

COVID-19: LESSONS LEARNED

TAKE-AWAYS AND THROW-AWAYS

Working Remote – the upside:

- Better work/life balance; no commute adds 3 hours a day for family time, chores, making dinner, involvement with kids
- Can actually spend more time working before/after hours with no commute and easy lunch.
- Being able to work from an outdoor workspace or being able to move to a big table when you just need to spread out is very helpful.

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- Forced us to use Zoom frequently so now I like it better than a phone call. Screen sharing is so beneficial. Allowed me to connect with coworkers and customers in a different way and see people I have only spoken to previously. Meetings don't always go the full hour on Zoom.

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- Pushes you to be more independent when handling issues.
- More flexible work hours; can work from home before a personal appointment, waiting for maintenance person to arrive, or in inclement weather.
- Jerry's Zoom office hours are the best communication to ever come out of the CFO office. Very informative.

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- Saved on gas and eating out for lunch
- Reduced office distractions, fewer interruptions
- Casual attire, more sleep, time for personal care / wellness, reduces spread of germs
- Zoom provided better communication with staff in Galveston

COVID-19: LESSONS LEARNED

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Working Remote – the downside:

- Slow internet connection made things slow or frustrating; difficulty uploading documents
- Not seeing my coworkers in person as often is harder. It makes it tougher to have spontaneous brain storming sessions. Doing that via phone/zoom/teams isn't as easy.
- Working on a laptop vs. multiple large monitors; having to use personal phone for parent/student/customer calls

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- Sometimes you lose the feel for how your coworkers are doing which may make you not as “sensitive” to their current situation which may affect their work. Maybe they need more help and sometimes remotely you just can’t really see that.
- Less productive due to distractions; children at home due to school closures. Anxiety about not accounting for every minute of work hours; feeling like you have to be available at all times.

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Working Remote – the downside:

- Communication with my group declined; lack of interaction with co-workers
- Slower, less effective communication with campus personnel and outside vendors/customers
- Difficult to separate work and home life
- Printing unavailability; or print to office and hope it's there

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- Put off some processes/tasks until back in the office
- Zoom allows multi-tasking which distracts from the meeting; not as collaborative
- Access to food is too easy!
- Teaching, training, mentoring not easy

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Process Improvements:

- The new journal entry approval process is great since it eliminates more paper and allows us to consolidate more information in the backup.
- Using Zoom makes it efficient for people who are in different locations to attend meetings. Easy scheduling.

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Process Improvements:

- Implemented a new document imaging and routing process. Much more efficient and timely process. Accelerated going paperless saving time and money.
- Utilized Zoom for monthly iPayment training for TAMU and other System members. Made for much easier scheduling than doing it in person.
- Payroll eliminated the manual check process requiring manual entry into AggieBuy

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Process Improvements:

- Able to require a Travel Request prior to travel which increases usage of Concur; leads to better reporting and duty of care.
- Banking changed the routing of wire approvals to all electronic/digital. Eliminates delays when an approver is out or busy.
- Automated Texas A&M Foundation payments directed to HSC accounts.





ACCOUNTING & FINANCIAL SERVICES FY21 ALL HANDS MEETING

#WHATAYEAR

AGENDA

- Remarks from Jerry
- Lessons learned from this past year:
 - Working remote: positives / negatives
 - Processes we had to do differently: what stays, what goes?
- 15Five - Ivan Matip
- Our VISION: Continuous Improvement, Customer Service through Accuracy/Integrity/Timeliness, and a Best Place to Work Environment
- Team Presentations:
 - Continuous Improvement
 - Customer Service
 - Best Place to Work



Best Practices Finalist

Institution: Texas A&M University – Financial Management Operations

Title: Oversight – Transactional Risk Analysis Software

Benefits & Retrospect:

Provide a brief statement of the benefits achieved by implementing the best practice solution.

- Reduction of daily processing/audit volume
- Efficiencies in the review/audit process
- Focus on transactions that present a higher risk or are out of compliance
- Creates and tracks cases/exceptions that require review
- Provides actionable information to modify behaviors
- Templates that provide efficient and consistent communication
- Messaging system that tracks communication with end users
- Improves compliance and reduces fraud potential
- Identifies duplicates for prevention or collection

Questions/Concerns for Jerry

- What will 'return to normal' look like? 100% in office, no mask mandate?
- Do you expect there to be merit raises for FY22?
- What leadership style do you expect from President Banks?
-
- When do you think the hiring freeze will be lifted?
- Do you think we'll have any more Thursday night football games?

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15Five

15 

Minutes to write

5 

Minutes to read



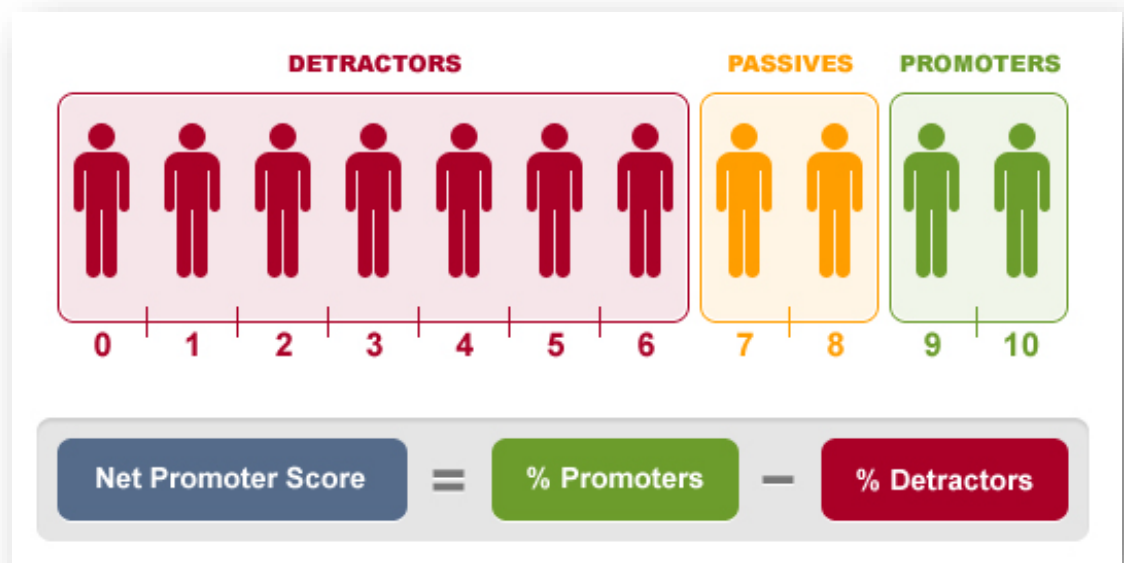
Everything You (May) Despise About 15Five - DEBUNKED -

Net Promoter Score (NPS)[®]

How likely is it that you would recommend this product/company to a friend or colleague?

NOT AT ALL LIKELY

EXTREMELY LIKELY



Survey Questions

What would you say is the purpose of 15Five?

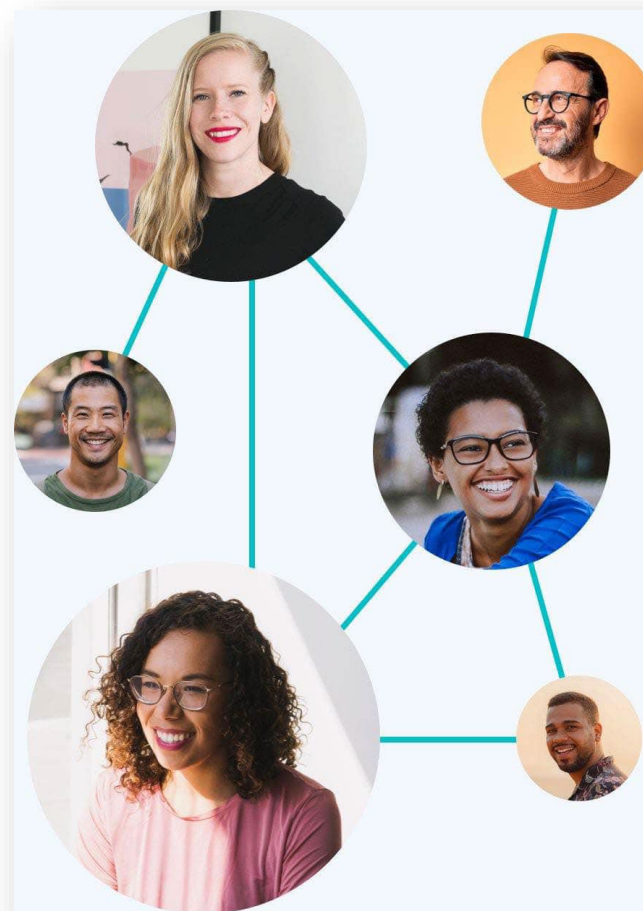
What other tabs do you visit before submitting your check-ins to your supervisors?

Does filling out your 15Five take more or less time you would expect?

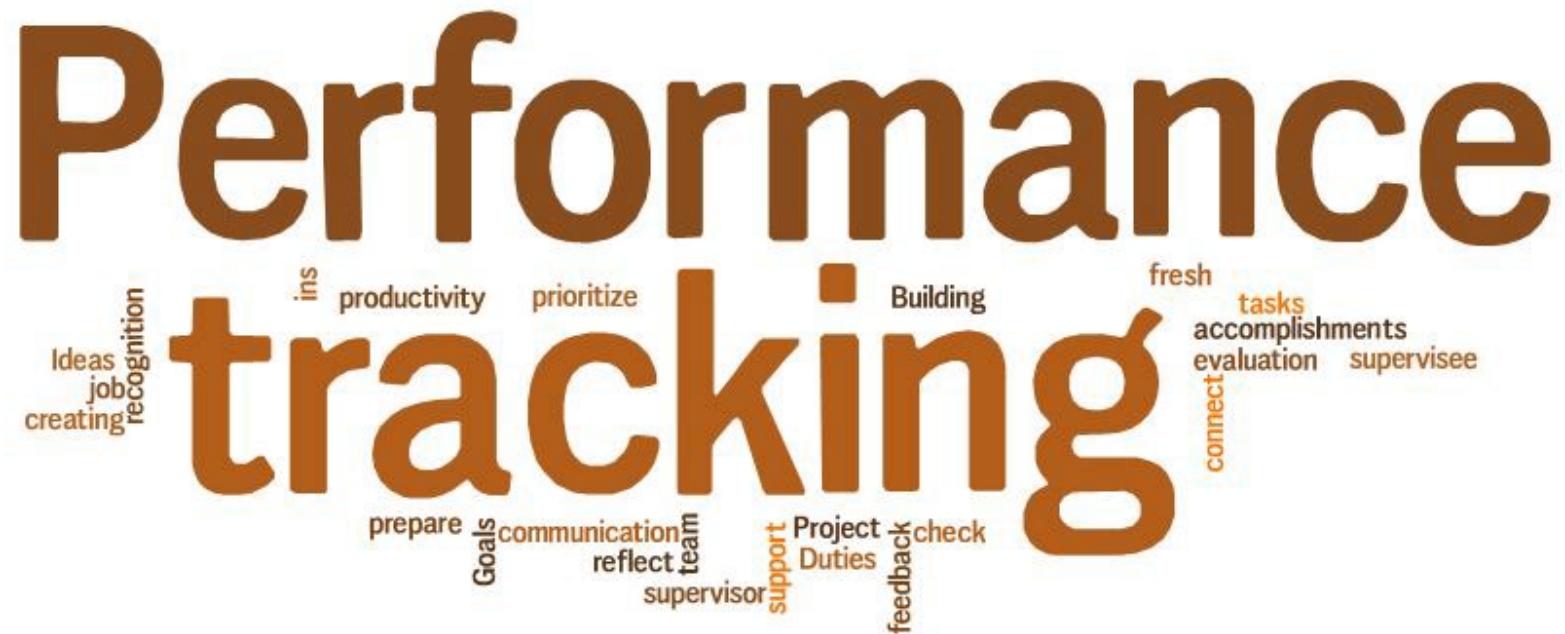
What new 15Five feature have you recently discovered that you were unaware of before?

Myth #1

What is 15Five for Anyway?



Responses



The Truth (According to 15Five)

- ✓ Improve the employee experience and retain your Rockstar talent
- ✓ Promote transparency and trust across all levels of your organization
- ✓ Empower managers to become impactful coaches for their teams
- ✓ Support the development of your employees so they can grow with your company

Myth #2

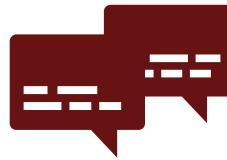
Irrelevant, redundant, and vague questions

Mundane
Irrelevant
Annoying
Useless
Same
Redundant
Meaningless

The Truth: 3 Question Types



Company-wide
Managed by administrators



Group specific
Managed by administrators
and managers



Person specific
Managed by administrators
and managers

Myth #3

Takes Too Much Time

A word cloud of terms related to the myth 'Takes Too Much Time'. The words are arranged in a roughly circular pattern. The largest word is 'Value', oriented vertically on the left. Other prominent words include 'Complete', 'Consuming', 'Efforts', 'Inefficient', 'Way', '15Mins', 'Time', 'Longer', 'Genuinely', 'Takes', 'Bored', 'Duplicative', 'Project', and '1Hour'.

Value
Complete
Consuming
Bored
Project
Duplicative
Efforts
Genuinely
Takes
1Hour
Inefficient
Way
15Mins
Time
Longer

The Truth: Earn Your Time Back

- ✓ Skip optional questions
- ✓ Put yourself on a schedule throughout the week
- ✓ Paste links in your comments in 15Five
- ✓ Take items that take too much time and add them to your 1-on-1 agenda
- ✓ Utilize private notes
- ✓ Add items “real time” by keeping 15Five open in your browser

Myth #4

15 Five Replaces Face-to-Face



The Truth: Does it?

- ✓ 15Five doesn't replace face-to-face; it backs the need for a face-to-face and make them more impactful
- ✓ Answer in the check-ins, a precursor to your one-on-one, more meaningful
- ✓ Documentation aspect, AI, difficult to remember everything from the 1-on-1
- ✓ Check-ins are more tactical
- ✓ Use 15Five 1-on-1s to make your meetings more efficient

Check-ins and 1-on-1s

Check-Ins

- Tactical
- Task-Oriented
- Asynchronous
- Somewhat Collaborative
- Digital

Like a text 

1-on-1

- Strategic
- Growth-Oriented
- Real Time
- Highly Collaborative
- Personal

Like a call 

Try using 1-on-1 agendas in 15Five!

Myth #5

Useless With No Results

A word cloud of terms associated with the myth. The words are arranged in a roughly triangular shape pointing to the right. The words include: Another, Value, Friction, Actionless, Task, results, Waste, Pointless, Routine, Garbage, Useless, Irritating, Unsure, and Time. The words are in various shades of brown and tan, with 'Waste' and 'Pointless' being the darkest.

Another Value Task results Routine
Friction Waste Pointless Garbage Unsure
Actionless Pointless Garbage Unsure
Useless Time
Irritating

Numbers Don't Lie

When Using 15Five for Performance Management

Source: 15Five 2018 Customer
Survey

1,669 Total Respondents

74 Admins

522 Reviewers

1,073 Reporters

Employee Productivity

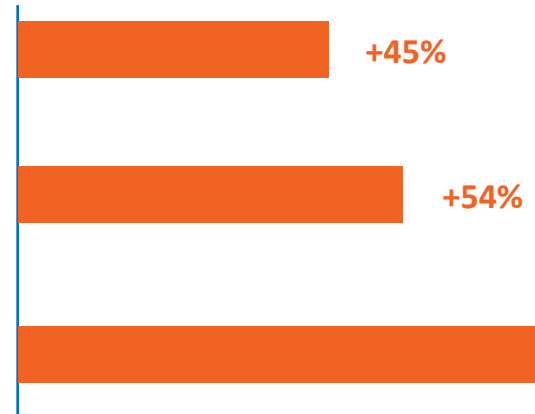
+45%

Employee Feedback

+54%

Better Managers

+78%








Post-Survey Results



The Future is bright

Five Keys To Success



-  Get to know your strengths and your people's strengths!
-  Have career discussions
-  Take a holistic approach
-  Use check-ins and 1-on-1 agendas to prep for you meeting
-  Be open and honest

15 
Minutes to write

5 
Minutes to read



TEXAS A&M UNIVERSITY

Student Business Services

Honor Your Commitments

Empowered To Resolve Issues

Leadership With Action

Professionalism With Every Encounter

Serving With Excellence

15Five
HELPS

Additional Resources

- ✓ [How to create/manage questions in 15Five](#)
- ✓ [Access the Question Bank here](#)
- ✓ **The Remote Employee eBook (PDF)**
- ✓ **QA from 1-on-1s_ Proven Effective Since the Stone Age Webinar (PDF)**
- ✓ [Schedule a 1-on-1](#)
- ✓ [Create a 1-on-1 with anyone](#)
- ✓ [Running a report on 1-on-1 activity/usage](#)
- ✓ [Exporting progress on objectives](#)
- ✓ [Tutorial Video: How to Create an Objective](#)



*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.*

WHAT - HOW - WHERE



CONTINUOUS IMPROVEMENT

MOVE FROM	MOVE TO
Job Security	Job Satisfaction
Position Elimination	Position Elevation
Working Harder	Working Smarter
We always do it that way	Why do we do it that way?
Resisting Change	Embracing Change
Being Afraid to Fail	Failing Fast and Fixing



Leadership Development Program

Restarting again this fall

Group Content	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Assess / Measure	Maxwell Leadership Assessment		Receive / Review Assess. Results						Initiate 2nd MLA for prior cohort	Determine next cohort of 10 to start in Sept.
Experiences & Skill Building	5 Levels of Leadership Full Day Private Training Maxwell-led Onsite			360° Leader Full Day Private Training + 1 Hour MLA Review Maxwell-led Onsite			Debrief luncheon with Org Leadership; feedback on program, takeaways			
Maxwell Group Content & Situational Deep Dive Coaching	5 Levels Deep-Dive Phone Coaching and Application 90-min. conf. call (assign pre-work)		5 Levels Deep-Dive Phone Coaching and Application 90-min. conf. call (assign pre-work)		5 Levels Deep-Dive Phone Coaching and Application 90-min. conf. call (assign pre-work)		360° Leader Deep-Dive Phone Coaching and Application 90-min. conf. call (assign pre-work)		360° Leader Deep-Dive Phone Coaching and Application 90-min. conf. call (assign pre-work)	
5-Levels / 360° Group Learning Forums	5 Levels of Leadership Level 1-2 Review Participant-led; 2 sessions		5 Levels of Leadership Level 3-4 Review Participant-led; 2 sessions		5 Levels of Leadership Level 5 Review Participant-led		The 360° Leader Section I Review Participant-led		The 360° Leader Section II-III Review Participant-led; 2 sessions	
Teach & Mentor "21 Qualities"	21 Qualities – Lead, Discuss Participant-led; Chapters 1-2, 3-4 2 sessions (Carney's)		21 Qualities – Lead, Discuss Participant-led; Chapters 5-6, 7-8 2 sessions (Carney's)		21 Qualities – Lead, Discuss Participant-led; Chapters 9-10 1 session (Carney's)		21 Qualities – Lead, Discuss Participant-led; Chapters 11-12 1 session (Carney's)		21 Qualities – Lead, Discuss Participant-led; Chapters 13-14, 15-16; 2 sessions (Carney's)	
							21 Qualities – Lead, Discuss Participant-led; Chapters 17-18, 19-20; 2 sessions (Carney's)		21 Qualities – Lead, Discuss Participant-led; Chapter 21 and wrap-up; (Carney's)	

Leadership Development Program



Class of 2021-22

Amelia Campos

Cindy McCasland

Jamie Crenshaw

Clint Merritt

Preston DuBose

Paul Ramirez

Cynthia Flemings

Alan Stilley, Jr.

Christal Lewis

UAS
Terri Gardner



Issue: Processing wire transfers (previously submitted via paper) during a pandemic

Proposed Solution: Develop procedures to move to completely paperless operations within a few days.

Result:

- Dale Cook in IT, Cindy Glover in A/P, auditors, approvers, and the entire banking team perfected and implemented the new, electronic procedures in 2 days.
- System Treasury, A/P, approvers and banking coordinated to extend the normal 10am deadline for wire transfers to 4pm enabling us to pay urgent wires for PPE (personal protective equipment) essential to combat the COVID-19 pandemic.
- Wire backup documents were accessed through AggieBuy or encrypted folders by the wire creator, wire reviewer, wire approver, and A/P auditor.
- All communication was handled via email or AggieBuy comments allowing all wires to be processed from a remote location.
- Procedures were revised, as necessary.

UAS

Terri Gardner



Issue: Paper entries, ACH Returns, reconciliations, and ET's can't be accessed via a remote location.

Proposed Solution: Develop complex procedures to move to completely paperless operations within a few days.

Result: We used Adobe Pro to convert paper entries, ACH Returns, reconciliations, and ET's to PDF and saved the documents in shared folders for review, approval and imaging.

- Each Banking member created an electronic signature (including date and time stamp).
- Folders were created for different steps in the routing process:
 - ✓ PDF documents were submitted to a folder where they are reviewed and approved with an electronic signature (validated with date and time stamp).
 - ✓ PDF documents were placed in the Banking student "to be entered" folder where the students accessed the approved entry and keyed into FAMIS.
 - ✓ After keying to FAMIS, students imaged all PDF documents by uploading them directly into imaging. Mando O'Cana, Jr. in IT created batch classes and gave our students access so they could complete the final step of our recordkeeping from a remote location.
 - ✓ Dale Cook in IT created the process for all incoming faxes to be accessed through a shared folder.
 - ✓ Procedures were revised, as necessary.

UAS

Susan Cranfill



Issue: Processing Unclaimed Property claims remotely.

Proposed Solution: Develop procedures to move to paperless submission of Unclaimed Property.

Result:

- Unclaimed Property payments are input into AggieBuy (this process was created by A/P and coincided with COVID).
 - This process eliminated the need to coordinate our payment method with corrections and made it easier to move away from paper check payments.
 - In some states it wasn't visible to pay online until after reports were submitted
- Maryjo Derrick worked with us to create an online form for property owners to submit their claims electronically.
 - Customers don't always have access to printers/scanners and photo form submissions can be hard to read sometimes.
 - It will also reduce the number of incomplete submissions.
- A shared email address was created strictly for Unclaimed Property correspondence.
 - Number of email/online claim form submissions increasing –needed to move these from my mailbox. This is also necessary for when I am out of the office.

Payroll

Joe Corn



Issue: Manual processing of Direct Deposit rejections and Emergency checks

Proposed Solution: Partnered with FMO to switch from printing paper checks via Payformance to entering them in AggieBuy.

Result:

- Provided Payroll with a true electronic approval process.
- Gives the employee the option to have their check direct deposited, which the employee had been requesting for many years.
- Eliminated manual entry by FMO

Tax Compliance & Reporting Chris Brooks



Issue: How to efficiently analyze multiple student accounts to ensure accurate tax reported data is being calculated from the Student Information System (Compass) to accurately and efficiently produce Form 1098-T Statements.

Proposed Solution: Create reports providing the data used to produce the 1098-T under the IRS regulations and guidelines. New reports to include all previously missing box 4 and 6 data. New testing worksheet, populated with the report data, to automatically calculate the QTRE and other box amounts. This allows for mass population of testing.

Results:

- Instead of reviewing several hundred student accounts during the testing period, nearly all for the student population can be tested. This improves confidence in the accuracy and quality of the 1098-T data that will be presented to the students and sent to the IRS.

(Continued on next slide)

Tax Compliance & Reporting Chris Brooks



Results *(continued from previous slide):*

- Enhanced and customized the 1098-T calculation worksheet to automatically populate the QTRE detail codes. The enhanced and customized worksheet allows for a mass population of student data to be analyzed and tested for tax reporting and accuracy.
- The only manual process is importing the reports and using Excel for analysis of data. Can analyze an entire report set in 30 minutes, even if there are thousands of students in the reports. Routinely run five to ten files per day. As testing period nears the end, more files are tested as issues have been cleared up.

FMO

Stacie Sodolak



Issue:

- The System regulation regarding state holds and write-off's changed which greatly impacted Transportation Services

Proposed Solution:

- FMO worked with Transportation and their IT staff to develop a process to handle this change.
- FMO initially placed approximately 8,000 individuals on state hold for unpaid parking citations from FY13-FY20 totaling near \$525,000 which took almost 6 months to complete
- FMO now receives monthly spreadsheets of new holds and releases

Result:

- Total amount collected from the state hold process for FY21 as of March 15th is \$39,795
- This is 61% of what was written off for bad debt in FY20

SBS



Rachelle McDonald

Issue:

Trying to continue providing excellent customer service despite the sheer volume of customer requests that Student Business Services receives.

Proposed Solution:

- Bot implementation to answer general questions quickly without staff interaction.
- Ease for students using Apple products to contact us with Apple Business Chat.
- Appointment Scheduler to allow a more structured way to visit our office to pick up an Aggie Card.
- Adding institutional loans in the “Student Profile” to allow students to see student account data as well as institutional loan in the same site.

Result:

- The Bot assists with immediate responses to general questions that our customers ask and allows us to focus on the detailed questions that must be researched.
- Apple Business Chat allows our customers to easily start a conversation through our texting platform from any Apple product.
- Qless has allowed our customers to visit our office with an online appointment setup and reminders to their mobile device.
- Quick and easy access to student account and institutional loan information in the Student Profile eliminated having to access multiple sites by our students and customer service staff.

SBS

Michael Outland



Issue:

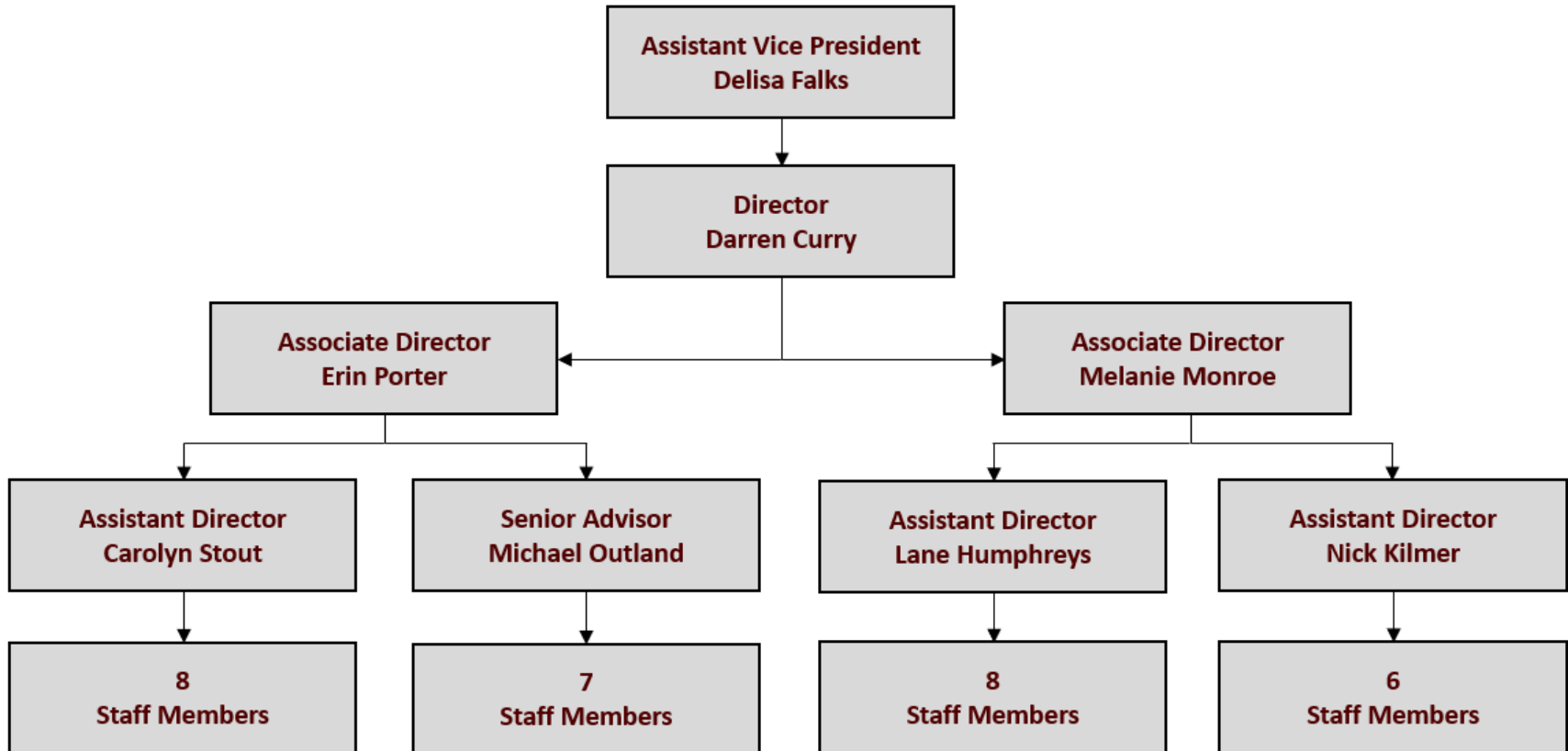
Students have had to go to several different offices on campus in order to get their questions answered about their student accounts (Admissions, Registrar, Scholarships & Financial Aid, Student Business Services).

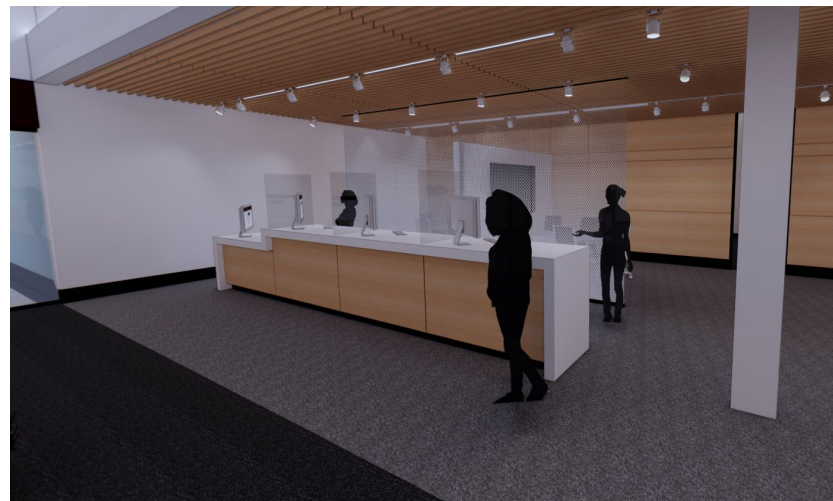
Proposed Solution:

For years, we have been talking about consolidating or cross-training employees on different offices and their job duties.

Result:

As a result, we are opening up the Aggie One Stop. A place where we will promote consistent and high-quality customer service, remove barriers to student's continued enrollment, and support efforts to improve student success. The Aggie One Stop will assist students and their families by answering questions about their student account, financial aid, enrollment services, admissions and financial counseling.





Oversight

Clint Merritt

Kyle Metcalf



Issue: Transactional risks. Overall purchase volume grows each year, staff resources generally stay the same, so it is difficult to provide 100% review/audit of every payment transaction. In addition, there are several platforms in which we make payments from so difficult to catch duplicate or overpayments to employees/vendors.

Proposed Solution: Implement a transactional risk analysis software to monitor/audit 100% of our transactional volume across all payment platforms (Concur Travel, Concur Payment Card and AggieBuy/FAMIS vouchers). Oversight is currently in the implementation phase to audit and monitor 100% of our transactions while creating audit cases for those transactions that produce a higher risk, may be potential fraud, or are out of compliance with our policies. This will track and monitor to help reduce fraud and improve compliance.

Oversight

Clint Merritt

Kyle Metcalf



Result:

- Analyzes 100% of our transactions as they occur and uses historical data for trend analysis
 - Pre and post payment
 - OCR/AI technology
- Identifies and reduces duplicate/over payments across all platforms
- Monitors for and reduces potential fraud
- Improves policy compliance through behavior modification
- Automatically produces transactions for review/audit using a workflow structure
 - Allows managers to manage volume
 - Helps employees focus on transactions that either are out of compliance and/or carry a higher risk
- Result tracking of the transactional audits can help to manage out-of-compliance cardholders or departments

SBS

Katie Rader



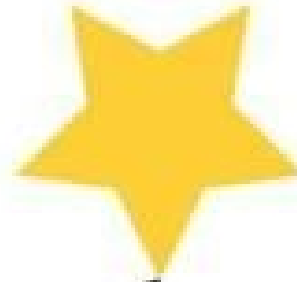
Issue: Internal Tuition and Fee Audit

Student Business Services goes through an exhaustive audit of tuition and fees every 5-7 years, and we had that audit this past year. Every assessment process on the student account is open to examination from beginning to end. This time they chose to audit actual tuition and fees charged, exemptions and waivers, and set-asides.

Proposed Solution:

They had us pull the assessment of every student at TAMU CS, GV and HSC, along with a copy of every rate table. They reviewed our 12,000 assessment rules and our testing processes and asked a lot of questions to keep everything straight for who should be charged which rate in their random samples.

Result: Zero findings or comments/suggestions for change.



Best
Places to

W@RK

SBS

Dana Michelle
Amelia Campos



Issue: Covid-19 brought about many challenges for all of us: working remotely, disconnection, etc.

Proposed Solution: Find ways to stay connected as a team during this time, one way of encouraging employees to reconnect with one another was to work on a group project:

- During the holiday season we became aware of a local family who was going through a serious medical crisis with their young son. We reached out to them and asked if we could help with what they were going through by adopting the family for Christmas. We asked for “wish lists” from every family member.
- Started what we refer to as a “Lunch n’ Learn” where we gather 5-6 employees who typically do not spend much time together and we bring them together in our large conference room for lunch. Those who are working remote, or don’t feel comfortable meeting in the conference room, join us via Zoom.

Result:

- For the Adopt-a-family for Christmas, our SBS team along with some generous people in the Division of Finance, were able to get everything on their lists plus a bit more. Sorting the gifts, coordinating with one another to purchase specific items and gathering in the conference room to wrap gifts brought out the best in all of us.
- Lunch n’ Learn we play some light-hearted Get-To-Know-You games that encourage group discussions as well as ice breakers to start conversations. We also talk about things going on at Texas A&M and within the department that we want to make sure everyone is aware of. We ask staff to share ideas with us that can make their work environment better and find out if they have the tools they need to be as productive as possible.

SBS
Ivan Matip



Issue: Working remotely because of COVID and not seeing each other face-to-face regularly created communication breakdowns among staff and presented other challenges centered around efficient teamwork and collaboration.

Proposed Solution: SBS' Operations Team came together and began watching a series of LinkedIn Learning videos under the broader topic of **Building Trust and Collaborating with Others**. After each video, the team would meet to dissect it and discuss the main takeaways, and how to apply the lessons learned to day-to-day operations.

Result: Today, SBS staff is more knowledgeable and intentional about developing and sustaining trust, managing conflict, having difficult conversations, communicating with diplomacy and tact. The time and effort put into this are already paying off through a strategic communication campaign for the new payment system, monthly departmental updates, training opportunities, and the team feels better equipped to solve student account issues.

UAS/Payroll



Issue: Payroll needs a designated, secure suite that is not under threat of encroachment by HR

Proposed Solution: Swap spaces with HROE

Result: Payroll will reconfigure and relocate to Suite 2200. This will be brand-new space with modular offices, a conference room, a break-room, and work-room space.

UAS/FMO



Issue: The UAS and FMO space on the third floor of GSC has not been updated since the building was built in 2006. The common area spaces, in particular, are worn and outdated.

Proposed Solution: Provide updates to reception area, breakrooms, and conference rooms

Result: UAS/FMO will have fresh, new meeting rooms, break rooms, work areas, and a welcoming reception space.



CFO asks CEO: “What happens if we invest in developing our people and then they leave us?”

CEO: “What happens if we don’t, and they stay?”

Train people well enough so they can leave. Treat them well enough so they don’t want to.

- Richard Branson

