



Implementation Masters Podcast Series

Episode 2: Managing scope creep for successful implementations

Host: Kathee Fox – Managing Director, Deloitte Consulting LLP

Guest: Carmen Barrier – Director of Human Capital Systems, Truist Bank

Kathee Fox: Hello everyone I'm Kathy Fox. I'm a managing director at our Workday practice and I'm your host for today's session. In today's session, we're going to focus on hearing some insights from an implementation master in the field. I'm joined today by Carmen Barrier, who's held a number of positions at BB&T Bank and is currently the Director of Human Capital Systems for Truist Bank following the merger of BB&T and Suntrust, creating one of the largest regional banks in the U.S. As an implementation master we've asked Carmen to share some insights from her implementation experiences. Carmen, thank you so much for joining us today.

Carmen Barrier: Thank you Kathee.

Kathee Fox: When we first embarked on the project to merge BB&T and Suntrust, we knew that this was going to be a challenge to get done in the time frame that we were given, which

was about six or seven months, and embarked on actually the project prior to the close date. What else did you see as the challenges and how did you work with your team to overcome some of those challenges?

Carmen Barrier: First of all, I would say team. We needed to be one team, yet we were two, BB&T and Suntrust, and really three with the Deloitte team as well. So there was no time to bond really and create that cohesive team atmosphere. We were all in different locations. We were all experts in our own functions and with a project of this magnitude and with this short amount of time we had to implement it. Again, I think the biggest challenge was just that we weren't one team. We had to learn each other and learn each other's experiences and abilities along the way, but in very short order. I think another challenge was just that we were different

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organizations with different structures, different policies, different procedures, and again, to your point, especially starting before legal close, operations had to continue, as you know, business as usual so we each had to abide by our organizational structures policies, procedures, and even when those were, you know, very different in some ways. And I think the other challenge that we faced was we were going to be the first system to convert and we knew that it would be several months before any other systems converted. And because Workday is at the core of almost everything within a company, we had the challenge of being able to convert but making sure that we didn't break or interrupt any downstream systems and operations. So I think, you know, how we work together to overcome them. Ultimately, we acknowledge the obstacles. We hit them head on. We worked together to get through them. We, we didn't put our heads in the sand and pretend they weren't there or that they would go away, and I think constant communication with key -- communication with each other, with the centers of excellence within HR with downstream partners and with leadership.

Kathee Fox: One of the things that that you mentioned Carmen was along the lines of the fact that, you know, we had the BB&T and Suntrust. They were spread out. In addition to that, you're in the process of moving to a new headquarters for the new organization and we added in the Deloitte team also located around the country to that. So we did a lot of work virtually kind of before that was the thing to do on these projects. Any additional tips and tricks that you've got for how we managed to make that work?

Carmen Barrier: Yes, I think working virtually worked well for the team because there was an intense focus on communication. The meetings were unreal. You know, we were double and triple booked most days, sometimes more. But we developed work streams and meeting cadences and really kept to those and kept the lines of communication open. I think we were able to work very efficiently remotely. We just had to keep it top of mind to pick up the phone or send a quick email or send an instant message, you know, to keep everyone in the loop at any given time, even though we weren't all there together.

Kathee Fox: Yeah I know, and I think that was what really showed, I think at the end of the project party where whether we had some people meeting for the first time, a month after the go live happened already.

Carmen Barrier: Absolutely. And you felt like you had known them forever. That's how closely we worked together, even though we had never seen each other in some cases.

Kathee Fox: So you've now been involved in leading various implementations that BB&T over the years, you know, some smaller acquisitions and now this large integration of the Suntrust and BB&T Workday solution into Truist, what would you say was kind of the biggest difference between those other implementations and this

one and how was your approach different?

Carmen Barrier: So at the time of I would say you know the initial implementation, Workday implementation at BB&T had very little human capital self-service and processes. So the

Workday implementation was really a game changer. Pretty much everything needed to be evaluated and decisions based on Workday functionality at the time. And we had no internal resources with previous Workday experience. BB&T was customer number 184 and one of the early adopters within the financial services industry. And so after that initial implementation, we staffed internally to support Workday and so managed subsequent feature or module implementations ourselves largely and this included mergers. So essentially, in a merger situation in the past, we would essentially just merge the acquired company into the existing framework. So it was largely a data conversion effort and then a training effort for the newly acquired teammates versus an implementation of Workday. With the merger of equals though, merging into the existing framework was off the table. So this was much larger than a data conversion, although there was certainly a lot of data to convert, but we knew the expectation was to create better. So that involved comparing modules, configuration, security roles, and processes, as well as consulting with the Deloitte team to define, better, and best for Truist. This, of course, was not the easy way out and quite frankly further complicated an already tight timeline, but it was the right thing to do. And even though Suntrust and BB&T both had strong resources supporting the existing systems, we knew we needed to support a partner to make this happen, and we absolutely would not have been successful without Deloitte.. So I think that that was really the largest difference is just that, again, we didn't, we didn't approach this from, from the perspective of bringing them in to the existing framework but really thinking long and hard and carefully evaluating the framework partnering both heritage organization Suntrust and BB&T along with Deloitte to make the right decisions and to do the right thing for Truist.

Kathee Fox: And I think that was a common theme as we went through, you know, design and as we make decisions as we went through. It was really focused on what was going to be the best outcome for the new organization? And I thought that was a really strong message that came out from your leadership throughout the entire project.

Carmen Barrier: I think so too. And you know honestly think that with the Workday conversion, it has gone a long way in developing and supporting the Truist culture. You know, because we work together and we really took this "best of both" and created this new Workday platform in some ways, HR has really been able to operate within Truist terms, instead of BB&T and Suntrust terms. And so I do think that has really gone a long way in supporting the Truist culture.

Kathee Fox: Yeah. And so, so now you're five, six months past go live for about seven months after you know the close and the new organization. So other than that. What other benefits have you seen from the implementation?

Carmen Barrier: Well, it's kind of odd to hear that timeline, in some ways, it feels like we are well beyond six months. And in another it seems like much less. But clearly, I think, you know, the first benefit that we've seen from the implementation is one single source of truth and HR processes for the Truist population. And just kind of piggybacking on the comment I just made, I think that, again, that has

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gone a long way in developing and supporting the Truist culture. With the volume of reporting needs, and then with COVID-19, and the many changes we have implemented with respect to the pandemic, I cannot imagine the difficulty and the inaccuracies we would have experienced in duplicating the work effort. So also think back to the premise that drove this; you know both heritage organizations have benefited from better. The better processes that were cohesively developed within Workday. I think the final benefit we've been able to see within the, you know, these few months is, is the fact that we've been able to implement the majority of our differed items and I think that just goes to show what a great partnership we had and a great conversion effort we had that we've been able to deliver what I believe was a list of about 150 differed items, we've been able to deliver the majority of those already within this within the six month time frame.

Kathee Fox: Yeah, that's fantastic news, because I know there are a number of things were like, that's just not going to happen by the go live date, right? So we were ruthless and prioritizing what was going to be there for January 1.

Carmen Barrier: Absolutely.

Kathee Fox: You're talking to somebody else who is about to embark on a similar journey. What advice would you give them?

Carmen Barrier: The advice I would give is start early with legal approval, of course. But, you know, start talking, building relationships, sharing configurations, developing understanding behind the approach that each company has taken to date. You know, don't be afraid to ask for help. Whether that is from the merging institution or a great partner like Deloitte. Plan. Make sure you have the right resources and enough resources to make it happen. Contingency plan. This certainly, you know, isn't a fun exercise, but without this type of effort or with this type of effort, a viable contingency plan is key. I think also repeating yourself. And I know that can get know that can get frustrating and can also be time consuming, but there's likely information overload occurring and many things will bear repeating and repeating again just to make sure everyone is clear and everyone understands. And I think most importantly the advice I would give to someone starting out on a similar journey is be patient and have a positive attitude. I know that sounds cliché but it is very true. And with this type of effort it's going to be intense and so being patient and maintaining that positive attitude is going to be necessary to get you through it.

Kathee Fox: No, I think that's absolutely key. I think that goes for more than just implementations - that that's good advice in general. Patience and a positive attitude both goes a long way these days it feels like so.

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Carmen Barrier: I think no time has it ever been more true than now. Yeah.

Kathee Fox: Anything else you would say, you know, thinking about, what made the project successful, how your team worked well together... Anything else you'd want to make sure you, you know, replicated if you ever get the opportunity to do this again?

Carmen Barrier: Well, I have said, I would not want to have the opportunity and but should I be so inclined. You know, I absolutely think it's the people who made this project so successful. Even though there were challenges and we discussed those. It was just truly amazing to see how everyone came together as one team, working towards one common goal to accomplish, you know, what truly seems like the impossible. Everyone worked around the clock because everyone was committed to making this happen and you know we truly did become a family through it all. And Deloitte, this goes hand in hand with the people, the partnership was just amazing. The team came in, rolled up their sleeves and jumped right in along with us. You guys brought knowledge, expertise and leadership that that guided our decisions, kept us on track and ultimately led to our success. The thought partnership or the thought leadership and partnership were just absolutely wonderful and I think you know what really made this so successful was the teamwork and those common goals and making sure everyone was aligned and felt empowered and able to move towards those.

Kathee Fox: I think that's great. And I think that some, you know, I really appreciate you sharing your experiences with us today. The key messages that I took away from this are the relentless prioritization, communication, continued communication, the teamwork that we really pulled together in terms of the common goals that we had from a project perspective. Anything else you want to share?

Carmen Barrier: Again, just, you know, really appreciate the partnership and certainly looking forward to continued partnership with you and with the Deloitte team in the future.

Kathee Fox: I appreciate and Carmen, thank you so much for joining us today and for sharing other tips and techniques on our implementation master podcast series. And listeners: if you're interested in hearing more podcasts, please check out our Implementing Smart web page on deloitte.com and thank you so much for joining us today.



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