The Human Capital Management Transformation Initiative will improve Penn’s HCM-related processes using Workday as a foundation.

**Project Goals**

1. Create an integrated, modern system that increases access to data and allows for informed decision-making
2. Standardize and optimize processes to gain efficiencies
3. Shift from administrative/data-entry tasks to enhanced consultative and strategic support
4. Provide support through new service delivery team and alignment of central, school, and center activities

**Project Approach**

- Inclusion
- Transparency
- Focus on customer experience
- Two-way communication
Phases

- **Plan & Architect**
  - July 2017

- **Wave 1**
  - Jan. 2018
  - Service Desk 1.0 Live

- **Wave 2**
  - Jan. 2019
  - Workday Wave 1 Live
  - Workday Wave 2 Live

**Plan & Architect**

- Core HCM
- Academic Unit
- Payroll
- Benefits
- Compensation
- Time/Attendance
- Absence
- Recruiting
- Onboarding

**Workday**

- Performance
- Talent
- Learning
- Effort Reporting
Guiding Principles

- Think “One Penn”
- Adopt, Don’t Adapt
- Keep It Simple
- Be Accountable
- Strive for Clarity
- Innovate and Improve
Design Principles

- **Empowerment & Timely Implementation** – Committed to new system and redesigned business processes. Project team is empowered to make immediate decisions during Discovery and Design sessions. We will adhere to the governance model identified.

- **Business Practices & Procedures** – Penn will implement business practices and procedures as delivered by the software vendor, even when it means changing our current business processes, unless there are significant and compelling reasons to do otherwise.

- **Flexibility & Adaptability** – Penn will not customize the software and will avoid using third-party point solutions whenever possible, unless the third-party point solution is a preferred partner of Workday.

- **System of Record** – Workday will be the official, authoritative data source for employee information. Processing externally to Workday will not be the system of record.

- **Design Beyond Implementation** – Minimize the HCM data entry and modifications of the same information and shared data fields in multiple systems. Utilize one HCM technology to enable efficient and uniform processes University-wide.
Timeline & Overall Status

Wave One

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Timeline and Scope Confirmation
SIT
UAT/Parallel
Deploy
Go-Live
Foundation
Configuration
Configuration 2
SIT
UAT/Parallel
Gold
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Deloitte
Project Phases – Plan

Timeline
  • July 2017 through September 2017 (Current Phase)

Objectives
  • Define and confirm the overall project
  • Define the team members (Penn and Deloitte), roles and responsibilities, and communication plans
  • Design Foundational Elements – HCM Organization Structure, Job Profiles

Activities
  • Develop Project Charter
  • Develop Project Work Plan
  • Develop Issues Management Plan
  • Develop Risk Management Plan
  • Draft Communication Strategy
  • Conduct Discovery Sessions for defining Foundational Elements
    • Organization Structures
    • Job profiles
Project Phases – Architect

Timeline
- October 2017 through January 2018

Objectives
- Further document business requirements, business processes design, and integration requirements
- Initiate the knowledge transfer process with the Penn project team on Workday terminology and concepts
- Discuss and capture process requirements and current pain points across functional areas
- Design and implement the first iteration of the HCM Service Center

Activities
- Load Workday Tenant – Configuration Build
- Configure Workday Tenant for In-Scope Functional Areas
- Prepare for and Conduct Prototype Review Sessions
- Design and Develop Integrations and Reports
- Develop Knowledge Transfer Strategy
- Develop End User Training Strategy
- Go-Live for HCM Service Center 1.0
- Publish and Communicate Onboard Best Practices
Project Phases – Prototype

Timeline
• February 2018 through June 2018

Objectives
• Produce a data loaded, fully configured Workday tenant for applicable modules, integrations, reports, and security
• Three main components, typically executed twice
  • Convert, Configure, and Review

Activities
• Load Workday Tenant – Configuration Build
• Configure Workday Tenant for In-Scope Functional Areas
• Prepare for and Conduct Prototype Review Sessions
• Design and Develop Integrations and Reports
• Develop Knowledge Transfer Strategy
• Develop End User Training Strategy
Project Phases – Testing

Timeline
• July 2018 through November 2018

Objectives
• Produce the testing for Workday

Activities
• Conduct System Integration Testing
• Conduct User Acceptance Testing
• Conduct Parallel Payroll Testing
• Execute Test Phase Communication Strategy
• Conduct End User Training
Project Phases – Deploy

Timeline
• December 2018

Objectives
• Prepare for and execute system and business process Go-Live to Workday.
• Support of the solution is transitioned to the Workday Customer Care organization.
• Project close out activities are commenced.

Activities
• Final data conversion activities
• Complete Workday Go-Live Checklist
• Execute Cutover Plan
• Conduct End User Training
• Execute Communication Strategy
Project Phases – Post Go-Live/Support

Timeline
- January through March 2019

Objectives
- Provide support to end users

Activities
- Support Issue Resolution
- Transition Workday System from Deloitte to Penn Workday Support Team