Progress Towards
Workday @ ISU Deployment

Discussion with IT Executive Committee
4 January 2017
Purpose of the Meeting

• Initial overview on progress towards Workday deployment

• Desired outcomes for today:
  • Address questions relating to deployment
  • Discuss ITEC’s role as “Project Sponsor”
Agenda

• Overview & Introductions
• Presentations:
  • Workday Deployment Methodology
  • Project Planning Phase
  • Shared Services & Delivery Models
  • Communications Strategy
• Discussion
Introductions

• Keith Wengronowitz – Workday Project Director

• Kelly Kelly – Workday Engagement Manager

• Megan Cluver – Workday / Huron Shared Services Project Lead

• Francis Quinn – Interim Iowa State Change Management Lead
Opportunity

- Modernize ISU’s information infrastructure to provide cost effective, mobile-enabled new functionalities in the following areas:
  - Reporting
  - Data analytics
  - Business processes
  - Business intelligence
  - Competitive intelligence
  - Security
Iowa State Roadmap to Workday

2014

• Board of Regents ISU TIER recommendation to modernize
• Deloitte study endorses shared service model

2015

• Discovery phase of legacy enterprise systems
• Chazey Activity Based Analysis for shared services
• RFP finalized and published

2016

• Jul: Workday selected and approval to negotiate received
• Sep: ISU contracts for all higher education software
• Dec: Workday planning phase begins

2017

Workday HCM & Financial Implementation Begins
Guiding Principles

• Adopt Uniform Processes and Best Practices
• Minimize Conversion of Legacy Data
• Enable ISU to Manage Future Integrations
• Minimize Legacy System Interfaces by Utilizing Workday Software as the System of Record
• Implement Shared Services to Improve Service Delivery and Achieve Cost Efficiencies
• Conduct Implementation Project Management using Performance Measures and Metrics

Ref: Workday SOW Phase 0
Resources to Support Deployment

• People Resources
  • Workday: 10-12 FTEs
  • ISU:
    • 10-12 FTEs for each subject area
    • Backfill & additional support employees TBD

• Financial Resources
  • Separate ISU-only Senior Leader Discussion
# Workday Deployment Methodology

<table>
<thead>
<tr>
<th>PHASE 0</th>
<th>PHASE 1 HCM, Payroll and Financials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now</td>
<td>Apr 17</td>
</tr>
<tr>
<td></td>
<td>May – Aug 17</td>
</tr>
<tr>
<td></td>
<td>Sep – Dec 17</td>
</tr>
<tr>
<td></td>
<td>Jan – May 18</td>
</tr>
<tr>
<td></td>
<td>Jun – Dec 18</td>
</tr>
</tbody>
</table>

## PRE PLAN
- Training plan
- Data Conversion Approach
- Integration Discovery
- Initial project plan & charter
- Deployment Roadmap

## PLAN
- Project Start-up Training
- Customer Training
- Project Planning Initiated
- Foundation Tenant Build
- Architect Workshops
- Architect Documents
- Test Preparation (for Config & Prototype)
- Finalized Project Planning Documents
- Configuration Tenant

## ARCHITECT
- Customer Confirmation Sessions
- Configuration Unit Test
- Reports Build & Unit Test
- Integrations Build & Unit Test
- End User Training Plan
- Test Preparation
- End to End Tenant Build

## CONFIGURE & PROTOTYPE
- End to End Testing
- Parallel Tenant Build
- User Acceptance Testing
- Payroll: Parallel Testing
- Regression Testing
- Performance Testing
- Cutover Plan
- End User Training Materials

## TEST
- End User Training
- Gold/Pre-Production Tenant Build
- Go-Live
- Post Production Data Conversion
- Production Support

## DEPLOY

### DELIVERY ASSURANCE

### PROJECT MANAGEMENT & ADMINISTRATION

### OPERATIONAL READINESS

Ref: Workday SOW Phase 0
## Iowa State Phase Zero - Planning Timeline

<table>
<thead>
<tr>
<th>December-16</th>
<th>January-17</th>
<th>February-17</th>
<th>March-17</th>
<th>April-17</th>
<th>May-17</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase-Zero</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Management</td>
<td></td>
<td></td>
<td></td>
<td>Deployment Roadmap, Trng Plan, SOW Phase 1</td>
<td></td>
</tr>
<tr>
<td>Change Management &amp; Service Delivery</td>
<td></td>
<td></td>
<td>Stakeholder Engagements, Shared Service BCAP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scope Discovery and Validation Workshops</td>
<td>Complete HCM &amp; Financials Questionnaires</td>
<td></td>
<td></td>
<td>Initial Online Training for select ISU Employees</td>
<td></td>
</tr>
<tr>
<td>ISU Training - On Demand Education (ODE)</td>
<td></td>
<td>Integration Plan for HCM &amp; Financials Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Conversion Strategy</td>
<td>Identify HCM &amp; Financials Data Sources and Requirements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integration Discovery and Strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SOW Phase 1 - Project Phase**

Ref: Workday SOW Phase 0
**BoR TIER Shared Services**

### Shared Services: What is it?

Shared Services differs on many levels from Centralized Services. Shared Services entities typically focus on processing common transactions for an organization to improve service delivery, reduce processing time, and increase accuracy. The optimal service delivery model would balance the need for standardization and efficiency with the recognition of local needs and the importance of customer service.

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Decentralized</th>
<th>Shared Services</th>
<th>Centralized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Units Treated Like</td>
<td>Entrepreneurs</td>
<td>Customers (internal and external)</td>
<td>End Users</td>
</tr>
<tr>
<td>Process Focus</td>
<td>Transactional: “Get the job done”</td>
<td>Service Excellence, High Performance, Cost Control, Continuous Improvement (service and costs)</td>
<td>Cost Control</td>
</tr>
<tr>
<td>Key Metrics</td>
<td>Ad hoc</td>
<td>Key Performance Indicators (KPIs) and Service Level Agreements (SLAs)</td>
<td>Budgets</td>
</tr>
<tr>
<td>Relationship with Operating Units</td>
<td>Embedded</td>
<td>Cooperation</td>
<td>“Competition”</td>
</tr>
<tr>
<td>Customer Contact Management</td>
<td>Not performed</td>
<td>Multiple channels (voice, email, web)</td>
<td>Variable</td>
</tr>
<tr>
<td>Hours of Operation</td>
<td>Standard business hours</td>
<td>Extended business hours to meet service needs</td>
<td>Standard business hours</td>
</tr>
<tr>
<td>Location</td>
<td>Local</td>
<td>Variable</td>
<td>Central Admin</td>
</tr>
<tr>
<td>Typical Management Processes</td>
<td>Just-in-time (services are often ad hoc or as needed)</td>
<td>Performance Management (Continuous Improvement, Client Relationship Management, Communication, People Development)</td>
<td>Tactical (Workload Management, Cost Management)</td>
</tr>
</tbody>
</table>

Ref: Board of Regents ISU TIER Town Hall, Oct 13, 2014
BoR Shared Services Delivery Models

Illustrative Shared Services Options

There are multiple operating models that can be considered when evaluating whether the service delivery model for transactions can be improved. Options provided below are illustrative of common delivery models. There are multiple hybrid models that are also feasible along the spectrum.

**Decentralized**

- **College-Based Model**
  - College A
  - College B
  - Shared Services
  - Dept. A
  - Dept. B
  - Dept. C
  - Dept. A
  - Dept. B
  - Dept. C

  - Decision on how to revise service delivery model resides at College level
  - Colleges may be expected to conform to ratios of administrative staff

- **Cluster Model**
  - VP Finance & Admin
  - Shared Services
  - Cluster A
  - Dept. A
  - Dept. B
  - Dept. C
  - Cluster B
  - Dept. A
  - Dept. B
  - Dept. C

  - Services are provided within an individual university and organized either by college, cluster of departments, or by geographic location (e.g., buildings)
  - “Clusters” provide services locally, but are coordinated and led at the University level

- **University-Wide Model**
  - VP Finance & Admin
  - Shared Services
  - College A
  - College B
  - College C

  - Services are provided and managed at the individual university level
  - Work is organized functionally (e.g., by process) with one point of entry for customer support questions and inquiries

Ref: Board of Regents ISU TIER Town Hall, Oct 13, 2014
Iowa State Service Delivery Discussion

• In alignment with the redesign of business processes and launch of Workday, ISU will identify the optimal service delivery model to provide HR, finance and research administration activities across the University

• During the planning stage, a small workgroup will develop a high-level model and implementation plan

• The high-level model will provide the framework for detailed design, in alignment with the deployment of Workday across the University

• As we move into the design phase, perspectives from across the University will be incorporated into the detailed design and implementation of the model
Huron Designed and Launched Shared Services To Reduce Cost At KU

Case Study: Integrated Service Units at the University of Kansas

Goals & Drivers
- Increased service levels for faculty and staff and improved administrative career opportunities
- Cost savings and consistent processes

A Distinct Model of Service Delivery
- “Siloed” operations were replaced with an expertise-based shared services model supporting finance, procurement, billing, HR, and research activities
- Five affinity-based centers share one major reporting line; staff specialize in a single area and work together in one location
- Service levels increased and cost savings are being realized (natural attrition of FTE), over $1M annually has been redirected to the academic mission

Lessons Learned
- A clear mandate from leadership at the onset of the project, and unwavering resolve throughout, was critical to project success
- Development of a coordinated communication plan was crucial, including regularly-scheduled open forums and a dedicated website
Huron Implementing ERP & Service Consolidation To Reduce Cost Across Tennessee’s Colleges

Case Study: Consolidated ERP and Operations Across 13 Tennessee Community Colleges

**Goals & Drivers**
- Legislative mandate requires a shift to a consolidated operating model
- Past budget cuts forced administrative layoffs, creating an unsustainable administrative operating model across the 13 Colleges
- Better decision support is required for College leaders facing a shifting landscape

**A New Model of Service Delivery Launching**
- College-based operations will be replaced with an expertise-based shared services model supporting finance, procurement, billing, HR, and enrollment management activities
- Staff specialize in a single area and work together in one location
- Cost savings are expected, coupled with an increase in service

**Challenges and Critical Dependencies**
- The service delivery design is being launched in conjunction with a consolidated ERP instance across the colleges, enabling standardization and remote work
- Previous cuts have removed any “slack,” adding a complex implementation on the backs of over taxed leadership and staff
Michigan Launched A Successful Shared Service Center

### Case Study: Michigan’s Single Service Center Supporting Campus Needs

#### Goals & Drivers
- A focus on cost-savings, compliance and standardization of processes drove the implementation of Michigan’s Service Center

#### Transaction-Focused Service Delivery
- Through one large center, the UM SSC provides support for select finance and HR transactions
- Staff are clustered within the center to provide more specialized support to units
- A focus on staff empowerment and opportunity are the cornerstone of the delivery model

#### Lessons Learned
- Transparency and collaboration are vital throughout all phases of design and implementation
- Failure to establish a sound governance model, with broad representation and clear lines of accountability, can seriously inhibit the credibility of shared services implementations
Traditionally, Purdue’s Central Business Management Office has coordinated and supervised all business aspects of the University’s academic departments, schools, and admin units.

Consolidated HR, Finance and Research Administration functional staff are geographically located each unit, but share a common reporting line to the center. Although business office staff report centrally to Purdue, processes and services are tailored to the needs of the individual units.

The focus at Purdue is on a centralized service, without some of the accountability measures (such as Service Level Agreements, transparent metrics, etc.), typical of a shared service model.

Purdue has created a culture open to the concept of shared resources. A particular style or format is not required of any units at Purdue; Business Offices act as partners to provide optimal service level to their customers.
Communications Strategy

Context

• Deploying Workday is a multi-phase process with distinct timelines and milestones.

• HCM, FIN and SIS will not necessarily be deployed exactly in step.

• The ISU community is composed of multiple stakeholder groups: Students, Faculty, Staff, Senior Leadership, Media.

• This dynamic must be mapped onto the nature, form, and timing of the communications & outreach to the ISU community.
Nature of Communications

Progress Towards Deployment

Workday @ ISU
Guiding Principles for Communications & Outreach

• Communication is a 2 way dialogue
• Transparency and completeness
• Timeliness and accessibility
• No Iowa Stater left behind
Our Peers

• Many other higher education institutes have deployed Workday and the details of their communications & outreach are available to us.

• We are not going to reinvent the wheel.

• We are going to adapt our communications & outreach to reflect the unique values and culture of the ISU community.

• “Branding” the deployment is common to all institutions.
What kind of things can we expect for Phase 0

- Senior Leadership: Vision and call to action to the ISU community (written/video). Need a united, coherent, and consistent message.

- Operational Leaders: How the deployment will proceed and what their teams need to do – roadmap, timelines, milestones, deliverables.

- Change Management advisors: Face-to-face consultations with stakeholders.
  - Q&A
  - Sticking points
  - Champions
  - Aspirations and concerns
What kind of things can we expect for Phase 0

• Communication Liaisons in every business unit and College will need materials and copy for local outreach

• Dedicated website to Workday deployment:
  • One-stop-shop
  • Updates from ISU leaders (written/video)
  • FAQ and Glossary
  • Project outline / Timelines / Milestones / Deliverables
  • Project tracker (HCM, FIN, SIS)

• Reminders / Flyers, table tents, town-hall discussions, social media, surveys…
What kind of things can we expect for Phase 1

- Gradual evolution in the nature of communications:
  
  Informational → Instructional (training and support)

- Resources:
  
  - Change Management advisors
  - Communication Liaisons
  - Champions
  - Operational Leaders
  - Senior Leadership
Dedicated Website (Branded)
• Have a great Workday
• A new Workday is dawning
• Welcome to your Workday
• Simplify your Workday
• Project Fusion
• It’s a new Workday
• Smart | Simple | Secure
• Workday @ College
Workday@Yale

The Workday@Yale Program supports Yale’s mission with administrative services that mirror Yale’s excellence in teaching, research and practice. Yale’s initial rollout of Workday in July 2015 included the delivery of human resource, academic and payroll business processes. We continue to optimize current Workday functionality and are preparing to go-live with Yale’s Financials in July 2017.

The strategic objectives for the program include:
Workday at LSU

Workday is LSU’s administrative system for financial, payroll and human resources processes. From this site you will find a variety of resources, frequent updates and background information on the migration to this new system from the mainframe.

If you are new to Workday, an overview video is available at uiswcmssweb.prod.lsu.edu/training/employee/. This overview introduces a user to Workday’s way of handling a few basic activities, including time entry. A wealth of other training videos and job aids are also available on this site as well.

If you have any questions, please visit the Workday knowledgebase at lsu.edu/servicenow.
What is Workday?

Workday is a new administrative system that will replace our current HR/Payroll and Financial systems.

What does Workday mean for me?

- 24/7 access to personal information from any computer or mobile device with Internet access, anywhere, any time.
- Ability to update your address, request vacation, change a beneficiary, and view benefit and compensation information.
- Ability to review account balances, approve employee reimbursements, or payroll timesheets.

What does Workday mean for Brown?

- Workday replaces Brown’s aging HR, Payroll and Finance computer systems that are becoming costly and difficult to support.
- Workday will change the way we do business today.
- Many of Brown's paper-driven, labor-intensive processes will be automated making it easier and faster to submit and track changes and provide more accurate data.
- Policies and processes will be built into the system to ensure consistency and transparency.
- Managers will have direct and easy access to staffing and organizational information.
- Workday will enable Brown to decrease administrative inefficiencies and bureaucracy.

What is the expected timeframe?

- Workday HR/Payroll system targeted for use - July, 2012
- Workday Financial system targeted for use - July, 2013

Visit our website on the Brown home page, A to Z Index or at:

http://brown.edu/about/administration/workday/
Soon Workday will give you 24/7 access to...

- VIEW benefit elections
- ADD emergency contacts
- REQUEST accrued time off
- CHANGE direct deposit allocations
- EDIT personal information

AND MORE...

Simplify your workday.

www.brown.edu/go/w...
Communicating Change
# Social Media

<table>
<thead>
<tr>
<th>Social Media Directory</th>
<th>Facebook</th>
<th>Twitter</th>
<th>YouTube</th>
<th>LinkedIn</th>
<th>Photos</th>
<th>Instagram</th>
<th>Pinterest</th>
<th>RSS</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iowa State University</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Colleges</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agriculture and Life Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liberal Arts and Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Offices, Units</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admissions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alumni Association</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyclone Athletics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CyRide</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extension and Outreach</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environmental Health &amp; Safety</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inside Iowa State</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ISU Police</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ISU Foundation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Purpose of the Meeting

✓ Initial overview on progress towards Workday deployment

• Desired outcomes for today:
  • Address questions relating to deployment
  • Discuss ITEC’s role as “Project Sponsor”
Discussion