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DELOITTE HIGHER EDUCATION

Client Success Story

An Ivy League University: Lessons learned in higher education operational efficiencies

Lessons learned in higher education operational efficiencies

A top Ivy League University combines technology and change management to alleviate administrative burdens and turn attention back toward the University's mission.

This Ivy League University was built on a foundation of firsts, and a commitment to remaining on the forefront still stands true today. The University strives to teach and learn at a global level, prepare future leaders, maintain excellence with faculty in all areas of academic pursuit and lead the way in clinical and non-clinical research.



This desire to retain a number-one position extends beyond academics and into administration. Jay Dumphy, Managing Director, Deloitte Consulting LLP notes, "They're a leader in research, education, technology and they want to be a leader in running the University as efficiently as possible." The Associate Vice President of HR Operations made that her personal mission, knowing that improvements made within administrative processes can actually improve institutional performance on a wider scale. She elaborates, "If we operate more efficiently with less administrative overhead, that gives us the competitive edge and brings more dollars back toward the academic mission."



In the business of education

The opportunity to implement organization-wide change presented itself with the retiring of the University's 15-year-old administrative software that had been used to manage HR, payroll and finance operations. Over the years, the system had been customized to meet the needs of each administrative unit or school, which added a layer of complexity when updates or changes were required. But the challenge went beyond simply choosing a new platform. The University's Chief Information Officer (CIO) reiterates, "Improving business operations isn't entirely based on technology, but also on the processes and policies that are in place."

At that point, the University's processes relied on paper forms to track everything from compensation to job changes to on boarding. There was also a lack of standardization across academic and business units,

+ IMPACT

The implementation affected 19,000+ employees and more than 170 administrative systems across the campus.

+ IMPACT

Workday HCM reduced transactional time for key administrative tasks like terminations by up to 93%—what used to take over a month, now takes two days.

+ IMPACT

Effective introduction and implementation of mobile technology to allow for 24/7 access and self-service for a variety of functions.

which resulted in a very expensive and cumbersome administrative effort further hindered by an out-of-date tech tool. The HR team went through an extensive research process to select a replacement system and ultimately chose Workday, a cloud-based enterprise resource planning (ERP) platform featuring both human capital management (HCM) and financial capabilities.

Their second task was to choose an implementation advisor, to which they turned to Deloitte. Deloitte is one of the largest partners for Workday Human Capital Management (HCM) as well as Workday Financial Management in the U.S. and globally. The organization's track record also includes effective implementations for dozens of other higher education clients. For the University, the decision to go with Deloitte was an easy one.

The University's project lead explains, "I wanted a deep bench of individuals with experience not only with Workday, but with business process improvements, too."

The teachers become the students

Implementing organization-wide change is no easy task, and to accomplish such a feat would require dedication on both sides. From day one, collaboration was key. Working with the University, Deloitte co-located the teams,

working "two in a box" with the mindset that there was no delineation between Deloitte and the University.

Kathy Karich, Principal at Deloitte Consulting LLP remembers, "They were looking for a more collaborative style. We were here to be their advisor, but not to tell them what to do." Together, the teams developed a phased, multi-year roadmap to implement Workday Human Capital Management, and Workday Financial Management. While the Deloitte Cloud ERP team focused on process transformation enabled by deployment of the software, the Risk & Financial Advisory specialists performed identity and access management work to mitigate cyber risk, given the transfer of sensitive, personal information within the platform, and also to perform a review of application security, business process controls, and segregation of duties.

An area of focus for the joint team was on the University's business processes around faculty and staff management, with the stated objective to streamline, simplify and automate manual tasks. Perhaps more importantly, the team placed a strong emphasis on change management. Dumphy explains, "We evaluated the impact that this rollout would have on students, faculty and staff and developed a plan for how we needed to communicate to them, prepare them and enable them to adapt the new technology and processes effectively."



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Associate Vice President of HR Operations



The academic enterprise looks to its leader

Because of the University's position in the educational sector, much attention was paid to the University's movements. According to Karich, "All eyes were on the University. Everybody was watching." The University approached the Workday implementation with the mindset of a leader, and Deloitte was there alongside them. The CIO recalls, "Service firms like Deloitte bring a different level of leverageable benchmarking experience for what the institutional requirements should be for a higher education institution. That's important in the short term for us to get across the finish line for a project, but it's also important for the Workday community in that it means there is a higher probability of designing it once in a successful way for many institutions moving forward." The University completed multiple enhancements to the platform in conjunction with Deloitte and Workday, serving as a valued design partner for the ERP software. Karich notes, "There were a lot of firsts with this implementation. This University helped pave the way for the universities that follow suit."



The true test: Day 1

The initial roll out occurred in the summer of 2015 for Workday HCM and focused on the delivery of human resource, academic and payroll modules. The new system gave users more control, offering self-service for a variety of functions and 24/7 access via desktop or mobile devices. Employees can easily update their personal information, view pay slips or even adjust their benefits. Administrative staff finally had full visibility into the system, which provided them with a clear understanding of where approvals were within the process. Previously manual tasks like hiring, salary adjustments and terminations were digitized, reducing and more

often than not, completely eliminating the need for paper forms. With standardized processes in place across the entire University, Dumphy believes it has transformed the University's workforce, "taking what used to be roles in technology maintenance and transitioning them into roles focused on business analysis and business support." The CIO agrees. "By removing the administrative burden with a tool like Workday, we can focus on activities that support the University's core mission over time."

The second phase of implementation occurred in mid-2017 with the launch of Workday Financial Management, which brought the University's purchasing, financial and expense reporting, effort certification and grant processing activities into a single platform. Having a common framework for all financial transactions further increases the University's operational efficiency and with access to information and reporting capabilities, it enables better decision-making across the entire organization. The behind-the-scenes nature of the Workday roll-out might not appear to affect the student body directly, but its impact is clear.

"Other areas of impact were illustrated in procure-to-pay and expense processing," Karich elaborates. "With the go-live of the new system, the University was able to process twice as many approvals to allow for more detailed review of transactions, without a degradation in processing time. Analysis of transactions during the first year post go-live indicated that the majority of low dollar-value requisitions and expense reports were being approved with no changes required. Due to this accuracy, the University is now considering increasing the dollar threshold that requires approval, which should help reduce administrative burden and improve processing times." By reducing the time it takes to accomplish administrative tasks for students, faculty and staff, the University will be able to focus its attention where it truly belongs.



Leading the way

As new functionality becomes available with Workday HCM and Financial Management, the University plans to embrace an environment of continuous improvement, constantly optimizing and evolving business processes to yield effective results. Their ability to impact the University's operations can now be added to the long list of firsts, helping to maintain its position as a leader in the educational landscape and forging a path that other institutions will likely follow.

For more information, please contact us.

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