



HAVERFORD
COLLEGE

Haverford College Workday Implementation

Design Phase Kickoff

October 5, 2016



Today's Objectives

- Provide a general awareness of project scope, structure, and deliverables
- Introduction to Core Project Team
- Overview of readiness activities
- Review next steps

Project Overview

Project Goal

- Implement a new, highly usable and effective system to support all of Haverford's HR, Payroll, and Finance needs.

What is Workday?

- **Workday is a Software-as-a-Service (SaaS) HR/Payroll/Finance application**
 - Hosted by Workday
 - Accessed via the web
 - Configurable, non-customizable software
 - Best practices for Higher Ed incorporated
 - Works on a 2x per year release strategy
 - New releases available in production in March and September
- **Will replace current HR (ADMIN), Payroll (ADP), and Finance (Kuali) systems**

Workday Implementation Project Scope

HCM

- Human Resources
- Compensation
- Benefits
- Time Tracking
- Absence
- Payroll
- Recruiting

Financials

- Financial Accounting/
Reporting
- Customer Accounts/
Contracts
- Supplier Accounts
- Banking & Settlements
- Procurement
- Endowments
- Expenses & Business
Assets
- Budgets

Project Objectives – IITS

- Provide a user-friendly system that helps the community accomplish their jobs more easily and effectively.
- Provide flexible reporting tools that better meet college and individual reporting needs.
- Minimize manual processes and manual integrations so staff can maximize their time devoted to value added activities.
- Place Haverford within rich communities of practice, to ensure good processes and procedures and an available, qualified talent pool to recruit from

Project Objectives – Human Resources

- What is HCM ?

Human Capital Management

- What does this mean for Haverford?

This allows us to provide unified streamline service:

HR, payroll, benefits, absence management, recruiting & onboarding – *these all communicate with one another now.*

Project Objectives – Human Resources

Employee Self Service

- Hourly employees enter their time online or via mobile
- Request leave (sick, vacation, etc.)
- Review paystub including leave balances
- W-2 taxes
- Benefits review and enrollment
- Make changes to your profile – updates, address, etc.

Project Objectives – Human Resources

Management Service

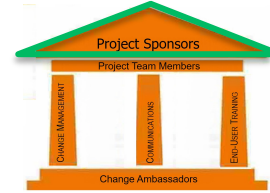
- Approve hourly employees time online or via mobiles
- Review, approve, decline staff's request leave (sick, vacation, etc.)
- Review salaries, promotions, etc.
- Initiate, review, approve position requisitions
- Request recruitment process, review applicants, hire candidates

Project Objectives - Finance

- Flexible ad hoc reporting, which enables us to replace current “shadow” systems
- Reporting to permit real-time financial review by departments, functional areas, and Senior Staff
- Reporting to provide timely and accurate data for informed decision making
- Integrated budget tools, to allow more timely accurate forecasts for planning
- Business processes to support best practices workflows

Project Structure, Methodology, and Timeline

Project Leadership



Mitch Wein
Executive Sponsor



Megan Fitch
Executive Sponsor



Spencer Golden
Project Director

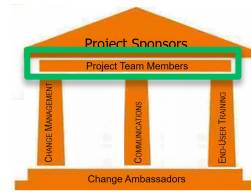


Anthony Machamer
Project Manager

Key Success Factors:

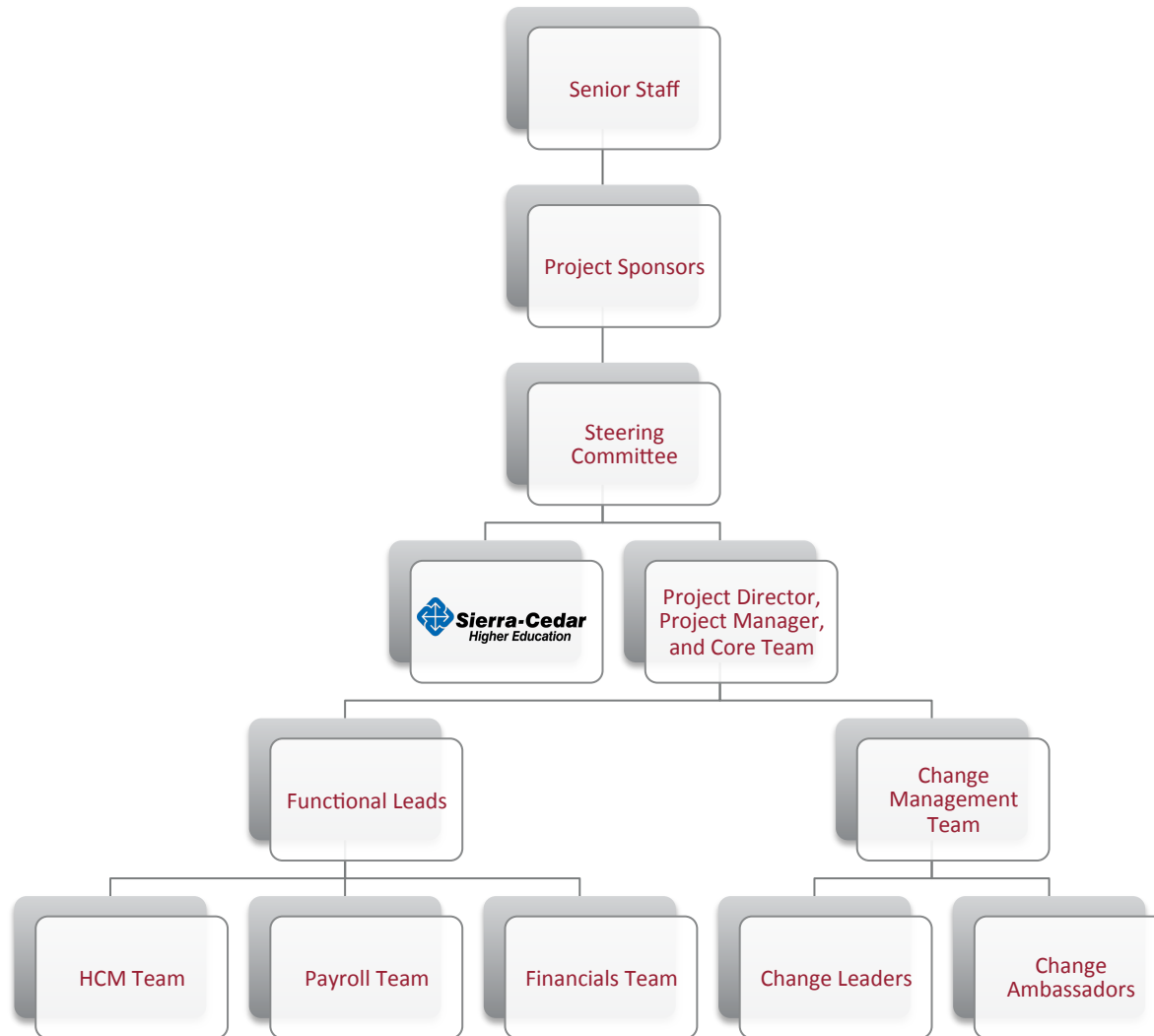
- Lead the project through active and visible participation
- Resolve issues and make decisions regarding schedule, scope and resources
- Build awareness of the need for change
- Clearly define the vision and strategy
- Reinforce the change and celebrate successes

Core Project Team

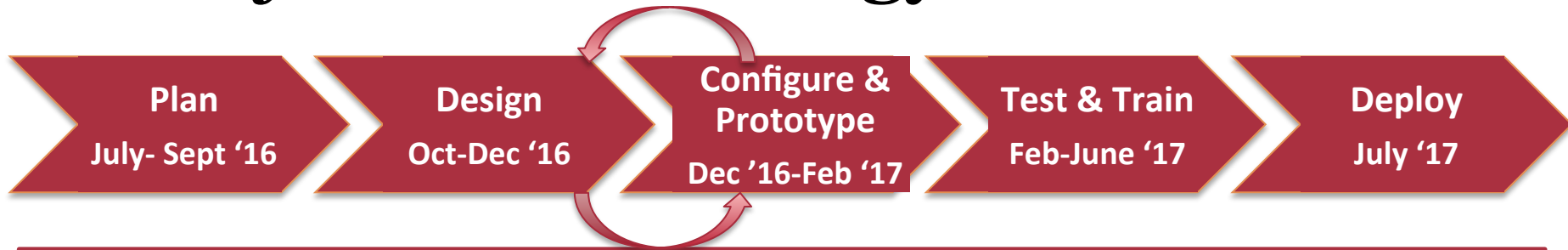


Megan Fitch	Project Sponsor
Spencer Golden	Project Director
Anthony Machamer	Project Manager
Muriel Brisbon	Human Capital Management Lead
Deborah Fullam	Financials Lead
Karen Pedano	Financials Lead

Project Structure



Project Methodology & Timeline



- | | | | | |
|--|--|---|--|---|
| <ul style="list-style-type: none"> ▪ Team Assembly ▪ Charter ▪ High-Level Plan ▪ Change Ambassador Kickoff ▪ Team Training Begins | <ul style="list-style-type: none"> ▪ Initial Prototype ▪ Design Sessions ▪ Integrations Discovery | <ul style="list-style-type: none"> ▪ Configuration Prototype ▪ Unit Test, Validate Configuration ▪ Build Integrations & Reports ▪ Final Configuration Prototype ▪ Training Needs Identified ▪ Create Test Cases & Scenarios | <ul style="list-style-type: none"> ▪ System Test ▪ User Acceptance Test ▪ End-User Training Plans Finalized ▪ Training Materials Developed | <ul style="list-style-type: none"> ▪ Go-Live Checklist ▪ Production Readiness Review ▪ Go-Live ▪ Post Production Support ▪ Post Project Review |
|--|--|---|--|---|

Organizational Readiness

Change Management

- Manages the “people side” of change
- Uses a structured change management approach (ADKAR)
- Strives to understand and communicate the impact of change on employees
- Develops plans to help move the organization forward:
 - Communication Plan
 - Training Plan
 - Sponsor Roadmaps

Change Ambassadors



- The “foundation” of change management for the Workday Project
- Formal network of individuals who influence positive change
- Representatives from impacted departments and user groups
- A two-way communication channel between department employees and the Project Team

Change Ambassadors

Marta Bartholomew	Provost's Office
Lisa Griffin	Provost's Office
Marie Bistline	Business Office
Bryan Savage	Facilities
Joe Hudgins	Housekeeping
Pat Callaghan	Dining
Kerry Lynch	Institutional Advancement
Susan McCabe	Athletics
Wendy Smith	Athletics
John Castrege	Security
Cheryl Mathes	Student Services
Joan Wankmiller	President's Office
Dawn Heckert	Library

Training

- **Project Team Training**
 - Formal Workday Training underway
 - Collaboration with Sierra-Cedar consultants ongoing
 - Knowledge Transfer “checkpoints” administered throughout the project
- **End-User Training**
 - Training needs assessments and audience analyses are finalized in the Configure and Prototype stage
 - A Training Plan will be developed to deliver “just in time” training to end users
 - “Just in time” training provides the best opportunity to immediately apply the training to actual job functions

Wrap-up

Next Steps

Project Team

- Complete Project Team Training
- Complete design sessions on first system prototype (P1)
- Data Validation of initial Tenant
- Unit Testing of Configuration
- Provide input to solution

Change Management

- Evolve Project Website
- October Change Ambassador meeting
- Project Update Direct Email to Haverford Faculty and Staff
- Present at Haverford Staff Meeting
- Present at Haverford Faculty Meeting

Contact Us

Workday Project Website:

- *www.haverford.edu/work*

Dedicated Email Address:

- *hc-workday@haverford.edu*