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Workday Implementation

Recommendations from Broward College
(amended 7-28-14 following Finance go live)

Tom Olliff

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Introduction: Workday although intuitive is still a significantly complex software product that will require many of your best assets who will be largely or even completely dedicated to the implementation which will last several months after the “go-live” date. There are many activities which can be done in advance that will help the implementation and perhaps more importantly assures that support for the day-to-day business continues to be accomplished in an acceptable manner.

Listed Below are a number of steps / lessons learned from pre-implementation, through post-implementation that will hopefully help your institution as it goes through this important process.

Pre-Implementation

- **Don’t Skimp on the Implementation Team.** There is little that your institution will be doing that will be as important as making sure that the significant investment in the Workday software produces the maximum value. The quality of the individuals assigned needs to be the best that you have, they are building the foundation for the system that will run everything for years to come. Overtime will be required and it may be significant. How these extra hours are going to be handled needs to be decided up front. Is comp time going to be provided? Is overtime going to be provided? Can the team be built to minimize the overtime costs and still get the right seats on the bus filled?

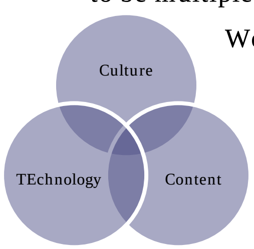
- **A Detailed Backfill Plan is Required**. Filling in the roles and responsibilities of the implementation team will require employees being assigned additional duties, contracted employees or temporary employees to conduct the regular daily work. For any employees accepting additional duties, an understanding in advance for how payment for these additional assignments will be handled needs to be made and consistently implemented.

- **A Dedicated “War Room” is Needed**. This is a room where consultants can reside and work with the team members, where all team meetings will be held, that has connectivity, power outlets, lots of remarkable boards, good AC circulation, allows for food to be eaten in the room and can be taken out of production for months.

- **Pick a Good Implementation Partner**. The implementation partner is important. There are only a few who have Workday experience and this is not a database based system so just any implementation firm will not do. Implementation firms who get other contracts will want to move assets from your assignment, which will hurt the continuity of your team. Know who is on the assignment team, and lock them in via your contract. The implementation firms specifically partnered with Workday are included in the following web page: http://www.workday.com/company/partners/services_partners.php

- **Pick a Good Engagement Manager and Project Manager.** The engagement manager will be assigned by your implementation partner. The project manager will be assigned by your institution. The communication between these two individuals is constant. The success of the project relies heavily on these two individuals. Set ground rules up front as to work responsibilities for each manager so as not to overlap responsibilities and covering a wider landscape.

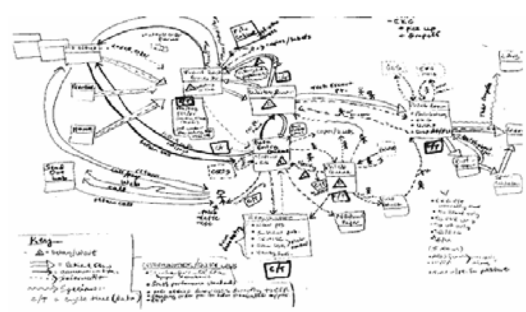
- **Plan for More Communication and Training**. Whatever you think you'll need for communication of the new product and for training the staff who will be using Workday; double it.
    - **Communications**. The implementation team cannot talk about it enough. There needs to be multiple formats for communications with the employees of the institution. Workers don't always read email. Suggested formats include: team meetings, steering committee meetings, senior staff meeting updates, on campus meetings to show and tell, sandbox opportunities for people to play with the product, updates to the board on project status during implementation. This is important both to build an excitement and to assist with change management. This will be a major change. No matter how good the tool is, it is a major change and for better or worse people are not comfortable with change and relate everything to the old system.

    - **Training**. There will be a tendency to think that Workday is so intuitive and "Amazon or Google – like" that as much training will not be required. This is wrong. Workday as you configure it, will likely require people in the organization like Associate Deans to do tasks in the hiring process for example, that have been done by administrative assistants for years. At some point in the future you may want to allow the delegation of these duties to the administrative assistants, but in the beginning, we wanted to ensure that our ADs knew how to hire and credential new staff. On the Finance side, the configuration of your chart of accounts and cost center structure will change significantly. Start building your account structure immediately. Get the proposed structure in the hands of the end users for awareness and feedback. Give them plenty of time to review and suggest changes. This requires deep training on the campus, and it should be mandatory.

- **Make The Team Commit That It Will NOT Build the old business process workflows Into Workday. This cannot be reiterated with your team strongly enough.** The Workday system is built on business processes. The staff that are on the team to help build the new work flows for each business process know the current *processes and are comfortable with them*. The institution's current business processes are not *Best Business Practices*; if they were, your organization wouldn't have spent what it just spent on Workday. The product comes with menus of best business practices. Establish a requirement for a high level sign off, (Senior Vice President, Provost, or even President) if something other than a best business practice is being recommended by the business process team. Nothing will be more frustrating and costly as building the systems you already have under a new software label.

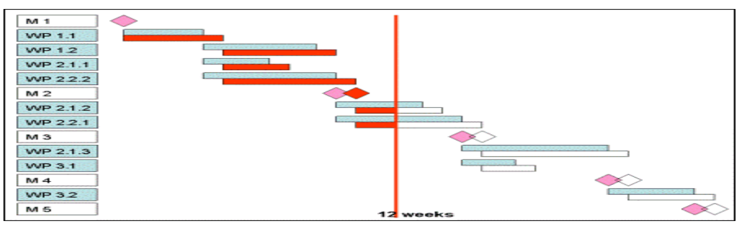
- **Do As Much Business Process Mapping As You Can Up- Front.** Because the software is based strongly on work flows, spend as much time as you can determining what your current business processes are. Broward hired someone who does business process mapping, who taught others in the organization how to do mapping as well. Chances are, business process mapping has never been done. People think they know how the work flows but they don't. Once process maps begin to hit paper and become visual, the staff will easily understand why the current systems are so difficult and inefficient. This will also begin to get the "fix it" juices flowing and lay good groundwork for Workday. Using some of these "As –Is" process maps as a communication tool is a good visual supporting why this deep change is important.



- **The BP Function**. Have more than one person assigned responsibility for developing BPs. While coordination with more than one person may be more complicated, it is too important an area not to have redundancy.

- **Allow Administrative Assistants to be part of the hiring process**. You might as well designate a role for them in the hiring process and build them into your business processes. The expectation that ADs and Deans and Managers should know the system and know how to hire their staff within the system is a good one. However, the truth is that credentialing, I9 forms and many other steps of the current process have been handled by Administrative Assistants for so long that the ADs, Deans and Managers do not know how to do these things in your legacy system. Having the Admins built in from the beginning will shrink the organizational learning curve and make your go live smoother.

- **Detailed Implementation Plan**. A detailed implementation that includes specific project milestones, staffing assignments, consultant hours, integrations development, testing etc. is needed up front. The reporting schedule should be established at the beginning and monthly is recommended. The Project Manager and Engagement Manager should jointly produce a brief bullet report and orally give an update to the Leadership Team. The plan should have some float built into it, everything will not go smoothly and re-work will be necessary, members of the team will quit or get ill or integrations will not work right, etc. Build Workday software releases into the plan. Training should be done on the release that will deployed. Training on a version that is going to change significantly is a is of little value.



Implementation

- **Reporting meetings**. Schedule and hold regular Steering Committee meetings at a minimum monthly and more frequently the last two months. Require budget and schedule updates at each. Don't let technical people blow by technical issues and the team not get it. Stop and make sure everyone understand the issues, as there is often cross pollination with Finance, budget or other operations, that is required at these meetings that the technical people may not appreciate.

- **Integrations**. Assign a college IT staff member and a consultant staff member to oversee all integrations. Make individual team leads responsible for assisting in the development and testing of integrations. There are many integrations from Workday to your current system. Examples include: third party retirement fund providers, to FRS or other retirement systems, integrations to your student system to hire faculty and assign course load, your credit and collections system general ledger interface, banking integrations, and student check processing from you old legacy system. Although some integrations are not absolutely required to be completed prior to go live, it is recommended that you build into the schedule that they be done and tested ahead of go live anyway. It's one less stressor you'll have on the plate when go live occurs.

- **Data conversions**. Identify all your data conversions points from your old legacy system. Make individual team leads responsible for assisting in the development and testing of data conversions processes. Include data conversions in the responsibilities of the IT staff assigned to the project. Data conversions include: loading general ledger balances, loading life to date balances for some grants, projects and other accounts, converting suppliers and outstanding POs, employee data (positions, demographics, compensation etc). Build repeatable processes for converting your data so that with each tenant build they can be rerun. Monitor the status of your data conversions regularly.

- **Testing.** Workday provides basic testing scenarios. You will need to modify these scenarios for each functional area. Build your testing scenarios for each functional area as soon as possible. As part of your implementation plan allow sufficient time for full system testing and user acceptance testing. User acceptance testing is when you invite folks outside the Team to participate in testing.

- **Mock deployment.** Build time for a mock deployment into your implementation plan. The number of problems you will uncover and resolve during this exercise is invaluable. This will make your actual "cutover" much less stressful. The team will know what to expect and the order in which tasks need to occur.

- **Configurations.** It is very important for each team lead to understand the configurations for their area of responsibility. With each tenant build configuration setup needs to be validated. The initial configuration setup is done by your consultant. The consultant does the knowledge transfer with the team lead and build the necessary reports that will be used for validation. After that, configurations roll or are created with each tenant build and the team lead should be able to validate them each time using the tools developed. You will have to do this a few times so it is important to develop a repeatable process that works.

- **BP review.** Even though this was clearly discussed in advance, take the time to have someone or a sub team reviewing the BPs in detail. BP design is constantly changing based on testing outcomes, especially when you begin user acceptance testing. Even though you may devote a significant amount of time to the development of the BP's, when you go live you will probably still be making changes. People want to be a part of reviewing everything, and they don't need to be. If there are good policies and procedures in place to manage risk and the BPs are working within approved budget structures - fewer not more people should be in the workflow. The compromise - People can be notified without having to review and approve.

- **Plan for the go live help desk demands**. There will be a SIGNIFICANT impact on your help desk. If there aren't sufficient resources to handle the load, the turn-around time will be too long, people with problems will lose faith in the helpdesk system and will resort to emailing or phone calling whoever they can find. As soon as the issues begin to go around the helpdesk there will be no control. There are contractors who are Workday skilled and can be brought in to help. Planning and budgeting for this is recommended. The contractors should be brought in during the training phase of the project so they can be included and retained for at least three months after go live. Put a process in place to monitor helpdesk tickets looking for patterns and trends. Develop a strategy that progresses a help ticket to the next level for resolution. In theory, share the load. Train your helpdesk staff as a first line, escalating to a campus experts if necessary, forwarding to a team leads when necessary, and when all else fails escalate to the IT staff for resolution.

- **Plan to go on campus for training**. Schedule rooms with computers on campus for twice as much time as you think you will need as soon as possible. These rooms are popular and if you wait, you will have to try and bump things to get these rooms and that is never well received. Training may need to occur at odd times to catch some of the staff that either work untraditional schedules or cannot leave their current assignments when you might have trainings scheduled. Think about who your audience will be and the best way to group them for training sessions. Be prepared for users who can make the scheduled time and offer "make up" classes.

- **Develop on Campus go to SMEs**. During the training certain staff will just *get it*. Figure out who these people are and bring them in for more intense training with the understanding that they are going to serve as the on campus subject matter experts (SMEs). When roll out is official publish the list of on-campus SMEs who can assist those who may need help to *get it*.

Beyond this, don't hesitate to contact the following people if there is anything that we can help with. It's a great product and will vastly improve the way we and you do business!

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