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Learning from the journey

Workday implementations in higher education offer different real-world lessons

Changing software platforms can align systems and people so they work in harmony.

Enrolling, studying, and graduating is the traditional path to acquiring knowledge at a university. But it isn't the only one. Getting to know an institution from the inside out is an education in itself—and professionals who work to implement products like Workday financial and HCM management software at colleges and universities come away with lessons about change, culture, and the ways "hard" technology and "soft" human considerations need to work in tandem.

At a high level, the insight that each of these projects underscores is that a technology transformation should be a comprehensive transformation. Changing software platforms can accomplish only so much if an institution doesn't take an equal, parallel, simultaneous approach to evaluating and improving its structure and operations—and to aligning systems and people so they work in harmony.

This is a journey. Think of "online, on time" as critical signposts—but not as destinations. The full measure of effectiveness may be not how great a splash the new software makes, but how quickly people can forget about the tools and look past them to the mission. ⟩
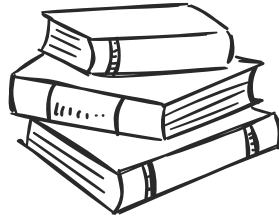
The basics, and beyond

The basics
Key insights every institution can use on the journey

Implementing applications such as Workday at higher education institutions can offer many of the same challenges that might arise in enterprise or government applications— plus a few extras that are different to the university setting.

- *The methodology matters.* You are not installing software. You are undertaking a transformation that will impact the entire university. A solid, demonstrated methodology driven by experienced, capable consultants is recommended.

- *Your consulting ally matters.* Your consulting partner should bring experience with leading practices in higher education, deep software knowledge, tools, and accelerators to increase the speed to success, and leadership that understands your needs and goals.

- *Know your software.* If you have invested in Workday, your consulting ally should assist in making this relationship stronger, helping you understand existing and planned capabilities from Workday.

- *Design broadly for the future, but populate for the present.* The design should be flexible for future needs, but populated and tested for today's needs so it is both capable and adaptable.

- *Test, test, test.* Rigor, structure, and focus during testing can help ensure quality results.

- *Conversion will be the "long pole"—prepare now.* Scrub your legacy master data for inactive accounts and balances. Clean data with integrity will streamline the conversion effort, limit the time needed for reconciliation, and provide a solid foundation for reporting.

Beyond the basics
Three large implementations, three sources of fresh insight

Those basic lessons can be valuable. But many projects expose a new wrinkle or throws a key principle into important relief. Three recent large-scale Deloitte-led Workday implementations at prominent, but diverse, higher education institutions, provide the basis for the next-level lessons we share below.

Ivy League university
This Ivy League icon is prominent not only for its reputation, but also for its complexity. More than 19,000 employees and over 18,000 active users rely on its systems. Working together, this world-famous university, Deloitte, and Workday carried out a migration from a previous technology platform that encompassed HCM, payroll, benefits, finance, P2P, expense, grants implementation, and the business transformation program. One key outcome: a 70 to 93 percent reduction in task time for faculty and staff-related operations such as compensation, job requisition and hiring, job changes, onboarding, and terminations. On the financials side, the job included 115 integrations and 422 reports developed, with 6600 users trained.

Leading private research university
This major research university, known for its music, business, nursing, and other specialty disciplines, had two distinct areas of need—finance and student systems. The "Financials First" project included general ledger, accounts payable, post-award grants, banking, and settlement. Its goals included risk mitigation, cloud migration, accounting and controls consistency, and more streamlined and consistent data handling. Following successful implementation in December 2014, a second project, to implement Workday Student, aimed for 2019 deployment. Its goal is to replace a legacy system that dated to the early 1980s and to centralize admissions, records, and financial aid approaches.

Large U.S. state university system
A large campus is one thing—but a large system, with more than 50,000 employees and 148,000 students across 21 member institutions, is a next-level change management task. For this engagement, the mandate was to replace and integrate HR and payroll systems, standardize processes, reduce administrative overhead, lower operating costs, and reduce risk. Accomplishing that goal would require implementing Workday in a coordinated, "Big Bang" approach across 10 operational areas: core HR, compensation, benefits, payroll, reporting, absence, time tracking, recruiting, talent management, and performance management.

Lessons learned from the journey of other institutions

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Change management is critical.
But at a high level, the insight that each of these jobs underscores is that a technology transformation should be a comprehensive transformation.

A technology transformation affects much more than the technology organization. In higher education, plan on practices, people, technology, and the institution itself all evolving together, in tandem. Otherwise leaders may have to keep adjusting each of those areas to align with the others.

For example, the Ivy League implementation referenced earlier followed a training structure that was multi-layered and comprehensive. This wasn't a "user's manual" for a piece of software—it was a program to help more than 6,000 users hit the ground running with a new way of doing their jobs. Training took various forms, from auditorium and instructor-led sessions to web learning, print guides, and simulations.

In our work with the large state system, a dedicated program of organizational change was built in alongside the architecture, configuration, test, and deployment tasks that most people would associate with a software migration.

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Build objectives around what the platform will accomplish, not what it will be or look like.
In our work with the Ivy League university, the Workday program sponsors agreed upon five key strategic objectives. None of these addressed system architecture, data models, or other technical specs—though all those things remained important. Instead, our objectives defined what it would be like for people at the university to live with the system once it was in place:

- Simplify and standardize processes

- Make it easy to get work done and harder to make mistakes

- Establish an accurate, trusted, and timely reporting environment

- Minimize administrative overhead for faculty and end users

- Lower operating costs and improve effectiveness

Similarly, the project mandate at the large state system went beyond technical specs, and even beyond operational goals, to include high-level goals such as "do no harm" and "keep moving forward."

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There is no such thing as a standard Workday implementation—in part because there is no such thing as a standard institution.
As with many institutes of higher learning, the research university relied on Workday to handle a broad scope of functions. In that case, there was a clear order of priorities, reflected in the "Financials First" implementation plan that had general ledger, accounts payable, post-award grants, banking, and settlement functions take precedence over a separate, later phase. This phase will apply Workday Student to additional needs like academics, student records and registration, curriculum management, and academic advising.

Lessons learned from the journey of other institutions

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Common practices on integrated systems are better than inconsistent practices on disparate systems.

That doesn't feel like much of an insight, until you approach a large university in its "status quo ante"—in which practices and platforms are likely to be a patchwork that reflects decades of decentralized development. It may be easy to accept institutional structures as they are and dive straight into making the new technology serve that reality. It's more complex, but ultimately more rewarding, to think through the functional and organizational possibilities first, and then design an implementation that combines technology with a broader agenda of change management.

This understanding helped shape the guiding principles of the Workday Student implementation at the research university, which embraced five different admissions systems, a core Student Information System, three supplementary records systems, and three separate financial aid systems.

For more information and to contact us, visit
www.deloitte.com/us/higher-ed-technology

How Deloitte can help

Deloitte's Workday practice has accumulated credentials in higher education that speak to the confidence institutions can have in us: We completed one of the first higher education single deployment go-lives of Workday HCM-Payroll and Financials, we are responsible for one of the largest Workday HCM-Payroll Cloud implementations in the sector, and we are the only alliance approved to prime Workday Planning, Learning, and Student.

But these examples of higher education Workday implementations, and of the lessons others can apply from them, are only part of Deloitte's work as the largest Workday implementer in the world. In over nine years as a Global Alliance Partner, our team of more than 1,100 certified consultants has completed more than 280 projects.

Anyone who has enjoyed this inside look at the daily, nuts-and-bolts relationship between a university and its systems comes away appreciating the many variables involved. No two institutions are the same or use software in precisely the same ways. Within a campus or system, different constituencies have different needs and budgets—yet it's worthwhile, in terms of cost and operational efficiency, to promote comprehensive systems instead of patchworks.

Above all, this work teaches that implementing, replacing, or migrating a software system is a journey. It begins before the first entry on a Gantt chart, and continues long after the go-live celebrations. That's why it is important for an institution and its implementation provider to build in the change management, organizational design, human capital, and learning capabilities that are so vital to effective rollouts, as the lessons from these projects show. It can be difficult to tackle a technology platform migration or implementation without built-on, day-one alignment with these "soft" areas. It can be just as difficult to try to coordinate all those vectors of change using an array of different partners. Deloitte's interdisciplinary, global breadth means you don't have to.

Maybe you're considering a Workday implementation. Or ramping one up. Or maybe you're encountering challenges with an implementation already underway or post go-live. Higher education clients rely on us every day to guide implementations from start to finish, as well as assist in more targeted ways at discrete stages. No matter where you are in your Workday journey, we can help.