Welcome!

Welcome

- We have engaged the Deloitte team to conduct **research on behalf of UMass' President's Office to help set a strong foundation for the potential modernization of UMass' ERP system**, building off the UMass ERP Summit held in April 2024.

- We are **meeting with select leaders across the System and its campuses to deepen our understanding of the potential options for UMass' path forward** and to ensure we capture a wide range of perspectives.

- The **information gathered during these sessions will be used to enhance the insights gained Summit and provide inputs into the future development of an ERP Roadmap.**

Agenda for Today

Welcome	• Opening Remarks • Icebreaker • Key Discussion Topics • Virtual Participation	**1:00 – 1:10 PM**
Activity #1	• Here to There – *How would you describe the current state and what would you envision for a potential future state?*	**1:10 – 1:35 PM**
Activity #2	• Opportunities & Challenges – *What are the greatest opportunities and challenges for a potential modernization?*	**1:35 – 2:00 PM**
Activity #3	• Brainstorm Activity – *Thinking broadly, what are the largest enablers and barriers to a potential modernization?*	**2:00 – 2:25 PM**
Looking Ahead	• Summary and discuss next steps – *Where do we go from here? What would you like to see happen next?*	**2:25 – 2:55 PM**

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April ERP Summit – A Look Back

120 UMass Participants

Representing

5 Campuses and the President's Office
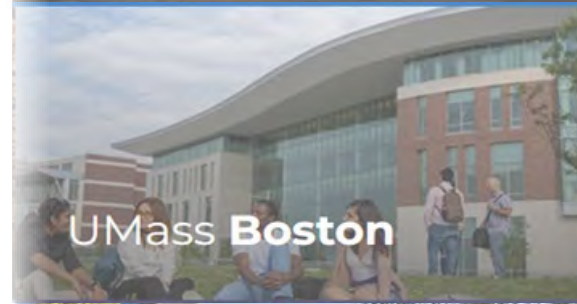
From across

14 Functional Areas

- Academic
- Budget
- Bursar
- Controller
- Enrollment
- Finance
- Grants/Research
- Program Management
- Human Resources
- Information Technology
- Procurement
- Risk/Policy
- Student Financials
- Treasury

UMass **Amherst**

UMass **Chan**

UMass **Boston**

UMass **Lowell**

UMass **Dartmouth**

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ERP Summit - Key Takeaways

Users report significant institutional knowledge of current systems but are strongly aware of associated challenges and limitations.

Although UMass's ERP systems are not 'burning platforms' the significant challenges identified present compelling opportunities for potential transformation.

Stakeholders seek an actionable roadmap outlining potential next steps, including initial work on a future vision and guiding principles.

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Post-ERP Summit Campus Meetings - Timeline

- Engage campuses/UMPO in more ERP discussions to gain further insights from what was brought forward at the Summit (June-July).

- Organize content from campus sessions into a document that will help guide a potential ERP Roadmap Phase in FY25 (July).

- Present ERP Roadmap approach to system-wide leadership (July).

Campus	Date
Amherst	June 25
Boston	June 28
Chan	July 16
Dartmouth	June 4
Lowell	June 27
UMPO A&F	June 26
UMPO UITS	June 26

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Ice Breaker: One Good Thing

What is your name, role, and number of years at UMass?

What is one good thing you're looking forward to this summer?

Key Discussion Topics

1
What is working well?

- Can you talk about what is currently working well with the ERP system?

- What are the things that should stay the same?

- Which aspects of the current ERP do you find meet or exceed your expectations?

2
Opportunities for Improvement

- What are some limitations from the current ERP system?

- What are some adjustments or workarounds that you (or your team) utilize with the current system?

- How could potential new systems better address these issues?

- Are there other improvements that you would like to see in a new system that would improve your daily activities?

3
Your Interactions with ERP Systems

- In your official capacity, do you interact with the other campuses with respect to the ERP system? Why/not?

- If so, can you describe these interactions?

- Are there processes you think would benefit from more cross-collaboration amongst campuses?
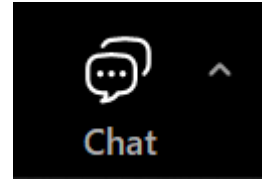
- If so, which ones? How?

4
The Path Forward

- What excites you about an eventual, potential ERP modernization?

- What concerns do you have (if any) regarding an eventual, potential ERP modernization?

- What barriers could you anticipate?

- Do you have any other insights from prior modernization initiatives that we should factor into our thinking?

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Virtual Attendees – How to Participate
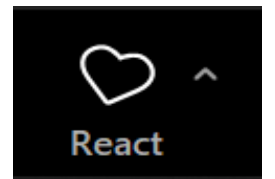
1   **TO PARTICIPATE IN TODAY'S ACTIVITIES:**

At the bottom of your screen, you should always have access to the _chat_ feature. By clicking on this icon, you will obtain access to the chat box. We will monitor any messages submitted in the chat box as part of the structured activities.

2   **TO PARTICIPATE IN THE OPEN DISCUSSION:**

At the bottom of your screen, you should always have access to the _react_ feature. By clicking on this icon, you will be able to use the _raise hand_ feature. We will monitor the Zoom for any raised hands from virtual attendees as part of the open discussion.

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Here to There

Here to There – ERP Current State

How would you describe the current state and what would you envision for a potential future state?

1 | Independently, reflect on your experience using UMass' ERP systems.

2 | Characterize the current state of UMass' ERP systems, capturing both positive and negative aspects.

3 | Write your characterizations on post-it notes (using one post-it note per characterization) and post it on the wall.

4 | As a group, we will review what has been posted, discuss the characterizations, and group the post-it notes into common themes.

Please write your function on the back of your sticky notes.

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Here to There – ERP Potential Future State

How would you describe the current state and what would you envision for a potential future state?

1 Independently, reflect on your experience using UMass' ERP systems.

2 Characterize the potential future state of UMass' ERP systems, capturing both positive and negative sentiments.

3 Write your characterizations on post-it notes (using one post-it note per characterization) and post it on the wall.

4 As a group, we will review what has been posted and identify common themes, contrast points, and/or other linkages across the two columns, and discuss implications as a group.

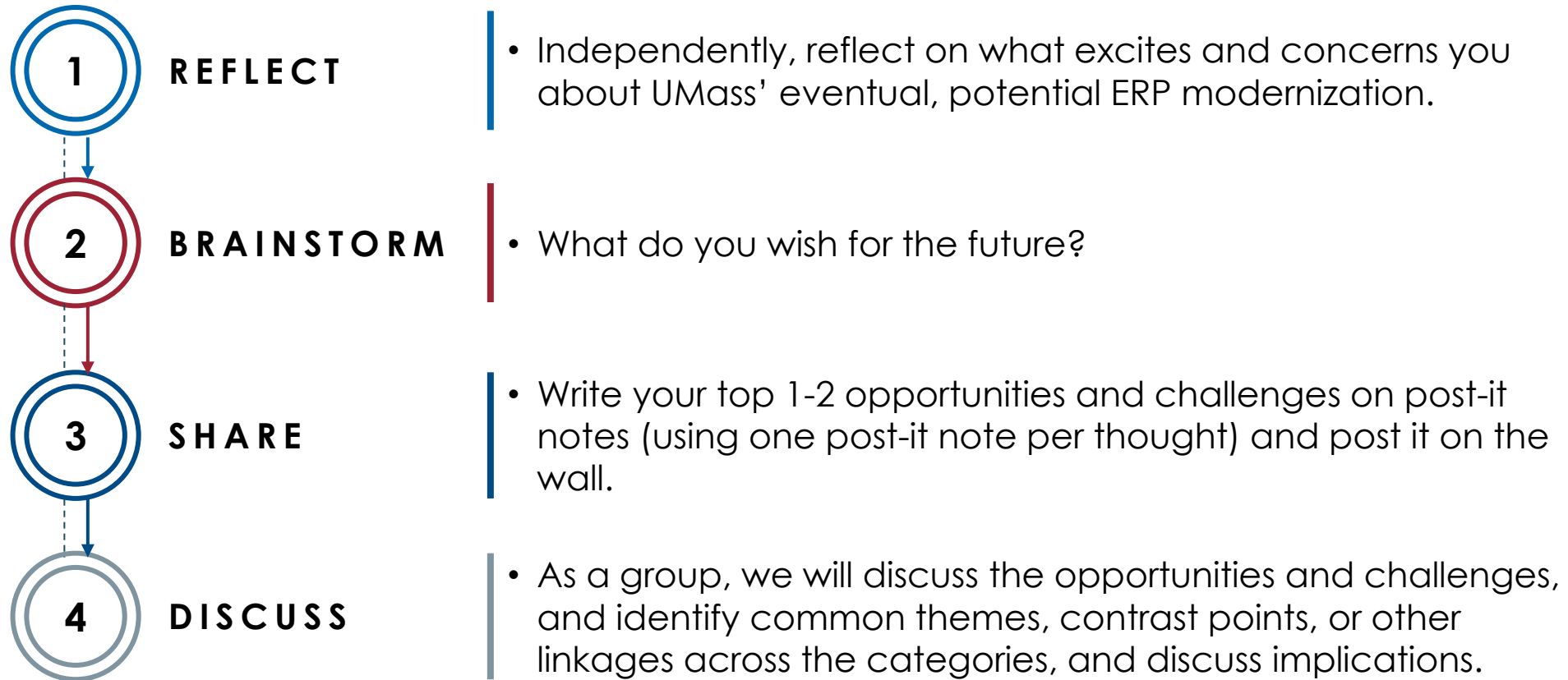*Please write your function on the back of your sticky notes.*

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Opportunities & Challenges

Opportunities & Challenges

What are the greatest opportunities and challenges for a potential modernization?

1 REFLECT
- Independently, reflect on what excites and concerns you about UMass' eventual, potential ERP modernization.

2 BRAINSTORM
- What do you wish for the future?

3 SHARE
- Write your top 1-2 opportunities and challenges on post-it notes (using one post-it note per thought) and post it on the wall.

4 DISCUSS
- As a group, we will discuss the opportunities and challenges, and identify common themes, contrast points, or other linkages across the categories, and discuss implications.

Please write your function on the back of your sticky notes.

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Brainstorm Activity

Brainstorm – Critical Enablers & Barriers

Thinking broadly, what are the largest enablers and barriers to a potential modernization?

1. Take 5 minutes to brainstorm as many ideas to address the below questions as possible (one idea per post-it note).

   - *The goal is quantity of ideas, not quality at this point.*

2. What are the critical enablers of the eventual, potential ERP modernization/transformation? What potential barriers (e.g., modernization fatigue, change resistance, etc.) could you anticipate related to an eventual, potential ERP modernization?

3. As a group, we will review what has been posted, identify common themes, and discuss how to best utilize the identified critical enablers and potential mitigation strategies for the identified barriers.

Please write your function on the back of your sticky notes.

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Looking Ahead

Looking Ahead

What would you expect or like to see in terms of next steps, priorities, etc. as it relates to UMass' potential ERP modernization?

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Next Steps

1 | Develop and distribute a **post-focus group report**

2 | Develop and distribute **transformation preparation guide**

3 | Outputs will inform the development of an **ERP Roadmap Phase in FY25**

4 | Continued **engagement with Campus Leaders** to keep the conversation going

Thank you!

Parting Thoughts

As you have time to think back on this session, please feel free to share any additional insights or thoughts as it relates to UMass' potential ERP modernization over the next few days.

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