

UPEI Enterprise Resource Planning (ERP) Project

Sept 29, 2010

ERP Project

- ▶ Phase 1:
 - ▶ Identification of Business Requirements
 - Nov 2010 – Feb 2011


- ▶ Phase 2:
 - ▶ Selection of Software Solution
 - March 2011 – June 2011

- ▶ Phase 3:
 - (1) Migration planning (July – Dec 2011)
 - (2) Implementation (Jan 2012-

ERP Project Description Phase 1

- ▶ Identify Business Requirements
- ▶ Review Business Processes
- ▶ Develop a plan for future development of computerized administrative applications including financial, human resource and student management information systems at UPEI.

ERP Project – Phase 1

- Step 1: Project Kickoff**
- Step 2: Transformation Strategy Development**
- Step 3: High Level IT Support Assessment**
- Step 4: Vision Focused Requirements Development**
-  **Recommendation on future development**
 - Vender supplier solution, or
 - Enhanced UIS development

ERP Project – Phase 1

- ▶ Solution will emphasize business requirements (best practices) over current processes
- ▶ Emphases on Student, Financial & Human Resources systems

The choices:

- (1) Purchase of vender supplied software, or
- (2) Investment in enhanced in-house development, or
- (3) Vender solution with some targeted in-house development

ERP Project – Phase 2

If External Vender path selected:

- Step 5: Develop RFP for ERP Vendor Selection
- Step 6a: *Vendor Evaluation – Establish Evaluation Process Methodology*
- Step 6b: *Vendor Evaluation – Software Demonstration*
- Step 6c: *Vendor Evaluation – Systems Integration Firm Interviews*
- Step 6d: *Vendor Evaluation – Evaluation Process*
- Step 7a: *Select Target Process Transformation Processes*
- Step 7b: *Document Selected Current Business Processes*
- Step 7c: *Develop Future State Processes*
- Step 7d: *Develop Process Migration Plan*

Moran Technology Consulting

- ▶ Consultant Selected to undertake Phase 1
 - On-site Nov 2, 3 and 4, 2010
 - Conduct change readiness interviews with
 - Executive Steering committee
 - Systems evaluation team
 - Admin department heads and managers/supervisors/technology leaders
 - Develop communications plan

Executive Steering Committee

- ▶ VP Finance & Facilities (Chair) (Gary Bradshaw)
- ▶ Board of Governors representative (Pat Sinnott, Exec. VP Canadian Tire Corp)
- ▶ VP Academic (Jim Randall)
- ▶ VP Research & Development (Katherine Schultz)
- ▶ Comptroller (Phil Hooper)

System Evaluation Team

- ▶ Comptroller (Chair)
 - ▶ VP Finance & Facilities
 - ▶ Dir. of Human Resources
 - ▶ Registrar
 - ▶ Dir. of ITSS
 - ▶ Assistant Dean AVC – Admin & Finance
 - ▶ Senior Technology Advisor
 - ▶ Manager Information Systems
- Project Manager (phase 2) – to be identified
Coordinator: Joan Marks
Communications: Integrated Communications
(Designates for Comptroller, Dir. of HR, Dir of ITSS, and Registrar will also attend most meeting of SET)

Subject Matter Experts

Human Resources
Financial Services
Registrar's Office
ITSS

Research & Development
Advancement
Ancillary Services
Student Services
Facilities Management

Moran Technology Consulting

Phase 1 – Work Plan

Step 1: Project Kickoff

Objectives:

- ▶ To establish a clear understanding on the part of the MTC and UPEI project teams and UPEI sponsors regarding the objectives, project scope and approach
- ▶ To gain an understanding of UPEI's organization and culture in order to create a productive project work environment

Approach:

- ▶ MTC will develop a draft Microsoft project plan for the project
- ▶ Conduct a 1-hour meeting with the Executive Steering Committee (ESC):
 - ▲ Validate and refine the basics of scope, objectives, and approach that were proposed and review/refine the detailed project work plan
 - ▲ Discuss potential risks and hot buttons with the project sponsors to develop communication and risk mitigation plans
- ▶ Conduct one joint MTC/UPEI System Evaluation Team (SET) kickoff workshop to:
 - ▲ Validate and refine the detailed project work plan
 - ▲ Provide an overview of the methodology that will be used for the project
 - ▲ Discuss potential project risks, hot buttons and risk mitigation plans

Assumption: This will be a 3 hour meeting on the same day as the ESC Meeting

Step 1: Project Kickoff (con't)

Deliverables:

- ▶ Project plan with major milestones
- ▶ Project team assembled and kickoff meeting held
- ▶ Project management processes:
 - Status Reporting
 - Communication
 - Deliverable Approval
 - Scope Change Management

Resources:

- ▶ UPEI personnel to identify workshop participants, participate in kickoff meetings and review project plan
- ▶ •MTC personnel to help identify workshop participants, prepare for and conduct kickoff meetings, and develop and finalize the project plan

Step 2: Transformation Strategy Development

Objectives:

- ▶ Develop a communications plan to engage the project's stakeholders and to support their buy-in to the project
- ▶ Develop a high-level Transformation Vision for future student services
- ▶ Develop a set of Transformation Guiding Principles that define major change themes
- ▶ Identify the set of high-level change inhibitors that face UPEI's ERP project and document the high level set of impacts that these inhibitors will have on the project

Approach:

Communications Plan

- ▶ Conduct up to two (2) meetings with the appropriate UPEI staff, with responsibility for providing communications to the various campus stakeholder groups, to define the project communication plan. MTC will facilitate this meeting with UPEI to help define:
 - The communications goals of the project
 - The discrete UPEI community groups
 - The media that is/are most effective for reaching these groups
 - The points during the project where there will be information that should be communicated to the campus community to obtain their feedback.

Step 2: Transformation Strategy Development (con't)

Communications Plan (con't)

- Various communications channels that can be used, including:
 - An email and vmail box at MTC for receiving anonymous and confidential communications
 - A campus-built website that contains project information that will be useful to the campus community. All MTC generated final deliverable reports will be stored on this site.
- NOTE: Helping the campus to use this type of website will be extremely helpful for this project, as well as during the ERP implementation project where there will need to communicate a wide-range of information

Assumption: MTC will be responsible for creating all of our contracted report deliverables. UPEI will be responsible for writing general stakeholder communications messages and distributing them at the appropriate time. MTC will provide communications guidance, as requested.

Step 2: Transformation Strategy Development (con't)

Transformation Guiding Principles

- ▶ Conduct a two hour executive Transformation workshop with the ESC to:
 - Develop a high level Vision for how student services need to be transformed
 - Develop and document the Transformation Guiding Principles for this project which will be utilized in the functional transformation workshops
 - Define the high level 'Change Inhibitors' that must be addressed to have a successful ERP project
- ▶ Conduct up to two (2) workshops with campus stakeholders to review and refine the Guiding Principles and to expand the set of potential "Change Inhibitors"
- ▶ Distribute the guiding principles to the appropriate stakeholders

Step 2: Transformation Strategy Development (con't)

Change Readiness Assessment

- ▶ Identify and interview select stakeholders of both user and functional departments focusing on:
 - *Organization Structure, Organization Behavior and Structural and Behavioral Enablers*
- ▶ *Assumption: This will involve up to thirteen (13) one hour group / individual interviews for this task, tentatively identified as: Registrar's Office, Student Services, Research and Development, Comptroller's Office, Procurement Services, Accounting, Information Technology Systems and Services, Ancillary Services, Human Resources, Advancement, Facilities Management, Academic VP (individual) and Finance and Facilities VP (individual).*
- ▶ Conduct one (1) two hour workshop each with the System Evaluation Team and the Executive Steering Committee to validate and refine the draft Change Readiness issues and associated remediation strategies and responsibilities

Step 2: Transformation Strategy Development (con't)

Overall Deliverables:

- ▶ Communications Plan
- ▶ Guiding Principles
- ▶ Change Readiness Assessment, including remediation strategies
- ▶ **Resources:**
 - ▶ UPEI personnel to participate in communications meetings and to review the plan, ESC members to participate in transformation workshop, and stakeholders to participate in change readiness interviews and review workshops
 - ▶ MTC personnel to help identify workshop participants, prepare for and conduct communications plan meetings, transformation workshop and change readiness assessment interviews and review workshops

Step 3: High-Level IT Support Assessment

Objectives:

- Assess the IT environment's readiness for a new ERP and major recommendations for lowering any risks that are found

Approach:

- ▶ Interview the IT Support managers to gain their perspective on the readiness of UPEI's IT environment to effectively support the new ERP
Assumption: This will include up to three (3) interviews with the appropriate ITS&S managers, tentatively identified as: Blair Vessey (Acting Director), Michael Reid (Mgr, Information Systems), and Jeff MacDonald (Mgr, Operations).
- ▶ Conduct a one hour workshop with IT Support staff to gain their perspective on the readiness of UPEI's IT environment to effectively support the new ERP
Assumption: This will include up to two (2) workshops with the legacy ERP team and other groups, tentatively identified as: Information Systems Staff and Operations Staff.
- ▶ MTC will develop an initial assessment document
- ▶ MTC will conduct one (1) workshop with IT management to review and refine our findings and recommendations.

Step 3: High-Level IT Support Assessment (cont'd)

Deliverables:

- ▶ IT Assessment and Risk Mitigation Recommendations Report

Resources:

- ▶ UPEI personnel to participate in interviews and workshops to gather data for the assessment and review draft assessment documentation
- ▶ MTC personnel to help identify workshop participants, prepare for and conduct interviews and workshops, and develop and finalize the draft IT assessment

Step 4: Vision Focused Requirements Development

Objectives:

- › Ensure MTC team has consistent understanding of the impact of the Transformation Vision on UPEI's current strategy, business practices, organization and culture, and supporting technical/application architecture for the targeted process areas
- › Identify opportunities for improvement across processes
- › Identify critical business objectives, decisions, and other initiatives that may govern/constrain potential solutions
- › Define UPEI's functional and technical requirements

Approach:

- › Collect and review any documentation related to the current ERP environment
- › Facilitate Process workshops with the UPEI and MTC SME's to gain an understanding of the core processes that are within scope. These workshops will document the current process requirements and identify opportunities to streamline the processes to meet the goals of the Transformation Vision.

Assumption: Some processes are large and will take extensive levels of work; other processes are relatively small and can be combined into a single workshop. We have budgeted up to nine (9) workshops for this task. Most workshops will take approximately 3-4 hours, with a small set taking an entire day.

Step 4: Vision Focused Requirements Development (con't)

Approach (con't):

- › Develop ERP requirements combined from our intellectual capital, information from the workshops and the DecisionDirector Knowledge Packs and generate a consolidated set of potential set of ERP Requirements
- › MTC will coordinate review of the requirements via e-mail in order to finalize the DecisionDirector survey and identify stakeholders who will be asked to respond to the DecisionDirector survey
- › *Assumption: The review time spent by individuals will vary but on average, it will take 2-3 hours to review a typical section of the survey.*
- › Advantiv will manage the campus stakeholder survey data collection process. MTC will serve as the contact point for stakeholder questions about the survey. Advantiv will generate an initial set of charts and provide MTC with data upon request
- › *Assumption: The survey completion period will last 2 weeks and Advantiv will have one week to provide a final set of data to MTC.*
- › MTC will analyze the survey results and create a prioritized set of final requirements for each area
- › MTC will conduct a three hour workshop with the System Evaluation Team (SET) to review the survey responses and the MTC analysis. This team will refine and finalize the set of RFP requirements during this workshop

Step 4: Vision Focused Requirements Development (con't)

Deliverables:

- ▶ For each functional area, MTC will produce the following:
 - ▶ Using Microsoft Office tools, documented process steps and descriptions of the current business processes
 - ▶ Documented list of improvement opportunities and current functionality that must be retained for each of the business process areas
 - ▶ Final set of UPEI requirements

Resources:

- ▶ •UPEI personnel to participate in workshops, electronically review draft requirements, and participate in the DecisionDirector survey
- ▶ •MTC personnel to help identify workshop participants, prepare for and conduct workshops, and develop step action diagrams to document the processes, coordinate requirements review, conduct survey setup, monitor the survey, and review survey results

Step 5: Develop Recommendation for Future Solution

Objectives:

- ▶ Determine an appropriate recommendation for the future ERP solution for UPEI

Approach:

- ▶ Review output of DecisionDirectorsurvey feed back on the „gap/fit“ of the current system to the new set of functional and technical requirements
- ▶ Develop draft in-house development evaluation document
- ▶ Conduct up to two (2) two hour workshops to review and finalize the future solution recommendation with the SET and ESC

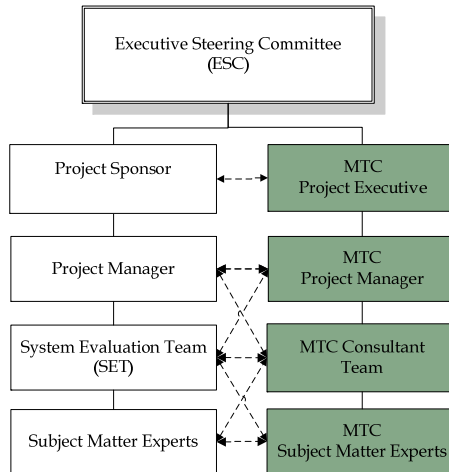
Deliverables:

- ▶ Future solution recommendation

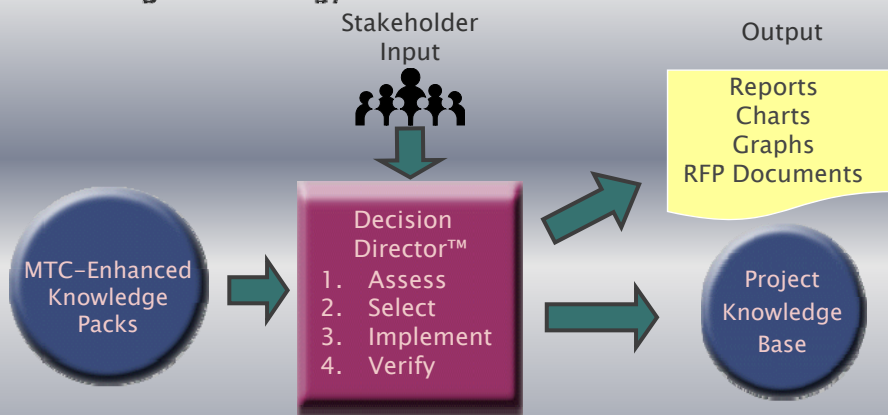
Resources:

- ▶ UPEI personnel to participate in review workshops
- ▶ MTC personnel to prepare for and conduct workshops, and develop and finalize the future solution recommendation

Moran Consulting Support Team



Advantiv's DecisionDirector tool is imbedded within Moran Consulting Methodology:



Key Benefits of DecisionDirector:

- Build institution-wide understanding / participation / buy-in
- Reduce client project time and cost
- Quantify and control project customization costs
- Define scope of work for system implementation firm contracts