



case study

A COMPLEX INTEGRATION

A leading engineering innovation nonprofit organization using multiple systems to accomplish core HR activities, including a dated and customized version of PeopleSoft, sought to consolidate and optimize their HR systems and processes by implementing Workday. Impact Advisors' Workday experts were engaged to help lead the complex deployment, which would involve integrating Workday with several key business systems.

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Engineering Innovation Company Replaces Dated HR Systems with Workday

With a significant business process and tool transformation project underway, an engineering innovation organization selected Workday's HCM module to replace its dated HR systems. The platform was chosen for both its functionality and its ability to integrate with other key business systems currently in use across its Finance and other functional areas.

A professional services firm leading a large transformation project for the client organization subcontracted Impact Advisors to lead the Workday implementation. The firm believed Impact Advisors' Workday expertise and ability to integrate the technology with other systems would be assets for the deployment. Workday steers clients who want to get up and running quickly to its Launch methodology, a preconfigured approach to implementing the cloud-based solution. It is based on the best practices of thousands of successful deployments and is designed to get customers the core functionality they need on time and on budget.

Evolving Scope

The original scope of the project was small and limited to the HCM module without Payroll, which the client would continue to outsource. As the project evolved, however, the client began to identify requirements they deemed critical to deployment, including functionality tied to talent management, advanced compensation, and

integrations. Impact Advisors worked closely with client leadership, having transparent conversations about what could and could not be accomplished within the timeline and helping them understand the give and take of various requirements and functionality so they could effectively prioritize. Ultimately, almost 600 hours of scope were added to the initial contract without dramatically shifting the project timeline.

Project Management

The client's Director of HRIS was very hands-on during the deployment, serving as the HCM lead, as well as the co-lead for Integrations and Reporting. She took on many project management tasks initially, which on top of her "day job" left her spread very thin. Impact Advisors counseled client leadership to assign a dedicated project manager, which enabled the Director of HRIS to focus her contributions on the functional and technical areas where her expertise was crucial. The ability to serve as true advisors and offer honest feedback allowed everyone to work towards the same goal and function as a team. This collaboration also extended to the Project Steering Committee, which included the CHRO, COO, CIO, and CFO.

Overcoming Ingrained Ways of Working

While business process improvement was not part of Impact Advisors' scope of work, the deployment was part of the client's broader program aimed at business process transformation; and there is always an opportunity to configure the Workday system to enhance the business processes it supports. For the tool to be most effective, ideally the processes themselves are examined and optimized first. In this case, Impact Advisors worked through some of those opportunities during requirements definition and design sessions, offering best practices and suggestions based on Workday knowledge, previous deployments, and the operational experience of the consultants.

Many of the organization's current state processes were tailored to engineering roles instead of being more broadly applicable across functions. The recruiting process is an example of one that is critical to get right, because so much of the data collected flows downstream into other functional areas or modules. The Impact Advisors team helped to guide the organization towards best practice workflows that are optimal and efficient for all positions and that would not present issues downstream.

Impact Advisors' team leads also invested time guiding their client counterpart leads through the strategic process of considering how their different systems would communicate with one another. Impact Advisors

"We are endlessly grateful for the leadership, technical expertise, and positive IMPACT we received from the entire Impact Advisors team. I could write a novel thanking each individual for their outstanding support."

Client Project Manager



developed 26 integrations to systems in areas such as identity management, benefits, and payroll.

The Human Factor

Successful Workday deployment must include careful consideration of the impacts of that technology on the people who will use it. Although not officially part of the deployment partner's role, Impact Advisors leveraged their experience with change management to discuss important components like managing resistance, training, and communication to further the adoption of new functionality available through Workday.

Results

Impact Advisors helped the organization successfully utilize Workday to streamline processes, improve data quality, enhance reporting capabilities, and increase employee satisfaction. The HR team reduced their daily workloads through more efficient workflows. As a result of the Workday implementation, delivered on time and within budget, the client moved toward automated processes within HR versus previous manual and paper-based transactions. For example:

- Previously, when HR needed to perform a job change on a worker, a form would be generated and routed for approval/review via email. This is now handled directly through the Workday platform.
- Additionally, the HR team fielded many employee questions through emails to the HR inbox. With Workday Help, questions are answered via cases submitted by employees without having to circulate emails from one department to another.
- An Advanced Compensation module, inherent to Workday, enabled the client to automate market salary analyses previously done by an outside party using Excel.

Looking Ahead

As with any technology implementation, there will continue to be opportunities for business process improvement at this innovative organization. Impact Advisors is currently working with leadership on a roadmap for further transformation, including an Application Managed Services team to support those efforts. ■