



University of Massachusetts

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# UMass ERP Roadmap Project

## *Post ERP Summit Phase*

### May 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

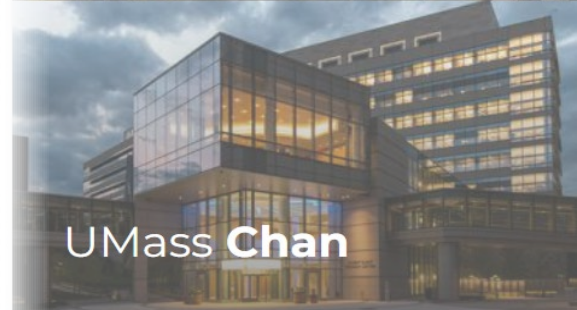


**14 Functional Areas**

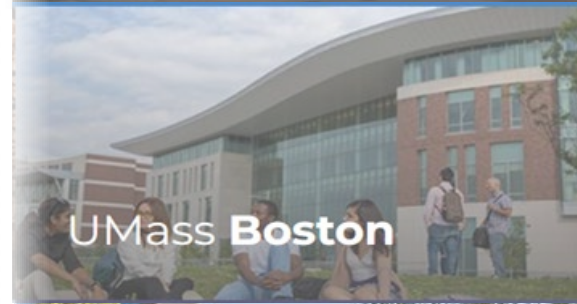
- Academic
- Budget
- Bursar
- Controller
- Enrollment
- Finance
- Grants/Research
- Program Management
- Human Resources
- Information Technology
- Procurement
- Risk/Policy
- Student Financials
- Treasury



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 3<sup>rd</sup> 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)
- 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 campus meeting with selected stakeholders |
| Boston    | TBD     |  |
| Chan      | TBD     |  |
| Dartmouth | June 4  | 2 hour campus meeting with selected stakeholders |
| Lowell    | TBD     |  |
| UMPO A&F  | TBD     |  |
| UMPO UITs | TBD     |  |