

# Is your school ready to take these three steps along the transformation journey?

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Colleges, universities and other institutions of higher education today must differentiate themselves so they can attract students, faculty and other institutional employees, and stay competitive in the increasingly busy higher ed marketplace.

That starts with determining and planning how to solve and address the unique needs of each of their constituent groups. From attracting faculty members and highly qualified administration, to recruiting students and even communicating with parents, each has high expectations from all facets of their relationship with the university—and have distinctive anticipation of their experiences as well. At the same time, institutions must consider retention of these same constituent groups currently involved.

Often, the way technology is used can serve as a competitive advantage. Apps, services and other tools—like Workday—help accomplish the goal of creating and deepening a personal relationship between a school and its students, faculty and employees by increasing their number of touchpoints and furthering the school’s engagement with their constituents.

Competitive-minded colleges and universities want to provide a tailored experience for all their constituents, which is no longer the exception — it’s the rule. It’s expected. Forward-thinking institutions understand that deepening their digital footprint, expanding their use of modern technology and building an infrastructure that addresses an end-to-end solution is a critical component when it comes to staying relevant in an increasingly competitive marketplace.

That’s why it’s not enough to just have technology. In fact, a technology deployment is just one aspect of a larger transformation journey. Accordingly, institutions must be effective in how they deploy any new tool and strategic in the direction they point their constituents so they can recognize the true value of such an endeavor.

Regardless of whether you’re deploying Workday HCM, Financial Management or Student, there are best practices to be considered at an institution of higher education to safeguard both time and the financial investment, so your journey will be a successful one. Here are three I’ve learned from working with a number of leading colleges and universities.

## 1. Getting executive buy-in is critical

The most successful institutions put strategic and tactical forethought and preparation into their Workday deployment. These schools consider the size and scale of their internal teams and ensure the people they want—and need—to be involved have the bandwidth available to provide the proper amount of attention to the project.

They also assess the level of change and are always looking ahead at what it will require to get decisions made in their institution. From this advanced thinking, they’re able to create and enact a preemptive change management plan. They get strong executive sponsorship and participation as they begin to move forward down the road and begin their deployment journey.

“My boss, who is the CFO, understood that this was a worthwhile investment,” one client recently told me. “That’s what happened. He got behind it, and then he was willing to go with me before his peers in the executive council and publicly lend his support.”

## 2. Know what problems you want to solve

When launching Workday, successful institutions have a vision of what they want to achieve by embarking on their journey — not just at go-live, but throughout their roadmap. They want their systems to answer questions and help them make decisions; they want their system to understand them and provide insights on a real-time, dynamic basis; they want to create a better, more engaging experience for students, faculty and staff; and they want to relieve their people from mundane low-value tasks so they’re able to focus on more mission-critical activities.

Leaders of successful transformations know these targets are not made in a vacuum. They understand the importance of bringing in stakeholders and managers from across the university to get their input. Less-involved team members can also bring a fresh perspective that a core team, working day-to-day on the project, may be missing. Not everything has to be solved for the initial go-live. Focus on low-hanging fruit at the outset; accomplish bringing new, fresh, absorbable functionality to the organization; and then create a second-tier priority plan. But the keyword is *plan*, and making sure all challenges are accounted for at some juncture of the roadmap.

## 3. Use educators to educate your employees

It’s important to start educating employees — whether they’re members of the faculty, office staff or student employees — as early as possible so they’re ready when Workday goes live. Start product demonstrations early. Need help? You already have trained, expert educators who can assist with the training!

One institution I know of began its transition with a series of on-campus tours, with a small group from the core team giving a high-level overview and demo of Workday to different departments. That was a good level-setting and emphasized that the new system wasn’t something intimidating or over-whelming. Later, when Workday rolled out, users were accepting and things went smoother because they had bought in earlier in the process. Another university created an extensive FAQ resource site to help educate staff, and provide support when live assistance was unavailable.

Deploying a technology solution that can be formulated to address a university’s specific composition of workers will go a long way toward deepening employees’ connection to the school, whether they’re student workers, faculty or general staff. Know what is unique about your institution and build your Workday deployment plan around that.

Share your thoughts on what challenges your institution here: [www.surveymonkey.com/r/HEchallenges](http://www.surveymonkey.com/r/HEchallenges), or email us at [melissa.caulkins@ibm.com](mailto:melissa.caulkins@ibm.com).

