Workday Project Kickoff
Oct 26, 2017
Agenda

1. Welcome and Opening Remarks
2. Project Benefits and Guiding Principles
3. Collaborative Solutions Overview
4. Project Overview
   • The “Why” – Project Objectives
   • The “What” – Project Scope
   • The “Who” – The Team
   • The “How” – Change & Project Management
5. Project Approach
6. Project Oversight
7. Architect Workshops/Underway
8. Questions
Welcome and Opening Remarks
Introductions
Project Benefits

As a result of implementing the Workday solution for Financial Management (Finance), Human Capital Management (HCM) and Student Systems, the Brandeis community will benefit through the ability to:

- Provide easy and consistent access to information for managing resources
- Modernize business processes and systems to take advantage of emerging technologies
- Ensure the system meets business and compliance requirements
- Minimize administrative overhead for faculty and end users
- Increase effectiveness in business process areas and lower operating costs
- Facilitate rapid adoption to business and system updates
- Improve student, faculty, and employee user experience
Project Guiding Principles

1. Adopt Workday best business practices
2. Follow the Workday LDP (Lifecycle Deployment Program) methodology
3. Drive consistency across HR and all business areas
4. Minimize handoffs
5. Honor the role of the ‘Workday manager’
6. Minimize traffic in Inboxes
7. Just because the system can do something doesn’t mean it should
8. Focus on the core activities not the exceptions: (80/20)
Next Stop: Collaborative Solutions Overview
Over a decade of delivering full-service HR and Financial transformation to Education & Government and Fortune 500 customers

350+ Workday customers

98% Customer Satisfaction

30% more experience per consultant compared to ecosystem average

Workday Experts
75+ Product Leads

Deployed in 125+ countries

Global Experience

Change Management
Workday-certified team
Prosci®-based methodology

Undisputed alternative to the “Big 4”

#26 Workday HCM Customer
#3 Workday Financial Management Customer

Longest-tenured Workday partner (since 2007!)
COLLABORATIVE SOLUTIONS WORKDAY CERTIFICATIONS
898 CERTIFICATIONS ACROSS 282 CERTIFIED CONSULTANTS AS OF SEPT 2017
Project Overview

Why are we doing this?
What are we going to do?
Who are we?
How are we going to do it?
Project Phases

Updates to the timeline, should they occur, will be communicated to the Brandeis community.
<table>
<thead>
<tr>
<th>HCM (Human Capital Management)</th>
<th>Finance</th>
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<tbody>
<tr>
<td>Core HCM</td>
<td>Core Financial Management, Accounting, and Finance</td>
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<td>Compensation Plans</td>
<td>Financial Accounting</td>
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<td>Compensation Processing</td>
<td>Banking &amp; Settlement</td>
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<td>Benefits</td>
<td>Commitment Accounting</td>
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<td>Absence Management</td>
<td>Supplier Accounts</td>
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<td>Time Tracking</td>
<td>Business Assets</td>
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<td>Payroll</td>
<td>Revenue Management</td>
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<td>Core Talent Management</td>
<td>Projects</td>
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<td>Recruiting</td>
<td>Grants</td>
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<td></td>
<td>Endowments</td>
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</tbody>
</table>
Project Overview

Why are we doing this?
What are we going to do?
Who are we?
How are we going to do it?
ERP Project Team Structure - Phase 1, HR and Finance

Executive Sponsor
ERP Executive Committee

ERP Steering Committee
Includes: Attain Program Manager, ITS Project Manager, Collaborative Engagement Manager

Brandeis Project Manager
Jeff Stein

Project Oversight

Project Execution

Attain Executive Sponsor
Greg Baroni, CEO

Collaborative Regional VP
Mike Leardti

Collaborative Portfolio Director
Dan Petrin

Attain Program Manager
Steve Elder
Jason Stringfellow

Collaborative Engagement Manager
Natalie Foster

Attain Change Manager
Reshma Patel-Jackson
Jodi Ekelchik

Collaborative SMEs
WorkDay SMEs

HCM / Payroll

FINANCE

ITS

HCM & Payroll - SMEs
Kelly Santos
Joe Loynd

Benefits & Absence Lead
Kevin Pierson

Comp & Talent Lead
Lori Dougherty

Recruiting Lead
Lori Dougherty
Melinda Cerino

Time Tracking Lead
Joe Loynd
Mary Sharrigan

HCM/Payroll SME Pool
Heidi Lane
Vanessa Paul
Others TBD

Finance - SME
Ken Freda

Endowments Lead
Mike DiPalma

Grants Lead
Cassandre St. Louis
Mike DiPalma

Cust. Act, Banking & Settlements Lead
Courtney Sampson
Mike DiPalma

Finance - SME Pool
Kevin Connolly
Courtney Sampson
Cherie Sadell
Others TBD

Change & Training Lead
Kristin Zawatski

Data Conversion Lead
Richard Trudel
Xiaofeng Ma

Reporting Lead
Ofer Ben-Gai

Integrations Lead
Cathy Jameson
Xiaofeng Ma

Security Lead
So Wai Wong-Chan

Brandeis Testing Leads, Units & ITS Staff TBD (expected to be drawn from above contributors)
Project Overview

- Why are we doing this?
- What are we going to do?
- Who are we?
- How are we going to do it?
Workday Terminology

Workday Community

Tenants

AMU (Alma Mater University) = Workday demo environment

Implementation Tenants

Foundation Tenant
Configuration Tenant (Unit Test and Customer Confirmation sessions)
End-to-End Test (End-to-End and User Acceptance Test)
Parallel Tenant (Parallel Testing)
GOLD/Pre-Production (becomes Production)

Production/Sandbox/Sandbox Preview

Workday Releases – current version WD29

Glossary of Terms - [in Community](#)
Implementation Methodology

Monitor, Update, & Optimize

Project Management & Governance

Onboarding

Plan
Prepare

Architect
Manage

Configure /Prototype

Test

Deploy
Reinforce

Post-Production & Beyond

Inbound To Workday

Project Management & Governance
Tools, Templates & Best Practices
Quality Assurance Reviews
Change Management Approach
## Project Overview - Timeline

<table>
<thead>
<tr>
<th>Stage</th>
<th>Start/End Date</th>
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<tbody>
<tr>
<td>Plan</td>
<td>August 28, 2017 - October 20, 2017</td>
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<tr>
<td>Architect</td>
<td>October 23, 2017 - January 12, 2018</td>
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<tr>
<td>Configure and Prototype</td>
<td>January 15, 2018 - March 23, 2018</td>
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<tr>
<td>Test</td>
<td>March 26, 2018 - June 15, 2018</td>
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<tr>
<td>Parallel</td>
<td>June 18, 2018 - August 24, 2018</td>
</tr>
<tr>
<td>Deploy</td>
<td>August 27, 2018 - Sept. 28, 2018</td>
</tr>
<tr>
<td>Post Deployment</td>
<td>October 1, 2018 - October 26, 2018</td>
</tr>
</tbody>
</table>
A Joint Ownership Approach

**Brandeis**: provide project management oversight, subject matter expertise, test planning and execution

**Attain** provide project management and change management support, including Communication and Training planning

**Collaborative**: provide the functional and technical expertise to design, configure or develop Workday based on **Brandeis** requirements, and leverage Collaborative’s deployment methodology

**Workday**: provide Delivery Assurance to ensure the deployment meets all established guidelines and best practices
## Project Roles and Responsibilities

### Inbound To Workday

- Provides Executive Sponsorship
- Co-manage the Project Plan
- Provides Functional Experts
- Defines Org Structure & Business Processes
- Provides Technical Resources for Integrations
- Data Conversion and Validation Strategy
- Data extracts, mapping & cleansing
- Design/develop client integration
- Execution of E2E, UAT & Parallel testing
- Change Management (Attain)
- End User Training & Documentation

### Workday

- Provides Workday Deployment Methodology
- Workday Community and other resources
- Delivery Assurance
- Customer Success
- Workday Training
- Tenant Maintenance
- System Maintenance
- Quarterly Updates

### Collaborative

- Provides Project Management Support
- Co-manage the Project Plan
- Delivers Deployment Methodology
- Provides Templates/Tools and Best Practices
- Project Team Training
- Setup & Configuration
- Configures and unit tests
- Data conversion & supports data mapping activities
- Supports the design & build of custom integrations
- Develops contracted reports
- Supports testing cycles
- Tenant Management

### Brandeis/Attain

- Provides Executive Sponsorship
- Co-manage the Project Plan (Attain)
- Provides Functional Experts
- Defines Org Structure & Business Processes
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- Data Conversion and Validation Strategy
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- Change Management (Attain)
- End User Training & Documentation
Next Stop:
Change Management
Communications
Training
What we are hearing....

1. **Making decisions is hard!**
   - Why?

2. **At any juncture, you might make a mistake!**
   - So?

3. **Then all is lost!!**
   - When did you decide that?
Change Approach

Phase 1: Preparing for Change
- Define your change management strategy
- Prepare your change management team
- Develop your sponsorship model

Phase 2: Managing Change
- Develop change management plans
- Take action and implement plans

Phase 3: Reinforcing Change
- Collect and analyze feedback
- Diagnose gaps and manage resistance
- Implement corrective actions and celebrate successes

Current State | Transition State | Future State

Inbound To Workday
## Workday Project / Change Management

| Change Management | • Strategy and Plan  
|                   | • Deliverables  
| Communications    | • Strategy and Plan  
|                   | • Deliverables, e.g., Workday website, FAQs, Project Update  
| User Training     | • Strategy and Plan  
|                   | • Deliverables, e.g., job aides  

Project Training for Project Team

- Set up employee, vendors, customers, configure and maintain

End User Training for All

- E.g., Access your pay stub, enter time, login
Workday at Brandeis

Enterprise Resource Planning (ERP)

Enterprise resource planning (ERP) is a business process management software that will allow Brandeis University to use a system of integrated applications to manage the business and automate many back-office functions related to technology, services and human resources. This will enable the integration of systems for student administration, human resource management, financial management and business analytics environments that are currently supported by separate and sometimes incompatible information packages at Brandeis University.

Why Workday?

After a year-long ambitious and inclusive review process, Brandeis has determined that Workday, a modern, integrated, web-based software designed to standardize human resources and payroll processes, is the best system to meet the University’s current and future operating requirements. By choosing Workday, the University will receive numerous benefits not available with traditional, on-premise software applications:

- Improve communications, collaboration and cooperation across campus
- Increase data integrity, validity and reliability and information flow
Break – 5 Minutes
Next Stop: Project Administration
Confidential Data – Secured System Access

- Used to exchange Confidential Data
- Data Conversion
- Issue Details
- Screen Prints
- Exports/Reports
- Integrations
Consider ALL Data Confidential
   When in doubt – ASK!

Data Protection Requirements
   Do not send emails, spreadsheets, etc. with sensitive information
   Lock your computer/workstation when you step away (Ctrl+Alt+Delete)
   Always use SFTP or secured shared drive for exchanging data
   Do not download data to laptops
   Delete data when task is complete and data no longer needed

Passwords
   Stored in a Secure Manner
   User Id/Password Sharing is Not Permitted
   Generic User Id/Passwords only used when Authorized
   Use Complex Passwords (upper/lower case, numbers, special characters, minimum length)
   Access granted only with authorization from Project Managers

Data Protection is Everyone’s Responsibility!!!!
   Report any Data Protection/Security Concerns to Project Managers Immediately
   CS Engagement Manager will report any data breaches to Workday
SharePoint

- Secured project collaboration and documentation tool
- Version control functionality on files
- Issue and report tracking
- Team Contact List
- Team Vacation Calendar
- Links/Tenant Management
- Do NOT store Confidential data here!!
## What’s In SharePoint?

<table>
<thead>
<tr>
<th></th>
<th>Definition</th>
<th>Responsibility</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risk</strong></td>
<td>An issue that may occur that impacts the project</td>
<td>PMO to update and maintain</td>
<td>Identify, Analyze, Risk Response, Monitor, Close</td>
</tr>
<tr>
<td><strong>Issue</strong></td>
<td>An event that has occurred that impacts progress on the project</td>
<td>PMO to update and maintain (Initial), Transition to Leads to enter and maintain</td>
<td>Create, Resolve, CR, Close</td>
</tr>
<tr>
<td><strong>Action Item</strong></td>
<td>A task to be performed on the project (&lt;8h) outside of the Work plan</td>
<td>PMO to update and maintain (Initial), Transition to Leads to enter and maintain</td>
<td>Create, Perform, Close</td>
</tr>
<tr>
<td><strong>Project Plan</strong></td>
<td>Tool to track progress during the project life cycle</td>
<td>PMO to maintain</td>
<td>PMO to update weekly</td>
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</tbody>
</table>

PMO = Project Management Office
Project Meetings

**Working Sessions**
(e.g., Workstream, Function, Design)

**Project**
(e.g., Integrations, Lead Status, Delivery Assurance)

**Governance**
(e.g., Steering Committee, PMO)
# Scope Control

## What do I do if I see an issue/risk or something missing?

<table>
<thead>
<tr>
<th>All Staff</th>
<th>• Notify the core project team (leads, PMO, CS counterpart, etc.)</th>
</tr>
</thead>
</table>
| **Project Leads/Core Project Team** | • Notify the Project Management Team of the potential change in scope.  
• This is an accelerated project, so notifications are time sensitive  
• You may be asked to assist in documenting specifications and business case.  
• Do not proceed with the work associated with the adjusted scope until approved by the project management team. |
| **PM/PMO** | • Assess feasibility and estimate time, cost and impact.  
• Present change order to PMO. Without the approval of the PMO, the feature/scope will not be added to the Scope for deployment.  
• Execute the change order in compliance with the terms of the Change Order Process |
Next Stop:
Architect workshops
Phase: Architect - Objectives

• Engage Brandeis SMEs in a review of the Workday system features, per scope, and the customer provided data.

• Discuss and derive application configuration decisions and identify requirements, dependencies or gaps.

• Present business processes and review Critical BPs. Identify change management impacts associated with transition to Optimized processes.

• Review Integrations scope and inputs.

• Review data gathering methodology and conversion tools and prepare Brandeis in developing data conversion and validation strategy.
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<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
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<td>Oct 23</td>
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<td>26</td>
<td>27</td>
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<td>HCM AM/PM</td>
<td>HCM AM/PM</td>
<td>FIN AM/PM</td>
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<td>FIN AM/PM</td>
<td>FIN AM/PM</td>
<td>Project Kick Off</td>
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<td>Supplier Accts</td>
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<td>Business Assets</td>
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<td>Endowments</td>
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<td>Banking</td>
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<td>Nov 6</td>
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<td>Benefits</td>
<td>Absence AM/PM</td>
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<td>Time Tracking</td>
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<td>Adv Comp/Talent</td>
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<td>13</td>
<td>Data Conversion</td>
<td>Recruiting</td>
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What Happens After Architect Workshops?

• Weekly work stream meetings to discuss open issues and assign to SMEs for resolution - working.
• Customer delivers final configuration and worker data to Collaborative in preparation for the Configuration Tenant build by 12/06/17.
• Collaborative Configures Configuration Tenant for Customer Confirmation Sessions by 12/20/17.
• Reconvene for Customer Confirmation of Configuration Tenant starting 01/16/18.
• SMEs review Issues list on an on-going basis and maintain issues (status, resolution, target date to resolution, etc.).
Questions

BRANDEIS

INBOUND TO WORKDAY