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

# UMass ERP Summit
## Learn, Think, Share
## April 24th, 2024

University of Massachusetts
Amherst · Boston · Dartmouth · Lowell · Medical School · UMassOnline

# Welcome & Set the Stage



| START LINE Hoyt Statue, Hopkinton | 6 South Framingham Train Station | 9 Lake Cochituate, Natick | 18 Young at Heart Statue, Newton | 21 Heartbreak Hill, Newton | FINISH LINE Boylston Street, Boston |

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# Welcome

**120** UMass Participants

Representing

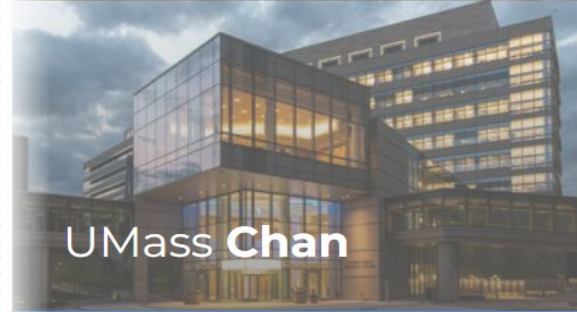**5** Campuses and the President's Office
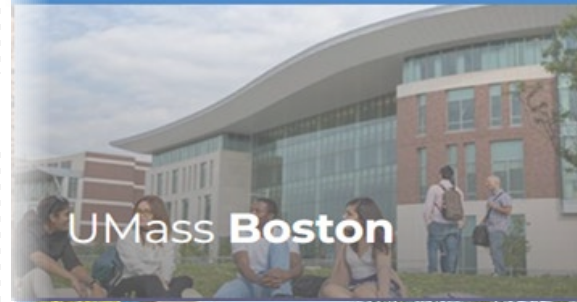
From across

**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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# Deloitte is thrilled to join you and partner to facilitate the day's conversations

**Executive Sponsor:**

Betty Fleurimond

**Summit Facilitators:**

Julia Wysocki and Kelsey Tardiff

**Senior Breakout Facilitators:**

| | |
|---|---|
| Brad Cobbs | Michael Ryan |
| Jay Dumphy | Ray Lozanes |
| Jen Tutak | Ronn Kolbash |
| Keith Burr | Sue Van Voorhis |
| Love Anderson | Ted Simpson |
| Maheshwar Ganguli | Tim Hurley |
| Marnie Fulton | Virginia Fraser |

**Facilitation Support**

| | |
|---|---|
| Amy Fonicello | Laura Mediavilla |
| Audrey Coulter | Lynnette McLaughlin |
| Dalton Wells | Seth Dannemiller |
| Kate McVey | |

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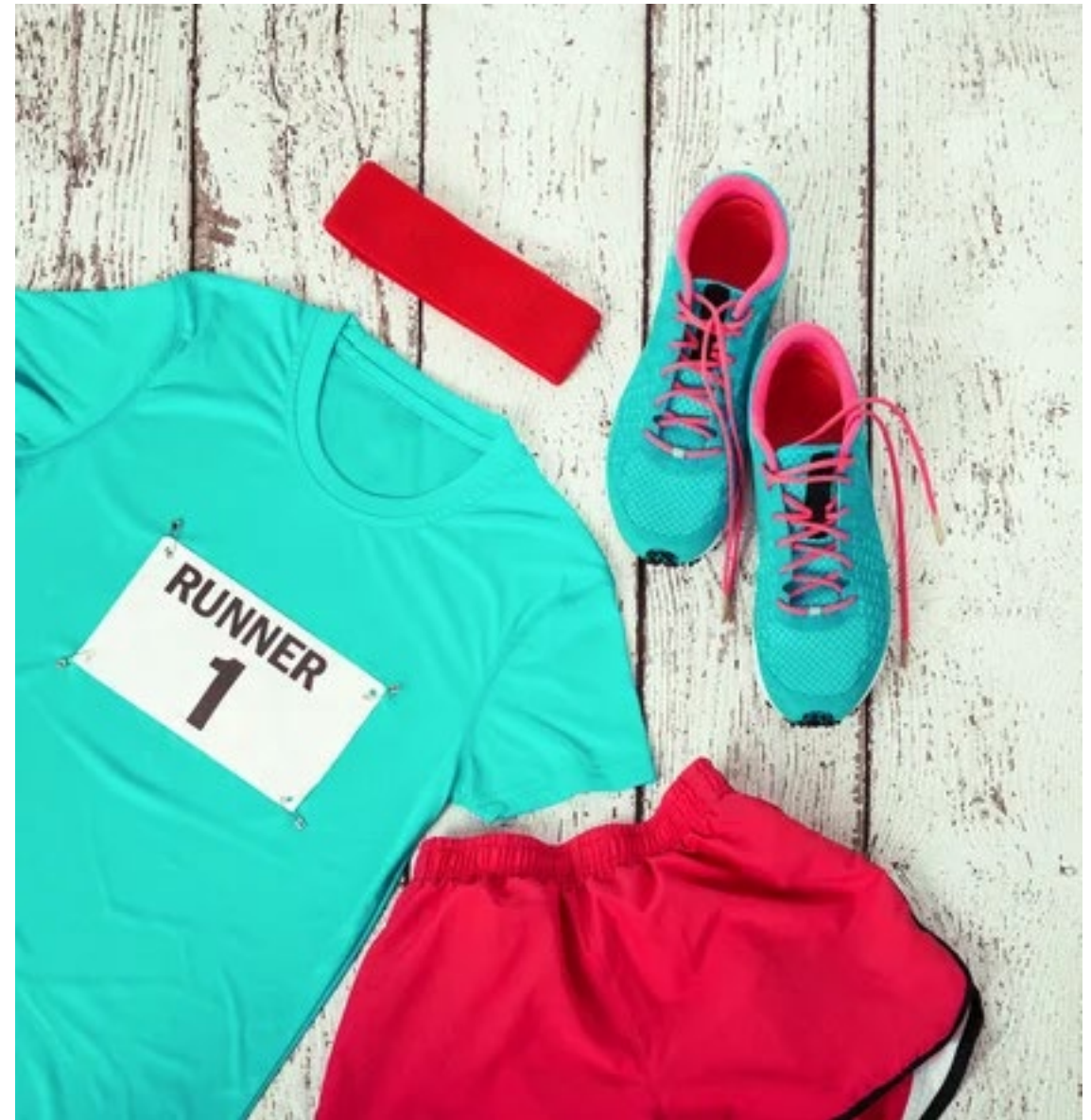
# Background

- "Enterprise Resource Planning (ERP)" is the industry's way of describing the systems used to support key areas like finance, human resources, and in higher education, student.

- In the context of UMass, ERP includes a myriad of technologies, from Peoplesoft HR, Finance and Student, to Buyways, to a large number of point solution products acquired and implemented over the past 20 years.

- The UMass "ERP" is now very much an ecosystem of products that has evolved over time to serve the needs of the campuses and the system.

- In the 20 years since we first implemented the core ERP, the higher education industry has evolved significantly, UMass's size, complexity and needs have changed drastically, and the ERP systems serving higher education have evolved commensurately.

- Thankfully, as a system we are not in a "crisis" with our ERP where we are in reactionary mode – we have time to "Learn, Think, and Share".  Our core tools are stable, but they are showing their age, and they have become increasingly difficult to maintain.

- The UMass ERP Summit is designed to start a conversation about ERP at UMass.

# Today's Objectives

## Learn, Think, Share

The UMass ERP Summit is a **first of its kind** event for UMass campus leadership to come together to "learn, think, and share" about Enterprise Resource Planning (ERP) tools.

Today's summit will include sessions that cover topics, including:

- A reflection/discussion on the University's current ERP landscape

- Understanding the current ERP market

- Understanding our peers and their ERP journey

- Discussion/brainstorming about the University's future – where could we go from here?

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# Logistics for the Day

Today's Summit is from 9am - 4pm EST

- Breaks scheduled throughout the day

- Lunch will be from 12pm - 12:45pm EST

- Water and coffee available outside the Commonwealth Room

- Throughout the day, there will be designated times for you to ask questions

  - If we are not able to address your question during designated Q&A, please write them down on the "Parking Lot" wall

  - After the Summit, all posted questions will be answered

- The President's Office Event Ambassadors have pink nametags and will be available throughout the day if you need additional assistance

Bathrooms are located on each floor near the elevator.

Huddle rooms are available if you need to step out to take a call.

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# Agenda for Today

| | | |
|---|---|---|
| **Welcome & Set the Stage** | • Opening Remarks, Background, Objectives, and Agenda Review<br>• Survey Results<br>• Icebreaker | **9:00 – 9:30 AM** |
| **Learn** | • UMass ERP background, history and current state<br>• Fundamentals and foundation for a modern ERP | **9:30 – 10:45 AM** |
| **Break** | | **10:45-11:00 AM** |
| **Learn** | • Guest speakers from Rutgers and the University of Arkansas System share their ERP journey | **11:00 AM – 12:00 PM** |
| **Lunch Break** | | **12:00 – 12:45 PM** |
| **Think** | • Breakout by Function to brainstorm limitations and strengths of the current ERP system(s) and related processes as well as future opportunities for improvement<br>• Come back together to review brainstorming and discussion | **12:45 – 2:20 PM** |
| **Break** | | **2:20 – 2:30 PM** |
| **Share** | • Breakout by Campus to share thoughts on where UMass could go from here<br>• Come back together to review discussion | **2:30 – 3:45 PM** |
| **Reflect** | • Summary and discuss next steps | **3:45 – 4:00 PM** |

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# Your Breakout Groups for the Afternoon

## Breakout #1

### *By Function*

- Budget & Controller
- Campus Department A&F
- Grants & Research
- HR & Payroll

- Student Administration
- Student Financials
- Technology

## Breakout #2

### *By Campus*

- Amherst
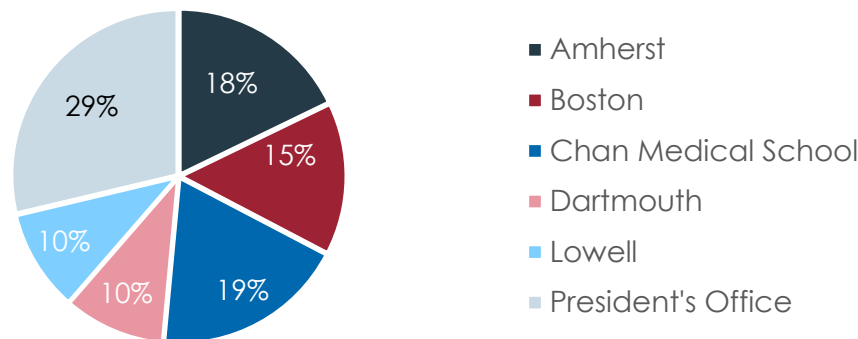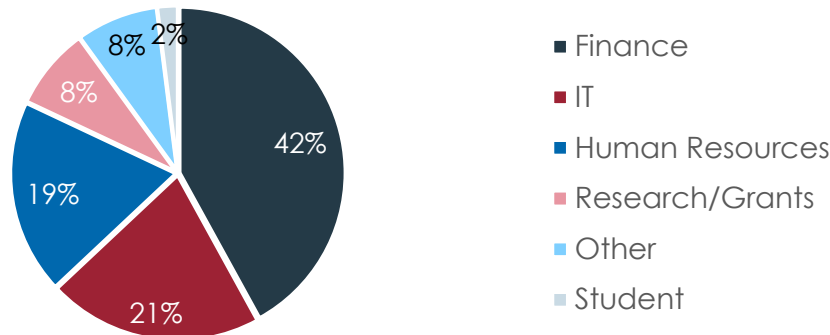- Boston
- Chan

- Dartmouth
- Lowell
- President's Office

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# Set the Stage

# Survey Response: Respondent Overview

**62 Respondents**

## CAMPUS REPRESENTATION



- Amherst — 18%
- Boston — 15%
- Chan Medical School — 19%
- Dartmouth — 10%
- Lowell — 10%
- President's Office — 29%

## RESPONSES BY FUNCTION



- Finance — 42%
- IT — 21%
- Human Resources — 19%
- Research/Grants — 8%
- Other — 8%
- Student — 2%

## How do you feel about the opportunity to participate in the UMass ERP Summit?

| 2% | Nervous |
| 18% | Curious |
| 34% | Interested |
| 47% | Excited |
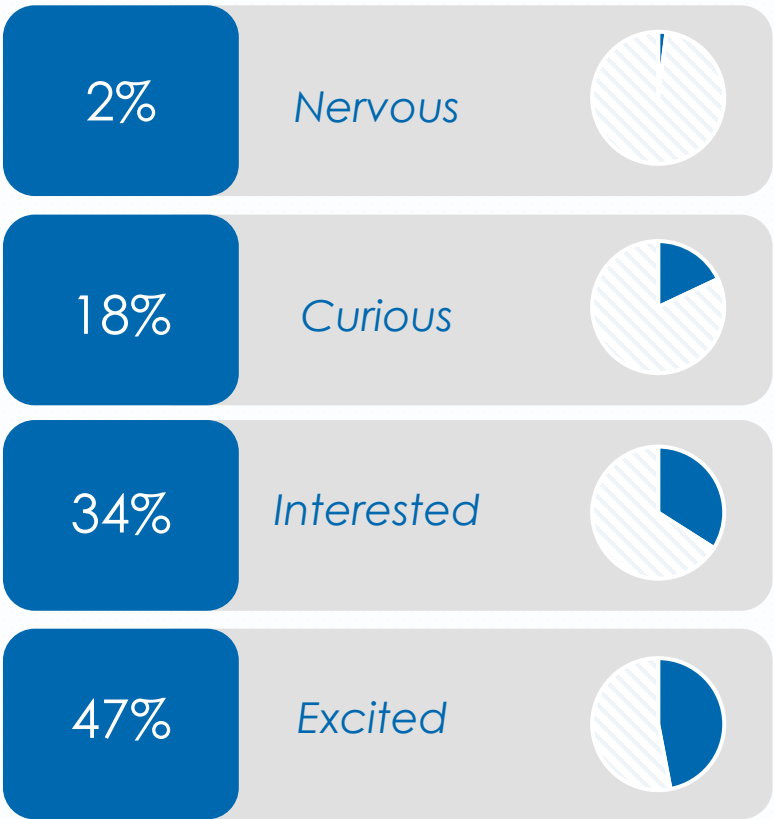
# Does the current ERP meet the needs of your campus?

**Related comments from respondents**

**Frequency of Response**

LOW | MED | HIGH
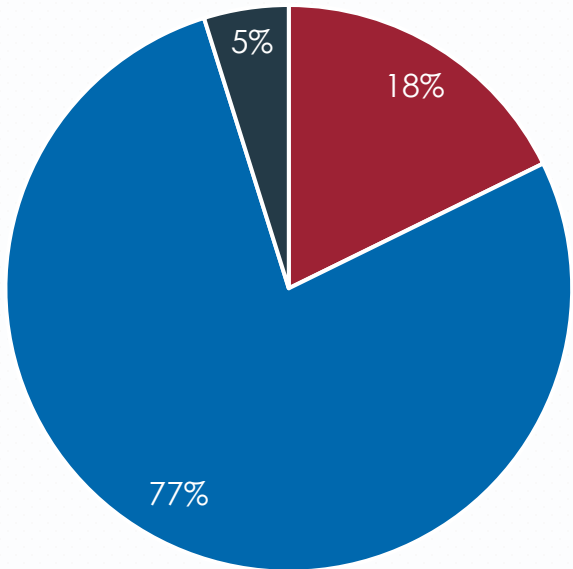
**Not Meeting Needs**

**Somewhat Meeting Needs**

- 77%
- 18%
- 5%

1. **Too many systems & lack of standardization**

2. **Reporting is challenging**

3. **Complexity of system landscape**

4. **Poor user experience & manual workarounds**

5. **Existing system is functional & meets our needs**

6. **ERP system ownership & support**

7. **Lack of campus autonomy**
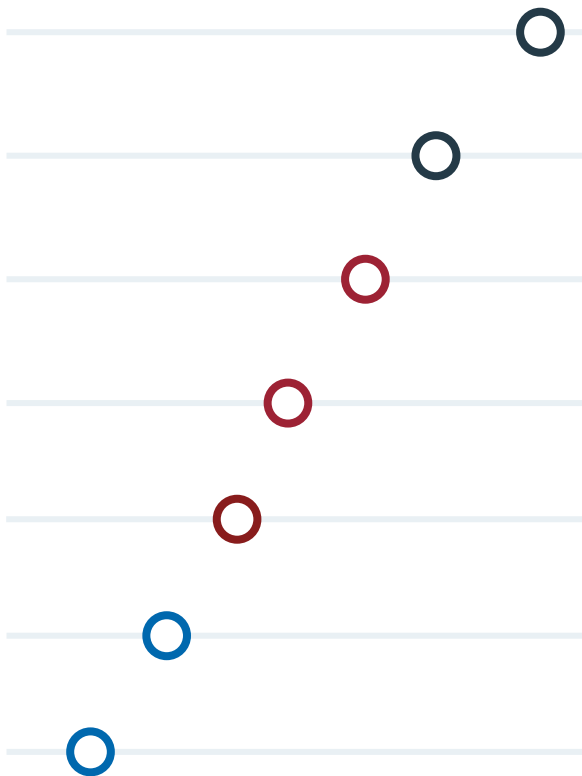
*Note: Data represents responses to survey questions 3b and 4. Individual responses may demonstrate multiple themes.*

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# Interest Areas for Summit and Post Summit Activity

**1**

**2**

**3**

### Opportunities to Improve Systems and Processes

- Lack of consistent processes as well as complexity of third-party system integrations and reporting

- Clean up chart of accounts data and structure

- Maximize functionality in existing modules and new modules to reduce reliance on third-party systems

### Setting a Long-Term Plan and Vision

- What is the process to establish vision, plan, and timeline to support the next generation of an ERP?

- Are there opportunities to improve our current ERP? What could that look like?

- How would the System approach implementing a new ERP? What would the role of campuses be in this effort?

### Components of ERP Planning

- What does a typical system architecture look like for a modern ERP?

- What are the leading software options for a modern ERP?

- What level of effort and types resources are required to implement a new ERP system?

**There will be several opportunities to continue this conversation following today's Summit**

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# Icebreaker | Pick a Picture

**1** Think about your role at UMass, and how you will bring your experience to the Summit and today's conversations.

- *What is your role?*
- *How might this experience be relevant during the Summit?*

**2** Select an image that represents your role.

**3** Introduce yourself to the person sitting to your left and right to share:

- *What image you chose, and*
- *Why you think that image relates to your role or contributions during the Summit*

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# Learn

**START LINE**
**Hoyt Statue,**
**Hopkinton**

**6**

**South**
**Framingham**
**Train Station**

**9**

**Lake**
**Cochituate,**
**Natick**

**18**

**Young at**
**Heart Statue,**
**Newton**

**21**

**Heartbreak**
**Hill,**
**Newton**

**FINISH LINE**
**Boylston**
**Street,**
**Boston**

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# UMass ERP Background, History, and Current State

# Learning Objectives | UMass ERP

**Understand** the history of the UMass ERP ecosystem

**Examine** the current state of the UMass ERP ecosystem including the core Peoplesoft products and other products

**Review** an example of the level of customization within one of the Peoplesoft environments

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# UMass ERP Background

- Campuses and UMPO share one instance of Peoplesoft HCM and one instance of Peoplesoft Financials

- Campus business units were established as part of the initial setup

- Boston, Dartmouth, and Lowell share one instance of Peoplesoft Student; Amherst and Chan have their own instance of Peoplesoft student

- The Peoplesoft applications are heavily customized and extensive integrations with non-Peoplesoft systems have been developed/maintained

- As of today, there is no Peoplesoft "end of life"

- Oracle has a rolling, 10-year support policy

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# HR & Finance ERP "Ecosystem" History

## FY 2002 – FY 2006

### Peoplesoft HR and Financials Phase 1

**Initial investment in Peoplesoft to support core HR and Finance functions**

- Human Resources
- Benefits
- Time and Labor
- Payroll
- GL
- AP
- Purchasing

## FY 2007 – FY 2011

### Peoplesoft Financials Phase 2

**Second investment in Finance functions to integrate with core Finance**

- Assets
- Grants
- Projects
- Contracts
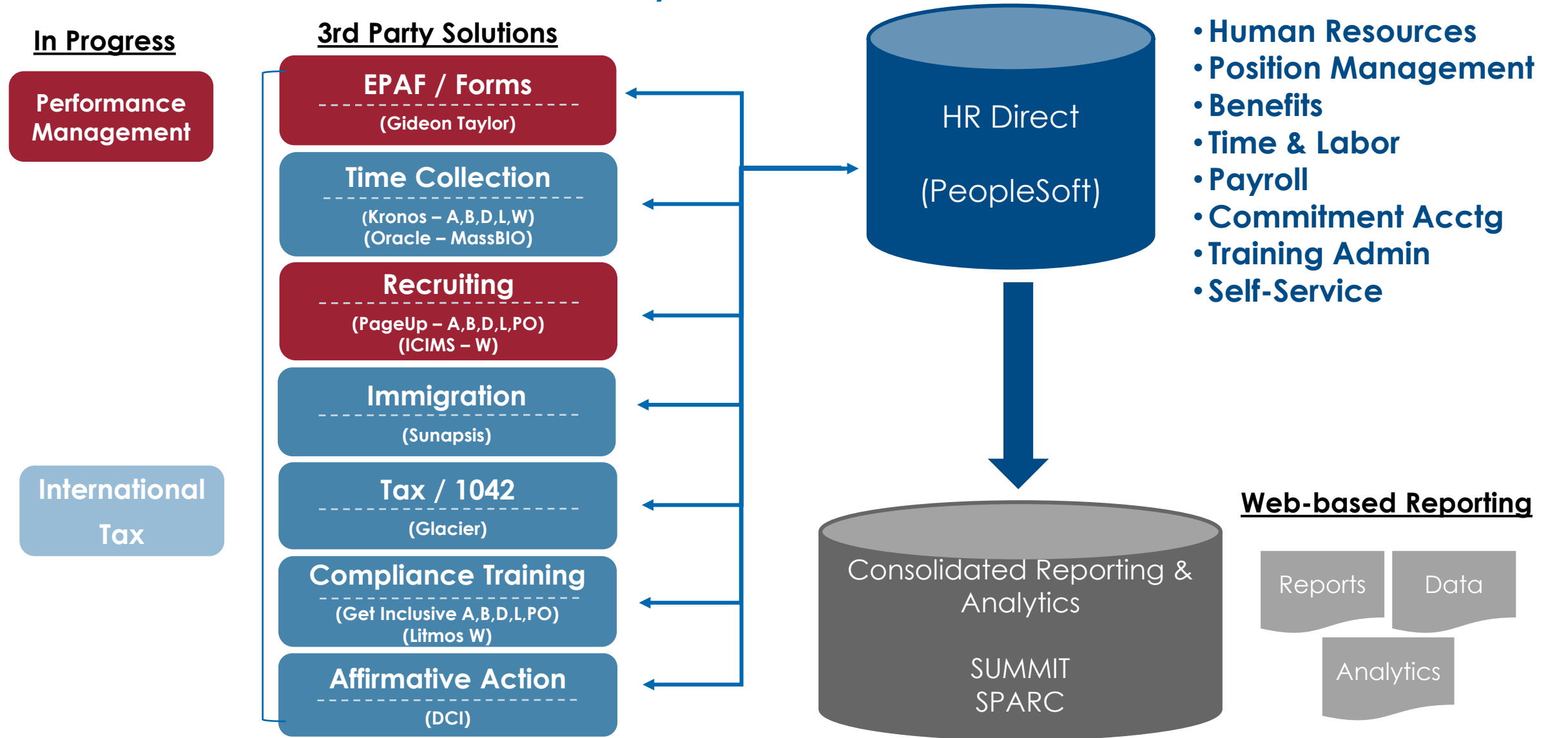- Billing/AR
- Effort Certification (Huron)

## FY 2012 – FY 2024
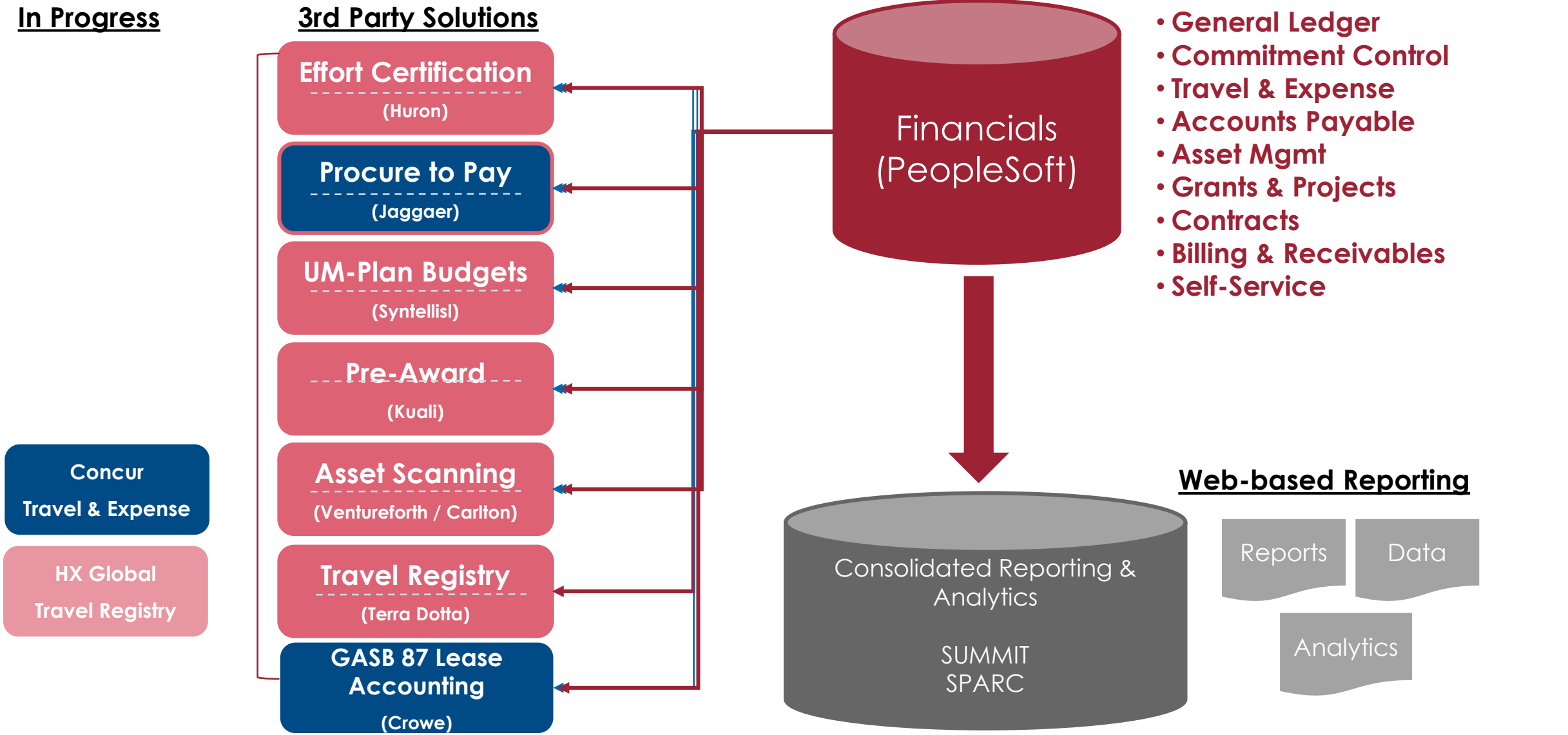
### Ecosystem/ Integration Phase

**Significant investment in non-Peoplesoft products to meet functional needs (some replaced Peoplesoft)**

- BuyWays Procurement
- PageUp/iCims Recruiting
- UM-Plan Budgeting
- Concur Travel & Expense
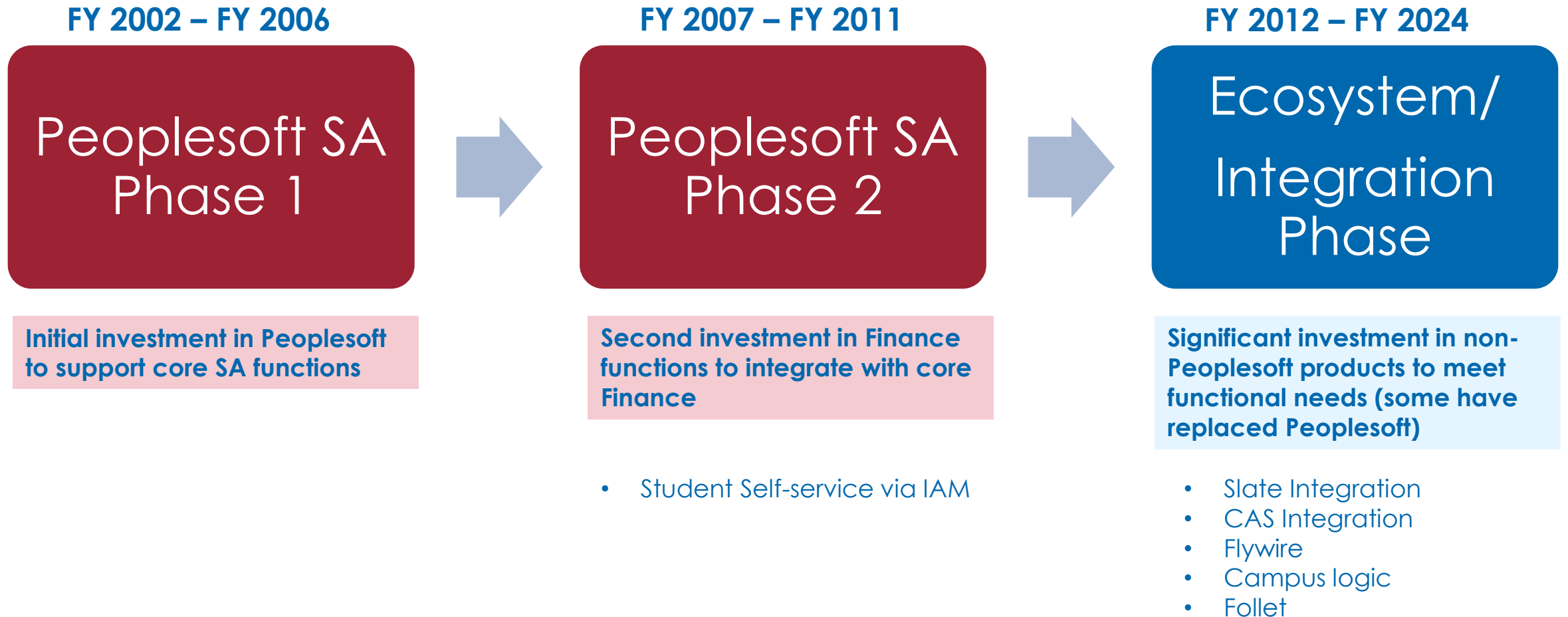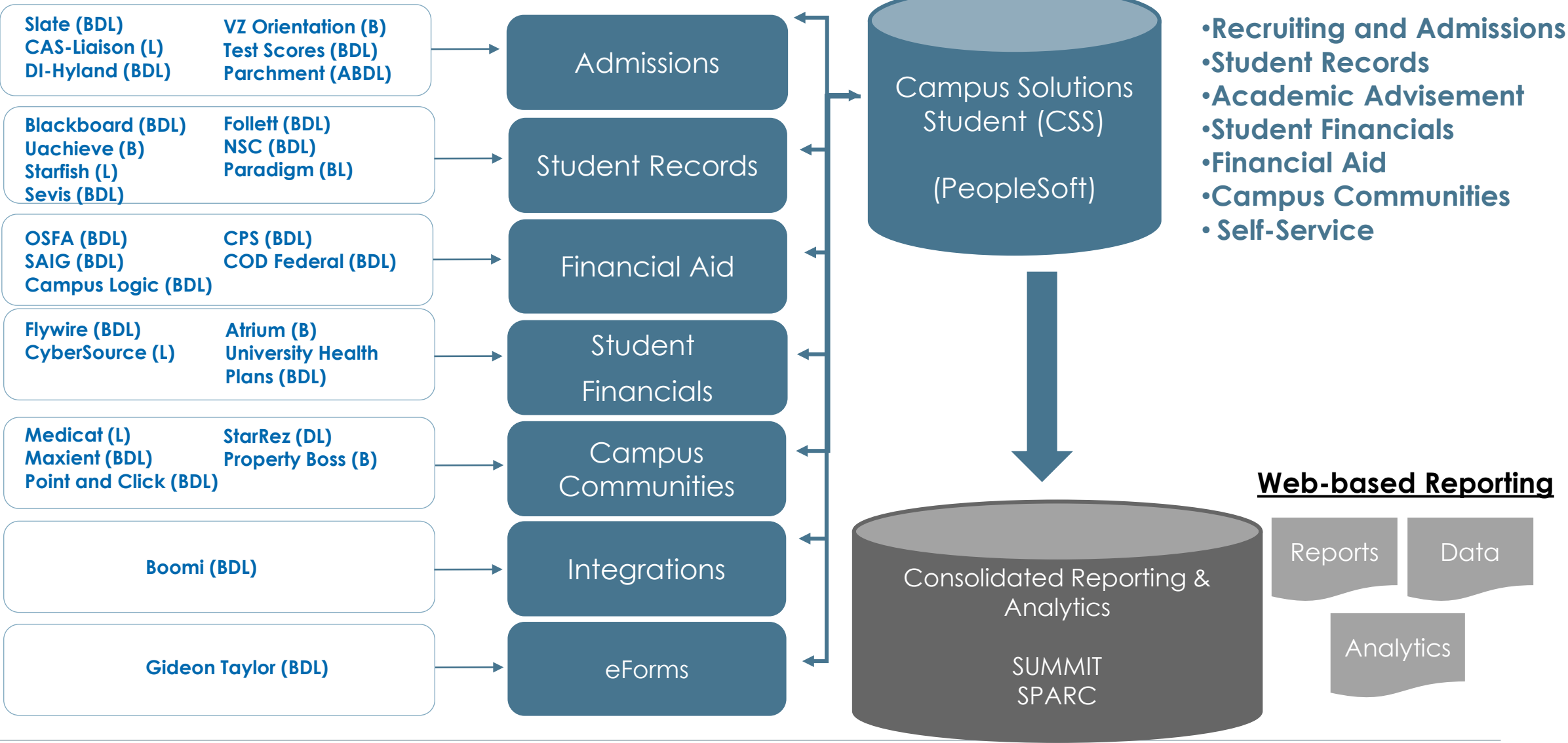- Kuali Pre-Award
- GASB 87 Lease Accounting

*Follow along in your participant guide*

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# HR Current State Ecosystem

**In Progress**

**Performance Management**

**International Tax**

**3rd Party Solutions**

**EPAF / Forms**
- - - - - - - - - - - - - - -
(Gideon Taylor)

**Time Collection**
- - - - - - - - - - - - - - -
(Kronos – A,B,D,L,W)
(Oracle – MassBIO)

**Recruiting**
- - - - - - - - - - - - - - -
(PageUp – A,B,D,L,PO)
(ICIMS – W)

**Immigration**
- - - - - - - - - - - - - - -
(Sunapsis)

**Tax / 1042**
- - - - - - - - - - - - - - -
(Glacier)

**Compliance Training**
- - - - - - - - - - - - - - -
(Get Inclusive A,B,D,L,PO)
(Litmos W)

**Affirmative Action**
- - - - - - - - - - - - - - -
(DCI)

HR Direct

(PeopleSoft)

- **Human Resources**
- **Position Management**
- **Benefits**
- **Time & Labor**
- **Payroll**
- **Commitment Acctg**
- **Training Admin**
- **Self-Service**

Consolidated Reporting & Analytics

SUMMIT
SPARC

**Web-based Reporting**

Reports

Data

Analytics

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# Financials Current State Ecosystem

**In Progress**

**3rd Party Solutions**

**Effort Certification**
(Huron)

**Procure to Pay**
(Jaggaer)

**UM-Plan Budgets**
(Syntellisl)

**Pre-Award**
(Kuali)

**Asset Scanning**
(Ventureforth / Carlton)

**Concur**
**Travel & Expense**

**HX Global**
**Travel Registry**

**Travel Registry**
(Terra Dotta)

**GASB 87 Lease Accounting**
(Crowe)

**Financials
(PeopleSoft)**

- **General Ledger**
- **Commitment Control**
- **Travel & Expense**
- **Accounts Payable**
- **Asset Mgmt**
- **Grants & Projects**
- **Contracts**
- **Billing & Receivables**
- **Self-Service**

Consolidated Reporting & Analytics

SUMMIT
SPARC

**Web-based Reporting**

Reports     Data

Analytics

*Follow along in your participant guide*

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# Student ERP "Ecosystem" History (BDL only)

**FY 2002 – FY 2006**

Peoplesoft SA Phase 1

Initial investment in Peoplesoft to support core SA functions

**FY 2007 – FY 2011**

Peoplesoft SA Phase 2

Second investment in Finance functions to integrate with core Finance

- Student Self-service via IAM

**FY 2012 – FY 2024**

Ecosystem/ Integration Phase

Significant investment in non-Peoplesoft products to meet functional needs (some have replaced Peoplesoft)

- Slate Integration
- CAS Integration
- Flywire
- Campus logic
- Follet

*Follow along in your participant guide*

# Student Current State Ecosystem (BDL only)

Slate (BDL)    VZ Orientation (B)
CAS-Liaison (L)    Test Scores (BDL)
DI-Hyland (BDL)    Parchment (ABDL)

Blackboard (BDL)    Follett (BDL)
Uachieve (B)    NSC (BDL)
Starfish (L)    Paradigm (BL)
Sevis (BDL)

OSFA (BDL)    CPS (BDL)
SAIG (BDL)    COD Federal (BDL)
Campus Logic (BDL)

Flywire (BDL)    Atrium (B)
CyberSource (L)    University Health
    Plans (BDL)

Medicat (L)    StarRez (DL)
Maxient (BDL)    Property Boss (B)
Point and Click (BDL)

Boomi (BDL)

Gideon Taylor (BDL)

**Boxes:**
- Admissions
- Student Records
- Financial Aid
- Student Financials
- Campus Communities
- Integrations
- eForms

**Campus Solutions Student (CSS)**

**(PeopleSoft)**

- Recruiting and Admissions
- Student Records
- Academic Advisement
- Student Financials
- Financial Aid
- Campus Communities
- Self-Service

**Web-based Reporting**

Consolidated Reporting & Analytics

SUMMIT
SPARC

Reports    Data

Analytics

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# Peoplesoft HR and Finance Customizations

## Over 17,000 HR Customizations

- App Engines, 87
- Pages, 593
- Translate Values, 727
- Queries, 1100
- Records, 1495
- Fields, 1757
- SQLs, 2967
- Peoplecode, 5911

**File transfers for HR: 220**
**API and DB Integrations: 9**

## Over 22,000 Financials Customizations

- Pages, 379
- Fields, 1361
- SQLs, 1531
- Records, 1698
- Queries, 1760
- Peoplecode, 12611

**File transfers for Finance: 134**
**API and DB Integrations: 16**

**Analysis completed by Sierra-Cedar**

# Q&A *[Time Permitting]*

# Fundamentals and Foundation of a Modern ERP

# Learning Objectives |
# Fundamentals and Foundation of a Modern ERP

**Establish** a common, foundational understanding of an ERP

**Explore** the evolution of the ERP

**Discuss** opportunities enabled by a modern ERP

# What is ERP for Higher Education?

*An ERP (enterprise resource planning) is a management software program that automates the collection, storage, management, and interpretation of data.*

**HCM & Payroll**
**Financials**
**Student**

## HCM & Payroll

- Human Resource Mgmt.
- Recruiting
- Talent
- Learning
- Compensation
- Benefits
- Payroll
- Time Tracking
- Workforce Planning

## Financials

- Accounting & Finance
- Budgeting & Planning
- Expenses
- Procurement
- Inventory
- Treasury
- Business Assets
- Project Mgmt.
- Gifts & Endowments
- Grants
- Revenue Mgmt.

## Student

- Academic Foundation
- Recruiting
- Admissions
- Curriculum Mgmt.
- Student Records
- Academic Advising
- Financial Aid
- Student Financials

**COMMON ATTRIBUTES**

Reporting & Analytics

Security & Compliance

Workflows & Communications

Mobility

Innovation

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# Traditional vs Modern ERP

**Foundational Systems:**
**Traditional ERP**

Hosted and maintained on an organization's own servers and infrastructure.

**Future-Ready:**
**Modern ERP**

Hosted on remote servers maintained by an ERP vendor or a third-party cloud service provider.

*Core differences between a traditional and modern ERPs can be grouped into three categories*

| **Implementation, Upgrades & Innovation** | **System Architecture** | **Accessibility & User Experience** |
|---|---|---|

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# Evolving Technologies Impact Process Maturity

**Reactive**
*Centralized & Batched
(1980s – early 1990s)*

**Purposeful**
*Complex & Online
(mid – late 1990s)*

**UMass is Here**

**Enhanced**
*Distributed & Real Time
(2000s)*

**Strategic**
*Optimized Cloud
(mid-2010s – Present)*

Mainframe

PCs

ERP Systems

Internet Enabled

Mobile Technology

AI    RPA

**Innovation Curve**
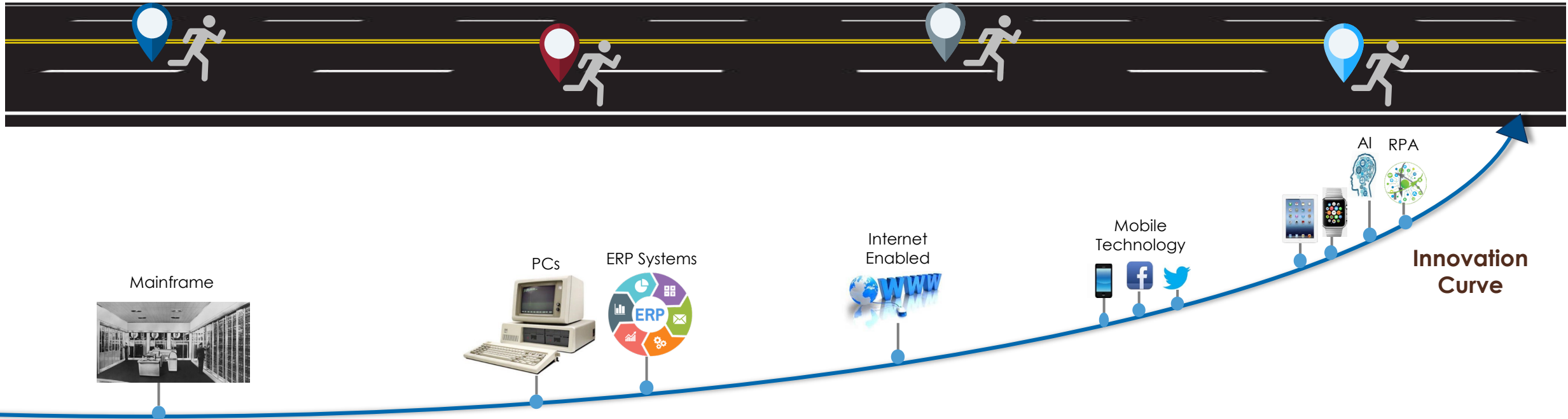
# Modern ERP Solutions



*These full platform ERP solutions are best positioned to meet the needs of R1 multi-campus institutions.*

# Public System & Multi-Campus ERP Projects

| System or Multi-Campus Universities | Financials | | | HCM/Payroll | | | Student | | |
|---|---|---|---|---|---|---|---|---|---|
| | Current | Legacy | Go-Live | Current | Legacy | Go-Live | Current | Legacy | Go-Live |
| **Louisiana State University System** | Workday | Mainframe | 2017 | Workday | Mainframe | 2017 | Workday | Mainframe | TBD |
| **Nevada System of Higher Ed** | Workday | PeopleSoft | 2017 | Workday | PeopleSoft | 2017 | PeopleSoft | - | - |
| **U. of Arkansas System** | Workday | PeopleSoft/ Banner/Various | 2020 | Workday | PeopleSoft/ Banner/Various | 2020 | Workday | PeopleSoft/ Banner/Various | 2023 |
| **Texas A&M System** | Mainframe | - | - | Workday | Mainframe | 2018 | Banner | - | - |
| **Washington St. System** | Workday | Mainframe | 2021 | Workday | Mainframe | 2021 | PeopleSoft | - | - |
| **Dallas College System** | Workday | Colleague | 2023 | Workday | Colleague | 2023 | Workday | Colleague | ETA 2025 |
| **U. System of Maryland*** | Workday | Peoplesoft | 2023 | Workday | Peoplesoft | 2023 | Peoplesoft | - | - |
| **Minnesota State System** | Workday | Mainframe | 2024 | Workday | Mainframe | 2024 | Mainframe | - | - |
| **CUNY System** | Workday** | PeopleSoft | 2025 | Workday** | PeopleSoft | 2025 | PeopleSoft | - | - |
| **U. of Wisconsin System** | Workday | PeopleSoft | 2025 | Workday | PeopleSoft | 2025 | PeopleSoft | - | - |
| **U System of New Hampshire** | Workday | Multiple | TBD | Workday | Multiple | TBD | Workday | Multiple | TBD |
| **U. of California System*** | Oracle | Various | Various | Oracle | Various | Various | PeopleSoft | - | - |
| **U. of Tennessee System** | Oracle | SAP | ETA 2024 | Oracle | SAP | ETA 2024 | Oracle | Banner | ETA 2025 |
| **U. of Maine System** | Oracle | PeopleSoft | TBD | Oracle | PeopleSoft | TBD | PeopleSoft | - | - |
| **Rutgers University** | Oracle | Oracle E-Business Suite | 2016 | Oracle | PeopleSoft | 2024 | Oracle | Mainframe | ETA 2025 |
| **SUNY Stony Brook*** | Oracle | PeopleSoft | TBD | Oracle | PeopleSoft | TBD | - | - | - |

*Workday*

*Oracle*

* By institution (not systemwide)     **Negotiations underway

*Follow along in your participant guide*

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# Why Do Institutions Modernize?

## Why might institutions HAVE to modernize?

**Address Software's End of Life & Diminished Functionality**

**Meet Stakeholder Demands for a Modern, Integrated System**

**Mitigate Challenges of the Shrinking Legacy System IT Personnel Talent Pool**

**Maintain Competitive Positioning**

## Why might institutions CHOOSE to modernize?

**Improve Operational Efficiency**

**Manage Long Term System Sustainability**

**Elevate Institutional Data Strategy**

**Enhance User Experience & Accessibility**

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# Q&A *[Time Permitting]*

# Activity | Test Your Knowledge

Using your phone or laptop, go to

www.menti.com

and enter the code:

3377  5374

# Break

*15 Minutes*

# Peer Insights

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# Peer Insights

**J. Michael Gower**

Executive Vice President - Chief Financial Officer & University Treasurer

**Michele Norin**

Senior Vice President and Chief Information Officer

**Steven Fulkerson**

Vice President for Administration President's Office

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# RUTGERS UNIVERSITY FAST FACTS

- # of Chancellor Led Units (CLUs): **4**

- Total # of Students: **67,620**

- Institution Type: **Public**

- Stage of Transformation: **Finance deployed, HR to deploy this year, Student Financial Planning deployed, and Student projected to deploy in two years.  EPM deployed.**

- Legacy Systems: **Oracle E-Business Suite, PeopleSoft, Mainframe**

# CORNERSTONE

- Strategic project to transform administrative information systems
- Each workstream includes time for business process review
- Co-led by CFO and CIO as executive sponsors but strongly driven from Finance office
- One key driver has been to consolidate systems from a merger
- Planning started in 2014
- Formal PMO established in 2016/2017
- Phased approach
- Anticipate complete transition 2028+
- Covid slowed us down
- Projected budget: ~$250M+

# System Transitions

| New System | Scope | When |
|---|---|---|
| Oracle Finance Cloud | Oracle Enterprise Perf Mgmt<br>• Finance<br>• Financial Close & Consolidation System (FCCS)<br>• Account Reconciliation Cloud Svc (ARCS)<br>• New Chart of Account<br>• Grant and Contract Accounting for post-award<br>    • Huron Click for pre-award<br>• Procurement – Jaegger Marketplace | 2017 |
| Salesforce | Enrollment Management – Recruitment & Admissions<br>    • Common App<br>Foundation and Alumni Relations<br>Athletics<br>Continue unit-based rollout | 2022<br>2023<br>2023<br>2024 (TBD)<br>2024+ |
| Oracle Student Financial Planning (Vocado) | Financial Aid Packaging | September 2022 |
| Oracle Human Capital Mgmt (HCM) | Phase 1: All components required to run payroll<br>Kronos for time entry | January 2025 |
| Oracle Student | Starting Business Process Review<br>Full Suite Implementation | Summer 2024<br>Early 2026? |
| Oracle Analytics Cloud | Expansion of data warehouse and shift to OAC | 2017 - present |

# Lessons Learned

- Cannot underestimate impact of change
- Need to increase focus on people and process
- Not enough time was allocated for system optimization and user adoption
- Need for greater collaboration and broader engagement
- Need to set and communicate clear expectations
- Never seem to communicate enough
- Most folks have no idea what is involved in system replacements, including the Cabinet

# Improvements Implemented

## Bolstered Project Management Office

- New Change Management Office
- Improved training programs
- New Project Portfolio Management platform
- Hands on experience for users earlier in the process
- Standardized tools and methodologies
- New training lab

## Enhanced Program Governance Model

- More inclusive decision making
- Solicit feedback and get input from broader stakeholder groups
- Increased collaboration across all units

## Expanded Communications

- Program and project websites
- Universitywide forums
- Newsletters
- Change Agent Networks

**UNIVERSITY OF ARKANSAS SYSTEM FAST FACTS**

- # of Institutions in System: **22**

- Institution Type: **Public**

- Stage of Transformation: **HR and Finance deployed; Student in progress**

- Legacy System: **PeopleSoft, Ellucian, and homegrown**

# Workday ERP Implementation Timeline
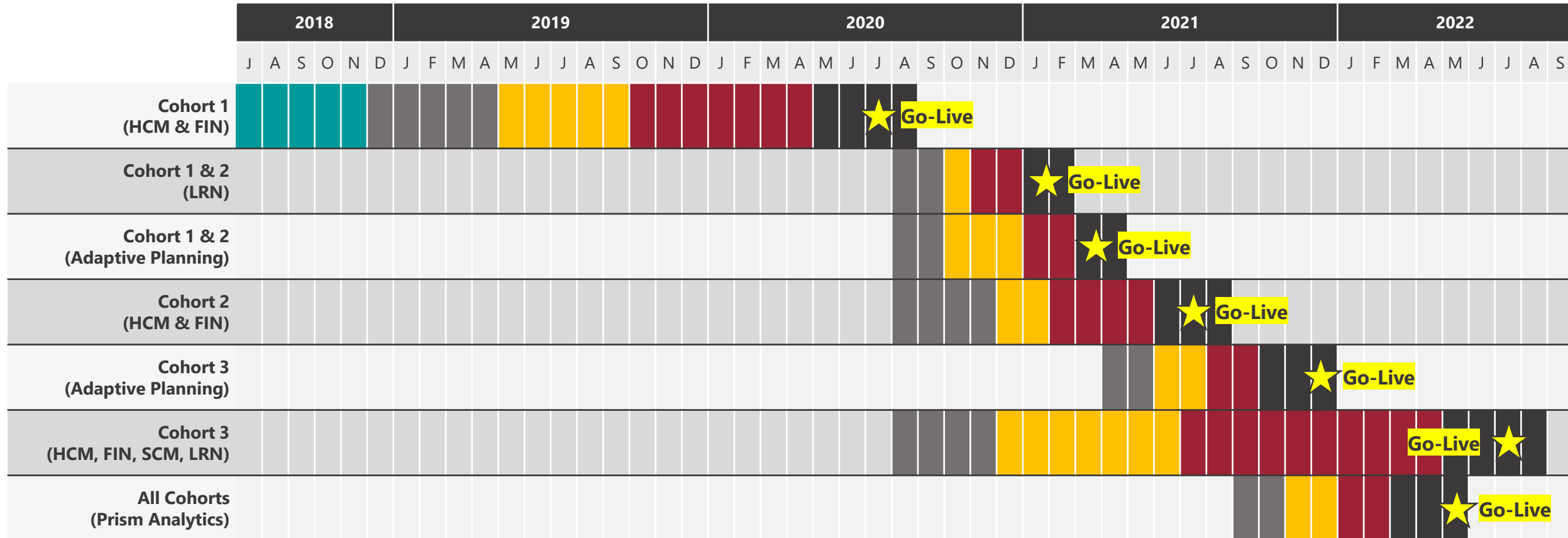
# Q&A

# Before Lunch: Overview of "Think"

## NOW IT'S YOUR TURN!

We want you to **consider the current condition of UMass' ERP system** and think about how your current technology impacts your functional areas, the campuses, and the System.

## WHAT ARE WE DOING?

During the next hour we will discuss the **strengths and weaknesses of your existing ERP system** and **how it affects your day-to-day work**, both on an individual level and within your function.

## WHAT IS THE PURPOSE?

The goal of this activity is to **begin to provide your insights into the primary challenges and potential opportunities.**

**LUNCH & TRANSITION TO ROOMS**

*Introductions & Icebreaker*
*(5 Mins.)*

*Unpack, Group, and Discuss*
*(40 Mins.)*

*Return to Main Room & Share with the Broader Group*
*(45 Mins.)*

*Summarize & Conclude*
*(5 Mins.)*

# Activity | Unpack and Group

## 1 Introduce Yourself to the Group



*5 Minutes*

- Using the photo that you chose earlier in the day, **introduce yourself to the group and share**:
  - What image you chose, and
  - Why you think that image relates to your role or contributions during the Summit

## 2 Independently Brainstorm and Post



*5 Minutes*

- Independently brainstorm:
  1. Current **limitations** of your ERP system(s) and related processes
  2. Current **strengths** of your ERP system(s) and related processes
  3. Future **opportunities for improvement**

- Write your observations on post-it notes. One post-it note per observation. Post on the wall.

## 3 "Unpack" and Group Observations



*30 Minutes*

- As a group, "**unpack**" the observations.

- Discuss how these observations impact both the strategic and day-to-day work of your area.

- **Group** similar observations to develop categories of strengths, limitations, and opportunities for improvement.

## 4 Prioritize Observations and Nominate a Speaker



*5 Minutes*

- Prioritize the top **2 limitations, 2 strengths, and 2 opportunities for improvement**.

- **Nominate a representative** to share out during the large group debrief.

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# By 12:45pm, please move to your Breakout Room

**Amherst Conference Room |**
*Budget & Controller*

**Boston Conference Room |**
*Campus Department A&F*

**Lowell Conference Room |**
*Grants & Research*

**University Conference Room |**
*HR & Payroll*

**Minutemen Conference Room |**
*Student Administration*

**Dartmouth Conference Room |**
*Student Financials*

**Commonwealth Conference Room |**
*Technology*

# Please bring your picture from the icebreaker with you

# Lunch

**START LINE**
Hoyt Statue, Hopkinton

**6**
South Framingham Train Station

**9**
Lake Cochituate, Natick

**18**
Young at Heart Statue, Newton

**21**
Heartbreak Hill, Newton

**FINISH LINE**
Boylston Street, Boston

University *of* Massachusetts

Think

START LINE
Hoyt Statue,
Hopkinton

6
South
Framingham
Train Station

9
Lake
Cochituate,
Natick

18
Young at
Heart Statue,
Newton

21
Heartbreak
Hill,
Newton

FINISH LINE
Boylston
Street,
Boston

# Activity | Debrief in the Commonwealth Room

## 1



Each breakout group will spend **three minutes summarizing their top 2 limitations, 2 strengths, and 2 opportunities for improvement.**

## 2



As each group shares their summaries, Deloitte will continue to **aggregate insights across groups into thematic clusters.**

## 3



By the end of this report out, you will have collectively developed a **visual representation of the most impactful limitations, strengths, and opportunities for improvement** for the UMass' ERP system(s), highlighting where there are similarities and differences across groups.

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# Before the Break: Overview of "Share"

## NOW IT'S YOUR TURN!

We want you to reflect on today's conversations and share **what is on your mind for where UMass could go from here**.

## WHAT ARE WE DOING?

Over the next hour, we will reflect on the day's conversations and **gather your thoughts/feedback** on an individual level and by campus.

## WHAT IS THE PURPOSE?

The aim of this activity is to collect your insights on **what you believe could be the focus for additional conversations and potential activities** following the conclusion of today's summit.

**ROOM TRANSITION DURING BREAK**

*Reflect on "What One Thing?*
*(5 Mins.)*

*Discuss Ideas as a Campus*
*(40 Mins.)*

*Return to Main Room & Share with the Broader Group*
*(30 Mins.)*

*Summarize & Conclude*
*(5 Mins.)*

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# Breakout Activity | What One Thing?



**1**

**5 Minutes**

- Reflect on today's conversations and share your feedback using the following prompt:

**"What one thing should UMass pursue as a next step coming out of today's Summit?"**

- Write your observations on post-it notes. One post-it note per observation.

- Post on the wall.



**2**

**35 Minutes**

As a group, review what has been posted and discuss the sentiments that have been expressed.

- Where are there common themes?

- Where are there differences?



**3**

**5 Minutes**

Align on the top two or three sentiments (as defined by your group) for each category to share out with the broader room *(you may wordsmith each sentiment as appropriate)*.

Nominate a representative to share out during the large group debrief.

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# After the break, please move to your Breakout Room

**Amherst Conference Room** |
*Boston Campus*

**University Conference Room** |
*President's Office*

**Boston Conference Room** |
*Amherst Campus*

**Minutemen Conference Room** |
*Lowell Campus*

**Lowell Conference Room** |
*Dartmouth Campus*

**Commonwealth Conference Room** |
*Chan Medical School*
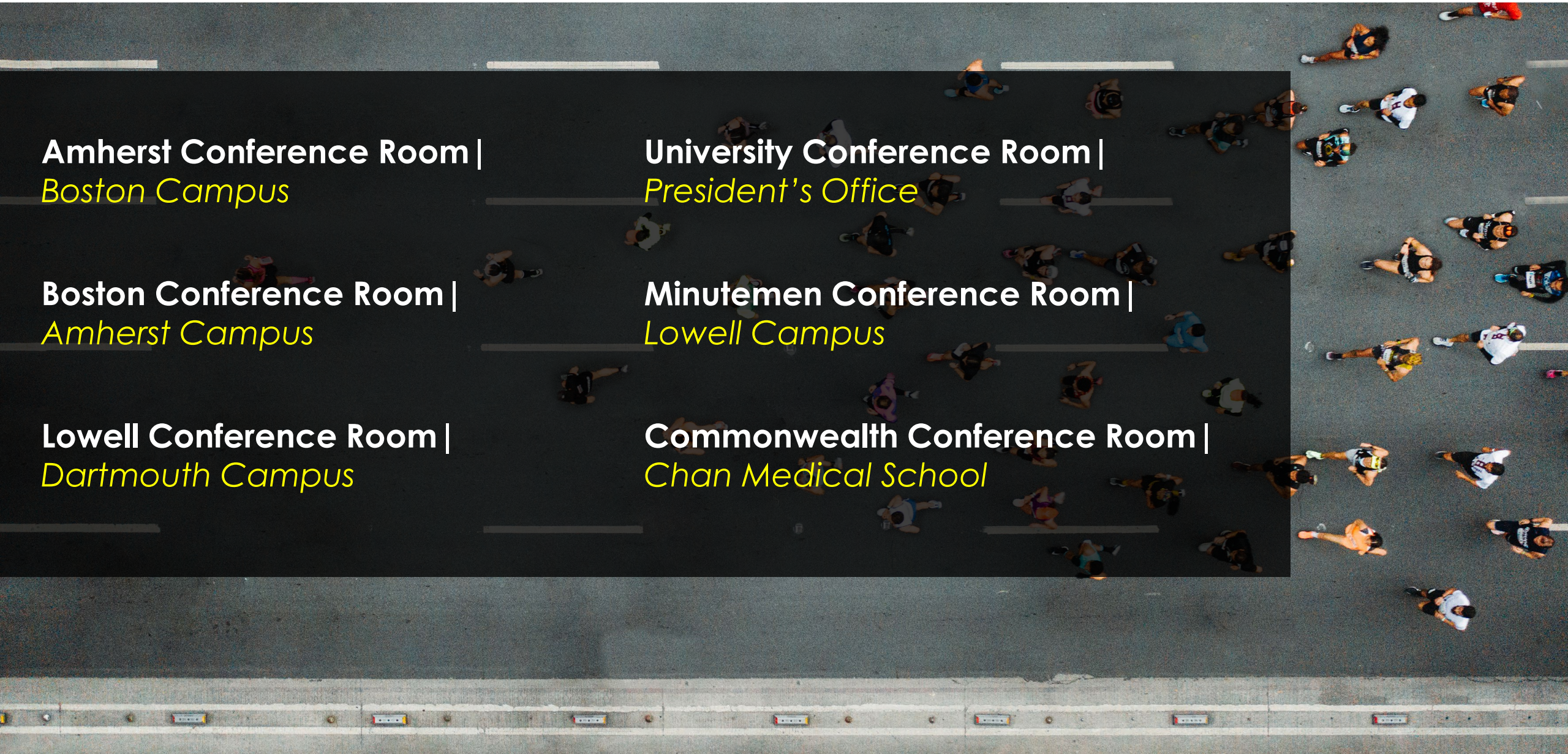
# Break

*10 Minutes*

# Share

6 — South Framingham Train Station
9 — Lake Cochituate, Natick
18 — Young at Heart Statue, Newton
21 — Heartbreak Hill, Newton
FINISH LINE Boylston Street, Boston

University *of* Massachusetts
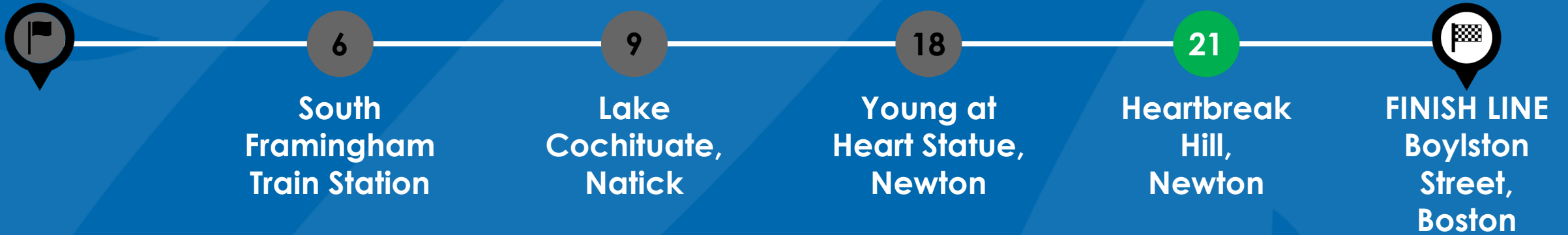
# Activity | Report Out

## 1



Each campus will spend three minutes **summarizing their top sentiments** from "What One Thing."

## 2



As each group shares out their summary of the discussion, Deloitte will continue to **sort insights shared into thematic clusters**.

## 3



By the end of this report out, you will have collectively developed a **visual representation of potential next steps shared**, highlighting where there may be **similarities and differences**.

# Activity | Report Out

Amherst   Boston   Chan   Dartmouth   Lowell   President's Office

**What One Thing?**

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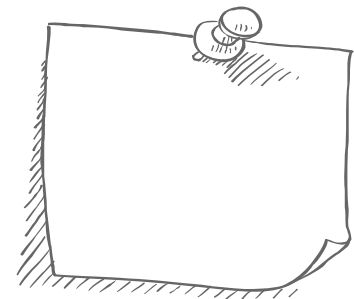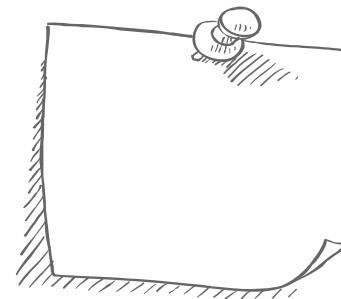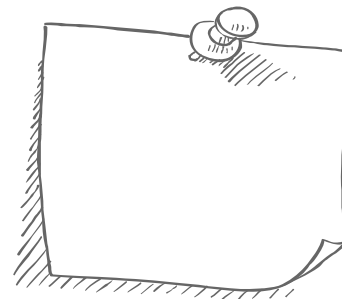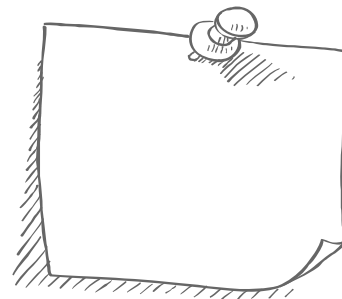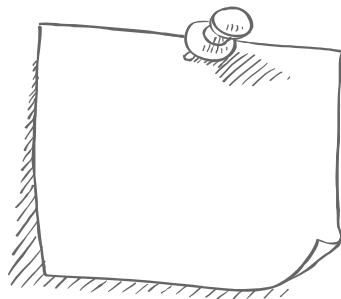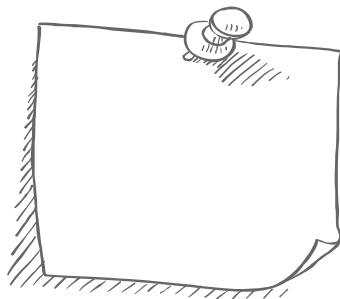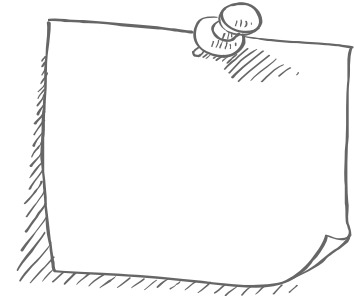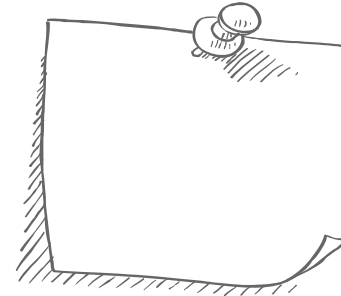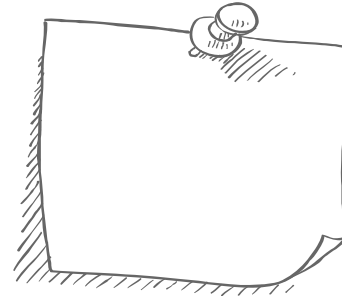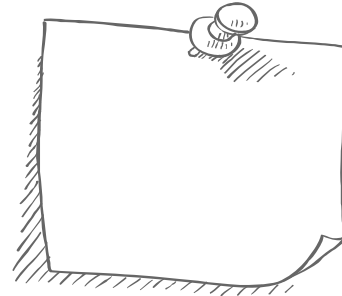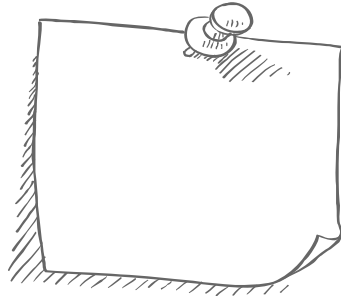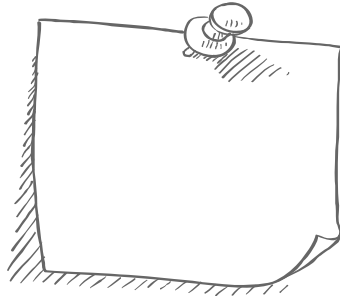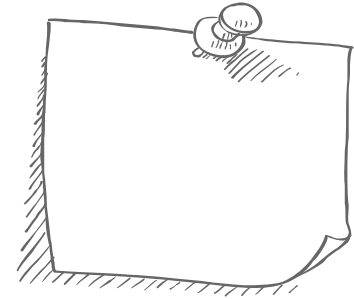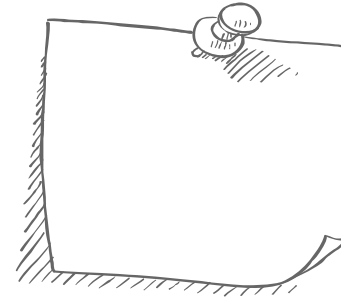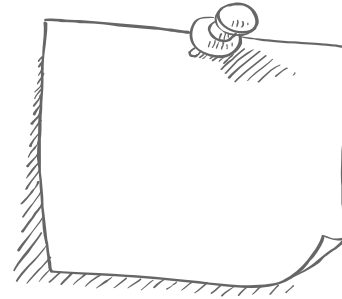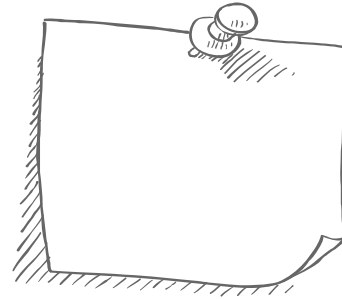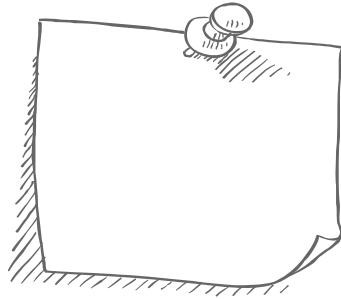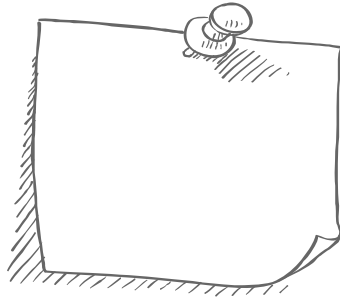
# Reflect & Closing

**START LINE**
Hoyt Statue,
Hopkinton

**6**

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Framingham
Train Station**

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Cochituate,
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**Heartbreak
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**FINISH LINE**
Boylston
Street,
Boston

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# Summary

## Learn, Think, Share

The UMass ERP Summit was a **first of its kind** event for UMass campus leadership to come together to "learn, think, and share" about Enterprise Resource Planning (ERP) tools.

Today's summit included sessions that cover topics, including:

- A reflection/discussion on the University's current ERP landscape

- Understanding the current ERP market

- Understanding our peers and their ERP journey

- Discussion/brainstorming about the University's future – where could we go from here?

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# Next Steps

**1** | Participants will receive a **post-event survey**

**2** | **Updates will be provided** to the Better Together Steering Committee (BTSC)

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

**4** | **Website** will continue to be **updated and maintained**

**5** | Develop and distribute a **post-Summit Report**

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