

METHODS AND TECHNIQUES FOR SUCCESSFULLY LAUNCHING A CLOUD IMPLEMENTATION

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INTRODUCTIONS



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Senior Director - Huron

Program Manager for Higher Education Oracle
Cloud ERP and HCM Implementations

- Strategy
- Project Management
- Client Success
- Shared Services
- Product and Subject Matter Expertise



LAURA SHEVLING

WyoCloud Project Manager - University of Wyoming

Member of the University's Leadership Team for Oracle Cloud ERP, HCM, BI, Planning and Budgeting

- Manage upgrades and testing
- Create strategy for continuous innovation and process improvement
- Direct the university executive business analysts for finance and reporting
- Collaborate with IT, Finance, Budget, HCM, university executives on communication, resolution, strategy
- Change management leader

Agenda

1. Introductions
2. Understanding Cloud Projects
3. Vision and Guiding Principles
4. UW Cloud Project
5. Lessons Learned

Huron's Oracle Cloud Experience

Huron has performed Cloud Assessment, Planning, Implementation, and Optimization projects at 100 of the top 100 research universities, including the following institutions:



VANDERBILT
UNIVERSITY



UNIVERSITY
OF WYOMING



TCNJ THE COLLEGE OF
NEW JERSEY



昆山杜克大学
DUKE KUNSHAN
UNIVERSITY



Allegheny
Health Network



SAN BERNARDINO
COMMUNITY
COLLEGE
DISTRICT



Stanford
University



RUTGERS
THE STATE UNIVERSITY
OF NEW JERSEY



Wake Forest™
Baptist Medical Center

Duke
UNIVERSITY



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UNDERSTANDING CLOUD PROJECTS

A Successful Cloud Transformation Can Address

Transition to Cloud applications can help organizations address common operational challenges caused by aging enterprise systems.

Business Process
Inefficiencies

Organizational
Integration Issues

Optimization and
Integration of Current
ERP Systems

Additional Self-
Service Capability

Master Data
Management: Quality,
Governance, and
Reporting

Chart of Accounts
Issues

Pain points with
Existing Financial,
Operational, and HR
Support Systems

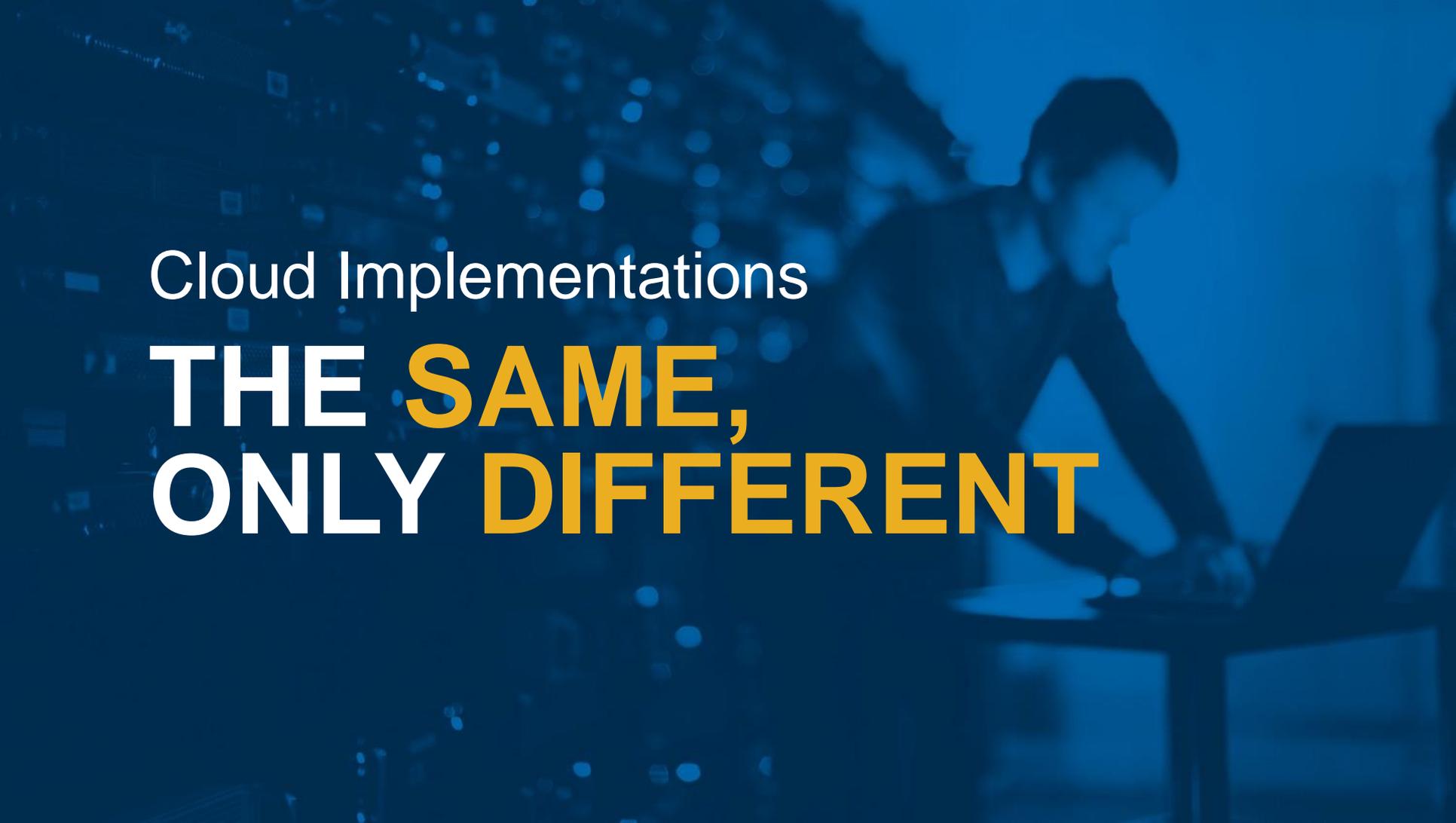
Rising IT Costs and
Reactive IT Spend

Compliance and Audit
Problems

Quantifiable Benefits

Migrating to the Cloud Applications across multiple platforms presents a number of potential economic benefits for organizations. Huron can assist in developing a 10 year TCO model and detailed business case to support your transition to The cloud.

TECHNOLOGY MODERNIZATION	BUSINESS PROCESS REDESIGN	PERFORMANCE IMPROVEMENT
<ul style="list-style-type: none">• Eliminated Software• Improved IT Support Model• Eliminated Infrastructure	<ul style="list-style-type: none">• Increased HR + Payroll Efficiency• Increased Finance Efficiency• Increased Supply Chain Efficiency	<ul style="list-style-type: none">• Shared Services (Decentralized)• Improved Employee Retention• Strategic Sourcing• Absence Management• Benefits Payment Controls• Better Utilization of Funds



Cloud Implementations

**THE SAME,
ONLY DIFFERENT**

Oracle Cloud Methodology

Build vs. Buy



Requirements Driven

- Assumed Customization
- Scope Creep



Solution Driven

- Drives Improvement
- Quicker delivery to the user

Strategic Solution Driven Implementation

Solution Driven Approach

How do we make this work for you?

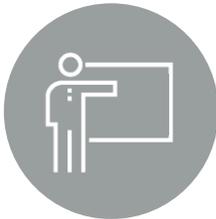


SOLUTION – DRIVEN APPROACH ATTRIBUTES

- Presumption that out-of-the-box will work 80% + of the time
- Time spent on defining and solving true gaps
- Drives process improvement discussion via leading practice “straw man”
- Prevents non-strategic differentiator scope creep
- Immediate end-user hands-on, day-in-the-life process experience mitigates change risk
- 30-35% project time savings typical



What do you want?



REQUIREMENTS – DRIVEN APPROACH ATTRIBUTES

- Presumption of customization
- Time spent defining and documenting “as is”
- Approach impedes process improvement focus
- Approach encourages “wish list” scope creep
- Significant delay until end user hands-on, day-in-the-life exposure increases project risk

Preparing for a Successful Implementation



PRE-LAUNCH PLANNING

Success and Guidance	Time and Team	Organizational Change	Business and Technical	Technical
<ul style="list-style-type: none"> • Business Case • Requirements Traceability Matrix • Total Cost of Operations Model • Performance Improvement Assessment • List of Milestones and Success Criteria • Project Charter • Program Org Chart, Governance Model and PMO Setup Checklist • RACI Matrix • RAID Log 	<ul style="list-style-type: none"> • Project Roadmap • Business Timeframes and Calendars • Preliminary Staffing Needs Assessment incl. Backfill Planning 	<ul style="list-style-type: none"> • Org Change Strategy • Sponsor and Change Network Plan • Communication Plan • Website Plan • Stakeholder/Sponsor Assessment 	<ul style="list-style-type: none"> • Chart of Accounts Structure Assessment/ Recommendations • Supervisory Org. Structure Assessment/ Recommendations • Assessment/ Recommendations of Interdisciplinary Programs and External Partnerships • Business Process Inventory • Reporting Inventory and Strategy 	<ul style="list-style-type: none"> • Conversion Strategy • Security Strategy • Current Systems Inventory and Map • Integration Strategy <div data-bbox="1518 685 1862 776" style="background-color: #0056b3; color: white; padding: 5px; text-align: center;"> Service Delivery </div> <ul style="list-style-type: none"> • Service Delivery Strategy • Service Delivery Mission

VISION AND GUIDING PRINCIPLES



Vision and Guiding Principles: Same BUT Different

Speed to
Implement-12
Months or Less

SME's Front
and Center

Convergence of
Functional and
Technical Roles



Keep it Simple

Plan and Plan Again
It is **All** in the Preparation!



Meet All
Milestones Go Live



On Budget
& On Time

A University-Wide Effort

TECHNOLOGY



INFORMATION TECHNOLOGY

- To provide the technical support to both internal and external teams throughout the process
- To provide program management and quality control

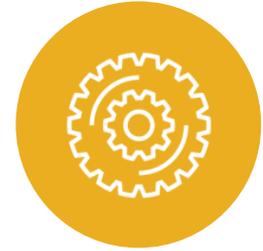
PEOPLE & CULTURE



ENTIRE UNIVERSITY

- To recognize the value of the program
- To embrace the changes to the existing processes, culture and policies

FUNCTIONAL AREAS



FUNCTIONAL AREAS

- To mobilize key personnel for the project
- To facilitate the design of new business processes
- To effectively adopt new business processes

Resource Considerations

RE-THINK TRADITIONAL PROJECT ROLES



- Blending of responsibilities and ownership
- Entire team needs to be involved at the start of the project (ie, Change Management, Training)
- Leadership must be more hands-on (not managing exclusively by committee)

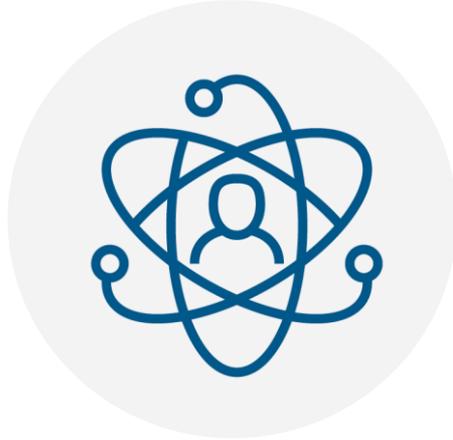
ENGAGE CLOUD-EXPERIENCED ADVISORS



- Maximize expertise
- Build back-up support
- Expand knowledge transfer
- Manage cost

Governance Structure and Decision Making

To support the pace of a Cloud project, the traditional governance and decision-making structure must also **adapt**



- Requires hands-on and engaged leadership
- Cannot effectively govern from a distance
- Eliminate traditional decision making by committee
 - Establish clear ownership
- Include non-traditional project leadership roles
 - Student Services/Academic
 - Emerging Technologies
 - Change Management

Questions to Consider in Your Vision

Huron suggests your case for change should answer the following questions:



How does this align with our strategic goals or advance our mission?



Why is now the right time for us to take this on?



What will we gain by making this transition to the cloud?



How will this benefit our students, faculty, and staff?

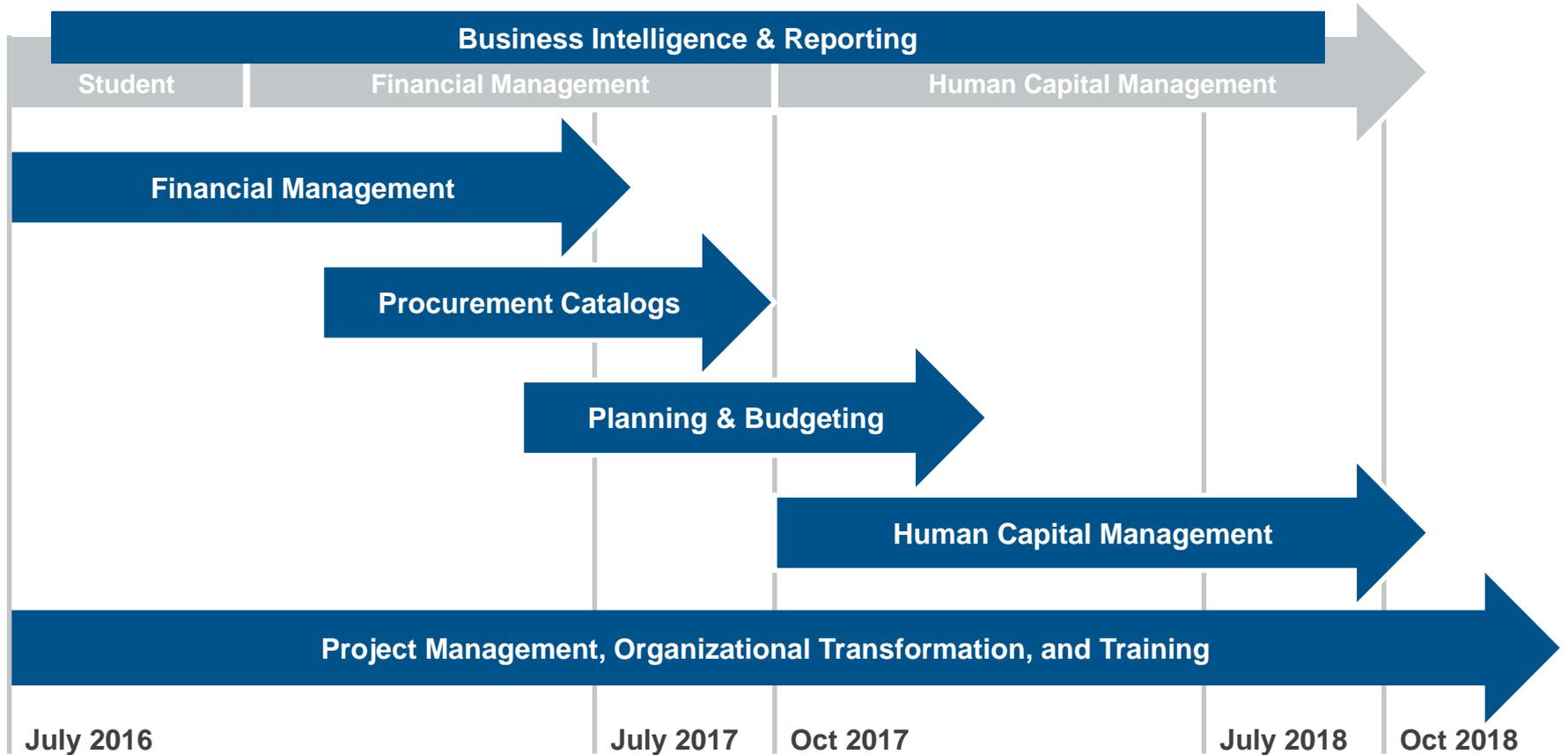


What will our organization look like after we are finished and how will we measure success?

UW CLOUD PROJECT ACCOMPLISHMENTS & LESSONS LEARNED



WyoCloud Implementation Timeline



Tangible and Real Results

Accomplishments at the University of Wyoming within the first 15 months



Designed a New Chart of Accounts

- Evaluated 7,212 accounts and cross-walked them to the new system with a 60% reduction accounts



Went Live with the Following

- WyoCloud Financial Management
- Student Reporting
- Procurement Catalogs
- Financial Business Intelligence
- Planning and Budgeting



Made Key Business Improvements

- Negotiated contracts with three key strategic sourcing vendors (an estimated \$2.7 million in savings in 3 years)
- Developed an all funds, zero-based operating budget
- Redefined the grants process
- Implemented standard fringe benefit rate



Initiated Organizational Improvements

- Reorganized procurement and accounts payable offices
- Implemented a WyoCloud student internship program
- Launched strategic enrollment management plan
- Created executive business analyst role
- Launched training program for financial systems



Improved Existing Processes

- Implemented a new contracts process with electronic signatures
- Completed major redesign of university financial business processes and workflow
- Achieved increased usability and integration of financial data
- Created access to real-time data and reporting

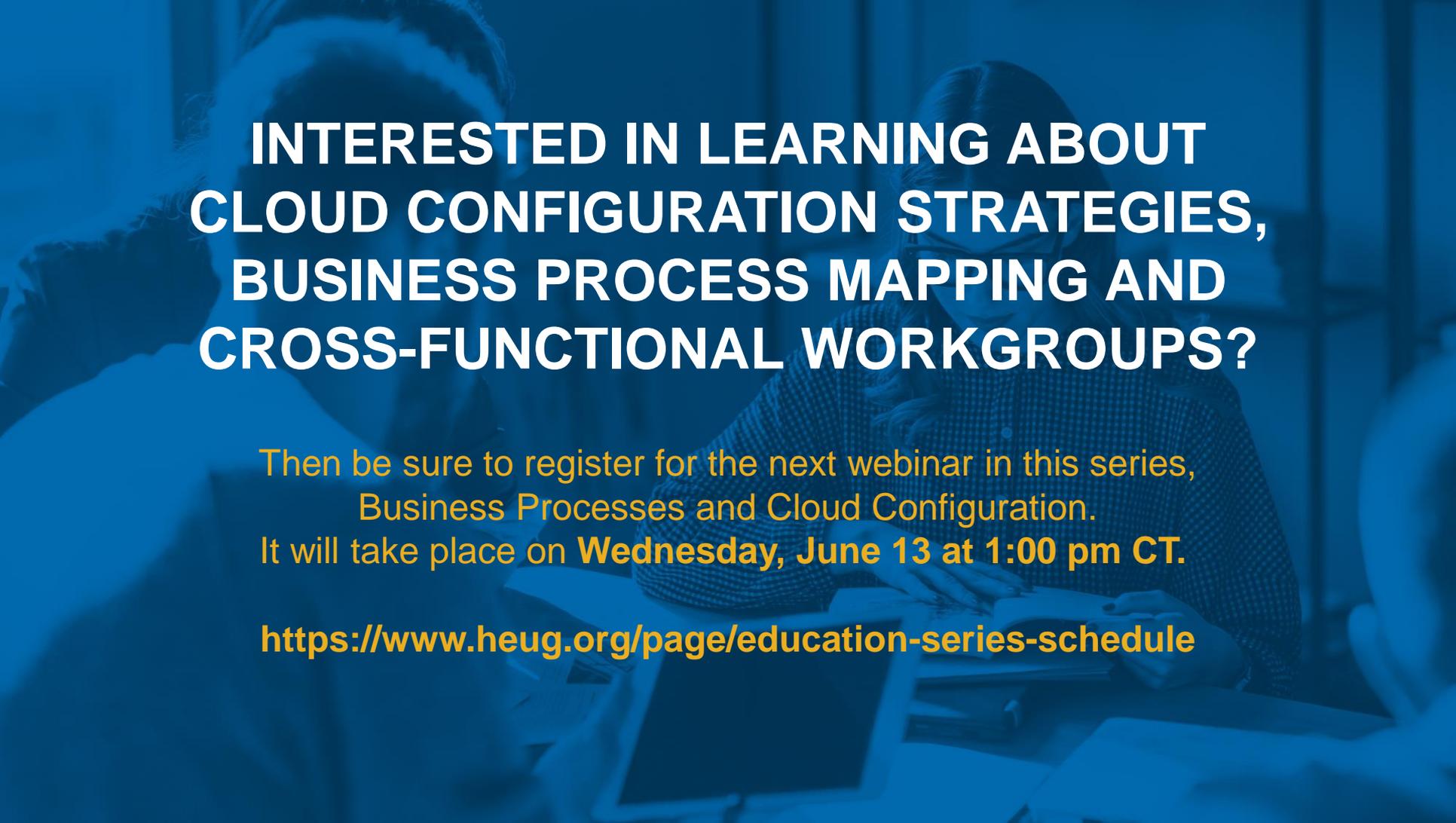
What Did We Learn

- Invest in Change Management
- Create a High Performing Team
 - Welcomes Change and Fosters Collaboration
 - Questions the Status Quo
 - Innovates, Investigates, Experiments, Contributes
- Encourage Individuals to Own Their Roles
- Avoid At All Cost 'Old' Is the 'New'
- Embrace a continuous process improvement mindset

QUESTIONS



 HURON



INTERESTED IN LEARNING ABOUT CLOUD CONFIGURATION STRATEGIES, BUSINESS PROCESS MAPPING AND CROSS-FUNCTIONAL WORKGROUPS?

Then be sure to register for the next webinar in this series,
Business Processes and Cloud Configuration.
It will take place on **Wednesday, June 13 at 1:00 pm CT.**

<https://www.heug.org/page/education-series-schedule>