

UMass ERP Summit Report to Attendees

May 2024

Overview of UMass Summit and Key Takeaways

Summary - Key Takeaways from the ERP Summit

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.

Summary of Results from “Think” and “Share”

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 | Debrief in the Commonwealth Room by Functional Group

Budget & Controller

Limitation
Access to actionable information

Opportunity
Consolidation of systems for a whole UMass system view (holistic vision and system)

Strength
Familiarity

Opportunity
Improve access to data and systems

Limitation
Inefficient business processes and user experiences

Strength
Specific areas of data and reporting

Campus Department A&F

Limitation
Data info analytics; planning (e.g., budget, position management)

Limitation
Integration: data, systems

Strength
It's a stable, known system that gets the job done

Opportunity
Reporting

Opportunity
Training

Strength
We have the people around the system who know how to use the system

Grants & Research

Strength
Financial reporting

Limitation
Not user friendly with confusing security roles & systems not talking to each other

Opportunity
Reporting

Opportunity
Simplifying/consolidating/automating processes

Limitation
Strategic reporting

Strength
You know "the devil," have spent a long time getting to know how it works

HR & Payroll

Strength
Everyone is familiar with the system

Limitation
Integration and lack of systems talking to each other

Limitation
Lack of data integrity, reporting, and dashboarding

Opportunity
Process efficiency

Opportunity
Reporting and analytics (inclusive of data)

Strength
The Payroll function works

Student Administration

Opportunity
Improvement of Support Model

Limitation
Manual work/Workarounds

Limitation
Number of Integrations of 3rd Party Systems

Opportunity
Reporting

Strength
Technical, peoplesoft as center point of ecosystem with integrations where feasible

Student Financials

Strength
Collaboration

Opportunity
Consistency of business processes integration

Limitation
Data reporting and analytics

Strength
It works

Opportunity
Multiple systems

Limitation
Student experience

Technology

Limitation
Consolidation of workflow.

Opportunity
Data governance and system-wide reporting.

Limitation
Different person records.

Opportunity
Embedded user interface.

Limitation
How roles are defined throughout the system.

Opportunity
System driven automation around process alignment across UMass.

Strength
The platforms are stable because of the people and infrastructure.

Strength
UMass employees have useful institutional knowledge.

Activity | Debrief in the Commonwealth Room by Category

Limitation

Budget & Controller Access to actionable information	Technology Consolidation of workflow.
Campus Department A&F Data info analytics; planning (e.g., budget, position management)	Student Financials Data reporting and analytics
Technology Different person records.	Technology How roles are defined throughout the system.
Budget & Controller Inefficient business processes and user experiences	HR & Payroll Integration and lack of systems talking to each other
Campus Department A&F Integration: data, systems	HR & Payroll Lack of data integrity, reporting, and dashboarding
Student Administration Manual work/Workarounds	Grants & Research Not user friendly with confusing security roles & systems not talking to each other
Student Administration Number of Integrations of 3rd Party Systems	Grants & Research Strategic reporting
Student Financials Student experience	

Opportunity

Student Financials Consistency of business processes integration	Budget & Controller Consolidation of systems for a whole UMass system view (holistic vision and system)
Technology Data governance and system-wide reporting.	Technology Embedded user interface.
Budget & Controller Improve access to data and systems	Student Administration Improvement of Support Model
Student Financials Multiple systems	HR & Payroll Process efficiency
Campus Department A&F Reporting	Grants & Research Reporting
Student Administration Reporting	HR & Payroll Reporting and analytics (inclusive of data)
Grants & Research Simplifying/consolidating/automating processes	Technology System driven automation around process alignment across UMass.
Campus Department A&F Training	

Strength

Student Financials Collaboration	HR & Payroll Everyone is familiar with the system
Budget & Controller Familiarity	Grants & Research Financial reporting
Student Financials It works	Campus Department A&F It's a stable, known system that gets the job done
Budget & Controller Specific areas of data and reporting	Student Administration Technical, peoplesoft as center point of ecosystem with integrations where feasible
HR & Payroll The Payroll function works	Technology The platforms are stable because of the people and infrastructure.
Technology UMass employees have useful institutional knowledge.	Campus Department A&F We have the people around the system who know how to use the system
Grants & Research You know "the devil," have spent a long time getting to know how it works	



Activity 2: Key Themes from “Share” Exercise

What one thing? Key Next Steps Discussed



Participants expressed their desire for a **clear timeline and roadmap** for when, if, or how the decision to move forward with an ERP modernization effort will be finalized.



Campuses focused on their **shared values**: what are the **factors driving a potential decision** to modernize UMass's ERP? How would undertaking this **transformative effort** ultimately benefit UMass?



Several campuses expressed an interest in taking steps to **begin reviewing current business processes** and learn more about **potential systems and functionality**.

Activity | Report Out

Amherst

Boston

Chan

Dartmouth

Lowell

President's
Office

Business process and
requirements review

Continue the
conversations with
actionable outcomes
and use governance
structure to make
sure the people's
voices are heard

Need to create a
vision and build a case
for change and
identify outcomes we
want out of this

Commitment to move
forward with a UMass
system vision

Establish a High Level
Timeline for Change

Determine guiding
principles

Need a Budget and
Planning tool

Develop a plan and
roadmap so that
current projects can
be prioritized to align
with the future state

Identify current
state to
understand the
starting point and
the change impact

How do we get this
done in terms of
timeline, summits,
communications, etc.?

Make Incremental
Improvements on
Data Quality

Committing to a
consistent system ERP

Standardize business
process (for functions,
campuses) where
applicable

Focus on data
quality and data
governance now
to improve
reporting and
analytics

Prioritizing the short-
and medium-term
improvements that
should go forward

Focus not only on
what we have, but
also what we might
want.

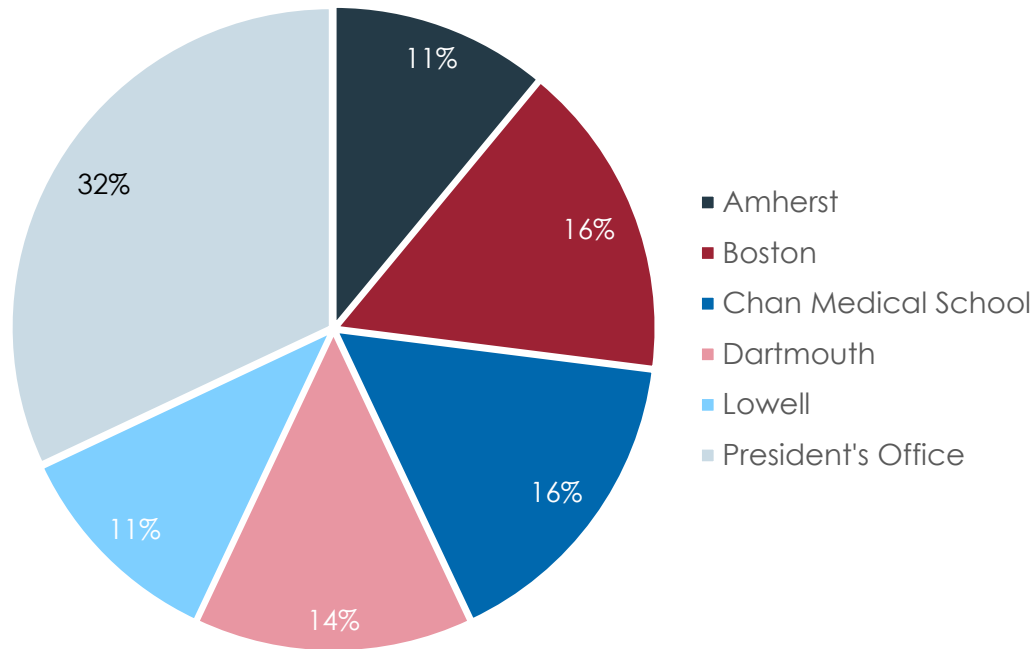
What
One
Thing?

Summary of Post-Event Survey Responses

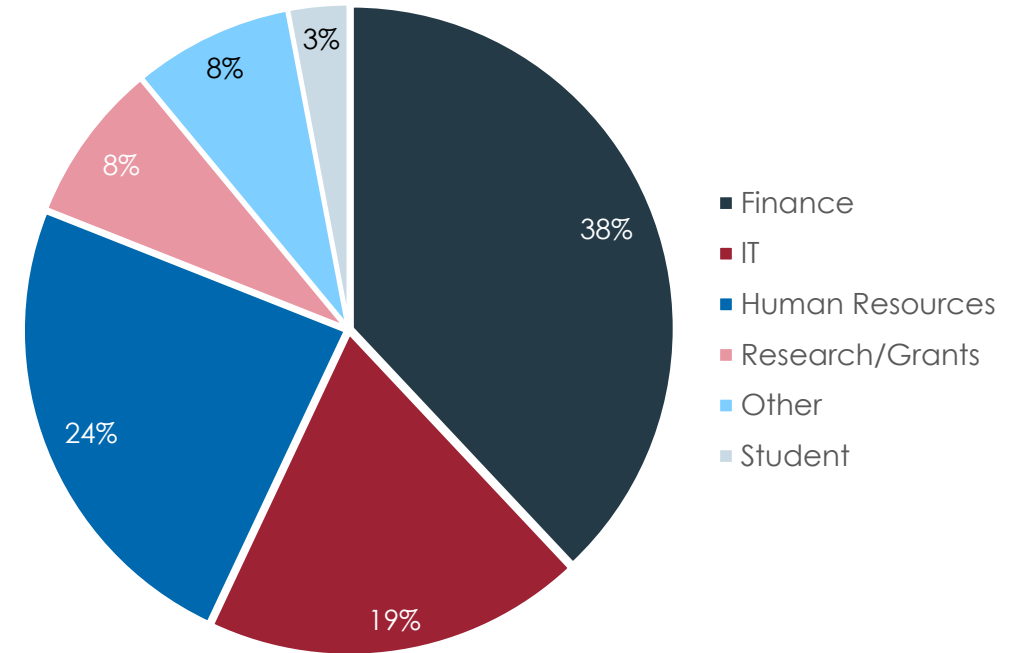
Post Event Survey: Respondent Overview

 37 Respondents

CAMPUS REPRESENTATION



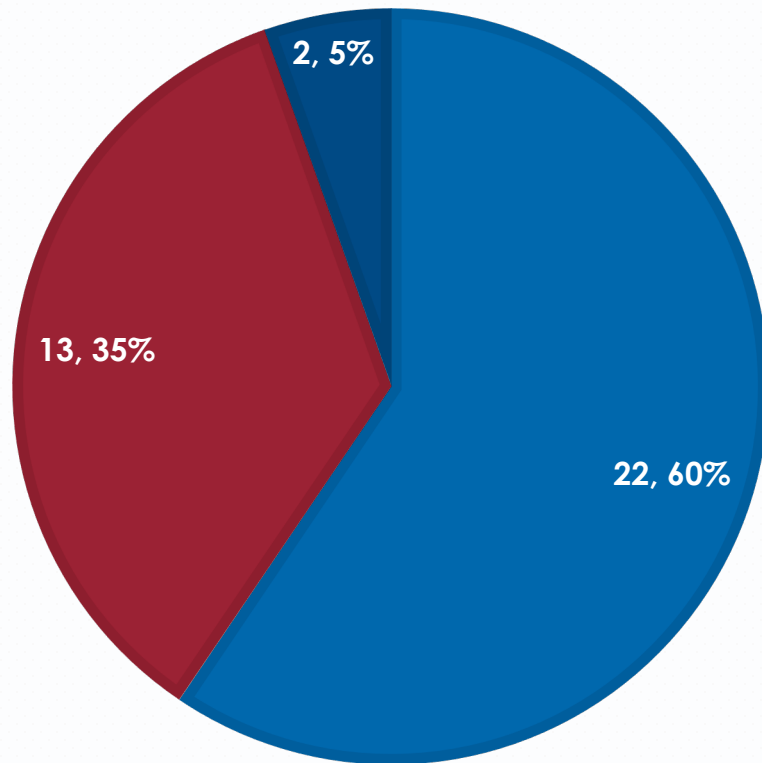
RESPONSES BY FUNCTION



Post Event Survey: Participant Satisfaction

What is your level of satisfaction with the UMass Cloud ERP Summit?

■ Very Satisfied ■ Satisfied ■ Not Satisfied



Key Messaging by Response

Very Satisfied:

“ Well organized day with the right amount of learning and doing. Felt **very collaborative** and **participants seemed open minded**. Appreciated the peer perspective and experience. Exercises were productive but not too "heavy" to complete. **Positive dialogue** had in breakout rooms.

This summit was very well organized and delivered. I found it **very helpful in understanding** the history, to start to think about where to go, and what some of the challenges would be. Having Rutgers and Univ of Arkansas there was **very informative** too. ”

Satisfied:

“ The presentations from Rutgers and University of Arkansas were very informative. I would have liked to have used **more of the time to hear more from them**. In addition, I would have liked Deloitte to spend more time **focused on what others have done** in terms of planning / timelines/ implementation successes and pain points. ”

Not Satisfied:

“ **Room was too crowded** and there was not sufficient seating for registered attendees

The space was too small. **Needed more background about what we stand to gain**. The main argument seemed to be that "everyone else is going to a cloud-based system". A lot of money and change--need to be clear about what we gain. ”

Post-Event Survey: Topics for Additional Engagement

Themes from survey responses

- 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.

Frequency of Response

