



ACCOUNTING & FINANCIAL SERVICES FY19 ALL HANDS MEETING

Leaders
Energized
Partners
Achieve
The Best
EMPOWERED
Enthusiastic
ACCOMPLISH
PROGRESS
FUN



DIVISION UPDATES

- Finance System Update
- HR back in Division of Finance & Operations
- Relocations and Renovations



*To be a model in higher education
for continuously improving financial and accounting services;
delivered with accuracy, integrity, and timeliness;
in a team culture that fosters a “best-place-to-work” environment.*



*To be a model in higher education
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CONTINUOUS IMPROVEMENT

Characteristics

- Create and sustain a culture of continuous improvement
- Be better today than yesterday
- Avoid “it’s always been done that way”
- Always streamlining and enhancing
- Applying “LEAN” principles
- Empowering ALL team members to challenge bad processes
- Improving yourself
- Moving forward
- Recognizing the *whole* team



CONTINUOUS IMPROVEMENT

MOVE FROM

MOVE TO

MOVE FROM	MOVE TO



CONTINUOUS IMPROVEMENT

Presenter:
Terri Gardner

Problem: Paper...paper... everywhere!

Proposed Solution: Image everything on a daily basis so everyone will be able to find what they need quickly and in one location.

Result:

- We are no longer copying reconciliations; they are imaged after they are approved.
- We are no longer printing bank statements; they are uploaded directly into imaging.
- Equity transfers are imaged once; previously, they were imaged as an equity transfer and attached to each journal entry.
- Positive pay and fraud filter issues are saved to the network drive so those needing access can view these decisions.



CONTINUOUS IMPROVEMENT

Presenter:
Cherise Morgan

Problem: Service Departments were engaging in avoidable audit risks. For example: Year-end fund balances over the allowable tolerable limit of 60 days of operating reserves; Purchasing capital items out of the service department account (Unallowable costs); Not charging the approved rate(s).

Proposed Solutions:

- Increased Communication
 - Created a listserv: service-department-news@listserv.tamu.edu.
- Increased Monitoring
 - Random invoice auditing to ensure the approved rates are being charged
 - Year-end fund balance analysis
- 8XXX sub code block-out of the 27XXX
- All transfers out of the service department to the 87XXX (Capital and renewal account) must be approved by DAS

Result: Increased engagement with service departments; 82% of service departments are in compliance with having a 60 day ending fund balance; 94% of service departments in compliance with not ending in a deficit.



CONTINUOUS IMPROVEMENT

Presenters:
Peggy Carey
Veronica Cone

Problem:

- High call volumes, hold times, and call abandonment rates.
- Customers unwilling to self-help.

Proposed Solution: Utilize text messaging in our current CRM (RightNow) to allow students and parents to communicate with us briefly without the need for immediate (within seconds) response or long conversations.

Result:

- Students get straight to the point with their question.
- We can send links so they can self-help.
- We can identify them just from their phone number.
- Increased response to outbound text messages vs. phone calls.

Conversations:

Total - **1472**
Outbound - **245**
Direct - **1227**

Average
Conversation Time
2:35:55

29,557
Total Outbound
Messages Sent



CONTINUOUS IMPROVEMENT

Howdy from Texas A&M University. Please upload your picture for your ID card prior to your NSC at myaggiecard.tamu.edu. Gig'em! Reply STOP to opt out of texts.

Howdy! To receive refunds from Texas A&M, you are required to set up direct deposit with Heartland ECSI. Visit sbs.tamu.edu/refunds. Reply STOP to opt out.

Howdy! Please select your Tuition Rate Code immediately. Questions? Reply HELP. Reply STOP to opt out of texts.

Howdy! Your current ID card works! Stop by the GSC in the next 3 weeks to have a new one made for future use at Zachary. Reply STOP to opt out.

Howdy from Texas A&M. Your fall courses are at risk of being cancelled. Please log in to Howdy and read the yellow alert from SBS. Text STOP to opt out.



Conversation with +17134372754



Assigned to Cristina Garcia



Outbound Notification from 2 months ago

Show Details

Outbound Notification for Topic Hard Drop

Howdy from Texas A&M. Your fall courses are at risk of being cancelled. Please log in to Howdy and read the yellow alert from SBS. Text STOP to opt out.

Fri, Sep 14 10:56:25 AM

Last conversation

Show Details

9/17/2018 at 9:05:24 PM Conversation started

Who dis

Mon, Sep 17 9:05:24 PM

System message

Thanks for contacting Student Business Services at Texas A&M University. No agents are available to assist you right now, but your request has been queued.

Mon, Sep 17 9:05:25 PM

9/18/2018 at 8:01:44 AM Conversation assigned to Cristina Garcia

9/18/2018 at 8:02:33 AM Conversation became active

Cristina Garcia

Howdy! This is Texas A&M University. You have received these texts because you or your student is at risk of having their fall courses being cancelled. Please log in to Howdy and read the yellow alert from SBS. Text STOP to opt out.

Delivered - Tue, Sep 18 8:02:33 AM



Conversation with +16824723599

Assigned to Veronica Cone



Last conversation

Show Details

8/23/2018 at 10:43:15 AM Conversation started

Hello, I have a question about disbursement of loans

Thu, Aug 23 10:43:15 AM

8/23/2018 at 10:45:17 AM Jay Green's invitation expired

8/23/2018 at 10:47:17 AM Blair Mosley's invitation expired

8/23/2018 at 10:48:57 AM Rowshana Kero rejected the conversation

8/23/2018 at 10:50:57 AM Brandon Alaniz's invitation expired

8/23/2018 at 10:51:27 AM Conversation assigned to Veronica Cone

8/23/2018 at 10:52:00 AM Conversation became active

Veronica Cone

Howdy Tiffany! How may we help you?

Thu, Aug 23 10:52:00 AM

Veronica Cone

We see that you have not set up your Direct Deposit. Please set this up asap so you can receive your refund. Go to your My Finances Tab in your Howdy Portal. There you will see a link that says "Set Up Direct Deposit for Refunds with Heartland ECSI". Click that link and follow the instructions.

Thu, Aug 23 10:55:31 AM

Okay, thank you!

Thu, Aug 23 11:00:00 AM

Veronica Cone

You are very welcome. Please let us know if you need further assistance. Thanks & 🙏 !

Delivered - Thu, Aug 23 11:01:27 AM

8/23/2018 at 11:01:53 AM Conversation was closed



CONTINUOUS IMPROVEMENT

Presenter:
Kyle Metcalf

Problem: Slow posting, labor intensive, manual reconciliation and approvals of payment card transactions. Tool used to changed every time the State awarded the contract to a different bank.

Proposed Solution: Process payment card transactions in Concur.

Result: Implementation was successful across the System members. Provides member departments with electronic workflow for approvals, reduces the effort necessary to reconcile and allows departments to post transactions to the accounts more timely. We can use Concur no matter which bank is awarded the contract.



CONTINUOUS IMPROVEMENT

Presenter:
Cindy Glover

Problem: Manual requests with manual approvals to revise purchase orders

Proposed Solution: Implement new “Change Request” functionality in AggieBuy

Result: Recently implemented and now facilitates a request with already existing automated workflow for approvals.

No longer a manual process and reduces back office staff data entry time as the entry is being done by the department as part of the request, so has reduced the duplicate entry.

This process also helps to ensure that the appropriate approvals are received for any PO change so reduces risks of not obtaining appropriate approval.



CONTINUOUS IMPROVEMENT

Presenter:
Dawn Suehs

Problem: The forms used for manual entry of processing Benefit Extra Deductions and Benefit Refunds (medical, dental, life, etc.) were identical and used BPP terminology. They were not interactive and had to be completed by hand.

Proposed Solution: Payroll Services combined the two existing forms into one. The new form also included space for a new task, Benefit Arrears Corrections, which avoided a third new form being created. The form was also made interactive.

Result: Less paper forms for HROE and Payroll to keep at their work area, less expensive colored paper to purchase, less data entry, easier to keep track and read.



CONTINUOUS IMPROVEMENT

Presenter:
Alan Stilley

Problem:

- Missing iPayment account setup information
- Incoming Check Log inefficiency

Proposed Solution: IT developed an online account setup request form and an online check log database.

Result: Streamlined the process for iPayment account setups and reduced the time it takes. The online check log has led to more efficient logging, tracking, and reconciling of incoming checks.



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ACCURACY & Integrity

Doing it Right

The World is watching



Characteristics

- Doing it right the first time
- Meeting deadlines and due dates
- Having sufficient resources to do the job
- Getting or providing proper training
- Eliminating errors
- Acting professionally and honestly
- Holding yourself accountable
- Providing excellent service to our customers
- No biased thinking

ACCURACY & Integrity

Presenter:
Preston DuBose

Doing it Right

The World is watching



Customer Service

Customer Issue: A group on campus with an annual event with thousands of registrations planned a switch of e-commerce platforms. IT had planned the switch months in advance but didn't bring in the e-commerce group until days before go-live.

Proposed Solution: The e-commerce group expedited a purchasing agreement, credit card merchant account, account setup, testing, and go-live. This project required the coordination and cooperation of many groups on campus, all working together toward a common goal.

Result: Successful registration process for their constituents on the advertised date

ACCURACY & Integrity

Presenter:
Katie Rader

Doing it Right

The World is watching



Accuracy, Integrity, Timeliness

Issue: The increasing complexity of tuition and fees is creating more ways for things to be wrong which becomes an accuracy and integrity issue.

- Testing has always involved queries trying to find examples of different scenarios to make sure assessment happened correctly
- We would either not find every example until after we were live, or something that was correct at one hour could still have an issue at a different hour.

Proposed Solution: Create a better tool for auditing and testing our assessment rules

Result: This new tool will allow us to identify and fix issues in our assessment rules before the students are impacted. We will have fewer unhappy students with fewer instances of corrected assessments after the start of the term.

ACCURACY & Integrity

Doing it Right  *The World is watching*

How Corrected:

- We had EIS write a program that would extract all of the information in the assessment of tuition and fees and put it into Excel. Then we have every line of that assessment populated with the student information that is relevant to assessment. This means each line in Excel has the student ID, the registered hours, the residency type, etc.

Banner ID	UIN	Registered Term	Detail Code	Detail Code Description	Amount	Total Bill Hours	SGASTDN Rate Code	Primary College	Primary Campus	Primary Degree	Primary Program	Primary Level	Primary Major	Residen
[REDACTED]	[REDACTED]	201831	CA29	University Advancement Fee	300	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CA40	Student Center Complex Fee	100	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CA41	Recreational Sports Fee	106	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CA43	Health Center Fee	75	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CT00	State Min Tuit UG RS (F)	150	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CTB0	Designated Tuit-UG RS 46 FY10	138	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CTB1	Designated Tuit-UG RS 46+ FY10	381	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R
[REDACTED]	[REDACTED]	201831	CTD8	Differential - AG UG Res	145.29	3	RES02	AG	CS	BS	BS-HORT	UG	HORT	R

ACCURACY & Integrity

Doing it Right

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We can now sort the spreadsheet to see assessment in several new ways:

- Student ID gives us the overall total assessed by student
- We can see a specific tuition or fee code for all students in each hour and quickly see if everyone was charged the same
- We can start to see things that are not in the spreadsheet as well by comparing the number of UG students enrolled with the number assessed.

	Banner	UIN	Registered Term	Detail Code	Detail Code Description	Amou	Bill Hour	SGASTDN Rate Cod
1			201831	CA29	University Advancement Fee	300	3	RES02
2			201831	CA29	University Advancement Fee	300	3	RES02
4			201831	CA29	University Advancement Fee	300	3	RES02
21			201831	CA29	University Advancement Fee	300	3	RES02
10			201831	CA29	University Advancement Fee	300	3	RES02
14			201831	CA29	University Advancement Fee	300	3	RES02
14			201831	CA29	University Advancement Fee	300	3	RES02

Presenter:
Ivan Matip

ACCURACY & Integrity

Doing it Right  *The World is watching*

Customer Service / Integrity

Issue: Many Texas A&M students are victims of fraudulent email messages known as Phishing Emails. Students are receiving emails appearing to come from Student Business Services that attempt to get them to divulge private information such as passphrases, credit card, or other account updates. The perpetrators then use the information to commit identity theft.

Proposed Solution: Assign valuable, unique attributes to SBS email communications so students recognize SBS brand messages.

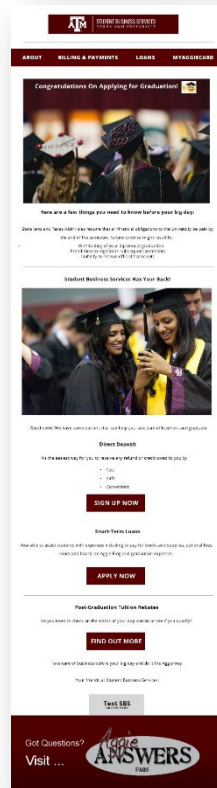
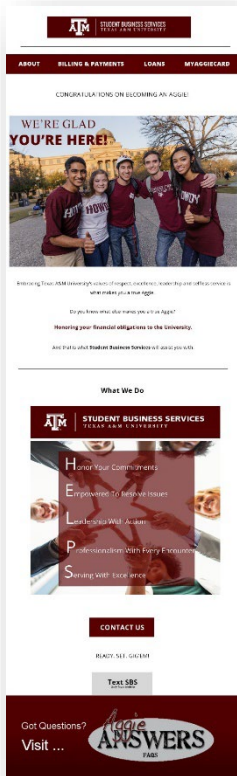
Results: Makes it harder on the phishing scammers to replicate our emails; develops student engagement in the fight against phishing scams; cultivates student loyalty and engagement in becoming partners through adoption and advocacy.



ACCURACY & Integrity

Doing it Right

The World is watching



Technical Outputs	Emotional Outputs
SBS Logo	Warm, Conversational Tone
Navigation Bar	Service Leadership
Clickable Images	SBS HELPS Attitude
Relevant Calls to Action	Your Friends at SBS!
Aggie Answers Footer	Excitement & Availability



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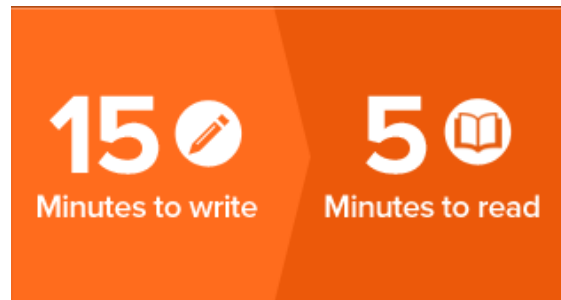
Characteristics

- Supportive supervisors and managers
- Employee appreciation
- Team collaboration and innovation
- Work-life balance
- Positive physical environment
- Professional development and internal advancement
- Respect for everyone; valuing diversity of people and ideas
- Fun work events
- Opportunities to engage in campus activities
- Open and constructive communication



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15Five

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15 Minutes to write

5 Minutes to read

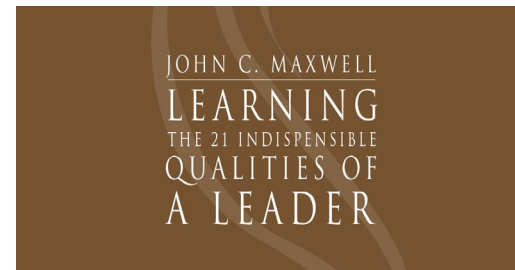
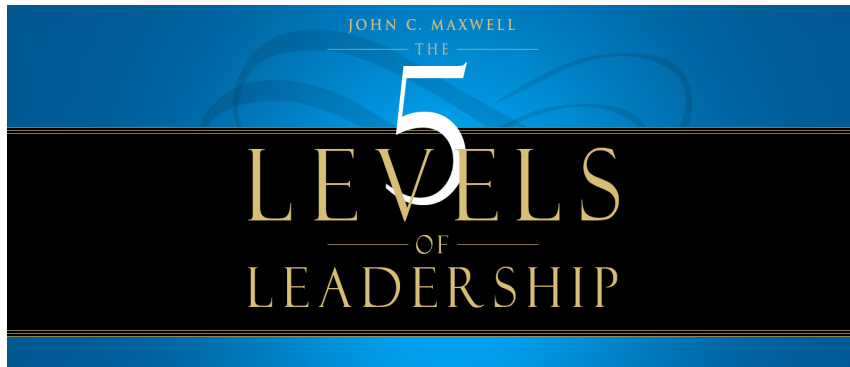
Presenter:
John McCall

Issue: People are promoted into supervisory / managerial positions with little to no investment in how to succeed in these roles

Proposed Solution: Create a Leadership Development program with a multi-faceted curriculum spread over the course of an academic year based on John Maxwell materials.

Implementation: First group of 10 started in September 2017.

Result / Feedback: First group's feedback was highly positive. They helped to refine the curriculum and select the next group of 11 which started in September 2018.



Presenter:
Bridgett Chargois

Issue: The open breakroom in FMO could be distracting for the office due to noise and smells.

Proposed Solution: Put a door on the FMO front breakroom to create a relaxed community atmosphere for connecting with others that you may not work directly with everyday.

Implementation: We put the door on the breakroom in June 2017.

Result / Feedback: Adding the door has allowed those that are working to not be disturbed by the individuals that are preparing food or visiting with other community members while getting coffee.

It has helped to keep the food smells somewhat contained in the breakroom. This has also provided a space for people to talk with other and not be directly outside someone's workstation.



Issue: Create a consistent theme that would guide the culture and actions of our department.

Presenter:
Rachelle McDonald

Proposed Solution:

Create definition behind our Customer Service Tagline that would help us embody it.

Student

Business

Services

Honor Your Commitments

(follow up and through)

Empowered To Resolve Issues

(what would management do?)

Leadership with action

(internal training and external education)

Professionalism with every encounter

(courtesy, respect and embracing diversity)

Serving with excellence

(setting standards and achieving our goals)

Result / Feedback:

The staff have really enjoyed celebrating each semester and is reminded about the Customer Service Tagline. This in turn has aided us in providing excellent customer service as we are continuously thinking about SBSHELPS in our everyday encounters with all of our customers.



Implementation:
We created a Customer Service Team within the department who developed an awards program as well as SBSHELPS week as a fun way to keep our Customer Service Tagline in the forefront for all staff

H-Honor your Commitments-
75937- Commitment to Customers



E- Empowered to Make Decisions-
75697- I Make It Happen



L- Leading through Action-
71683- Leadership in Key



P- Professionalism with Every Encounter-
73309 – Thumbs Up (no words)

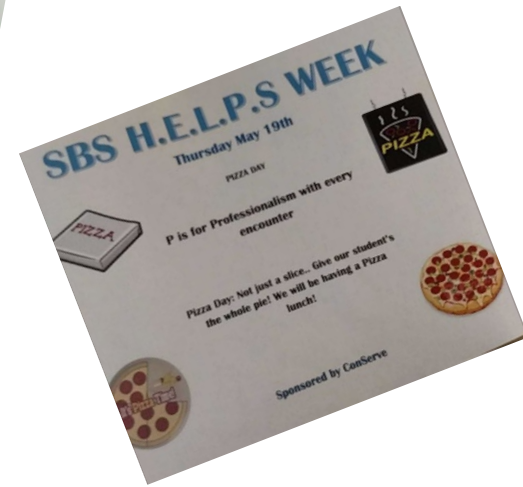


S- Service with Excellence-
73344- Delivering Excellence



Positive Results!

Best
Places^{to}
W@RK



Presenter:
Britney Rosario



Issue: Bring the staff closer together, boost morale, have fun

Proposed Solution: Create team-building activities like seasonal decorating & holiday gatherings. Allows colleagues to come together and collaborate with one another to build a festive atmosphere and celebrate the holiday season.

Result / Feedback: Having the freedom to decorate and collaborate as a group has had a great effect on our office. It motivates employees to come to work, and gives them a positive outlet for creativity and teamwork.

We have had two new employees on our team this fall and having the opportunity to decorate was a very effective way to collaborate as we worked together to plan our theme, combine our resources, and work together to execute our plan while still balancing our workload. Decorating as a team also created a friendly competition with neighboring teams creating a fun environment that spread through the office and encouraged communication between two groups who do not necessarily work closely on a daily basis.

The ability to decorate seasonally really helps create a fun atmosphere that helps to keep morale high year round.

Presenter:
Danny Grimes

Issue: Improve the working atmosphere while adding something different to the office environment during Staff Appreciation Week. We wanted something that would be more permanent and extend beyond Staff Appreciation Week that the Payroll Staff would enjoy

Proposed Solution: Rented a popcorn machine as part of the event and it was so well received that we purchased one so we could have it available all of the time.

Result / Feedback: Feedback from the staff was overwhelmingly positive which led to the decision to make the purchase for everyday use. It has become so popular in the suite we share with Human Resources they were extended the invitation to join in. When the smell of a freshly made batch of popcorn gets around, the breakroom gets busy. The machine is not restricted to any one person to use. When the machine is empty and someone needs a snack they just make a fresh batch.

At times during meetings in our suite we offer our visitors a bag of popcorn and they willingly accept!

