or desktop computer
Project Website

http://sites.uci.edu/canvaspilot/
Archived, but still available as a resource to us and anybody else interested in our pilot
The Site Itself

- Meet folks where they are
- History tells us the homegrown LMS homepage is an effective communication mechanism
- Short & sweet, link to detail
The Site Itself Today

- Updated to make information front and center
- FAQ can adapt to changing campus questions and needs
- Diagram illustrates the vision for the future
- Conversational tone to convey trust
What did we learn?
Lessons Learned

- Can’t communicate too much or too early (but there will be gaps)
  - Postcards surprisingly effective; think outside the box
  - Communication is user experience
  - Get feedback on content early and often
  - Involve the right people and skillsets
- Don’t neglect internal communications (but also don’t overwhelm)
- Take advantage of tools: 20-10-20-10 meetings, Google Drive, Trello, etc.
- Build in review & iteration -- challenge processes
  - Website content always in flux/change/adapt/etc.
  - Don’t be complacent!
Questions?

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Deck & templates: http://sites.uci.edu/e16uci/cheese/