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Project BREW

(Bentley Reinvents Education with Workday)



Workday Deployment Project
March, 2016

Project Goals & Objectives



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WHAT are we doing:

- Replacing our 25 year old Banner system with new HR, Payroll, Finance and possibly Student functionality on modern technology

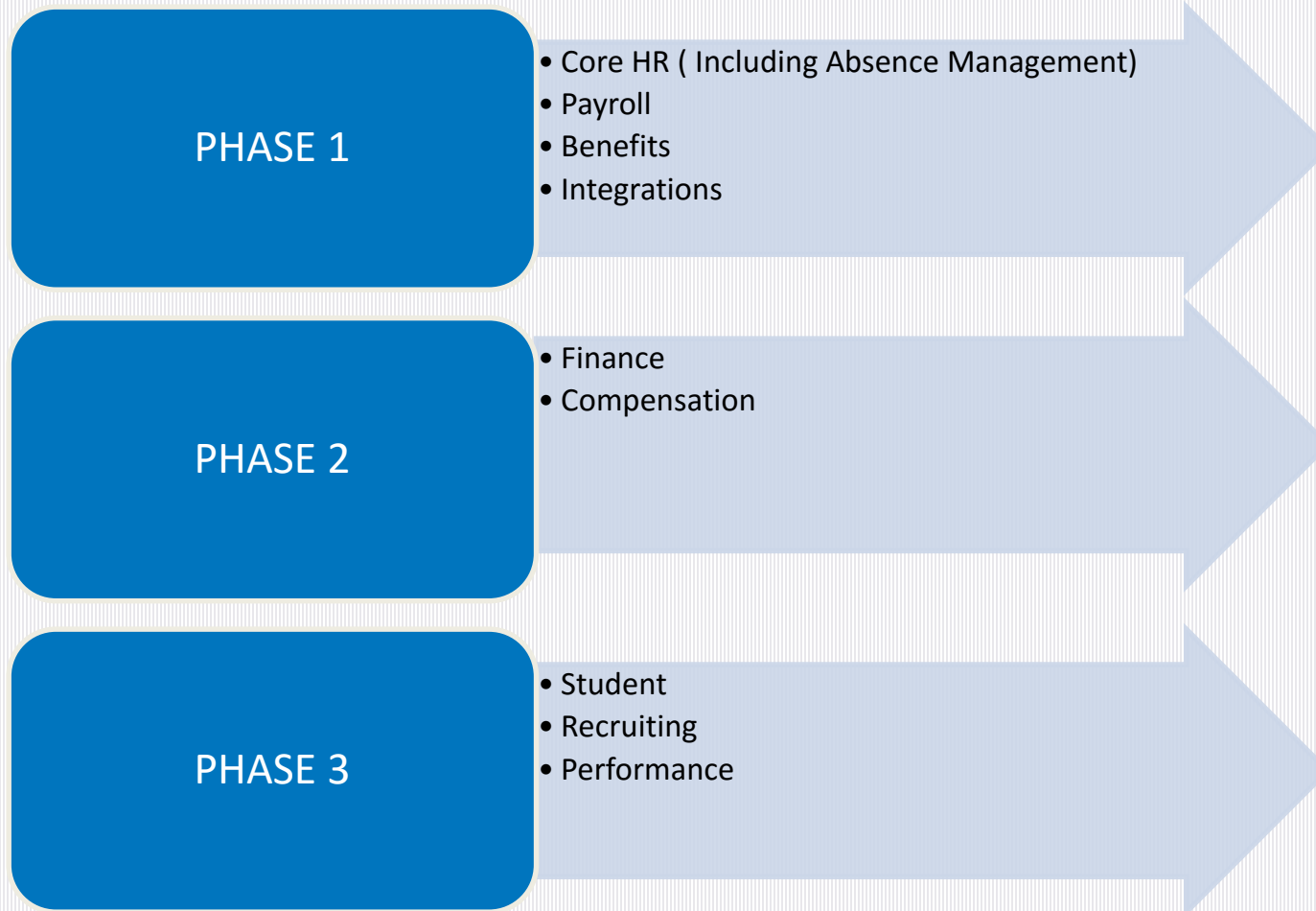
WHY:

- New and improved features and processes
- Enable people and teams to collaborate more easily
- Give people the information they need to be effective and efficient
- One source of data for decision making enterprise wide
- Better controls
- Change culture
- Leverage modern technology incorporating best practices, with easy to use mobile tools on any device
- An enabling system that supports teaching, learning & administration

See Appendix A for more detail



Project Scope & Phases



Overall Project Timeline

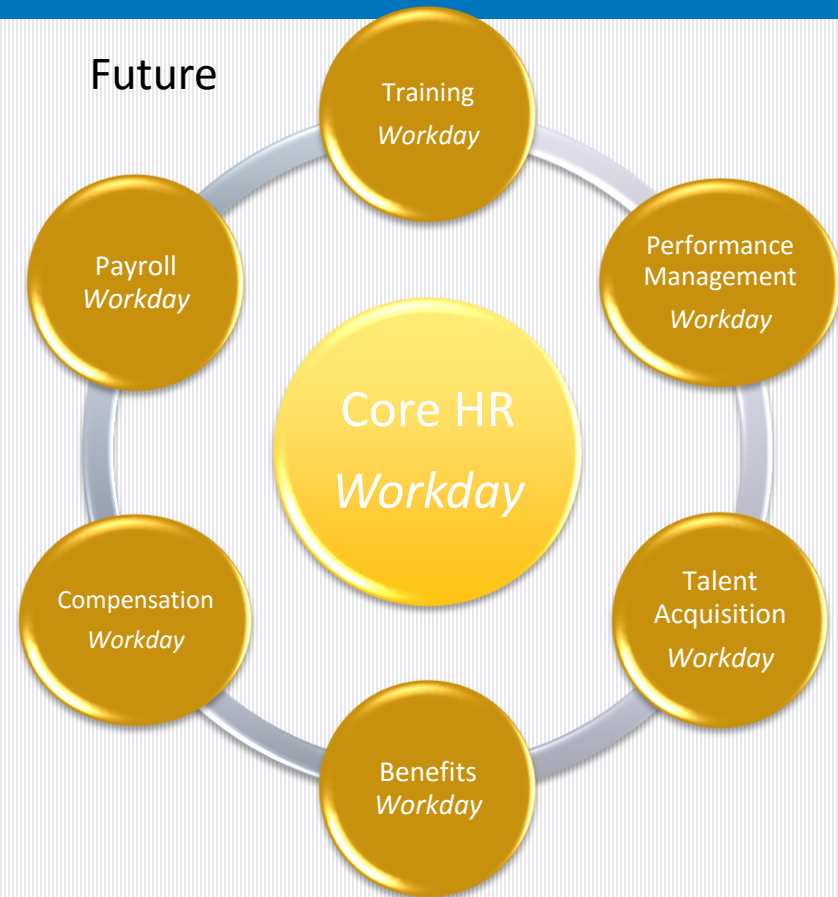


Workday Implementation Schedule

Q3 FY16	Q4 FY16	Q1 FY17	Q2 FY17	Q3 FY17	Q4 FY17	Q1 FY18	Q2 FY18	Q3 FY18	Q4 FY18	Q1 FY19	Q2 FY19	Q3 FY19	Q4 FY19
2016				2017				2018				2019	
Workday HCM, Benefits/Payroll				Workday Financials				Workday Student					

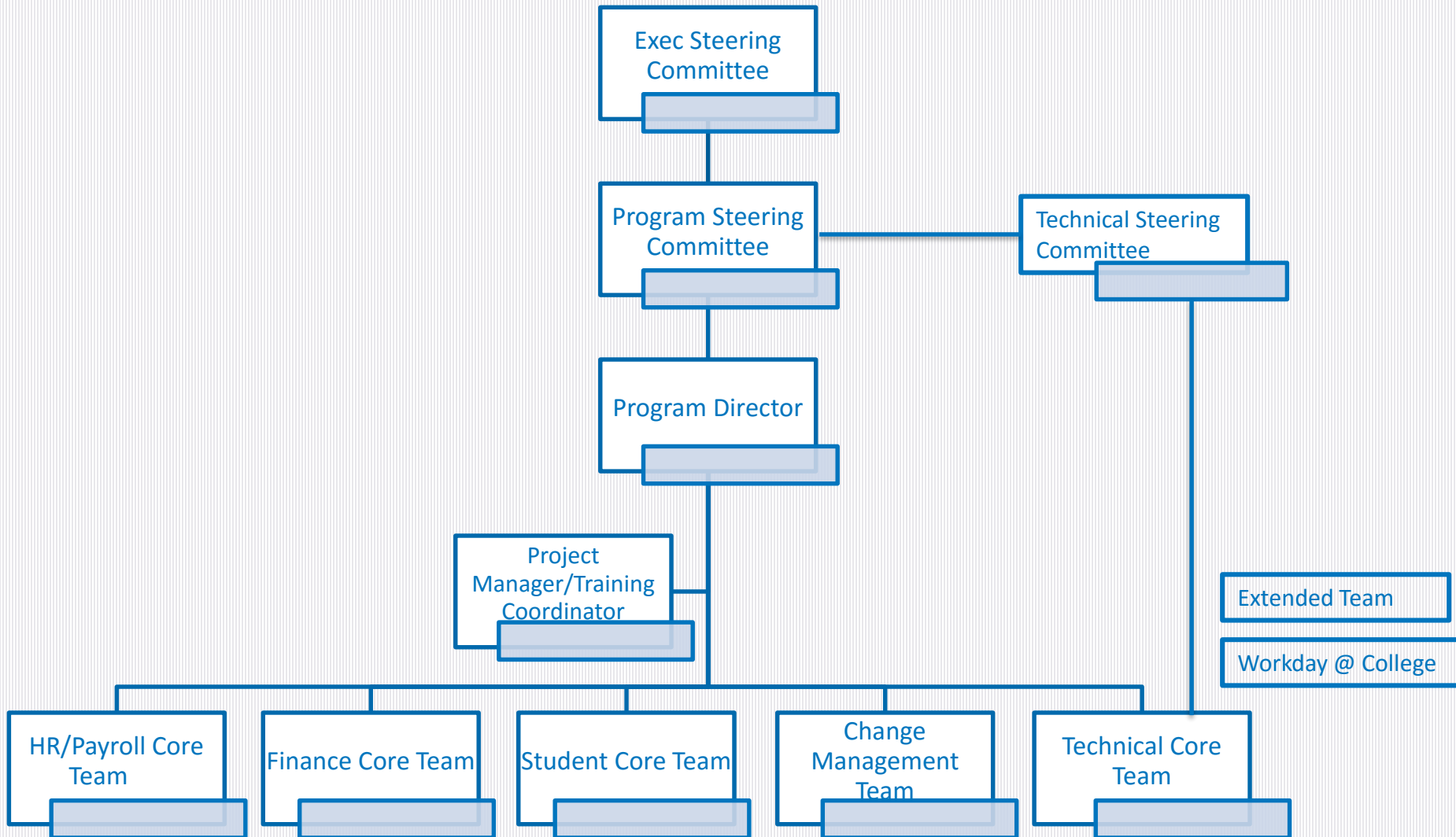


Where We Are Going – Workday Cloud (HR)



Key Benefits

- A common HR platform with fully integrated components
- A single platform enables enhanced reporting and analytics and real-time global data
- An infrastructure and foundation that we can build on over time





Committees and Core Teams

Executive Steering Committee

Nancy Antunes	Ken Cody
Ann Dexter	Vicki Lafarge
Joann McKenna	Mike Page
Bill Read	Luluah Safri
Andrew Shepardson	Bob Wittstein (Chair)

Program Director (HR/Payroll) –
Luluah Safri
*TBD for Finance and Student

Project Manager/Training
Coordinator – Valerie Pirri

Program Steering Committee

- Nancy Antunes
- Ron Ardizzone
- Ann Dexter
- Vicki Lafarge
- Christine Lyalko
- Anne Pugliese
- Luluah Safri (Chair)
- Laurie Sutch
- Bob Wittstein
- Faculty (Org Design)
- Member of the Internal Audit Committee
- Student

Technical Steering Committee

- Bill Gribbons
- Amon Horne
- David Norman
- Ted Robitaille
- Bill Schiano
- Bob Wittstein
- Student (CIS)
- Data Architect (IT)

Change Management Team

- Someone FT dedicated
- Val Fox
- Catherine Carlson
- Ann Dexter

We will list Workday and
Sierra-Cedar folks
in the same boxes as Bentley
folks

Committees and Core Teams - cont



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Core HR/Payroll Team

- Andrew Coole
- Jalila El Jadidi– AA
- Maria Meehan
- Luluah Safri, HR Lead
- Chris Sanftleben (Benefits and Position Management)
- Stacey Walazek

Core Finance Team

- Nancy Antunes, Finance Lead
- Barbara McLean
- Andrew Coole
- Christine Lyalko
- Maria Meehan

Student Core Team

- Ron Ardizzone
- Anne Pugliese
- Ann Marie P
- Laurie Sutch
- Others to be added close to implementation

Core Technical Team

- David Brontas
- Amon Horne

Extended Team

- Shauna Anderson
- George Cangiano
- Joanne Cantone
- Lindsay Connors
- John Falletti
- Laurie Fontaine
- Raj Kahlon

We will list Workday and Sierra-Cedar folks in the same boxes as Bentley folks



Roles and Responsibilities – Bentley Team

<i>Role</i>	<i>Responsibilities</i>
Executive Steering Committee	<ul style="list-style-type: none">➤ Champion the Project➤ Commit required resources to the project; including key users and functional experts from necessary offices➤ Set and approve goals and objectives, policies, timelines and deliverables and quality and success criteria➤ Monitor progress of project and organizational impacts➤ Approve changes in project budget and timelines➤ Be the escalation point for unresolved process issues/decisions
Program Steering Committee	<ul style="list-style-type: none">➤ Monitor progress of project and organizational impacts➤ Resolve issues that arise from project team➤ Approve design decisions for future processes and workflows
Technical Steering Committee	<ul style="list-style-type: none">➤ Review technical and data architecture and conversion/integration plan➤ Resolve technical issues that arise from the project team➤ Provide input on usability➤ Make decisions on technical direction and change requests
Program Director	<ul style="list-style-type: none">➤ Identifies critical task items and brings to attention to escalation with enough time to resolve without affecting overall timeline deliverables➤ Communicate project status to Program & Executive Steering Committees➤ Reviews project plan, project tasks, milestones, schedules, resources, and status➤ Identifies key project team resources and engages them in the project➤ Ensures project quality and success criteria are met➤ Liaison with Workday Delivery Assurance

Roles and Responsibilities – Bentley Team - cont

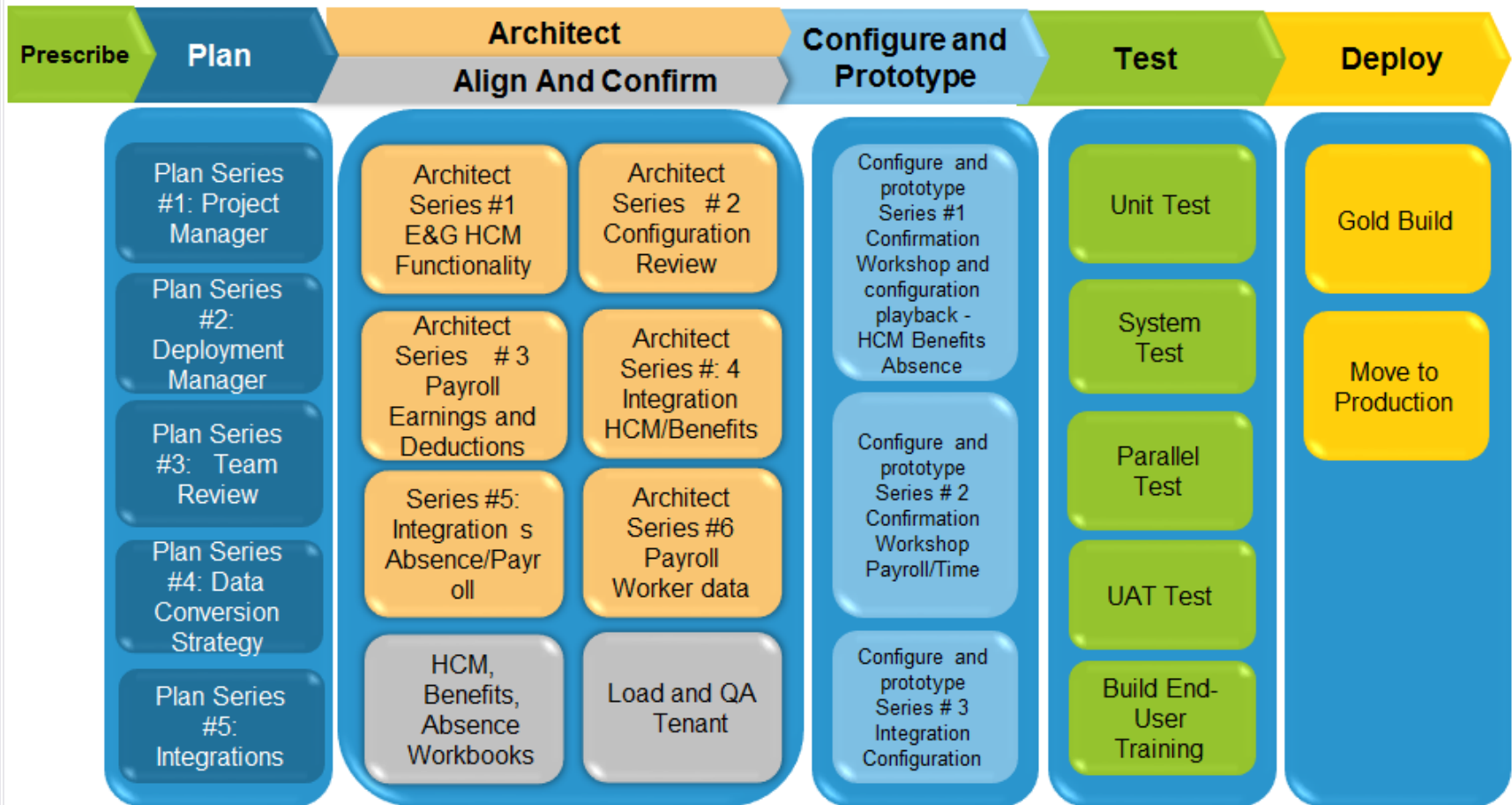


<i>Role</i>	<i>Responsibilities</i>
Project Manager/Coordinator	<ul style="list-style-type: none"> ➤ Build and maintain detailed project plan and schedule, including project tasks, milestones, schedules, and resources ➤ Facilitates project meetings, records and communicates issues within the project team and Workday ➤ Liaison with Sierra Cedar Engagement Manager to plan project activities and tasks
HR, Payroll, Finance, Student Core Project Teams	<ul style="list-style-type: none"> ➤ Define and recommend future configurations, processes and workflows ➤ Actively participate in system design, data conversion, compliance and reporting needs ➤ Identify integration requirements to internal and external systems ➤ Lead testing of new configuration and QA as needed ➤ Validate that business needs are met
Change Management & Communication	<ul style="list-style-type: none"> ➤ Address OD requirements that stem from best practices deployment of the system ➤ Develop and deliver training and education plan ➤ Develop communication plan(s) ➤ Identify end users and training needs ➤ Communicate change with the Bentley community throughout each phase of the project
Technical Team	<ul style="list-style-type: none"> ➤ Networking support ➤ Lead, develop and facilitate data conversion and data architect tools and requirements ➤ Lead, develop and facilitate data conversion and data architect tools and requirements ➤ Reporting and Compliance Management Support



Workday Implementation Methodology

Workday LDP Methodology





Project Timeline – HCM/Benefits/Payroll

WEEK: PROJECT	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34		
Planning	█	█	█																																	
Setting expectations, confirm scope, build team																																				
Documentation gathering																																				
Architect				█	█	█	█	█	█																											
Workbook population																																				
Configuration Review, HCM load																																				
Functional knowledge, tenant transfer																																				
Configure and Prototype										█	█	█	█																							
Configurations																																				
Validations																																				
Payroll runs																																				
Testing														█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█				
Unit testing and sign off																																				
Tenant 2 and 3 build																																				
Integrations																																				
Parallel testing																																				
Deployment																																	█	█	█	█
GOLD build																																				
Final workbook build																																				
Deploy																																				



Training

- Functional Consultants work with super users during testing events
- New processes documented and formal training provided
- End user training provided by super users with support from consultants

Education

- Emphasis on process adoption (not system implementation)

Communication

- Identify areas where change will have the biggest impact and work with the community to implement
- Faculty on the steering C\committee to engage and communicate updates to faculty

Sponsorship

- Strong sponsorship from the President's cabinet
- Address organizational change items early

Project Administration & Governance



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Weekly team reporting and management cycle

- Status reports produced Monday
 - Status Updates
 - Accomplishments for Week
 - Issues, Actions, Decisions
 - Core Team meeting to review status - Weekly

- Monthly Steering Committee meetings
 - Project updates (scope, schedule, budget)
 - Review accomplishments
 - Issue escalation as needed

- Monthly staff and faculty newsletters

- Quarterly meetings – Cabinet / Faculty Senate

- Use Google Site for project collaboration

Critical Success Factors



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- Take ownership of functional design decisions..... we will own the end results!
- Collaborate with the team..... we are all in this together!
- Be realistic about your workloadwe know there are competing demands!
- Remain informed of upcoming project deliverables..... there will be due dates!
- Utilize Sierra Cedar's experience..... they have done this before!
- Apply your knowledge of the Bentley environment & culture.... This is your area of expertise!
- Your commitment is critical to the success of the Workday project BREW!
- Be flexible, we are evolving!



Guiding Principles for Success

We will make decisions swiftly & through established governance

When in doubt, follow Workday & change Bentley

We will use the tool as-is whenever possible. BUY NOT BUILD

We will simplify and standardize our processes

We will communicate, communicate, communicate!!

We will do the most important things first, and table others

We will establish data governance including common data definitions & owners

We know change is difficult and we will navigate it as best we can

Next Steps



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- Mobilize the core team and begin requirements gathering sessions
- Finalize project plan with tasks, owners and key milestone dates
- Determine days/times for weekly project team meetings and monthly steering committee meetings
- Develop project communication plan
- Begin change impact analysis (post requirements sessions)



Appendix A

Enablers for Project Goals & Objectives



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- Built-in social tools power collaboration across the workforce and beyond
- Intuitive Facebook like interface, enables every employee to build a rich social profile
- Critical search capabilities, workspaces and business intelligence to easily find answers needed
- Significantly improve support and service by streamlining current data entry processes and procedures to ensure data is entered accurately.
- Real-time transactional intelligence
- Predictive analytics to guide decisions and built-in intelligence to accelerate action
- Ensure Systems Are Accessible to Everyone
- Personalized, easy-to-use mobile tools on any device to engage employees
- Single user experience and highly intuitive interface requiring minimal training



Appendix B - 1 Roles and Responsibilities Sierra Cedar Team

<i>Role</i>	<i>Responsibilities</i>
Executive Sponsor – Sierra Cedar	<ul style="list-style-type: none">➤ Responsible for being the point of contact representing Sierra- Cedar management team➤ Works with the Project Manager on escalated issues to mitigate Impact on the project timeline➤ Participates in regularly scheduled Steering Committee meetings➤ Maintains an ongoing relationship with the customer’s executive
Engagement Manager – Sierra Cedar	<ul style="list-style-type: none">➤ Responsible for working with the Bentley project manager to manage the overall project to completion➤ Monitors compliance with Sierra-Cedar standards and Workday defined project management procedures and templates via Sierra- Cedar project reviews and Workday Delivery Assurance assessments➤ Develops manages, and maintains the project plan➤ Manage and report on project budget➤ Manages the project issues, risks and key decision log➤ Sets priorities and evaluates milestones➤ Assigns responsibilities➤ Provides project health reports to Bentley and Sierra-Cedar Sponsors and Workday at agreed to intervals➤ Prepare regular Steering Committee meeting materials, document and follow up on any resulting action items. Escalates established issues to the Steering Committee➤ Participates in internal review meetings, which help to validate that the project is meeting deadlines and mitigating risk.➤ Interacts with Workday Delivery Assurance, Product Strategy and Development



Appendix B - 2 Roles and Responsibilities Sierra Cedar Team

<i>Role</i>	<i>Responsibilities</i>
Solution Architect – Sierra Cedar	<ul style="list-style-type: none">➤ Responsible for leading workshops during the Architect stage and validating business processes are designed from a cross functional perspective➤ Provides a framework for explaining the impact of key design decisions➤ Articulates the impact of the Workday Roadmap to Bentley University’s stated requirements
Principal Consultant – Sierra Cedar	<ul style="list-style-type: none">➤ Responsible for working with Bentley University to design business processes➤ Gathers functional and reporting requirements➤ Maps client data to Workday. Configures Workday according to Bentley University’s stated requirements. Documents areas where requirements are not met➤ Supports testing, data conversion, and integration development efforts➤ Escalates issues that may impact the go-live date to the Project Manager➤ Deliver one reporting workshop
Integration Architect – Sierra Cedar	<p>The Integration Architect is responsible for the overall strategy and design of assigned Workday integrations. Responsibilities include the following:</p> <ul style="list-style-type: none">➤ Plan, lead and facilitate integration workshop, during the Plan and Architect stages➤ Develop high-level integration strategy and design. Provide a Bentley University Integration Tracker to manage the Integrations and high level milestones to the EM for the Project Work Plan➤ Provide guidance on integration design decisions and downstream impacts for integrations➤ Provide mentorship of Bentley technical staff and oversight during the Configure & Prototype phase to verify the design principles are followed➤ Communicate design standards to Bentley University developers to provide consistency across integrations➤ Prepare documentation (e.g., design documents and required Workday Delivery Assurance review documents) for the tenant review

Appendix B - 3

Roles and Responsibilities Sierra Cedar Team



<i>Role</i>	<i>Responsibilities</i>
<p>Integration Consultants – Sierra Cedar</p>	<p>Works with the Sierra-Cedar functional consultants, Bentley University Development team, and Subject Matter Experts to gather and document integration requirements. Responsibilities include the following:</p> <ul style="list-style-type: none"> ➤ Responsible for leading integration workshop(s) ➤ Plans, leads and facilitates integration workshop(s) during the early stages of the project to provide: <ol style="list-style-type: none"> a. Support the design, configuration and testing of Workday integrations in scope for the implementation. b. Document design decisions for integrations assigned to Sierra- Cedar. c. Develop and unit test Workday integrations assigned to Sierra- Cedar. d. Support Bentley University with the development and testing of integrations assigned to Bentley University. e. Work with Bentley University team to resolve issues. f. Provide knowledge transfer to Bentley University integration team
<p>Data Migration Consultant – Sierra Cedar</p>	<ul style="list-style-type: none"> ➤ Responsible for migrating customer data into Workday ➤ Resolves data related issues during conversions