



Lessons Learned from ERP Implementation

SACUBO Fall Workshop

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Presenters



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Agenda – Panel Finance and Academics Perspectives



Evaluation and
Selection

Implementation
Considerations



Training and
Education

Lessons
Learned





- Located in Central Kentucky
- Our community
 - 6,350 undergraduate students
 - Includes 3,700 dual credit
 - 5,700 graduate students
 - 500 certificate students
 - 430 full-time staff
 - 225 full-time faculty
- Carnegie Classification – M1
- Legacy Primary System
 - Jenzabar– Since 1999
- Workday – Go live July 2023
 - Implementation began May 2022



- Located in St. Augustine, Florida
- Our community
 - 2,500 undergraduate students
 - 280 full-time staff
 - 145 full-time faculty
- Carnegie Classification – Baccalaureate Diverse
- Legacy Primary System
 - Jenzabar– since 2001
- Oracle – Go live July 2023
 - Implementation began April 2022



- Located in NW Washington, DC
- Our community
 - 8,000 undergraduate students
 - 5,000 graduate students
 - 1,700 full-time staff
 - 950 full-time faculty
- Carnegie Classification – R2
- Legacy Primary System
 - Ellucian Colleague – Late 1990s
- Workday – Go live January 2024
 - Implementation began Sept 2022



Evaluation and Selection

ERP Evaluation



- 1. Assess Current Environment**
 - How many disparate systems do you have?
 - System gaps and needs?
 - Objectives?
- 2. Establish Campus Evaluation Team**
 - Broad based - all stake holders
 - Narrowed Steering Committee
 - Internal evaluation?
 - Hire external consultant?
- 3. RFP Process**
 - Initial campus demos – elimination
 - Full week demos – final selection



Deployment Evaluation

- 1. Project Team**
 - Experience and depth?
 - Client case load, over-assignment?
 - Turnover?
- 2. Project Timeline and Estimates**
 - Meets project objectives?
 - Differences in approach and hours?
 - Exclusions?
- 3. Cost Evaluation**
 - Fixed fee or Time/Materials?
 - Incentives?



Implementation Considerations

Pre-Implementation Considerations

ACADEMIC

- Early involvement
 - Faculty
 - Staff
- Change management strategy
 - Self-service shift
- Academic unit readiness
- Data needs?
- Reporting needs?
- Timeline considerations
 - Accreditation?



FINANCE

- Staffing needs
 - Bandwidth?
 - Honest skillset evaluation
- Organizational readiness?
- Reporting needs?
- Early training needs – critical!
- Change management strategy
 - Self-service shift
- Team motivation
 - Burnout avoidance

Implementation Considerations



Project Manager

- Critical Role
- Weekly Project Monitoring
- Coordinate with Deployment Consultant



Deployment Consultant

- Be prepared to push as needed
- Remember it is your project
- Open communication is key



TESTING!!!

- Test
- Test again
- Test some more!



Reporting

- Push for early development
- More effective testing
- Fewer post go live gaps



Training and Education

Training and Education Considerations



Early and regular campus communication
Targeted messaging for key stakeholders
Top executive promotion key!



Establish a campus ticket system
FAQ Scripts and Job Guides
Functional team referral process



Outsource or Internal?
Campus climate?
Cost
Team capability / bandwidth



Functional user
End user
Videos are effective
Train, train again, train more!
Pre and post go live

A close-up photograph of two wooden blocks. The top block is held by a hand and has the word "LESSONS" engraved in black. The bottom block is resting on a white surface and has the word "LEARNED" engraved in red. The background is a soft, out-of-focus green.

LESSONS

LEARNED

Lessons Learned



Academic Perspective

- Get involved sooner
- More self assessment
- Cross collaboration with administrative teams
- More demonstration and training for key stakeholders

Finance Perspective

- More testing, more staff time to test
- Early reporting development is critical for testing
- 12 month timeline possibly too condensed
- More campus training – tracking / required?
- More change management strategy – self service complaints
- Timing issues: not during reaffirmation cycle

REASONS TO GO FOR IT!



Improved Reporting
Budget Accountability



Elimination of Paper Laden Process
Real-time Status on Approvals

Automation
Streamlined Processes
Mobile capability



Improved Campus Communication and Collaboration





Questions

Thank you!



CPE

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