

TECHNOLOGY SOLUTIONS CASE STUDY



Smith College Teams Up with Huron for a Transformative Workday Student Deployment

SMITH COLLEGE

Founded in 1871, Smith College is a private, liberal arts women's college located in Northampton, Massachusetts, which serves over 2,100 undergraduate students. Smith offers 49 undergraduate majors along with coeducational master's and doctoral programs. Smith is part of a consortium known as the Five Colleges, Incorporated (FCI), including Amherst College, Hampshire College, Mount Holyoke College, and the University of Massachusetts Amherst. The FCI colleges share resources, facilities, and more than 5,000 undergraduate courses for credit among the five members. Smith was tied for 17th in National Liberal Arts Colleges in the 2022 edition of *U.S. News & World Report: Best Colleges*.

VENDOR AND PARTNER SELECTION

In 2017, with support from an external consultant, Smith carried out a five-month planning process with senior stakeholders to develop a vision for enterprise systems moving forward. The stakeholder cohort prioritized the selection and implementation of a new system for human resources, payroll, finance, and student information functions. Samantha Earp, Chief Information Officer/Vice President for Information Technology at Smith College, led the cohort's 2018 evaluation of the enterprise resource management (ERP) and student system landscape to find a vendor that would nurture a long-term partnership, maintain a robust product improvement lifecycle, and invest in higher education-specific functionality. In the end, Smith concluded Workday was the best fit, and the college signed a contract with Workday to deploy the Workday Human Capital Management (HCM), Workday Financial Management, and Workday Student solutions.

After deploying Workday HCM and Financial Management with support from an initial implementation partner, Smith decided to work with a new partner for the Workday Student implementation. Earp and her colleagues interviewed several implementation services firms and found Huron to be the most aligned with Smith's vision of an implementation that would focus on effective business process development and robust change management. Earp reports that Huron has a holistic approach to Workday's implementation methodology that is focused on the student experience, and the Smith team felt Huron would be able to manage the project effectively within the college's culture and ambitious project goals.

Smith College selected Workday as a vendor that would nurture a long-term partnership, maintain a robust product improvement lifecycle, and invest in higher education-specific functionality.

IMPLEMENTATION

In summer 2019, after signing a contract with Huron, Smith began its Workday Student implementation. The college hired an internal project manager, who coordinated the Smith Workday Student core (centralized) project team, bringing together representatives from each of the functional areas whose services would be supported by the new system. Each representative was responsible for recommending configurations related to their department's business processes. Smith's project manager also partnered with technical staff from the Information Technology Services (ITS) department who supported data integration and Workday technical functions. Huron provided a full-time project manager who worked side by side with the Smith project manager. The implementation began with a student



experience assessment, which identified inefficiencies in then-current student business processes and explored opportunities to improve the student experience. John Singler, Associate Vice President for Enterprise Applications and Data Services, reports that Huron has worked collaboratively with the Smith team to carry out business process transformation. He notes that Huron's approach to Workday's implementation methodology meshed well with Smith's expectations. Huron's project team helped the Smith staff understand the value of Workday Student's new functionality and envision how it could benefit their processes. Earp reports that Smith extended its implementation timeline as the COVID-19 pandemic surfaced more immediate needs that diverted the team's focus. Smith went live with Workday Student functionality in phases, starting with internal office functionality in fall 2020 and undergraduate student registration in April 2021.

CHANGE MANAGEMENT

Smith prioritized change management as a critical piece of its overall technology transformation, starting with the finance and HCM implementations and then moving to the Workday Student deployment. Earp explains that the underlying message of Smith's change management mission is to focus on standard business processes that enable efficiency and support strategic operations. With this in mind, Smith is embracing Workday's best practices and evolving built-in functionality to the fullest degree possible, resorting to customization only in those limited cases where there is a clear, sustainable strategic benefit.

For the Workday Student deployment, Ellen Harter Wall, Senior Director of IT Change Management at Smith, coordinated the change management aspects of the deployment, in partnership with Earp, Singler, the executive and steering committees for the Workday project, and members of the core Workday student team. Wall was supported by a change

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management staff member who assisted with training, the creation of job aids, and supervision of students who participated in user acceptance testing. Huron subject matter experts provided guidance on best practices, and Huron consultants also participated in developing and delivering training for Smith's end users. At the start of the Workday Student implementation, Wall met with each participating Smith department to discuss the new Workday functionality available and how it might benefit and affect processes. Wall also conducted ongoing outreach to various student groups, and she led a group of staff (first convened with the HCM/FIN implementation) to serve as ambassadors to academic and administrative departments. As the implementation team deployed new features, Earp and Wall conferred with student testers and a faculty advisory group to understand their user experiences and requirements.

According to Earp, the Smith change management approach includes reinforcing a commitment to built-in functionality, limiting customizations, and following a shared change control process, along with ensuring that colleagues have the tools they need to complete the work of their office. She explains that Wall's change management responsibilities include serving as an informal "project therapist" to ensure that staff concerns are heard and calibrated effectively, prioritizing those that are core to strategic operations.

BEST PRACTICES

Before beginning the Workday system implementation, Earp reorganized the Information Technology Services (ITS) department at Smith to ensure readiness for upcoming technology transformation initiatives, including the Workday project. She hired John Singler for the new position of associate vice president for enterprise applications and data services. Earp and Singler worked collaboratively with the ITS leadership team and the Workday project management organization (PMO) to transform how the ITS department programmatically manages and supports its ERP and student systems and accompanying third party tools. In the past, legacy ERP management relied on Smith ITS to handle all platform changes and updates. Business users brought customization requests to ITS but were otherwise not involved in the process. With the adoption of Workday, Smith subject matter experts work within a centrally coordinated core team, sharing responsibility for configuration design, prioritization, and ongoing program management of their functional areas. This allows for more efficient and strategic use of technical and functional staff within ITS and partner departments.

At the onset of the Workday Student project, Earp worked with Wall and Singler to establish a clear vision of what Smith wanted to accomplish with the implementation. As competing priorities surfaced, the team often revisited its central mission and collective goals to keep the project centered. Wall and Earp report that though addressing new college requirements associated with the COVID-19 pandemic rerouted the team's focus at times, Smith decided it was important to continue the Workday Student project rather than pause it. The team adjusted its timeline but kept its project momentum going.

BENEFITS

While Smith is still in the early stages of using Workday, Earp reports that the college community is already experiencing its value. She notes that the system has been crucial in the college's COVID-19 pandemic strategy because its cloud hosting structure, routing capabilities, and workflow functionality have provided a way to translate critical workflows to a remote context. Earp reports that Workday Student also offers many new self-service functions that simplify and streamline operations for students. As Smith looks beyond pandemic priorities and plans for a trajectory of growth and maturity, the college plans to reap even more benefits from Workday Student functionalities. Staff members are creating more efficient and automated processes using Workday Student, which over time will allow them to spend more time on optimizing strategic functionalities supporting student learning. Earp notes that much of the Workday Student functionality is new to Smith, as the college previously did not have a degree audit tool or systematized advising tools. With the new functionality, multiple offices are developing new services and support models for students, collaborating with other groups to streamline and improve the student experience.

When Smith rolls out new Workday Student components, it first conducts user acceptance testing with students. This allows the Smith Workday team to understand the benefit to students and fine-tune plans for training and communications. Wall reports that student testers have been thrilled with the new features and say they wish the functionality had been available in years past. Earp notes that though Smith went live with its first registration period entirely remotely in the middle of the COVID-19 pandemic, it was the smoothest registration Smith had ever experienced, even given the new tools. Staff in the Registrar's Office were pleased when they did not receive their usual panicked calls from students seeking guidance. Students were equally pleased at how easy registration was compared to previous years. And from a technical perspective, the system functioned effectively under the usual heavy short-term load of concurrent student registrations.

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Singler notes that because the Workday Student product release cycles are consistent and well-managed, they are non-events for Smith. Workday communicates activities around major releases in advance, which enables Smith to develop a standardized process for assessing and testing updates. Singler reports that Workday manages a clone of Smith's Workday tenant that allows Smith to test long-term configurations before making changes in the production tenant. Smith staff are pleased with Workday's support and its training and learning opportunities that allow staff to optimize the system's functionality. Earp also notes that Workday offers many avenues for Smith staff to provide input on platform enhancements, and she has noticed the company listens to and follows up on roadmap requests.

PROJECT STATUS AND NEXT STEPS

As of February 10, 2022, Smith is live with the Academic Progress module for nine majors and is rolling it out for other majors in phases. Workday's Academic Progress module required heavy collaboration between department chairs and registration staff in mapping out course requirements. Earp reports that early feedback from Academic Progress feature testing is positive.

The Smith project team is meeting with Huron regularly as it continues to roll out Workday Student features and refine processes in the system. The college will be providing Workday Student advising training and releasing the rest of the advising tools, including tools for academic planning, in 2022.

Wall notes that since the campus previously did not have access to the Workday system's breadth of information, staff members are still learning about reporting and bringing reporting requests to the technical team. Singler explains that bridging the legacy ERP, Smith's data warehouse, and the new Workday system is ongoing. Smith has also licensed Workday Prism and is in the planning stages of its use.

REFERENCES

As part of this research, Tambellini interviewed Samantha Earp, Chief Information Officer/Vice President for Information Technology; John Singler, Associate Vice President for Enterprise Applications and Data Services; and Ellen Harter Wall, Senior Director, IT Change Management at Smith College. Tambellini also used publicly available information for this study.

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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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