# PeopleSoft Assessment, Training, Optimization Huron Consulting Group

March 8th, 2022





## Agenda

- PeopleSoft Phase II Assessment
- Assessment Findings Summary
- Implementation Roadmap
- Training Updates
- Optimization Effort & Next Steps
- Q&A





#### PeopleSoft Phase II Assessment (September 2021)

## **IDENTIFY**

Conducted Kick-off with sponsors and key stakeholders

Reaffirmed goals, vision for the health-check assessment

## COLLECT, ANALYZE

Gathered and reviewed Phase II Project Plan, Fit/Gap documentation, PeopleSoft setup, testing issues

Conducted 16 interview sessions to review readiness and gaps surrounding 40+ business processes

Conducted follow-up meetings to confirm findings and get additional feedback

#### VALIDATE, DELIVER

Validated Opportunity Inventory with 42 observations across Finance, HR, and Technology with PCCD stakeholders

Deliver presentation on opportunities, impact and roadmap





#### **Assessment Findings Summary**







- A lot of hard work from the district's teams from IT and business offices have brought the implementation close to the finish line and must be recognized
- Phase II functionality is helping PCCD meet its strategic goal of reducing paper and streamlining business processes while reducing customizations to the delivered application
- Preparation for end-user training is stalled due to lack of resources to create and deliver content
- Change Management has not been a focal point of the implementation, resulting in nominal stakeholder involvement from colleges
- Team members responsible for the implementation have also been maintaining operations
- Although the User-Acceptance Testing of the PeopleSoft functionality is almost complete, lack of involvement from colleges may result in adoption challenges
- Finance and HR teams have not had enough opportunity to optimize business processes during the implementation, resulting in inefficiencies such as approval redundancies
- Future State Business Processes are not mapped by actors and responsibilities, leading to uncertainty and potential inconsistency in performing critical functions post go-live





## Implementation Roadmap

Next Steps for Assessment Recommendations

#### Complete UAT

- Requires 4-6 weeks
- Resolve open issues in Expenses, Commitment Accounting
- Add UAT participants representing colleges
- Complete test scripts with pending status

#### Create and Deliver Training

- Requires 4-6 weeks
- Can be taken up concurrently with UAT
- Use external resources to develop content and internal resources for delivery

#### Go-Live and Optimize

- Continue end-user training for the first 4-6 weeks of going live
- Prioritize and implement Optimization phase recommendations
- Expand team to support operations and prepare of next phase
- Document business processes mapped by actors and responsibilities
- Invest 4-6 months to stabilize production further and address key optimization opportunities

# Implement Phase III Planning Phase

- Identify and map business processes needing optimization during Phase III
- Include Change Management as central part of implementation
- Backfill Peralta resources involved in implementation
- The planning phase will require 6-8 weeks





## **Training Update**

End-user training for HCM and Finance as part of Phase II

- Peralta and Huron teams have started working on development of training instructor-led classes, Quick-reference videos and Job-aids
- Over 20 Quick Reference Guides have been developed
- Training schedule and training plan will go out for approval this week
- This training will cover areas such as Time Entry, Self-Service eForms, Travel & Expense Entry and Approval, etc.
- Instructor-led classes will take place in the month of April to enable use of the new PeopleSoft functionality







#### Optimization Effort and Next Steps

Functional Support and Business Process Advisory Needs

- PCCD has requested Huron's assistance to help resolve issues related to optimizing business
  processes that have already been implemented as part of the recent PeopleSoft 9.2 implementation, as
  well as those related to the currently implemented Phase II
- Huron will provide up to 200 hours of advisory support to help with the following areas:
  - Student Billing
  - Financial-Aid Compliance and Efficiency
    - Pell and Student Loan Reconciliation\*
  - General Ledger Monthly Process Reconciliation
- Refining and optimizing processes is a continuous improvement journey for operations.

\*Contract forthcoming: based at Laney (as the largest campus) to address specific issues with reconciliation and related areas. Resolution to issue will positively impact current district processes across all campuses.

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