



University of Massachusetts
Amherst • Boston • Dartmouth • Lowell • Medical • Law

UMass ERP Roadmap Project Post ERP Summit Phase June 2024



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Overview of UMass ERP Summit

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

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.

Activity 1: Key Themes from “Think” Exercise

Limitations, Strengths, and Opportunities



The complex and largely non-integrated ERP ecosystem challenges staff's ability to effectively execute processes, manage and analyze data, and strategically plan for the present and future needs of campuses and the System.



Highly committed staff are adept at utilizing the current system because they possess substantial institutional knowledge. Strong internal capabilities have been developed to navigate and manage the current ERP infrastructure.



Participants identified a number of areas for future improvement by focusing on **integrated systems and processes**, **improved access to quality data** and **reporting**, and **enhanced user experience**.

Activity 1: Unpack and Group Summary

Limitations

1. Integrations across Core ERP System and 3rd Party Bolt Ons
2. Data Quality, Reporting, and Analytics
3. Inconsistent Processes and User Experience

Strengths

1. Familiarity with Systems and Workarounds
2. Technical and Institutional Know-How
3. Select Areas of Reporting

Opportunities

1. Reporting & Access to Data
2. Consolidate Systems
3. Process Alignment, Standardization, and Automation

Activity 2: “What One Thing” Summary

What one thing should UMass pursue as a next step coming out of today’s summit?:

- **Need for a Clear Roadmap and Vision**
- **Desire for More Frequent Communication and Collaboration**
- **Focus on Process Improvement and System Evaluation**
- **Importance of Prioritizing Initiatives**
- **Emphasis on Student-Centric Approach**
- **Desire for Consistency and Standardization**
- **Awareness of Long-term Implementation Timeline**
- **Interest in Benchmarking**

Post-Event Survey: Topics for Additional Engagement

- 1 **Demonstrations of different ERP solutions** (to include system overviews with a deep dive into specific modules, functionality, and potential gaps, with an emphasis on Student, Grants, P2P, Reporting, etc.)
- 2 **Continued discussions and learning from peer institutions**; potential topics could include ERP planning process, organizational change management efforts, and lessons learned.
- 3 **Develop a strategic roadmap** to steer future actions, establish an overarching vision and guiding principles, and foster consensus on how to advance ERP-related discussions throughout the System.
- 4 **Gain a better understanding of potential future gains** and how a new ERP system and implementation could be funded.
- 5 **Continue conversations started at the Summit by campus and functional areas** to understand system/process gaps, opportunities to standardize existing processes and data management, and processes/areas where there could be larger opportunities to transform.

Post ERP Summit Campus Meetings

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- 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	Details
Amherst	June 25	2 hour session with cross functional representation
Boston	June 28	2 hour session with cross functional representation
Chan	July 16	2 hour session with cross functional representation
Dartmouth	June 4	2 hour session with cross functional representation (complete)
Lowell	June 27	Morning session with HR/Finance, afternoon session with Student
UMPO A&F	June 26	2 hour session with UMPO A&F Leadership Team
UMPO UITS	June 26	2 hour session with UITS EMT