Fast Track Implementation of PeopleSoft Campus Solutions
First Things

- What’s Rapid Implementation?
- Depends on who you are:
  - Greenfield University?
  - Smaller University with limited number of programs? (Say less then 2,500 students and 10 programs)
  - Middle sized University with a full set of programs (Say up to 10,000 students and 25-30 programs)
  - Large university with multi-campus presence? (More than 10,000 students)
If you’re a Greenfield University

- Adopt business processes and standards from the product
- Extensive supporting documentation for configuration and deployment
- Based on best practices from past implementations
- That was easy!
If you’re a Smaller or a Midsized University...

- Why does implementation take so long?
Drilldown

- Gap Analysis: takes University users a long time to sign off on Requirements and gaps.
- Customization: Can we control and minimize the extent of customization?
- Data Provisioning/Migration/Verification: Esp. a challenge in legacy/manual systems
- User Acceptance Testing: Do we have the skilled resources in the University to complete the UAT on time?
- Production Readiness: Are all the other pieces in place?
So what does this mean?

Need to strengthen this to address this

Control this
The importance of process

- The implementation methodology – what are we going to do, when, and how.
- The Techlogix CSX Methodology:
  - Developed over 3 years of delivering PeopleSoft Campus Solutions in 11 universities
  - A set of templates and best practices that have repeatedly delivered breakthrough project performance
  - Validated across and customized in real life implementations
  - Tuned for a variety of university types (public, private, large general, small focused etc.)
  - Used in implementations in Pakistan, Malaysia and Thailand
9 Stage process that governs the entire solution lifecycle

Based on PMI principles but heavily customized for implementing PeopleSoft Campus Solutions

Techlogix CSX Methodology consists of:
- Project Governance methodology
- Detailed description of activities, roles and outputs of each stage
- Artifacts and templates for all deliverables
- Project team resource requirements (both University and Techlogix)
- Enabling tools (document repository, issue and defect repository)
- Process delivery metrics
# Solution Implementation Team

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Oversees the Campus Solutions implementation as defined by CSX</td>
</tr>
<tr>
<td>System Architect</td>
<td>Configurations Design</td>
</tr>
<tr>
<td></td>
<td>Custom Extensions Design</td>
</tr>
<tr>
<td></td>
<td>Interface Design</td>
</tr>
<tr>
<td>Analysts</td>
<td>Rules, Policies and Process Analysis</td>
</tr>
<tr>
<td></td>
<td>Coding Schemes</td>
</tr>
<tr>
<td></td>
<td>Configurations Design</td>
</tr>
<tr>
<td>Developers</td>
<td>Data Validation and Loading</td>
</tr>
<tr>
<td></td>
<td>Development of interfaces and custom extensions</td>
</tr>
<tr>
<td></td>
<td>Quality assurance</td>
</tr>
</tbody>
</table>
Project Deliverables: Summary

**Initiation & Planning**
- Contract Finalization
- Pre-Implementation Training
- Infrastructure Planning
- Implementation and Governance Plan
- University Team Finalization
- Change Management Strategy

**Analysis & Design**
- Communication Plan
- Requirement Engg.
- High Level Design
- Master Data Gathering
- Conversion Strategy
- Interface Strategy
- Testing Strategy

**Build & Test**
- Configuration
- Data Cleansing and Conversion
- Interface Programs
- Report Building
- Security Management
- End User Training Plan
- User Training Materials
- Testing Strategy & Scripts

**Deliver, Rollout & Support**
- End User Training
- Final Data Conversion
- User Acceptance Testing
- Cutover to Production
- System Retirement
- Go Live Acceptance
- Support Plan

---

**Techlogix Team**

**University Team**
But it's not just the process...

- The Implementation Team (both University and implementer)
  - Building a strong implementation team – functional and technical
  - Managing the mix between the internal team and the vendor team
- Delivery management & oversight:
  - Partnership with Oracle Customer Care to provide project assurance
But it's not just the implementation itself...

- Implementing PeopleSoft Campus Solutions itself
- Managing the migration from the existing system (if any) to the new
- Orchestrating the infrastructure changes required by newer systems
- Resourcing the people that will implement and manage all of this
- Managing the internal organizational change to roll this out
Migrating to the new system

- Provisioning master data
- Data enrichment
- Data migration
- Scheduling Go-Live
  - Infrastructure
  - Training
  - Synchronizing with the academic calendar
Migrating to a mission critical IT infrastructure

- New hardware
- Data center provisioning
- Overhaul of networking infrastructure
- High availability across hardware, data center and networking
- Managing security
- Disaster Recovery
- Operations and Maintenance across this new more complex hardware, networking and applications environment – where’s the HR to do this?
Resourcing People and Managing Change

- What is the immediate term and long term Operations & Maintenance model? (there’s a 6-12 month resource spike you need to manage)

- Who will drive the people, process, organization and cultural change not just in the Go-Live but in ongoing upkeep and maintenance of the system on a semester by semester basis
Moving to a Managed Services model...

- Hardware required for Campus Solutions (Servers & Storage)
- Placement of hardware in Tier 4 Data Center
- Placement of Disaster Recovery (DR) hardware in a DR site
- Operations and Maintenance cost for Hardware
- Managed services for PeopleSoft Campus Solutions to keep system operational

Optional:
- Oracle Technology annual support charge
- PeopleSoft Campus Solutions license annual support charge
Returning to the implementation challenge

- Implementing PeopleSoft Campus Solutions itself
- Managing the migration from the existing system to the new
- Orchestrating the infrastructure changes required by newer systems
- Resourcing the people that will implement and manage all of this
- Managing the internal organizational change to roll this out

- Managing the project and synchronizing all these work tracks to converge at a single point in time
Synchronizing work streams

- Your teams WILL silo
- You need a steering committee with IT, business and vendor participation which is looking across ALL these issues
  - This means a committee in which the hardware vendor, the networking vendor, the system integrator, IT, the business, HR etc. are all sitting together
  - This is NOT the Campus Solutions steering committee
- Lack of synchronization amongst these streams is a principal reason for delays, extensions in plans etc.
Key Takeaways

- The product is there. **Fast** Implementation is the challenge both from a cost and time perspective.
- Understanding local constraints (specific to each country in the region) while still delivering on global standards of excellence.

**Implementation:**
- University Team & detailed Product Training
- Starting work on data provisioning and migration upfront
- Minimizing customization

**Infrastructure:**
- Delivering on the infrastructure itself
- Synchronizing multiple vendor work streams
Some of the key lessons that shaped our approach

- Start Data Cleansing Early – Data Migration can turn ugly
- Ensure that the Customer takes Change Management Seriously – It can be the difference between success and failure
- Ensure that the client commits its best resources for the project
- Testing should be thorough and real (“week in a life”)
- Ensure that the implementation does not throw out those systems/processes that have worked well for the client
- Avoid scope creep: say ‘later’ not ‘no’
- Focus on the critical matters: prioritize
- Facilitate quick decision making: decision paralysis has sabotaged many implementations
Thank you for your time

BOSTON
BEIJING
DUBAI
KARACHI
KUALA LUMPUR
LAHORE
ISLAMABAD