Workday Transition Program Update

September 18, 2013
Today’s Objective

• Provide an overview of Workday

• Strategic Objectives

• Discuss engagement and communication with the community

• Discuss Questions and Concerns

Please note that the materials and thoughts we present today are work in progress
Strategic Objectives

- Make it easy to get work done and harder to make mistakes
- Establish an accurate, trusted and timely reporting environment
- Simplify and standardize processes
- Minimize administrative overhead for faculty and end users
- Lower operating costs and improve effectiveness
What is Workday?

- Workday is a cloud-based, software-as-a-service (SaaS) system that supports human resources (HR), payroll and financial functions

- Fun facts:
  - Workday is the name of the company, and the product that they sell
  - Founded in 2005 by Dave Duffield (founder and CEO of PeopleSoft) and Aneel Bhusri (PeopleSoft chief strategist) following Oracle’s takeover of PeopleSoft
  - Top rated vendor of human resources systems by Forrester Research
  - Publicly traded on the NYSE (WDAY) after highly successful IPO in October 2012
  - An established base in higher education (Cornell, Brown, Georgetown, NYU, Carnegie Mellon, USC, University of Rochester) and a growing pipeline
What systems will be impacted?  

• The following will be replaced by Workday:
  – Core finance systems including general ledger, accounts receivable, asset accounting, cash receipts, accounts payable and expense management
  – Post-award grants management
  – Human resource and payroll systems including HR records (includes 4D and BMS), self-service, payroll management and costing, and compensation administration

• Yale will partner with Workday to build:
  – Advanced grants management (sub-awards, cost transfers)
  – Faculty lifecycle (e.g., appointments, profiles, leaves, committees, professorships)

• Workday may also replace other functions currently performed outside of Oracle:
  – Time keeping (e.g., Kronos/MyTime)
  – Recruiting (e.g., Kenexa/STARS)
  – Benefits Administration (e.g., Hewitt)
  – Restricted funds accounting
What other impacts can we expect?  Workday@Yale

• The user experience should be significantly improved. The Workday interface is much more intuitive and natural than Oracle

• The SaaS model limits our ability to customize the system

• While not customizable, Workday is highly configurable, which is less costly and complex to support

• We expect significant positive impact to reporting, but reporting and data challenges at the University are broader than any single system
Where we’ve been, what’s next

Prepare Recommendation
- Determine scoring methods
- Hold demos
- Perform fit/gaps
- Establish cost comparisons
- Score
- Recommend

Vet
- Establish awareness
- Understand major concerns
- Prepare lead administrators to “carry the message”
- Execute Workday contract

Mobilize
- Select implementation vendor(s)
- On-board initial internal staff
- Begin to ready program governance
- Begin current state discovery

We are here

Workday@Yale

Our work when the program is staffed and mobilized
Timeline and approach – current thinking

- Release 1 could include HR, Payroll and Faculty Lifecycle
- Release 2 could include Financial Systems
- Timing and content of releases reflects our current thinking, but should be considered draft
- We will have a firmer view of releases and timing at the conclusion of the Vision & Plan phase
• We do not have a great track record of successfully including the enormously diverse needs and perspectives of the entire University

• We are at the very early stages of this project and cannot say that we’ve figured out the magic formula just yet

• We are maturing an approach for community engagement that is very different from past exercises, and has the potential to be impactful
Program Organization Structure

Community & Stakeholders

- Provide a link between the broader University community and the program team

Officers

Steering Committee
- Shauna King (Executive Sponsor)
- Cynthia Smith (Provost office)
- Julie Grant (Business Operations)
- Len Peters (ITS)
- Nancy Creel-Gross (HR)
- Steve Murphy (Finance)
- John Mayes (Change Leadership)

Program Leadership
- Jackie Tucker
- Marc Ulan

Program Mgt & Control
- Ryan Schlagheck

Subject Matter Advisors

- Provide expertise to the program team with regards to processes, areas of the University, systems, data, etc

Teams and personnel at this level will vary based on phase of program

Faculty Lifecycle
- Ernie Huff
- Cynthia Walker
- Cynthia Smith
- A-M Hummerstone
- Kathy Schoonmaker
- Donna Cable
- Joe Crosby
- Other Professional Schools TBD

Sponsored Awards
- Andrew Rudczynski
- Alice Tangredi-Hannon
- Joanne Bentley
- Cynthia Walker

HCM/Payroll

Finance

BI/DW & Reporting

Technology

Security & Controls

Change Management

Service Group
- We are working on a model that will engage the community in the design process
- A foundational piece of the model is the introduction of “Service Groups”
- We will have Service Groups for areas that are of most interest to the community
- Service Groups will consist of representatives from the community and will be accountable to ensure that we deliver services that are timely, accurate, cost effective, simple to use, and meet the needs of the community
- A Service Group Lead will be responsible for coordinating across service groups and the program
What’s next?

- Work with the community to identify Service Groups and participants

- Complete vision/plan phase, working with the lead integrator
More Information?

- Workday at Yale website:
  
  http://workday.yale.edu

- Program Leads:
  
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Q&A