



JOURNEY TO THE CLOUD, YOU CAN BENEFIT FROM WHAT WE HAVE LEARNED

SESSION 5517
OCTOBER 22, 2019

PRESENTER

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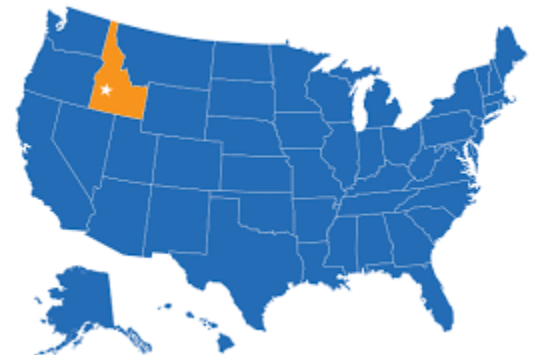
Jo Ellen joined Boise State on PeopleSoft implementation weekend in 1998. She has seen many PS upgrades and led the 2016 implementation of Oracle's Cloud ERP product. She is now involved in the 2020 Oracle Cloud HCM implementation.

Jo Ellen oversees University business functions including Student Financials Services. She created the Office of Continuous Improvement (OCI) which focuses on business process and change management associated with the Oracle Cloud applications.

Jo Ellen is an Executive HEUG board member and is currently Vice President of Administration.



BOISE STATE UNIVERSITY



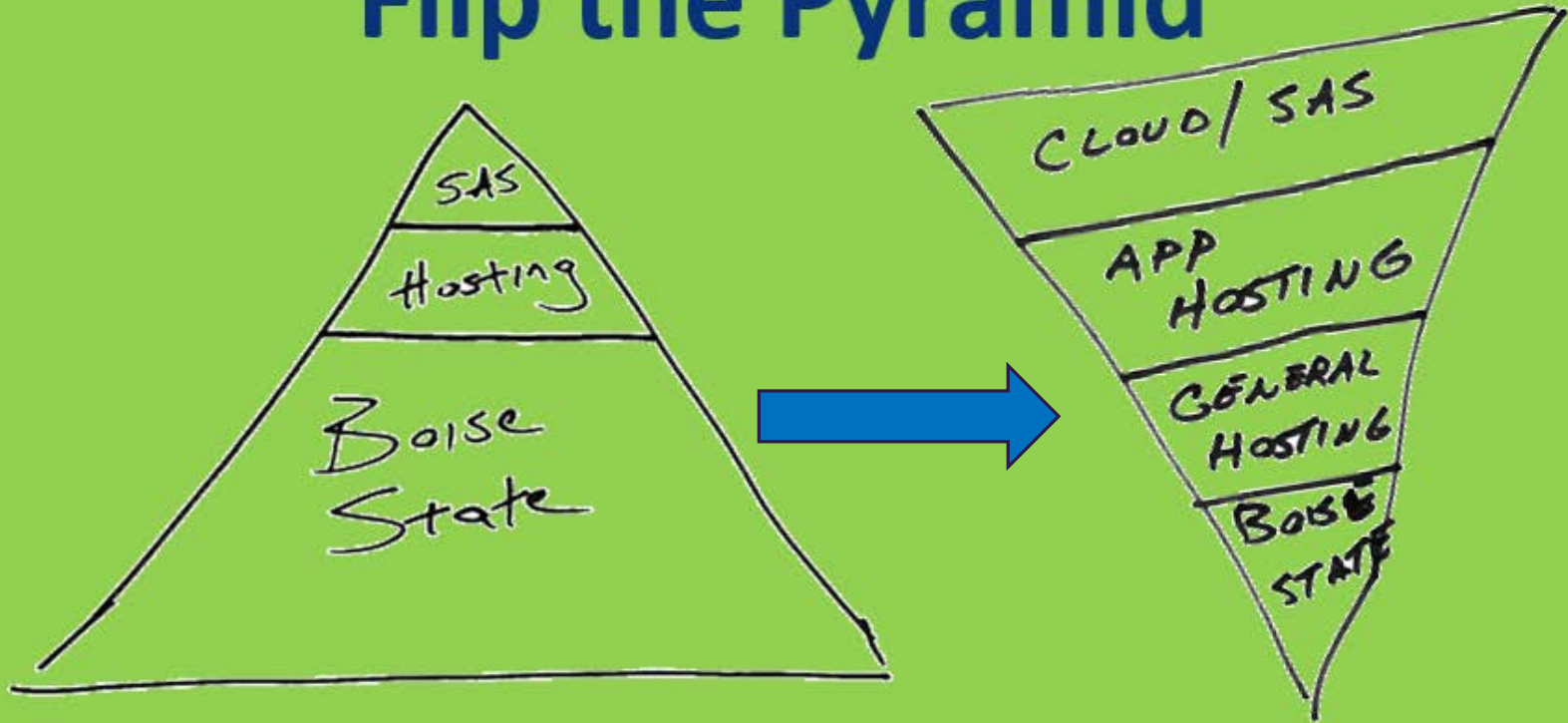
EMA ALLIANCE 22-23 OCTOBER 2019

QUICK FACTS — BOISE STATE UNIVERSITY

- 25,500 Students
- 3,800 Faculty & Staff
- 180+ Degree Programs
- \$47 Million Sponsored Expense
- Doctoral Research Institution (R2)



Flip the Pyramid



**BOISE STATE UNIVERSITY &
ORACLE**

- PS 9.2 CS
- ERP Cloud PS
- HCM Cloud – February 2020

2016 ERP PROJECT

- Fixed Assets
- General Ledger, included COA conversion
- Expenses/Accounts Payables
- Purchasing
- Accounts Receivable
- Cash Management
- Grants
- Project Costing
- Project Billing
- Project Contracts
- Oracle Transactional Business Intelligence

*Kicked off April 2015, Go
Live July 1, 2016
(15 Months)*

NEW

2020 HCM PROJECT

- Payroll
- Time and Labor
- Benefits
- Absence Management
- Employee Self-Service
- Manager Self-Service
- Compensation
- Data Warehouse Reporting

NEW

*Kicked off October 2018,
Go Live planned March
2020
(18 Months)*

HEUG ERP/HCM CLOUD ADVISORY GROUP



***Working with 20+ other schools monthly,
sharing tips/tricks and solutions.***

EMEA ALLIANCE 22-23 OCTOBER 2019

OVERVIEW

1

Return on Investment:
Cloud vs. On
Premise

2

**Planning for
Cloud:**
Implementation
Strategies

3

Implementation:
High Level Tips and
Tricks from Early
Adopters

4

**Post
Implementation:**
How does your
world change?
What is needed for
success?

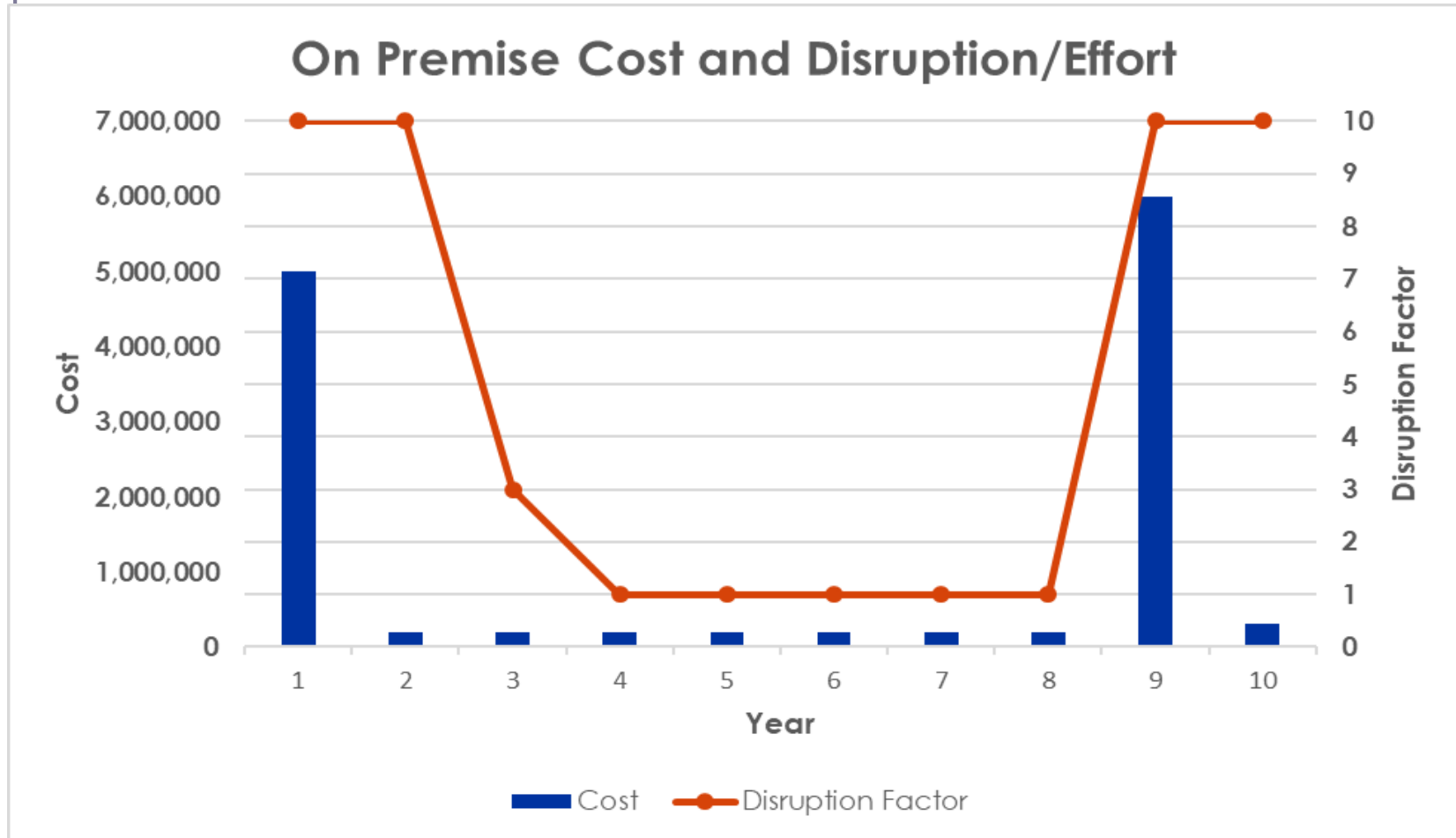
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The most important
difference isn't cost!

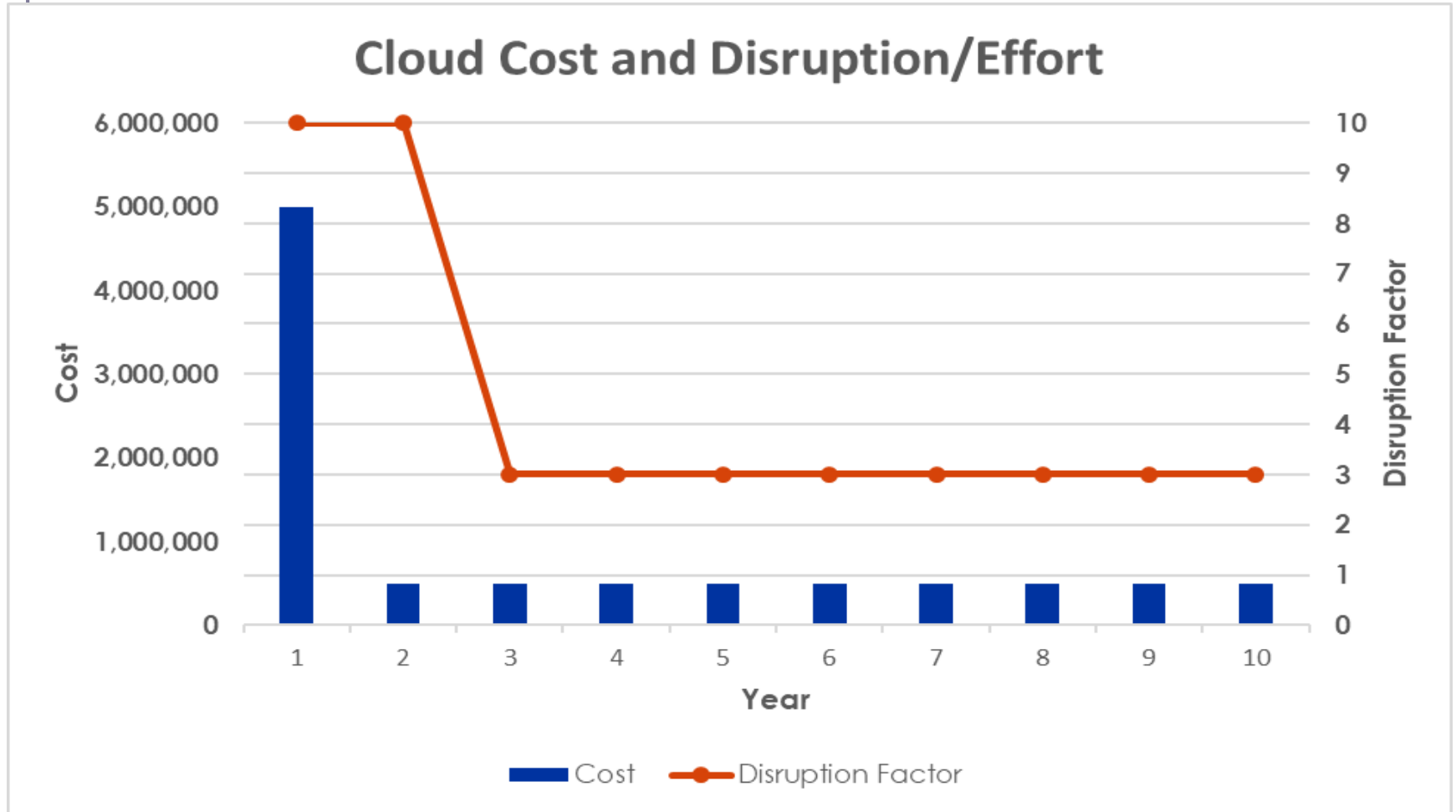
**RETURN ON INVESTMENT
CLOUD VS. ON PREMISE**

Philosophical difference

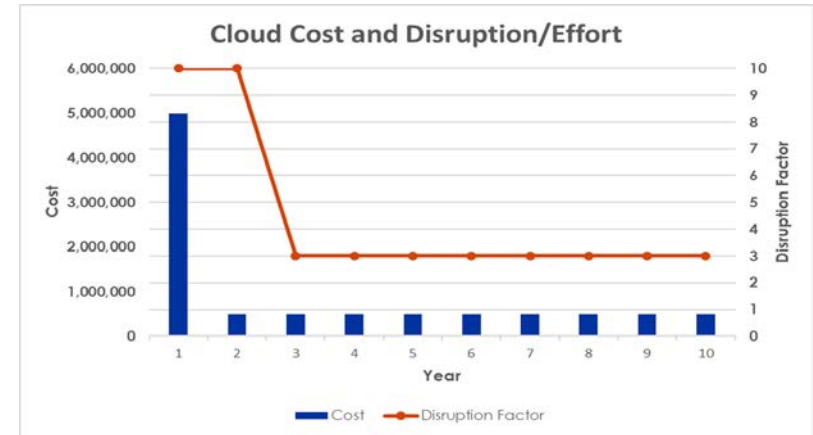
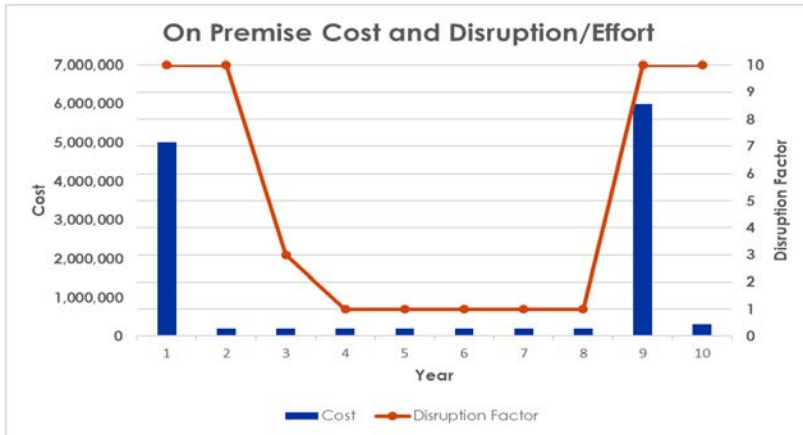
ROI – ON PREMISE



ROI – CLOUD



ROI – COMPARED



How long
can we make this platform last?



How fast can we adopt
functionality; get value? “Project”
never ends, it becomes your
operation.

HANG ON TO OLD METHODS

CONTINUOUS IMPROVEMENT

BOISE STATE CLOUD EXPERIENCE

- Three finance upgrades - NO ISSUES
- Quarterly releases began 2019 – NO ISSUES
- OIT primary involvement is testing integrations
- PS developers redeployed to mobile and reporting
- Shift of effort to functional change management and business process improvement
- Reduced cost of ownership

BOISE STATE EXPERIENCE

- Highest value potential opportunity is efficiency throughout the organization
- Process improvements = Staff resource redirection



PLANNING FOR CLOUD

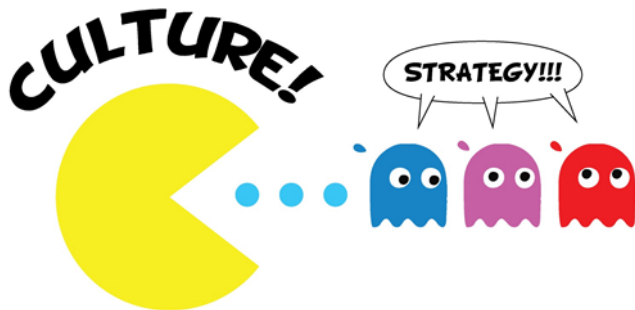
Implementation Strategies
Pace of Change
Contracting

IMPLEMENTATION STRATEGIES – BEST PRACTICE?



Sequencing?

- All at once
- One right after another
- One/Stabilize/Next

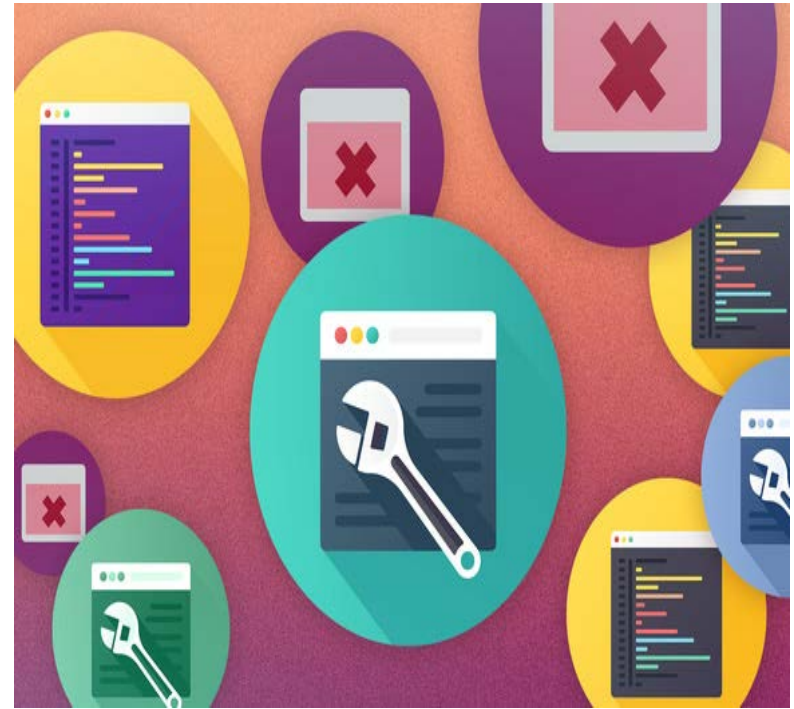


In-House or Outsource?

- Change management
- Campus engagement

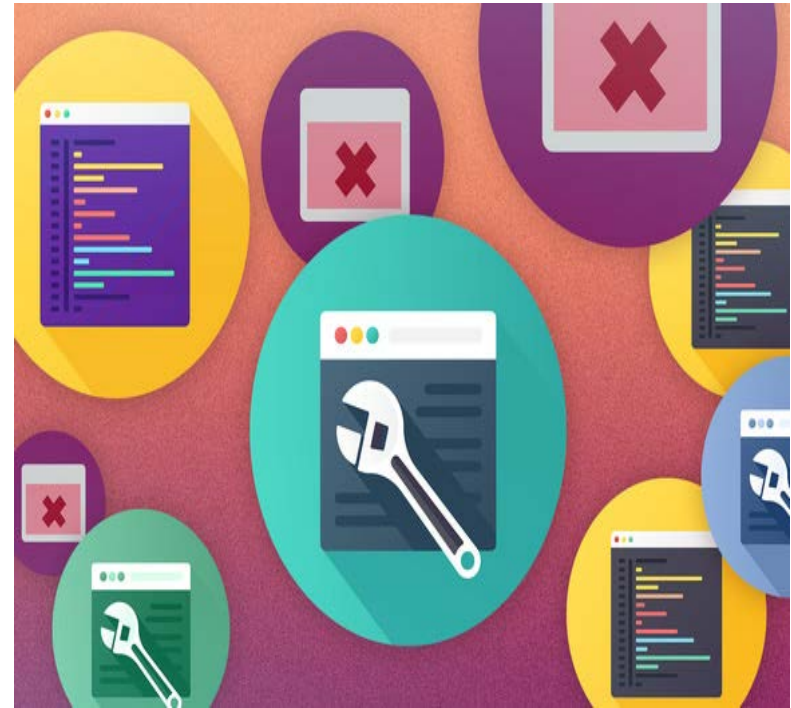
PACE OF CHANGE

- Quarterly fixes to test first Friday of the month
- Quarterly fixes to production third Friday of the month
- **READY OR NOT!**



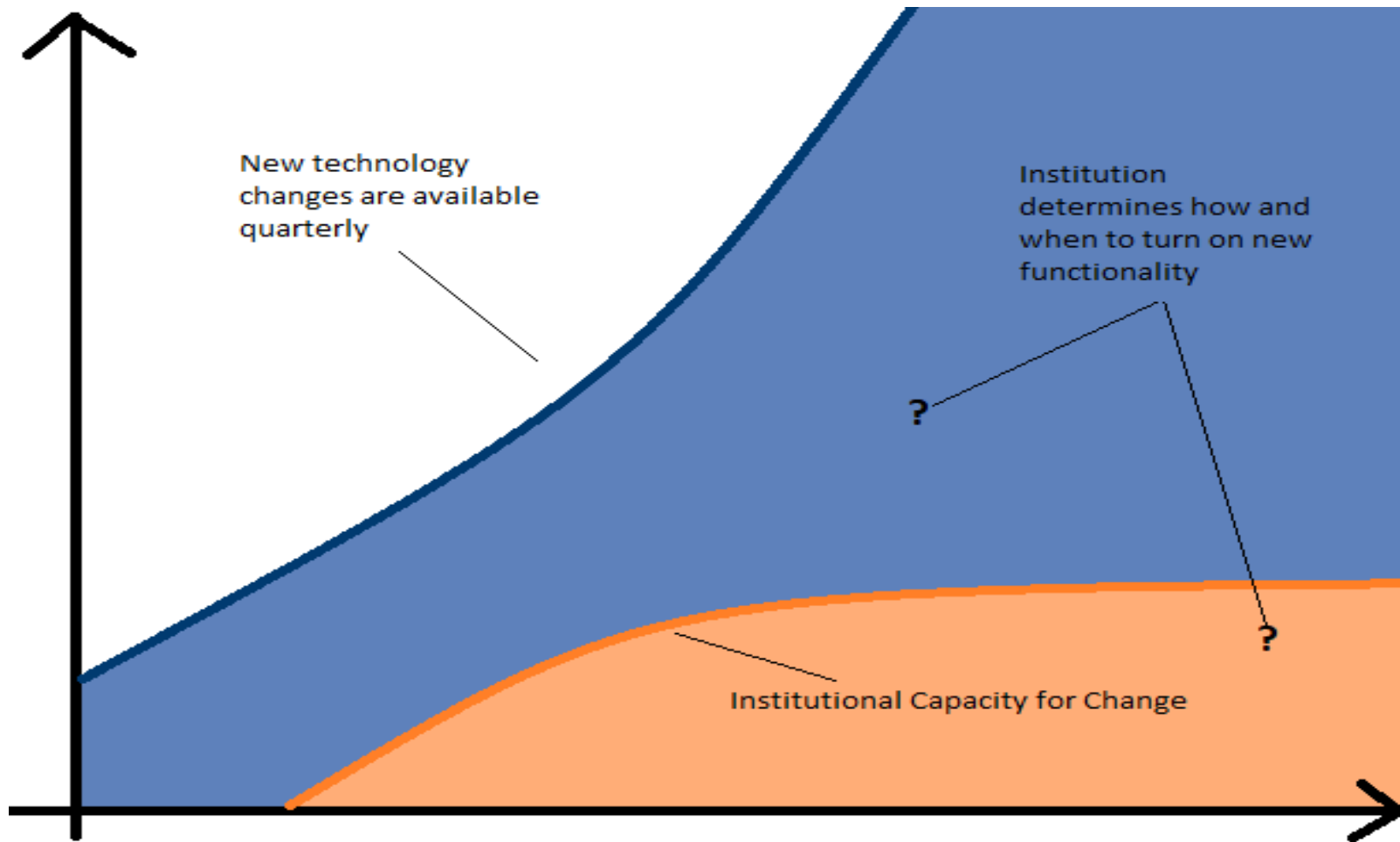
PACE OF CHANGE - BOISE STATE PROCESS

- End to end Test on day one to identify all changes in system



- Remaining nine days to resolve issues, update training materials and communicate to campus any changes they can expect in business process.
- Leveraging Selenium for automated test scenarios

PACE OF CHANGE



PACE OF CHANGE —

BOISE STATE PROCESS

- Review all functionality that is “turned off”
- Organize and present options to functional areas
- Prioritize and plan projects to implement on a quarterly basis
- Working to add campus to the discussion

CONTRACTING

Choosing an Implementer –

- Experienced
- Training - just in time, from implementer or vendor
- Adapt to changing software, including new functionality
- Ensure role definitions are clear
- Request variable AND fixed fee bid, carefully consider your options
- Question implementation under 12 months. Consider your own institutional bandwidth

CONTRACTING

Why Oracle for Boise State?

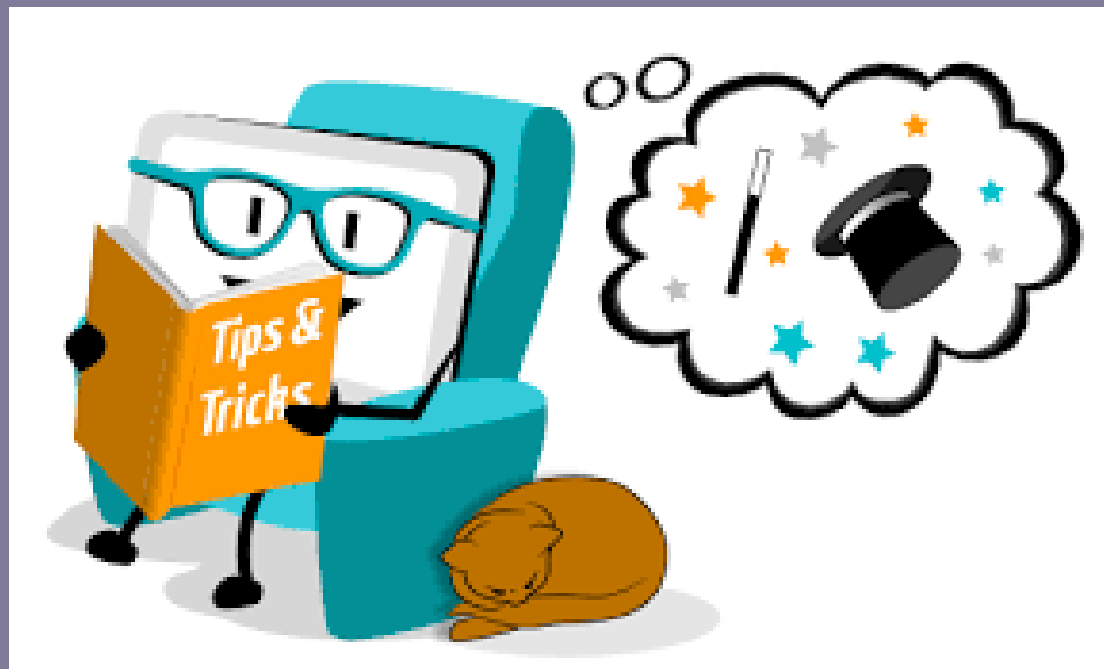
- Organizational commitment to the cloud, significant resource allocation
- Demonstrated commitment to our industry
- Global experience in cyber security
- Product breadth and depth
- Knowledge of where we had been (PS) aided in transition
- Price compared with value
- Long-term experience with organization created trust
- Able to fold under umbrella contract, no contracting issues arose

We are pleased with our experience.

CONTRACTING

Oracle –

- If training to be provided by Oracle, plan out costs, don't be surprised
- We were allowed to “shelve” PS modules and use them until we converted but only pay for one product at a time. Had to disable the legacy system once live
- ERP Licensing was essentially the same as our PS maintenance. This no longer available now, but value should still be there.



IMPLEMENTATION: HIGH LEVEL TIPS AND TRICKS FROM EARLY ADOPTERS

It's magic! No, just experience.
And what can you do now to get ready?

KEY TO SUCCESS – NEW UNIT

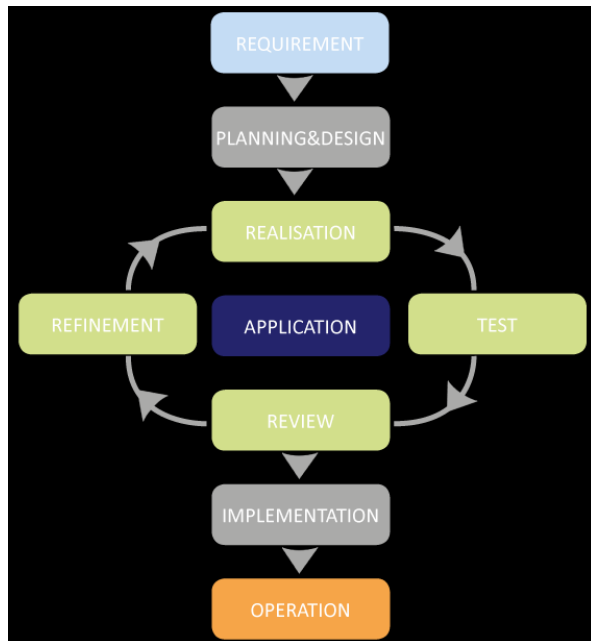
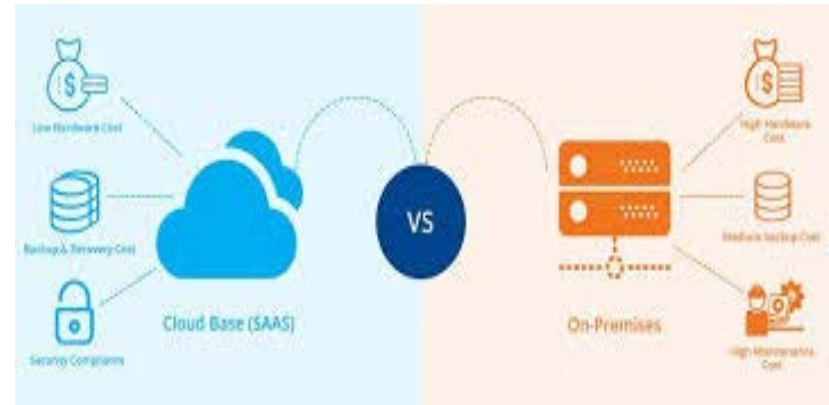
OFFICE OF CONTINUOUS IMPROVEMENT

- Handles change management, campus engagement and process improvement
- Functional central unit
- Most issues are policy, process, people and not related to the technology
- Used existing positions initially, has grown



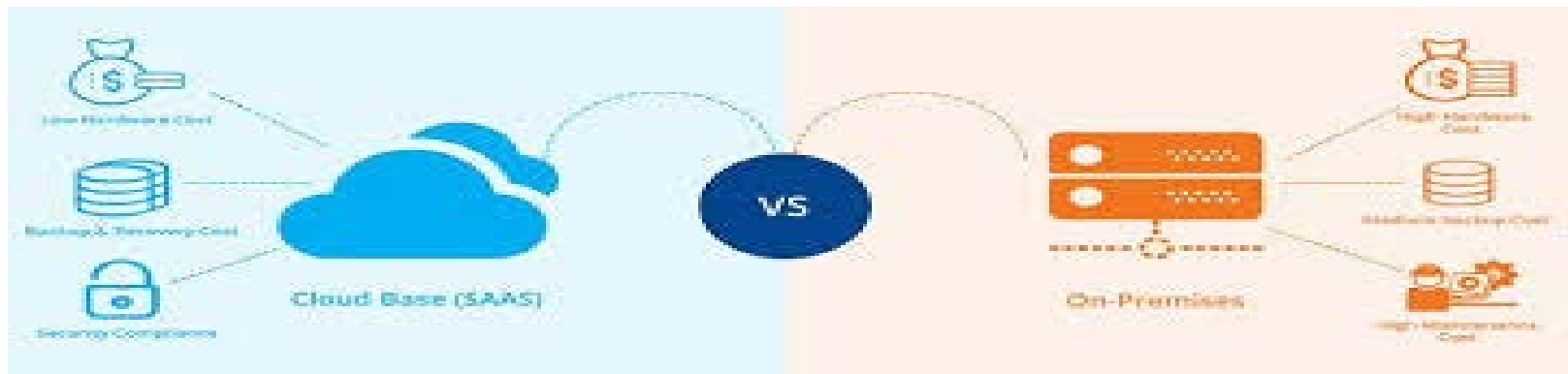
WHAT IS THE SAME?

**Both need structured
agile project
methodology**



WHAT IS DIFFERENT?

- **Focus on Fit Gap and Customization**
- **Control your environments**
- **Change management is training and one-time**



- **Focus on Business Process**
- **Software changes during Implementation**
- **Change Management is an Essential and Ongoing activity**

WHY NOT FIT-GAP IN CLOUD?

Assumes:

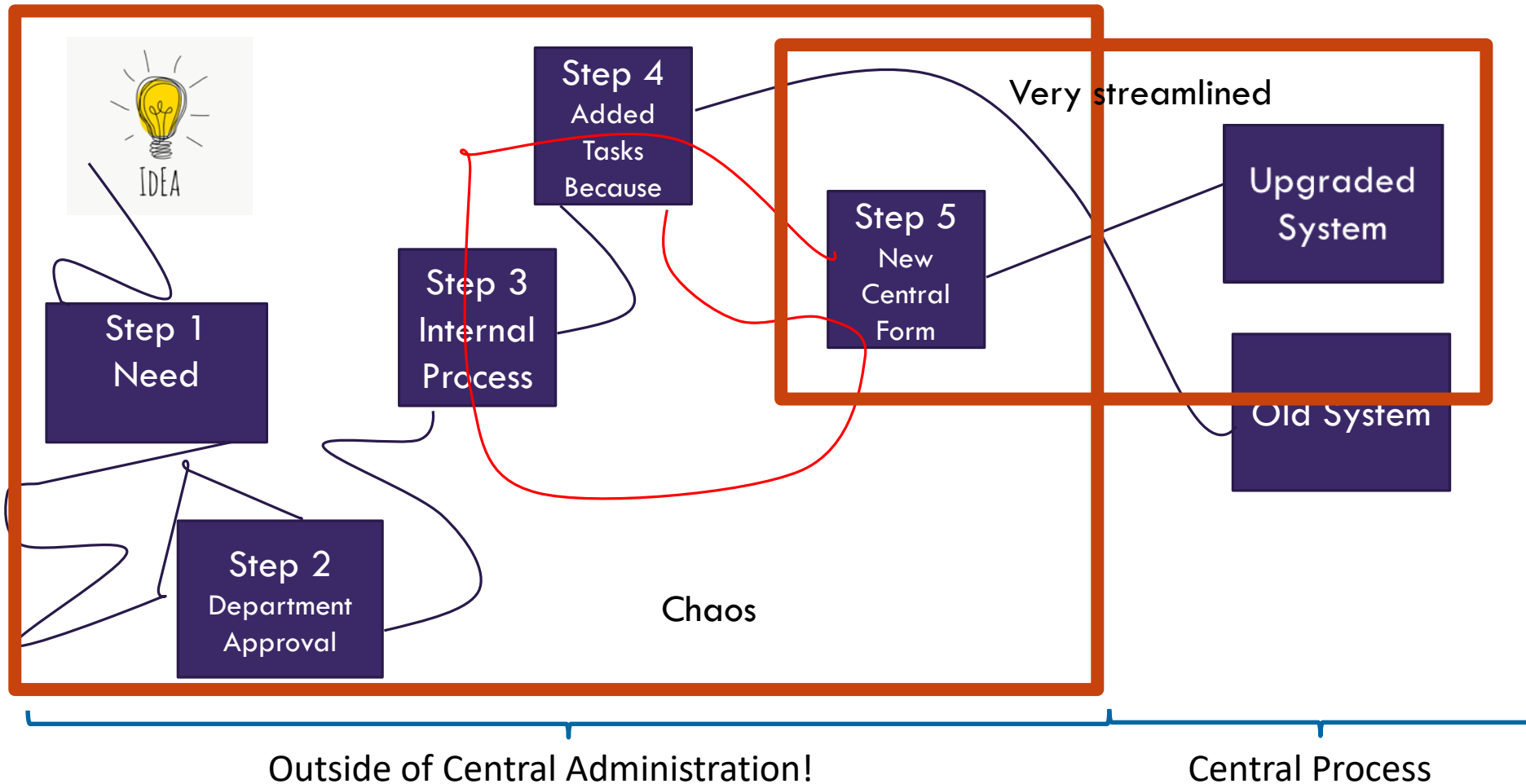
- We are the experts at how to automate a process
- If it doesn't work the way we do it today, it needs an additional automated solution
- Customization is a cost-beneficial solution

Historically not deep enough into the organization, but looks at inputs/outputs to the software.

WHY BUSINESS PROCESS IN THE CLOUD?

- Considers the **system, people and manual processes**. **All** contribute to inefficiency.
- Assumes ORACLE introduces best practices into the system.
 - **Our role is to work on the people and manual process.**

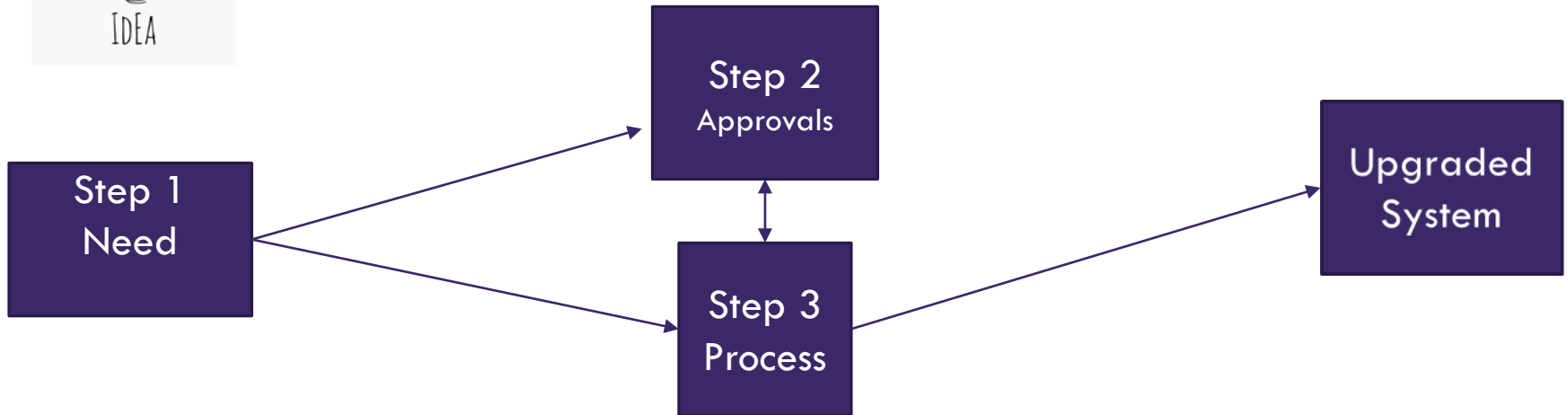
WHY BUSINESS PROCESS IS SO IMPORTANT



WORKING TOGETHER ON BUSINESS PROCESS



Streamlined

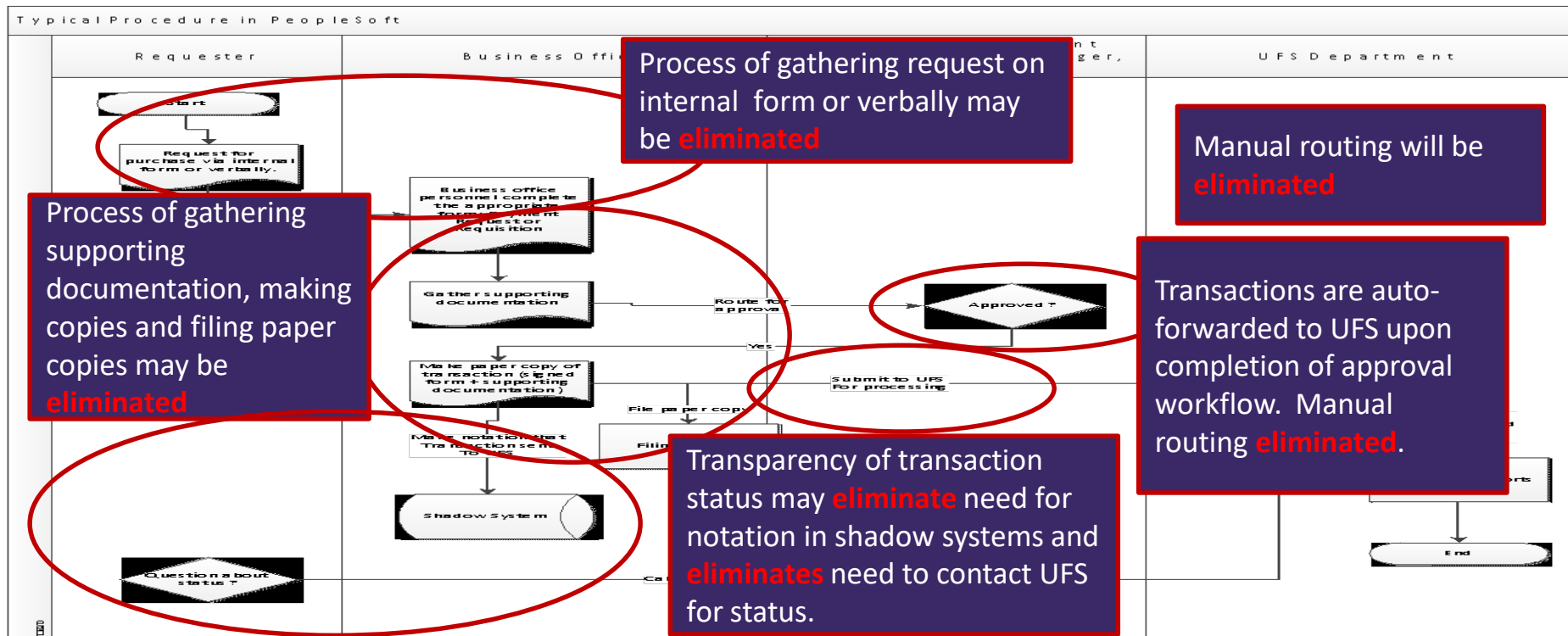


Outside of Central Administration!

Central Process

BOISE STATE EXAMPLE

Opportunity For Meaningful Change...



CHANGE MANAGEMENT

First...The Traditional Approach



Project Team
makes decisions



Communicate to campus

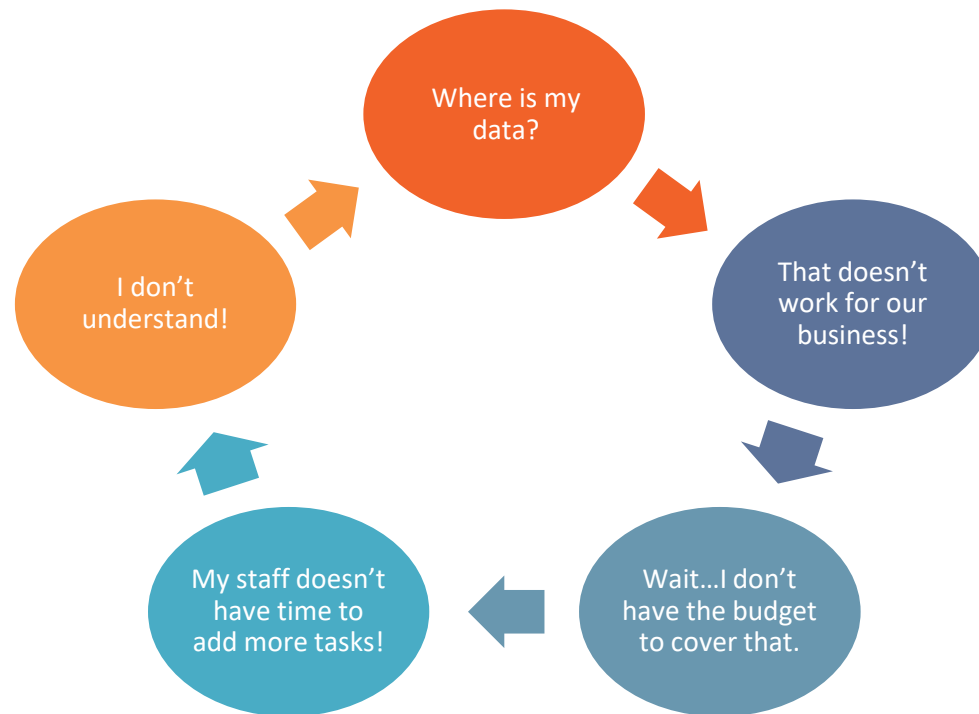


Conduct training 2 weeks before Go-Live



TRADITIONAL CHANGE MANAGEMENT

Let the Spinning Begin!!



NEW OUTCOME REQUIRES NEW APPROACH

ENSURING:

- Design acceptance of broad **political** solutions
- **All** voices are **heard**
- **Campus** takes advantage of tool
- **Understand** unit goals, accept the diversity of the university environment
- **Leadership support** of project and decisions

Required for Project Success

GOALS OF ONGOING OPERATION

- Sustainable methodology that doesn't end with the go-live

- Set us up to maximize cloud environment (functionality releases every 3 months)
 - Faster solution delivery
 - Adopting new functionality campus wide
 - Maximize product ROI

Required to ensure we keep evolving

Boise State is now realizing the promise!

HOW EXACTLY DO WE DO IT?

- What questions should we ask our campus?
- Project governance?
- Engagement strategies?

IMPORTANT QUESTIONS?

- How do they use the current system?
- Pain points in their business process?
- Where do you need conformity across campus and how will you get consensus?
- Where can you allow individualized design and how will you facilitate that without customization?
- Decision makers? Does it vary by unit?
- Management's goals? Do they vary by unit?

How do we get this information??



CAMPUS ENGAGEMENT LAYERS

(PROJECT GOVERNANCE)

Executive Engagement Committee

- Campus leadership charged with ensuring engagement and ultimate success
- Academic Deans and Associate Vice Presidents

Change Management Core Team

- Full time staff from the Office of Continuous Engagement who are managing the entire process

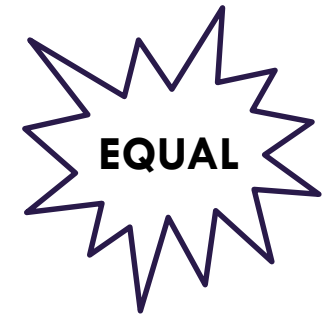
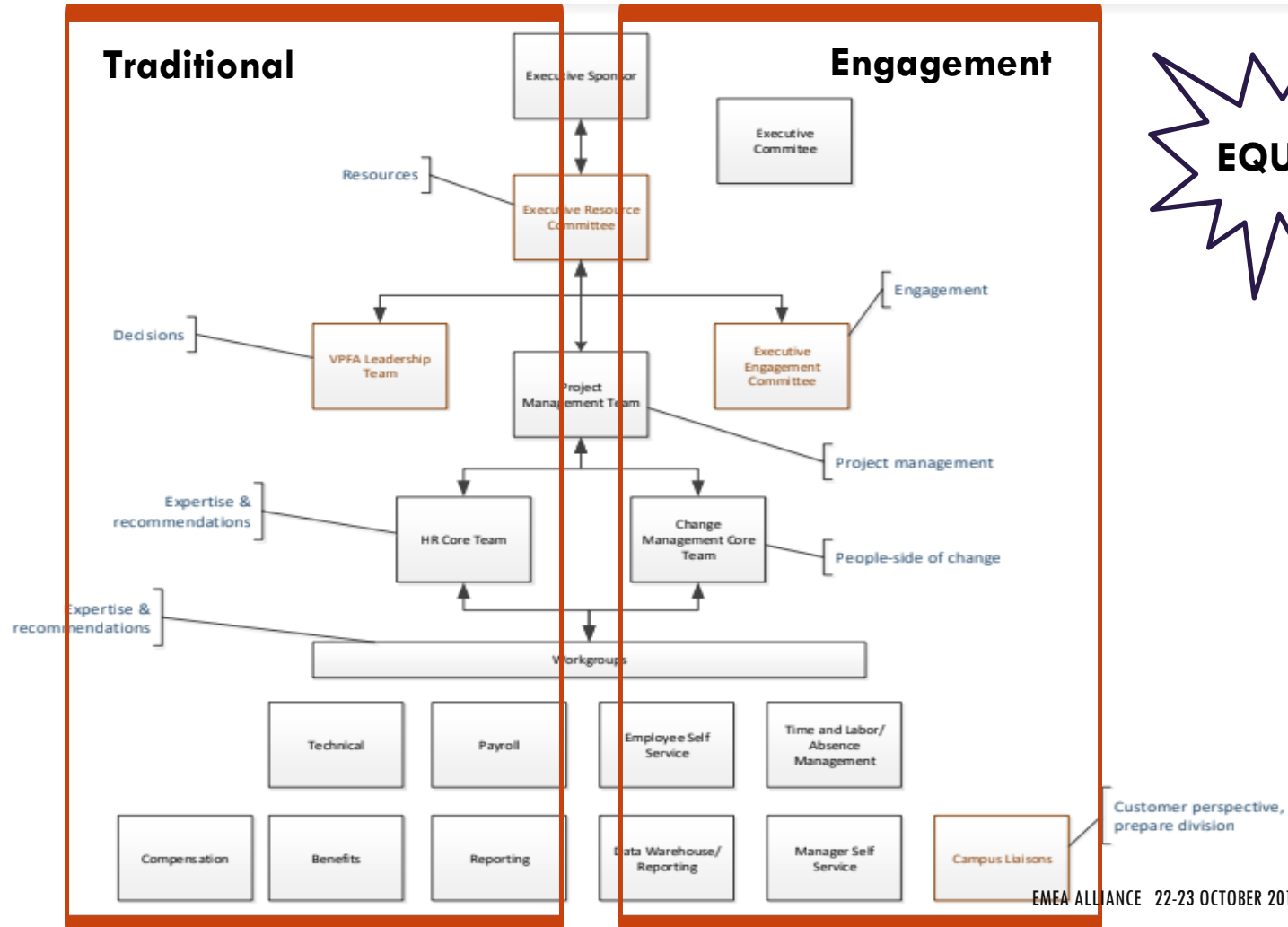
Campus Liaisons

- Prepares the division for change through **communication**, providing **voice of the customer**, and **process redesign** at the aimed at adoption.



Secret: You will need a form of all of these layers forever!

HCM PROJECT STRUCTURE (PROJECT GOVERNANCE)



CAMPUS ENGAGEMENT STRATEGIES (DECISION MAKING AND ENGAGEMENT)

Kick-off and “one page”

- 93 people on the project invited. Represented an orientation to scope and timing. “One Page” of role and responsibilities

Campus Liaisons

- 33 individuals appointed by leadership to engage in bi-directional communication

Facilitated Focus Groups

- Design and policy recommendations

Campus Small Group Meetings – recurring

- Focus on the wider business process including how best to utilize functionality at unit level

PRESENTED TO KICK-OFF GROUP



As Participants we actively contribute through positive engagement and idea sharing... even when it's hard.

As Advocates we provide a voice in decision making for our departments, divisions, and campus as a whole.

As Change Agents we challenge the status quo to find innovative solutions.

Every person in this room will play a critical role on our journey.

ONE PAGE EXAMPLES

- **Executive**
- **Team Member**
- **Campus Liaison**

93 separate One Page's were created.



Jo Ellen DiNucci – VPFA Leadership & Executive Engagement Committee

ROLE DESCRIPTION

As a member of the *HCM Cloud VPFA Leadership and Executive Engagement Committee*, your primary role is to make decisions based on recommendations from the project teams and manage engagement. You will drive change within your area of responsibility and engage campus with consistent messaging to aid in removing resistance to change. You will also play a critical role in responding to potential people-side risks and anticipated points of resistance from the campus community.

DECISION-MAKING

- Approve scope changes
- Sign off on major deliverables
- Approve move from one phase of the project to the next
- Resolve issues that can be accommodated with changes to overall schedule or scope
- Resolve issues that can be accommodated in the current schedule, but require additional divisional resources
- Final decisions related to budget and management of project financials
- Resolve issues that require project changes to resources that cannot be resolved at lower levels
- Resolve critical project decisions that cannot be resolved at lower levels
- Resolve critical adoption decisions that cannot be resolved at lower levels
- Make decisions related to securing resources/engagement for respective area of responsibility
- Approve Change Management plan and revisions
- Approve Communication plan and revisions
- Approve Training plan and revisions

RESPONSIBILITIES

VPFA Leadership Team

- Define project scope and resources
- Define vision for post-production operating model
- Determine scope and use of project-funded resources to support the project
- Remove adoption-related obstacles e.g. lack of access to the right people or gaining the right information
- Respond to engagement related issues for project participation
- Define business objectives, goals, constraints and expected benefits of the project
- Work to resolve escalated change concerns through active and appropriate communication or necessary measures

Executive Engagement Committee

- Remove adoption-related obstacles e.g. lack of access to the right people or gaining the right information
- Respond to engagement related issues for project participation, people-side risks and anticipated points of resistance
- Provide direction to project team regarding clarification of campus needs and expectations
- Develop specific plans to mitigate or address concern
- Work to resolve escalated change concerns through active and appropriate communication or necessary measures

REQUIRED MEETINGS

Biweekly VPFA Leadership and Quarterly Executive Engagement Committee Team meetings

Additional project meetings may be required based on project tasks and timelines.

**please adjust calendars to attend all meetings*



Susan Eaton

HR Core, Payroll, and Time and Labor project teams

ROLE DESCRIPTION

As a member of these project teams, your role is to define and configure the system and develop reports that support the future state business processes. You will also conduct development activities to ensure integrations and security meet end user business needs post go live. You will drive change within your area of responsibility and engage campus with consistent messaging to aid in removing resistance to change. You will also play a critical role in responding to potential people-side risks and anticipated points of resistance from the campus community. You will serve as the Subject Matter Expert (SME) for the business processes within your respective business areas.

DECISION-MAKING

- Resolve issues and risks related to HR modules and reporting requirements

RESPONSIBILITIES

- Participate in Design Sessions to craft future state processes
- Understand the interfaces between business processes and other upstream and/or downstream processes
- Provide feedback from department coworkers and campus peers
- Configuration of Core HR, Benefits, Absence Management, Workforce Management, Payroll, and Time and Labor and Workflow development
- Set up security roles and permission lists
- Participate in functional testing, integration testing, and end user testing of the configuration
- Work with consultants and change management team to ensure business processes are documented properly
- Become expert in future state process and system to be able to support the campus and back office at go live and beyond
- Review project work products and deliverable for accuracy and completeness
- Deliver training to central administration
- Identify and prioritize reports and dashboards that are needed for central administrative units and campus community
- Data conversion- cleaning data and validation of converted data
- Recognize and report project risks, issues, and participate in resolution
- Elevate people-side risks to Change Management PM so that a comprehensive solution can be determined. Coordinate with Change Management Core Team to resolve people-side risks.

REQUIRED MEETINGS

*2-3 days Design Sessions per cycle
1 hour project management per week for
each active project team
Additional project meetings may be required
based on project tasks and timelines.*

please adjust calendars to attend project meetings.



Rob Pangaro – Campus Liaison

ROLE DESCRIPTION

As a member of the *HCM Cloud Campus Liaison Team*, your primary role is ensuring your division is prepared by participating in people-centric activities including changing mindsets, transforming the culture, building excitement about the possibility of the future, building community, ensuring buy-in, managing expectations, focusing on adoption of change, and ultimately preparing end users for change. You will be expected to drive change within your area of responsibility and engage your division with consistent messaging to aid in removing resistance to change. You will also play a critical role in responding to potential people-side risks and anticipated points of resistance from the campus community. You will serve as the Subject Matter Expert (SME) for the business processes within your respective business areas.

DECISION-MAKING

- Make final decisions about internal business processes related to your specific units.
- Appoint representatives to focus groups, redesign, etc.
- Specific implementation decisions for your unit/department

RESPONSIBILITIES

- Ensure the right people participate in activities intended to prepare for go live
- Become expert in future state process and system to be able to support the division at go live and beyond
- Review project deliverables for accuracy and completeness. Identify issues and participate in resolution
- Understand the interfaces between business processes and other upstream and/or downstream processes
- Coordinate with change management team to resolve escalated change concern through active and appropriate communication or other necessary measures
- Work with change management team to ensure business processes are documented properly
- Identify various stakeholder audiences and define how best to support them as they make the necessary changes to their work processes
- Support, engage, and coach end users on the benefits and positive aspects of the change
- Provide guidance and support to project team regarding communication opportunities and challenges
- Provide weekly status reporting regarding how your division is preparing for change

REQUIRED MEETINGS

Monthly Campus Engagement Meeting
Focus Groups, as applicable
Independent meetings to prepare your division

Additional project meetings may be required based on project tasks and timelines.

CAMPUS LIAISON

Spends 15% of time on HCM Cloud Project. Expectations:

- Be a success advocate for the project in communications
- Support and promote teamwork
- Consider impacts of your work on others
- Demonstrate an ability to problem solve and make timely decisions
- Consistently share knowledge and information
- Actively seek and receive feedback for improvement

In addition Liaisons are required to:

- Attend monthly meetings or send representative as needed
- Complete assigned project related tasks and communications
- Complete weekly reporting status updates

FOCUS GROUPS — FOR CONSENSUS BUILDING (OCI RUN)

- Determine **recommendations** for significant changes
- **Intentional** Membership
 - All perspectives on campus
- Typically meet 2 – 3 sessions
- **ERP Examples:**
 - **Approval Workflow** — significant change, highly customizable paper to automated standard
 - **Internal Payments** — unique, issues are in the portion of the process before it intersects with central admin
 - **Tolerances** — easy, but campus-wide impact
 - **Reporting** — arguably most important deliverable

CAMPUS SMALL GROUP MEETINGS (OCI RUN - ONGOING)

- 30+ groups on campus (a unique group shares one business process)
- Help campus **assess** how functionality **options** within the product may impact **future state business processes in the department.**
- **Structure**
 - *Current State → New Functionality*
 - *Short bi-weekly sessions, allow time to absorb and assess*
 - *Tailored Agendas – not all departments need all processes (i.e. faculty hiring)*

These represent the foundation of ongoing change management!

CAMPUS SMALL GROUP MEETINGS

Central Facilitator Role (OCI)

- Provide Information
- Facilitate Conversation
- Ensure Transparency
- Provide structure

Departmental Participants

- Engage in Discussion
- Brainstorm ideas
- Recommendations /
- Decisions
- Provide Feedback to Unit

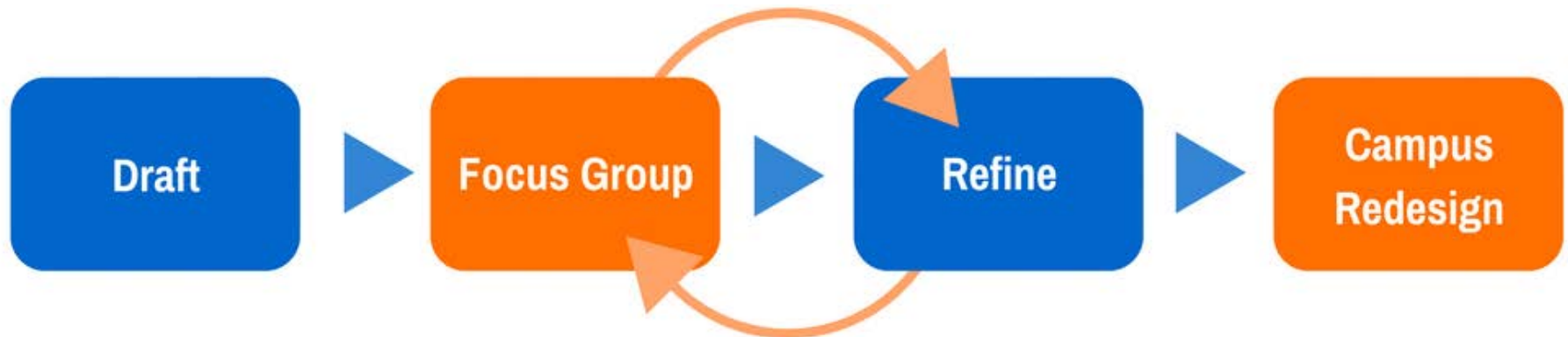
CAMPUS SMALL GROUP MEETINGS

Facilitation Strategies

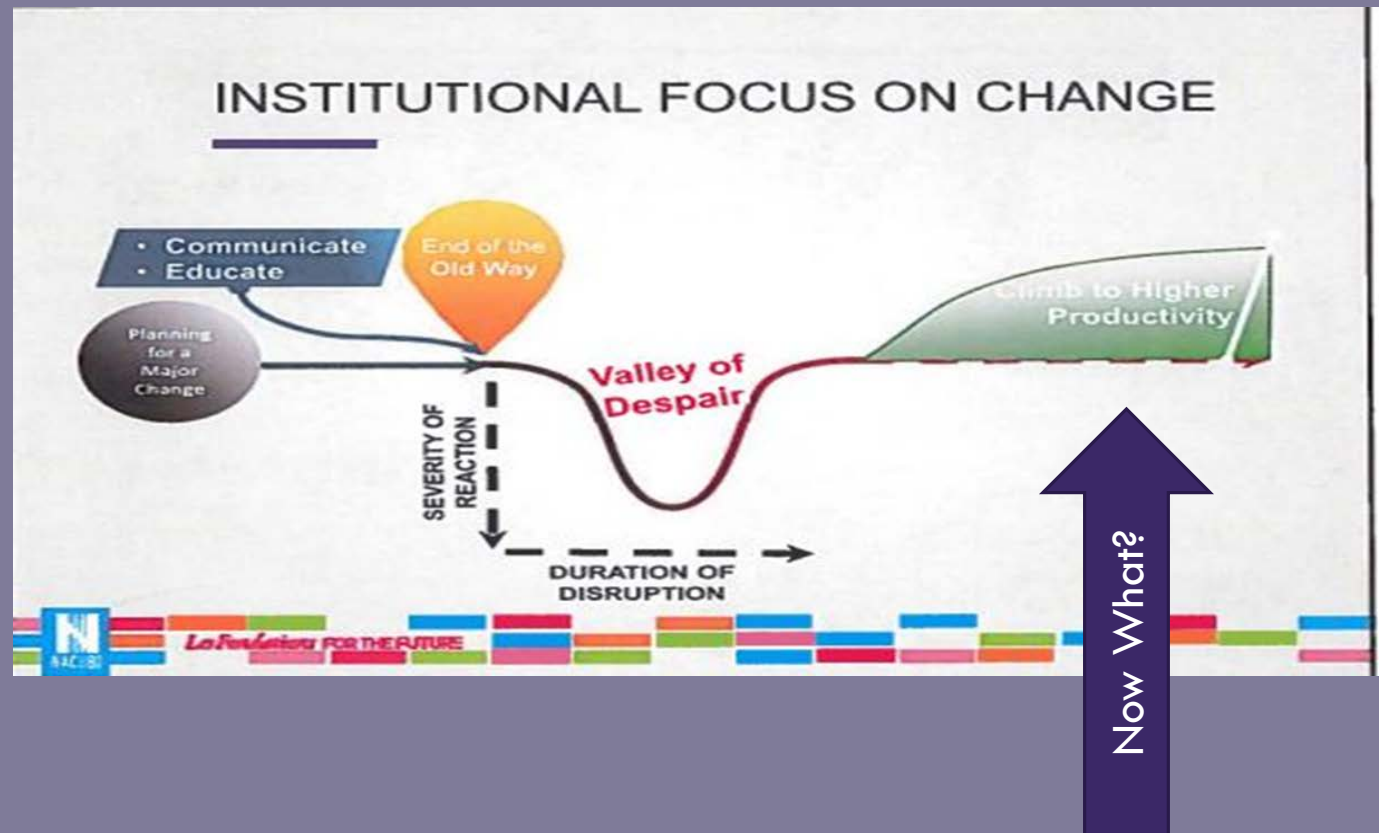
- *Implementation Checklists* – go live preparation
- *Decision Tracking* – note status
- *Parking Lot* – questions/topics outside the scope of the session
- *Go Live Checklist* – final list of tasks to be ready for go live
 - such as identify who needs training (Campus goes live too!)

Facilitation and Business Process Improvement skills are critical in the cloud world.

HOW IT ALL INTEGRATES – PROCESS DESIGN



Permanently engages the “Voice of the Customer”

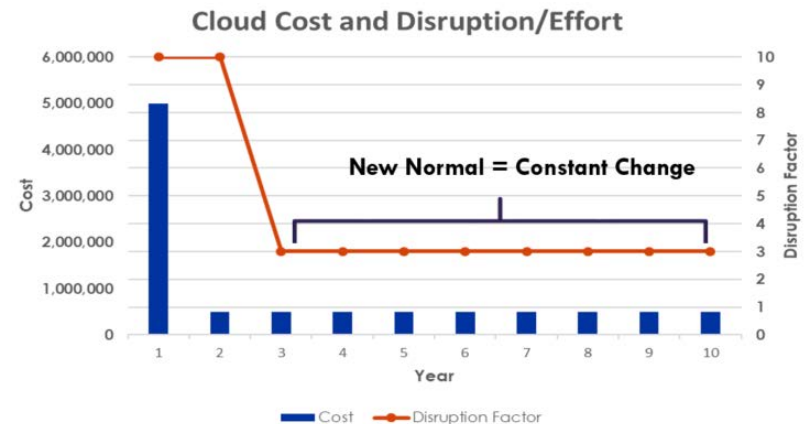


POST IMPLEMENTATION: HOW DOES YOUR WORLD CHANGE?

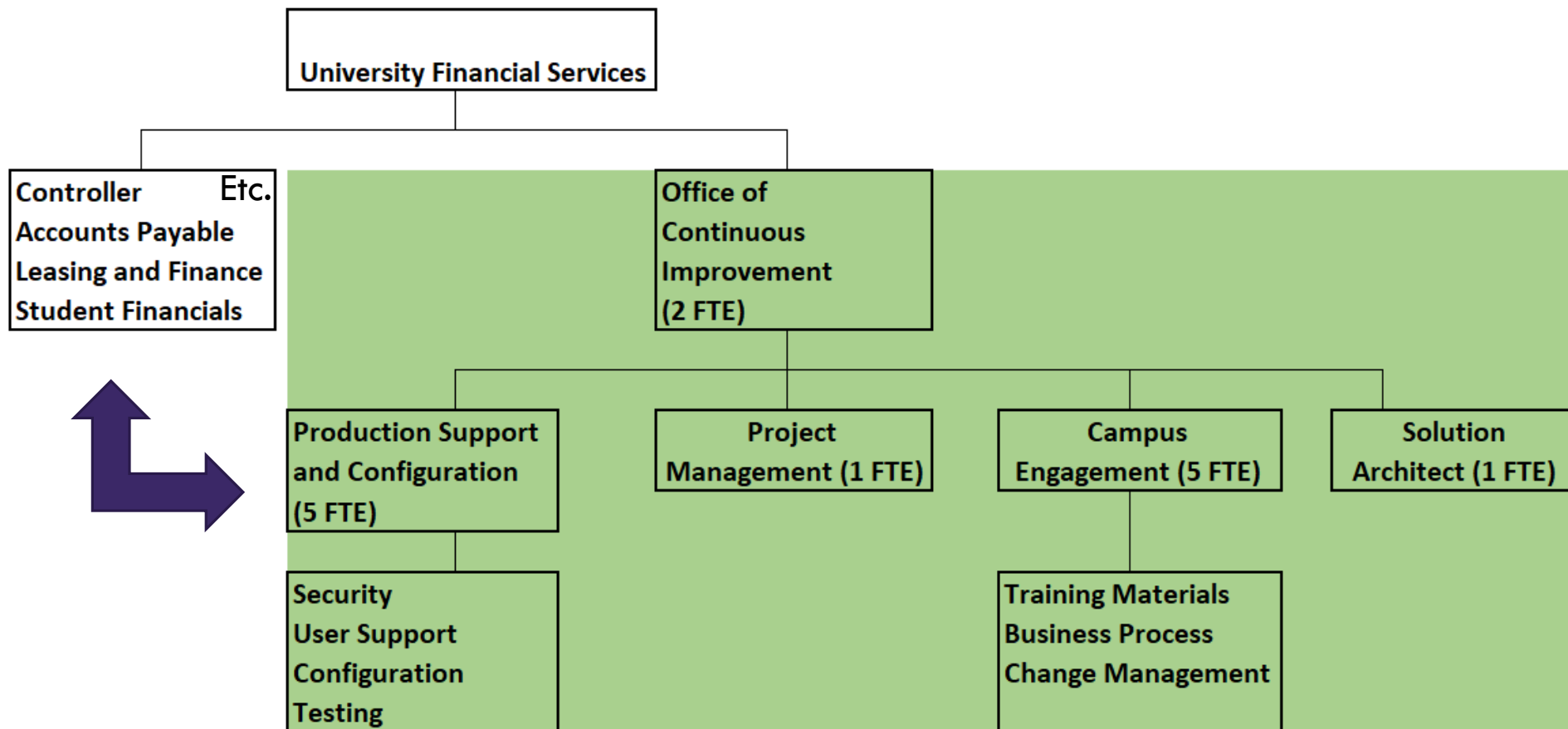
What is needed for
Success?

CONTINUOUS IMPROVEMENT MINDSET

- **ESSENTIAL!**
- Must have a structure for adoption.
- Must have a structure for change management.
- **Change management** is not project oriented, but a continuous culture.



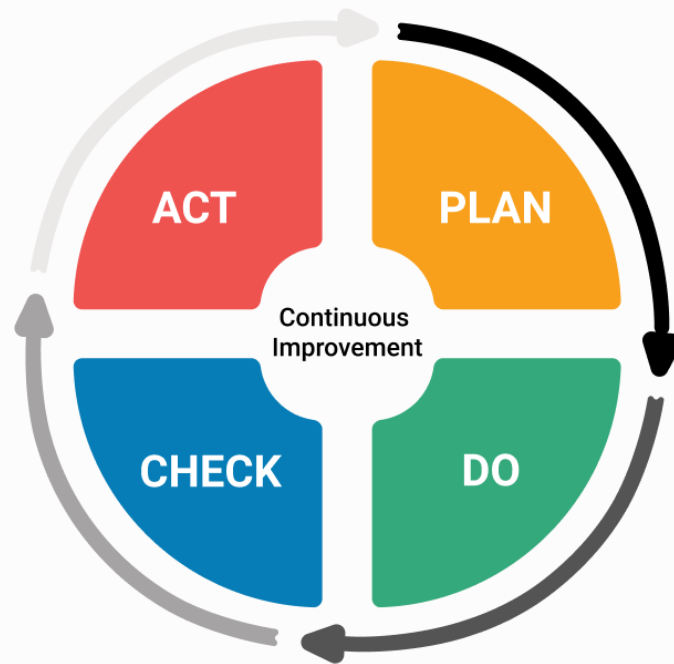
CONTINUOUS IMPROVEMENT MINDSET



ORGANIZATION STRUCTURE (EXAMPLE)



Activity	On Premise	Cloud
Project Management, including timing and scope	OIT - PMO	OCI (Functional)
Testing	Functional – Back office only	OCI – Expanded to campus end-users
Database refreshes	OIT	Oracle
Upgrade/Patch (DBA)	OIT	Oracle
Manage SR's	OIT	OCI
Campus Support	OIT and Functional users	OCI
Change Management	Project only, PMO	Continuous, OCI



SUMMARY

SUMMARY — CLOUD IS FREEING FOR OIT AND CENTRAL ADMINISTRATION

- Central administration isn't customizing.

**We help campus adapt to the solution, we
don't rewrite the solution to adapt to
campus.**

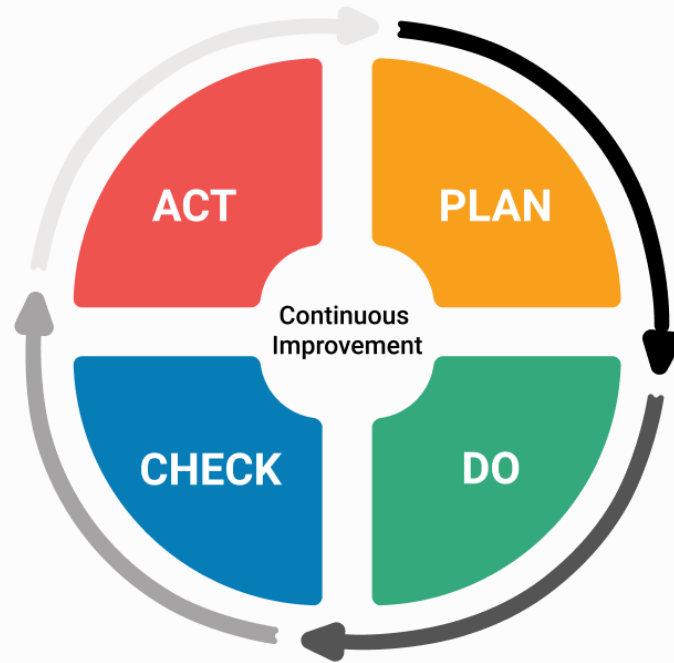
SUMMARY — TAKEAWAYS AS YOU PREPARE

Think about staffing **NOW**:

- Allow/**encourage** staff to **shift**
- **Outsource** your on premise support **over time** to avoid a layoff scenario
- All resignations replaced with **different skill sets**
 - **Functional** – PS funky techs replaced with Process Improvement Analysts, Facilitation skills
 - **OIT** – PS developers replaced with report writers and mobile developers
- Start **training** current staff

SUMMARY — TAKEAWAYS AS YOU PREPARE

- Maximized **ROI** based on continuous adoption of **new functionality**
- Campus engagement must **focus on end user business process**
- You **must facilitate adoption**
- Incorporate unit level business process review **with on premise** solutions



QUESTIONS

Thank you!

PRESENTER

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**ALL EMEA PRESENTATIONS WILL BE AVAILABLE FOR
DOWNLOAD FROM THE CONFERENCE SITE**



THANK YOU!

