A Thought about Visioning…

"There is a fine line between vision and hallucination"

(Ram Charan, former HBS Professor)

Moran Technology Consulting: What We Do…

MTC offers a FULL RANGE of IT and Management Consulting Services to the Higher Education Industry:

Strategic Services:
- Strategic Planning and Governance
- Organizational Assessment/Re-Alignment

- IT Assessment and Planning
- Change Management

Technology Acquisition/Deployment Services:
- Requirements & RFP Development
- ERP Implementation Planning

- Change Readiness Assessments
- Independent Project Audits

IT Outsourcing Services:
- Internal Project Management

- Interim CIO and CISO Staff

Information Security Services:
- Security Assessment and Remediation

- Infrastructure Upgrades (e.g., IdM, AD, etc.)

Data and Analytics:
- Data Governance

- Data Quality and Management

We have worked with over 290 institutions and have conducted over 715 projects, including 7 AJCU members.

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Quick Definitions – Different Approaches to Systems

- Cloud Computing/Web Hosting: Using a remote vendor data center on the internet, where a commercial provider maintains the hardware and potentially the software for a fee. This is a growing category to start schools on the path to the "cloud"…

- Software As A Service (SaaS): ERP software that runs in a cloud environment that auto-scales capacity; runs a single version of software for all clients and all clients get software upgrades automatically several times each year; and the software is highly configurable, but it CANNOT be customized.

- "Best of Breed": A reoccurring ERP concept where a school integrates a set of "best" separate vendor packages to create an integrated environment. This was popular in the 1990's and reappears every few years until schools face the resulting integration challenges.

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Major Higher Education ERP Vendors
*** Overviews ***

Major Available Higher Education ERP Suites

Vendor	Package(s)	Target Student HC
Oracle Corp.	Oracle Cloud (Finance/HCM/Student*)	1,000+ Students
Workday	Workday Cloud (Finance/HCM/Student)	1,000+ Students
SAP	Full ERP (Finance/HCM/Student)	1,000+ Students
Ellucian	Banner & Colleague Full ERP (Finance/HCM/Student)	1,000+ Students
Jenzabar	Jenzabar One	500+ Students
Anthology	Nexus and MS Dynamics	500+ Students
Unit4	Finance and HCM	500+ Students
Thesis	Student Management* and CAMS+*	700+ Students
Populi	Student Only	100+ Students

* = Not yet available for general sales

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Major Available Higher Education ERP Suites

Vendor	Package(s)	Market Focus	Challenges
Oracle Corp.	Oracle Cloud (Finance/HCM/Student*) (*PeopleSoft and eBusiness still supported through 2032)	Oracle has aggressively moved to replicate the success of Workday in the SaaS ERP market. It has designed and developed a new SaaS-based set of products including: Finance (ERP), HCM, Budgeting and, in 2024, Student (SIS). Oracle has generally caught up to Workday functionality and the two are competing aggressively.	The Finance and HCM products, while competitive, are still immature in some areas. Student Cloud doesn't ship until early 2024, though 'beta schools' are working with it now. Their software rollout strategy is regular quarterly functionality updates. Campuses can be challenged to keep up with the updates.
Workday	Workday Cloud (Finance/HCM/Student)	Workday provides Cloud-based Financials, HCM, Budgeting and Student solutions for higher education. Workday started focusing on large complex institutions but has expanded its focus to mid-sized institutions and even some small schools. Student CANNOT be installed without WD Finance and HCM.	The Student system is still maturing for complex institutions. Smaller institutions are successfully deploying WD Student. While still growing, we are seeing challenges for WD partners to fully staff projects. Their software rollout strategy is having twice-a-year functionality updates. Campuses are challenged to keep up with the updates.

* = Not yet available for general sales

Major Available Higher Education ERP Suites

Vendor	Package(s)	Market Focus	Challenges
SAP	S/4HANA Full ERP (Finance/HCM /Student)	SAP's primary U.S. higher ed products are Finance and HCM. SAP's U.S. clients include four-year not-for-profit publics and privates. SAP is focusing development on grants and funds management, and research analytics. S4/HANA brings new user interfaces; a new in-memory database structure; fast, scalable analytics; and multi-tenant, cloud deployments.	SAP appears focused on selling recently acquired packages to higher education (e.g., Concur, Success Factors, Ariba, etc.) and has not been very active in publicly competitive ERP procurements in recent years. Their market share is limited – in the U.S. they have 40-50 Finance/HCM higher education customers and 4 U.S. Student Lifecycle Management (SLCM) customers.
Ellucian	Banner Full ERP (Finance/HCM /Student)	Ellucian clients span the spectrum of institutional type, size and complexity. Ellucian has the largest market share of any vendor. It invested significantly in migrating to Banner V9 and getting all of its clients off of older versions. Their new ETHOS architecture promises extensive pre-written interfaces with a large number of third-party vendors – time will tell how successful this new integration solution becomes.	Ellucian's products are based on older technologies and may not have the money to create a product to compete with Oracle and Workday. Their annual maintenance prices have grown significantly over the years, pushing many once loyal schools to migrate to other vendors. They recently announced a non-Oracle DB (PostgreSQL) version of Banner.

Major Available Higher Education ERP Suites

Vendor	Package(s)	Market Focus	Challenges
Jenzabar	Jenzabar One	Jenzabar has been working towards their vision of a unified and modern ERP with Jenzabar One, a rebrand of Jenzabar EX. Exclusive to higher ed, and run in the cloud, Jenzabar has particularly emphasized the focus on easier use of and access to data in the platform. HR/Payroll has been a smaller piece of the platform.	Jenzabar has a small development team on this product and adding new functionality seems to be taking a long time. The platform currently feels like desktop functionality moved to the web. The firm hasn't had a great reputation among customers, hasn't really built anything large, and is working to earn back trust.
Anthology (formerly Campus Mgmt.)	Nexus and MS Dynamics	Anthology is completely focused on higher education, originally working on the for-profit sector, but now fully focused on non-profits. These efforts have resulted in a significant increase in their client base. They've developed a comprehensive SIS, while they use Microsoft Dynamics/365 for Finance and HCM functionality. Microsoft recently removed payroll from their Dynamics product line, so Anthology does not offer a Payroll solution.	Their implementation services are an area of significant risk with inadequate numbers of consultants and PM's and inconsistent methodology. Their installation cost estimates tend to be far lower than the eventual cost. While Anthology delivers integration to some industry standard applications, this area has been a major weakness. Anthology does not have a good interface between their student product and Dynamics 365, creating challenges for things like closing financial books.

Major Available Higher Education ERP Suites

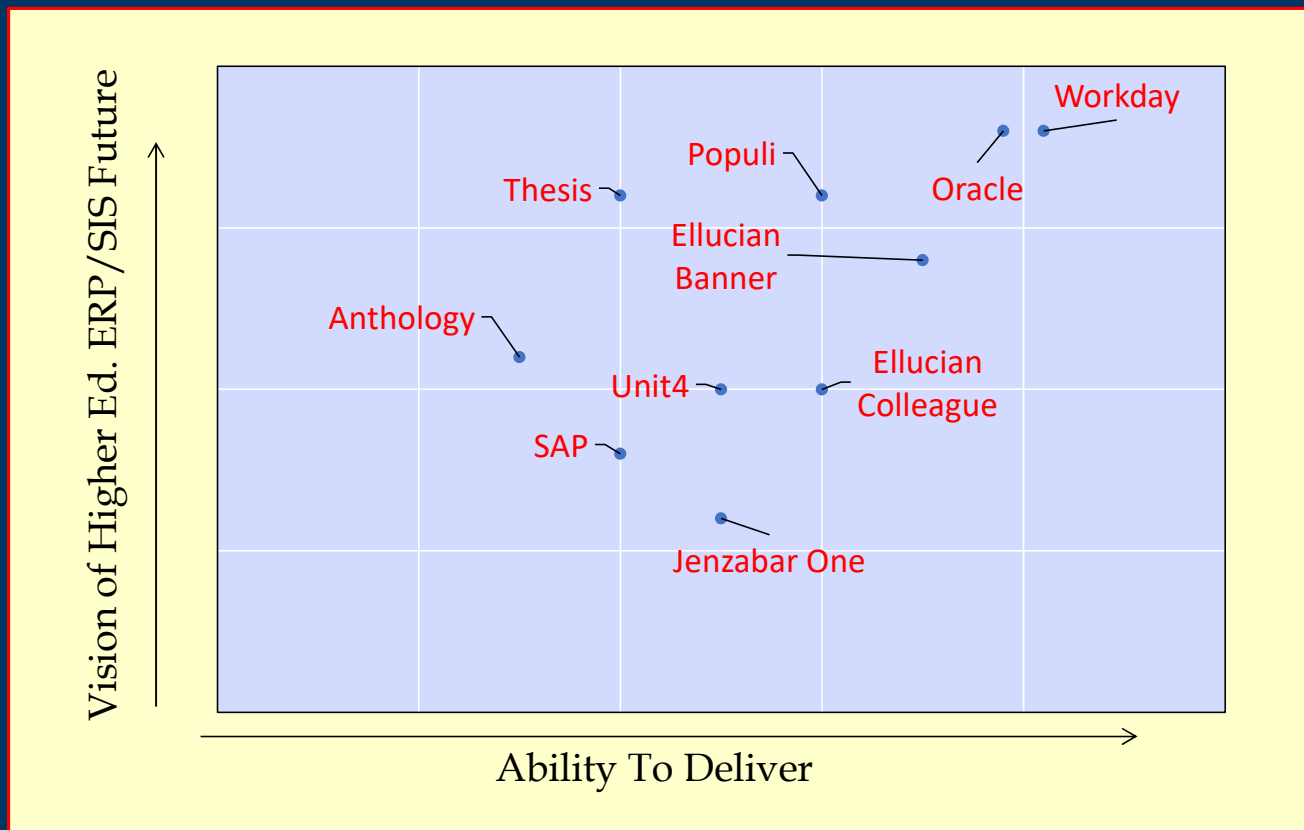| Vendor	Package(s)	Market Focus	Challenges
Unit4 (Cloud ERP)	Finance and HCM	Unit4, a Netherlands-based company, has historically provided offerings to service-centric organizations. It is a strong mid-market vendor in the Finance and HR/Payroll space in Europe; it has begun entering the US market, targeting small or mid-sized institutions. Unit4 has increased its development resources for improving functionality. Its market strategy is to move into larger and more diverse institutions.	There are limited references at this time since this is a new product, but their offerings look promising. The real question is whether they will remain focused on Higher Education since they were spun off from their SIS product.
Thesis **"The Higher Education SIS"**	Student Management* and CAMS+*	Unit4 recently spun off their ERP products and renamed the company Thesis. Their SIS SM product is focused on most higher education segments. Thesis is primarily focused on product improvement at present. They are updating their older CAMS product to focus on smaller institutions (<1,000 or less).	Similar to Unit4, there are limited references for Thesis (they have 10 SM clients with 4 live). The offerings look promising, but because Thesis is focused on product improvement vs. revenue generation, schools will have to come to Thesis. They want to provide general availability in 4Q '22/1Q '23.

= Not yet available for general sales

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Major Available Higher Education ERP Suites

Vendor	Package(s)	Market Focus	Challenges
Populi	Student Only	Populi focuses on SIS needs for small institutions. It is a basic system that schools implement themselves, but we find the platform modern, basic, and easy to use where it works. It is likely to work best for schools that have straightforward requirements, well-defined curricula, a willingness to change processes and the ability to handle implementing the product themselves following Populi's training materials. They include a basic LMS system or can integrate to most 3rd party LMS systems.	Like Thesis, Populi currently does not respond to RFPs, which can present a challenge for some institutions. We feel the product is promising for the niche it is serving, but schools need to make sure they are a good fit for this type of very straightforward, no frills SIS that they put in on their own. Pricing is unique: $199/month plus $7/month per active student headcount (not FTE).

And, of course, there's BC's new SIS built on Kuali Student!

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MTC Analysis of Vendor Vision / Commitment to Execute

Vision of Higher Ed. ERP/SIS Future

Ability To Deliver

Workday

Populi

Thesis

Oracle

Ellucian
Banner

Anthology

Ellucian
Colleague

Unit4

SAP

Jenzabar One

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ERP/SIS Procurement Approaches

Procurement Approaches

- Demo Driven
    - See 'canned' demos
    - Not requirements driven, so the devil's-in-the-details, can miss problems
- RFP Driven
    - Requirements driven with scripted demos and competitive pricing pressure
    - Can take 6-9 months
- Multi-Campus Procurement Vehicles
    - E&I Cooperative / HESS Consortium; Regional Co-ops
    - Can still be used for RFP to get started with pricing
    - Pre-negotiated software pricing for Oracle Cloud, Workday, Unit4, Anthology, Ellucian, and Jenzabar (These are starting prices)
    - Then there is the HESS Consortium Collective... *(see next page)*

The HESS Consortium Collective: A subset of HESS schools

- HESS/E&I organized a group of 33 HESS schools (HESS Collective) and ran an RFI process to select a single software and SI bidding group for schools to deploy

- Software – Oracle Cloud Suite
  - E&I/HESS Software and SI contract is with Oracle Partner Mythics
  - Very good price for bundled set of products (cannot split out): Fin/HCM/SIS
  - E&I/HESS RFI had collaborative requirements, so schools use those

- Systems Implementation (SI) Services
  - Drivestream was selected as the SI; large, most off-shore Oracle commercial partner who got into HiEd a few years ago
  - They are providing a mostly canned implementation; includes data migration and post go-live support for two-ish years

- Potential Challenges…
  - Can't renegotiate contract or pricing (Oracle Cloud and Drivestream are bundled)
  - SI scope not clear – may include MVP components (Minimally Viable Product)

ERP Critical Success Factors

Project Success Critical Success Factors …

Higher Education ERP Project - Critical Success Factors:

- Strong institutional executive leadership and support from all campuses
- Unambiguous governance and decision-making framework
- Formal agreement BEFORE vendor selection for common processes for multi-campus deployments
- Functional leadership own/drive the project
  - IT is the institution's "internal consultant"
- Implementer Statement of Work that clearly defines both institution and vendor roles and responsibilities
- Strong institutional commitment to change and collaboration
- Strong project management resources and processes (Project Plan, Risk and Issues Logs)
- Aggressive focus on understanding and tracking project costs/benefits
- Broad stakeholder participation
- Active communications plan

Critical Success Factors: Those few areas where things must go right for our efforts to succeed

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Most common DESIRED / UNDOCUMENTED ERP Benefits…

Typical benefit expectations of a new ERP system:

- Ability to drive Digital Transformation by providing new and improved innovative services to student, faculty, staff, alumni, parents, and other constituents

- Robust self-service functionality (registration, paycheck review, bill payment, degree audit, etc.)

- Significantly improved management reporting capabilities

- Ability to 'mine' ERP data to make better 'data-based' decisions

- Streamlined business processes with improved operational efficiencies

- Significantly improved and intuitive user interface

- Integrated notification, alerting, and communication capabilities

- Configurable approval workflows to speed up transaction and reduce clerical involvement

- Make paperless transactions real, finally…

Great goals…
MANY obstacles to achieving them…

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Best Practices: Data Migration Strategies

- **Axiom: The older the data, the 'dirtier' it is. 'Dirty' means:**
  - Over the years, data fields have taken on different meanings
  - Some required fields in the new system, don't exist in the new system
  - Some fields are different lengths between the new and old system
  - The older the data, the harder (work and cost) it is to get it into the new system

- **Data Migration Strategies:**
  - Convert as little data into the new system as legally and practically required
  - When you hear "legally we have to keep all data…", ask to see the law and/or policy
  - Work to provide users with access to non-converted data so that they have it if they need it

- **Data Migration "Best Practices":**
  - Finance: Convert on fiscal year end, only convert balances and, if needed, open contracts
  - HCM: Convert only current employees and employees who worked in the past five years
    - Create an employee information report for all employees and save in accessible PDFs
  - SIS: Convert only current students and students for the past five years
    - Create a student transcript report for all students and save in accessible PDFs

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Questions and Answers

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