Lessons Learned

BG@100 Project

HCM Implementation

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The BG@100 Project

The BG@100 Project has just finished its first phase with the successful implementation of the HCM product line. HCM is PeopleSoft's acronym for Human Capital Management. HCM is comprised of Human Resources, Benefits and Payroll modules. This first phase finished on time and under budget.

Lessons Learned Evaluation Process

The successes of this first phase were not accidental. They were the results of many good decisions and of the hard work of the project team members and many others on campus. This review is intended to help put the project on course for future successes by looking at the processes that contributed to our success and searching out areas that could use improvement.

The implementation lead for the next phase of the project, Deb Clink, was chosen to lead the review process as an interested but outside reviewer of the HCM implementation. Three other team members were chosen to assist Deb in collecting and compiling the data into a report. These team members were Mike Failor, Bob Kupetz, and Jen Sader. Input was collected through a variety of means. A large brainstorming session was held, with project team members and staff members from key functional areas on campus who were involved in the HCM implementation. A special session with the Student Employment office was also held. Other individuals were asked for their input through emails and personal interviews.

After collecting the data, the members of the report team met to discuss the key themes that stood out as central to the comments collected. These themes are the lessons we take forward into future phases of the BG@100 Project.

Findings

Strengths:

- **The choice of a phased implementation beginning with HCM** was important. HCM was chosen as a starting point because the Office of Human Resources was in serious need of a new system and was committed to making the project a success. Human resource, benefit, and payroll data entry is also done by a smaller group of people than financial and student administration data. Starting with a smaller, centralized client group made training more manageable as we learned the PeopleSoft product.
- The Project Team was especially appreciative of the **excellent support from management and the Executive Steering Committee (ESC).** The committee stayed informed about the team’s activities and made sure the project team got the resources and tools it needed to make the project successful.
- **The establishment of the BG@100 Project Office and allocation of full-time resources to the implementation, including ITS and functional team members** sent a clear message about the importance of the project and helped maintain the team’s focus and unity. Day to day distractions were minimized by physically moving personnel away from their office and onto the project. There were also team-building activities (potlucks, after work activities) and tools like Instant Messenger that helped the group bond well and work effectively.

- **The scope of the project was defined early and respected throughout the implementation** by team members, managers, and clients. The focus was on providing the functionality necessary to the university's mission. This helped to establish realistic expectations for a successful project implementation.
- **When necessary, there was an acceptance by the campus user community of changes to business practices** to avoid unnecessary customizations which would add cost to the project and make maintenance more difficult. Client offices seemed to accept and even welcome the opportunity to refine and update their business practices.
- **There was an effective process in place to address customization requests to the ESC with the Action Item System.** This review process helped the project team consider all possible alternatives to customizing PeopleSoft and added an additional sense of discipline about minimizing such customizations. When a customization was necessary, Action Items were addressed promptly to minimize delays for the project team.
- **A clearly-defined vision of the project's overall structure** helped shape the team from the start. The project director formed a project team and project plan in accordance with this overall vision. We also had a project manager who helped keep track of the day-to-day operations of the project. The result was that project team members were able to keep the focus on their tasks. This also helped assure a smooth transition when the project director changed.
- The project team members benefited from the **experience of the consultants** who were brought on board to help with the project. The consultants were able to start work on project tasks and help train project team members.
- **A well-defined conversion strategy was established early** on in the project. We followed the adage, "Convert early, convert often." The project team knew that the legacy data contained errors and had other issues, so multiple conversions helped in data cleanup. Conversion was the smoothest part of the implementation as a result of this strategy.
- **Communication was open and ongoing throughout the project**. The open forums, power users' meetings, articles, emails, and website helped keep the campus aware of the project and gave end users a chance to have their concerns addressed before the go-live date. Other members of the Higher Education User Group (HEUG) are referencing our website as an example of best practices.

Room for Improvement:

- Our **functional project team members were overloaded and their availability affected other team members' tasks**. There was also a concern that key constituent groups like Student Employment and Payroll did not have enough representation on the project. We may need to involve more functional people in project processes and decisions, not just the ones selected as full-time project team members.
- There was some **concern that the project timeline was date-driven rather than task-driven**. Certain tasks seemed rushed and the implementation date hit many offices at their busiest times. There was a suggestion that we evaluate alternative deadlines/project plans and do a cost-benefit analysis to assure that we choose the best possible implementation schedule.
- Back office users told us they wanted more time to learn the system before the go-live date. But there is also a concern if there is too much time lag between training and using

the system. **Training users earlier and then involving them in the testing process** could solve this conflict. Training may not have been given the attention it deserved, considering its critical importance to the project's success.

- Team members, especially the development group, felt that they needed **more outside PeopleSoft training** to effectively perform their tasks. Though internal training was helpful, many people did not feel it was enough.
- The team felt that **more of the reporting burden should be shifted from end users to the tech team**. Time and resources should be allocated to creating reports that will help end users do their jobs effectively after go-live.
- Several people noted that **a comprehensive security plan should be developed earlier in the process**. Because security roles and profiles were assigned late in the project timeline, there were unnecessary delays after go-live.
- **Customizations to PeopleSoft need to be fully documented** to avoid problems later when the system is upgraded.
- **Functional team members and were moved out of the project office one month after go-live, and our primary HCM consultant left at the same time**. There were issues that took longer than this to surface, and resolving them was more difficult with the reduction in dedicated resources. In future phases, we may want to allocate more time and resources to wrap-up activities, especially since the future phases will impact more people across campus.

Recommendations

1. **Training and documentation plans should be an integral part of the project plan**. Most people involved in the lessons learned process wanted to see training take place earlier in the timeline and many suggested shorter, more frequent training courses instead of longer ones. Testing the system can also be a part of the training plan and should be done by end users as well as project team members. Update meetings with the back offices are training opportunities. At every step of the project, we should keep training needs and goals in mind. Subject matter experts should be involved in planning the training since they know what their fellow users will need.

2. **Identify work processes, policies, procedures, and forms that need to be changed early in the project timeline**. A member of the project team should work with back offices to guide the change to completion through the back offices' internal approval processes.

3. **Dedicate resources to building reports and queries needed by end users to be productive at go live.** This should be considered an opportunity to examine the actual needs of the back offices and not just an exercise in duplicating existing reports.
4. **Project management should monitor team members' progress on key tasks** and make sure the project is hitting appropriate progress milestones.
5. Establish a testing lead early in the project timeline and do a **full parallel test of the complete system**, including data entry, payroll, interface processes, and month- and year-end activities before the go-live date. Any custom applications and reports should be complete and tested by the client office before final signoff is given.
6. **Fully document our security plan and conduct an internal audit of our business processes to ensure that we are following industry best practices for security of data.**

The information contained in our administrative systems is critical and sensitive. We may want to consult with the Auditor's office as we move forward with the financial system.

7. **Continue to use the Action Item Request system to review customization needs**. This system was very successful in the HCM phase and should be carried forward into future project phases.
8. **Use the communication lines opened during the HCM phase of the project to keep the campus informed** of the plans and proposed timelines for future phases. Much of the feedback we received indicated that the campus community appreciated having the ability to inform themselves of project developments.

The lessons learned from the HCM phase of the BG@100 Project will help make future phases of the BG@100 Project successful.