INFORMATION ITEM #4
Finance and Human Resource Modernization Initiative
(Stacy Pearson/Matt Skinner)

TO ALL MEMBERS OF THE BOARD OF REGENTS

SUBJECT: Modernization Initiative: Overview of WSU’s Workday Implementation Approach

SUBMITTED BY: Stacy Pearson, Vice President, Finance & Administration

BACKGROUND INFORMATION: See attached PowerPoint Presentation.
AGENDA

01 Brief Introductions & Qualifications of Deloitte / Workday
02 Project Approach and Timeline
03 Project Governance
04 WSU Stakeholder and SME Engagement
CLOUD LEADERSHIP IN HIGHER EDUCATION
APPLICATIONS THAT DRIVE INSTITUTIONAL IMPACT

One unified system for Finance, HCM, and Student

Built-in, actionable analytics

Configurable to support changing needs

Designed for engagement
GLOBAL FIRM, LOCAL FEEL

Revenue: US $38.8B
Headcount: 263,900
Countries and Territories: 150+
Current Deloitte professionals graduated from WSU: 60
Washington-based professionals: 900
Deloitte staff focused on serving State of Washington projects: 80+
Workday certified practitioners: 1,167+

WORLDWIDE – DTTL ORGANIZATION

A globally connected network of 47 member firms in more than 150 countries and territories
Largest professional services firm in the world (based on global revenues and headcount)
Serving 80 percent of the world’s largest organizations and the most prestigious higher education institutions
ENSURE

• Largest Workday HCM / Payroll Cloud implementation in Higher Education

• More full lifecycle Workday projects than any partner in the Workday ecosystem

EMBRACE

• Implemented Workday Financials, for Workday

• Only partner currently approved to prime Workday Planning, Learning and Student

• 1st “Financials First” implementation of Workday in any industry

ENCOURAGE

• 1st Higher Ed single deployment go-live of Workday HCM-Payroll and Financials

• Strong Workday/Deloitte, CEO-to-CEO relationship based on a 16-year relationship

• Multi-year Titanium Workday Partner

END result...
ERP IMPLEMENTATION JOURNEY MAP

PRE-PLANNING, PLAN, ARCHITECT

- Project kick-off
- Review of critical business processes
- Organizational change management and communications
- Review of COA/financial reporting structure
- Initiate WSU stakeholder adoption through socialization plan

CONFIGURE AND PROTOTYPE, TEST

- Software configuration
- Analysis and decision making enabled in design
- Workday implementation strategy and plan
- Confidence in WSU foundational design

TEST

- Successful testing of University administrative processing
- Confidence gained from testing

DEPLOY, SUPPORT

- Administrator training and knowledge transfer
- End user training and transition support
- Documentation

WSU’s journey to the E4

- **Ensure** continuity of university operations
- **Embrace** modern, scalable and standardized processes to support growth
- **End** costly inefficient and ineffective processes
- **Encourage** data-enabled decision making and budget management
# PROJECT APPROACH

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug</td>
<td>Sept</td>
<td>Oct</td>
</tr>
<tr>
<td>Nov</td>
<td>Dec</td>
<td>Jan</td>
</tr>
<tr>
<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
</tr>
<tr>
<td>May</td>
<td>Jun</td>
<td>Jul</td>
</tr>
<tr>
<td>Aug</td>
<td>Sep</td>
<td>Oct</td>
</tr>
<tr>
<td>Nov</td>
<td>Dec</td>
<td>Jan</td>
</tr>
<tr>
<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
</tr>
<tr>
<td>May</td>
<td>Jun</td>
<td>Jul</td>
</tr>
<tr>
<td>Aug</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## IMAGINE
- Pre-Planning
- Plan
- Architect

## DELIVER
- Configure and Prototype
- Test

## RUN
- Deploy
- Support

### Work Plan
- Project Kick-Off
- Business Process Design Sign-off
- System Integration Testing (SIT)
- Payroll Parallel
- UAT
- Deploy
- Support

### Key Dates
- Go-Live: July 1, 2020

### Data Conversion
- Integrations (Design, Development, and Testing – Workday and Legacy Systems)
- Change Management, Communications and Training
PROGRAM GOVERNANCE: ROLES & DECISION RIGHTS

Each stakeholder has a clear role in the governance and decision-making process; outstanding decisions and/or issues will be escalated to the appropriate role listed below for resolution.

<table>
<thead>
<tr>
<th>Governance</th>
<th>Role</th>
<th>Decision Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Sponsor</strong></td>
<td>Program Sponsorship, Strategic Direction,</td>
<td>Strategic decisions requiring sponsorship, decisions impacting funding, program</td>
</tr>
<tr>
<td></td>
<td>Executive Oversight</td>
<td>strategy and direction, or changes to milestones or deployment dates</td>
</tr>
<tr>
<td><strong>Steering Committee</strong></td>
<td>Program Guidance, Strategic Input</td>
<td>Collaborate on decisions impacting program strategy and direction, scope, budget</td>
</tr>
<tr>
<td></td>
<td></td>
<td>or changes to milestones or deployment dates</td>
</tr>
<tr>
<td><strong>Operating Committee</strong></td>
<td>Program Guidance, Project Objectives,</td>
<td>Decisions impacting project objectives, strategic design, and scope/budget that</td>
</tr>
<tr>
<td></td>
<td>Scope, Budget, and Quality</td>
<td>do not require Steering Committee approval; PMO-level decisions lacking consensus; Steering Committee prep</td>
</tr>
<tr>
<td><strong>Program Management (PMO)</strong></td>
<td>Program Governance and Operational</td>
<td>Approach, timeline, resourcing, or scope decisions impacting multiple work</td>
</tr>
<tr>
<td></td>
<td>Leadership, Cross-Thread Visibility and</td>
<td>threads; deadlines not affecting deployment dates</td>
</tr>
<tr>
<td></td>
<td>Ownership</td>
<td></td>
</tr>
<tr>
<td><strong>Workstream Leads</strong></td>
<td>Execution of Project Activities and</td>
<td>Approach, timeline, resourcing, or scope decisions only impacting single work</td>
</tr>
<tr>
<td></td>
<td>Deliverables</td>
<td>thread and without impact to project milestones or deliverables</td>
</tr>
</tbody>
</table>
CHANGE MANAGEMENT FRAMEWORK

ESSENTIAL ELEMENTS

1. DEFINE PURPOSE
   Define the business future and create the conditions for leader-led change

2. DESIGN FOR IMPACT
   Create a change roadmap with targeted interventions per community segment

3. DEVELOP CAPABILITY
   Define a learning framework to build capability for the future skillsets

4. DRIVE THROUGH PERFORMANCE
   Conduct workforce transition to prepare communities for new ways of working

Deloitte’s change framework fosters Workday adoption
The ultimate goal of our change management approach is to foster the right level of adoption among affected stakeholders groups at the right time.

- **Awareness**: General knowledge of program goals and efforts.
- **Understanding**: High-level understanding of program implications and changes.
- **Support & Buy-in**: Individuals are receptive to working with and implementing changes.
- **Commitment**: Individuals are actively involved in and contribute to project goals and efforts.
- **Ownership**: Individuals acknowledge that they own project efforts and create innovative ways to support them.
QUESTION AND ANSWER