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Enterprise Technology as a Catalyst for Digital Transformation at Baylor: An EDUCAUSE Research Case Study

by **Mark McCormack**, Brett Dalton, **Cheryl Gochis** and **Jon Allen** Wednesday, September 15, 2021

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Institutional Profile

Baylor University is a private Christian university and a nationally ranked research institution. Baylor provides a vibrant campus community for more than 19,000 students by blending interdisciplinary research with an international reputation for educational excellence and a faculty commitment to teaching and scholarship. The mission of Baylor University is to educate men and women for worldwide leadership and service by integrating academic excellence and Christian commitment within a caring community.

The Challenge/Opportunity

Digital transformation (Dx) in its earliest stages may emerge from within a small corner of the institution rather than as a sweeping institution-wide effort. For Baylor University, Dx first started to take hold within its HR department. Appointed as Baylor's vice president of human resources and chief human resources officer in 2016, Cheryl Gochis became aware early in her tenure of the need to do things differently in her department. HR staff were burdened with daily data-entry tasks that were inefficient and open to human error, and these tasks ultimately took staff time and energy away from more meaningful work. The institution did not offer any self-service online tools or resources for employees and student workers, further burdening the HR staff with a daily torrent of phone calls and inquiries. It was an inefficient and at times even unhealthy work environment for Baylor's HR team. As Gochis tells it, "Any joy [the staff] were bringing into work...it was sucked out by 9:30 a.m."

Many of these issues were not isolated to HR. Similar institution-wide challenges were being felt by other units as well. For many years, the finance team had been operating with its own separate data

system, an outdated system that, though familiar to the team, stifled growth and innovation in finding new and more effective ways of working. The chart of accounts was "antiquated," and the system simply didn't capture certain important bits of data and reporting. Where HR's functional systems were simply unsustainable, the finance team's data system was comfortable to the point of preventing them from imagining what might be possible with a more strategically implemented and integrated system.

Indeed, at the root of many of Baylor's challenges was a collection of disconnected and patchwork systems, with individual units left to devise their own solutions and solidify their own entrenched ways of operating. What was needed, Gochis and her colleagues discovered, was a more strategic and coordinated approach to aligning their systems across functional units. With this realization, the Baylor team set out to implement an enterprise technology solution, and it's where the institution's Dx journey began.

Process

Locking arms with a dedicated team. At the heart of Baylor's successful enterprise technology implementation, and critical for their continued Dx journey on the road ahead, was an early commitment among key stakeholders and institutional leadership to "lock arms" and move forward through the project *together*. Spanning multiple units at the institution, including IT, HR, Procurement, and Research, the Baylor project team was a truly cross-institution team that required intentional collaboration and coordination. As Baylor CIO Jon Allen put it, "If there are cracks in the team at the very beginning, it's going to fracture along the project." Key to this locking of arms at the outset of the project was an early stakeholder meeting to discuss and commit to a set of guiding principles for the team (see sidebar "Baylor Guiding Principles"). Getting clarity and agreement at the beginning of the project on how they were going to work together, and on what they were going to accomplish, allowed the team to anticipate and avoid pitfalls that they might have come across had they not identified and discussed them beforehand. Importantly, this was far from a set of guidelines that simply sat on a shelf. The team made a point of referring to their guidelines continually, to use them as the yardstick for measuring their work and to evaluate the successes and challenges of their project on the back end.

Baylor Guiding Principles

Baylor University leadership and the enterprise technology project team developed the following principles to guide their transformation and partnership with the wider university community:

- **Simplification and Standardization:** Moving toward improved efficiencies and standard business processes, we will change how we work. To enable the future state to meet project objectives, processes will be designed based on the out-of-the-box best-practice functionality as delivered by the cloud systems.

- **Transformation:** The future state design will not be constrained by the status quo. All business processes will be "on the table," and Baylor will focus on the possible.
- **Accountable Governance:** The project and the future state operating model will have a clearly defined governance structure that is communicated university-wide. We will create a dynamic environment that embraces ongoing, meaningful change.
- **Transparency and Inclusion:** We take the needs of stakeholders seriously, and we will consider suggestions and comments from the campus community. However, there should be no expectation that any given suggestion or recommendation will be adopted.
- **Clear Communication:** We are committed to making information about this initiative available to the Baylor community during the project and after "go-live." We will use multiple methods of communication and will keep them updated.
- **Measurable Results:** Transformed processes will be measured via qualitative and quantitative key performance indicators to track ongoing performance and identify continuous improvement efforts. We will communicate what and how we will measure.

Dx in service of the institution's mission. Also critical for the team's locking of arms, and for getting buy-in from other stakeholders such as the institution's board, the enterprise technology project was explicitly tied to the institution's mission and to shared values and commitments. Indeed, Dx efforts are unlikely to have a meaningful and lasting impact if they aren't directly tied to and helping advance the institution's mission. For Baylor, that mission is tied first and foremost to creating positive and formative learning experiences for their students, in addition to being a community-focused and faith-based institution, an integral part of which is the notion of stewardship and the wise and responsible use of students' and institutional resources. Presenting the institution's outdated infrastructure and disconnected and inefficient systems as wasteful and antithetical to the commitment to good stewardship—as well as to the commitment to creating positive working and learning experiences for their students—the project team found a common grounding for their work and a compelling message to communicate to their institutional leadership and stakeholders.

Finding the right partners for the work. With the right cross-unit team of stakeholders assembled, and with a shared commitment to helping build a better institution for the future together, Baylor issued a request for proposals (RFP) for its project, ultimately vetting and selecting Oracle as an enterprise resource planning (ERP) solution and tapping Huron as its external partner in implementing the project.

Through the guidance of their partners at Huron, the Baylor team undertook their work from the position that ERP implementation is not just an IT project, a notion that represented a fundamental restructuring of the siloed ways in which the Baylor staff and leadership were accustomed to working. For an ERP implementation—and for Dx efforts in general—to be meaningful and successful at the institution, it has to involve and fit with what the functional units across the institution need. In this spirit, the first 6–8 months of Baylor's project was more an institution-wide conversation than a technology implementation—listening, learning, and understanding how the Oracle solution could and should fit the unique culture, needs, and mission of the university.

Huron also connected the Baylor team with several other institutions that had recently gone through their own enterprise technology implementations with Huron, allowing the Baylor team to engage in conversations with institutional peers and gain the benefit of their knowledge of what worked well and what they would have done differently. These conversations illuminated issues including insufficient staff backfilling and potential lack of clarity in defining new staff roles and responsibilities, allowing Baylor to anticipate and try to address those issues early on.

The Baylor project machine. With the Baylor team assembled and their solution and project partners on board, the groundwork was laid for what the team now considers to have been a largely successful ERP implementation and transformation of key business processes. All told, it was a four-year process for the institution (two years for the RFP process and two years for implementation), a journey that likely had some ups and downs and moments of frustration and wanting to give up. But the overall arc of the story is that the ERP project was a "machine" that operated intentionally and consistently and iteratively. Project components were broken into smaller parts, each with its own designated lead staff, and team meetings were structured to ensure they involved the right people at the right times and in the right ways.

Team communication was also key for the smooth running of the "Baylor machine." Over the course of the project, the team learned the value of both "vertical" communication and "horizontal" communication, as well as the value of involving key institutional stakeholders at regular intervals along the way. They learned to function together virtually and asynchronously with new team collaboration tools (e.g., videoconferencing and file-sharing tools), which enabled more effective communication and sharing of project tasks and materials.

Outcomes and Lessons Learned

Even at the enterprise level, a single technology solution implementation does not fully constitute Dx, and the team at Baylor likely wouldn't contend that their institution is now completely digitally transformed. This enterprise technology is a single step on Baylor's longer Dx journey, a journey that the team will have to relentlessly and ceaselessly pursue over many years and across many dimensions of institutional life. To continue nurturing and evolving and expanding on the changes they've implemented, they will still need to focus the journey ahead on transforming other important aspects of their institutional mission, culture, and workforce, including the ongoing commitment to improving student experiences and success and their goal of becoming an R1 research institution.

The enterprise technology project at Baylor showed leaders and staff how intentionality and commitment can help a large, important initiative succeed on campus while helping the institution realize real, measurable change. Through this project, Baylor has reduced its number of payrolls,

saved on spending through procurement, and is working with a modernized chart of accounts. The principles they applied to achieve these outcomes will be equally relevant for other dimensions of Baylor's ongoing digital transformation:

- **Invest in change management on the front end.** Change is difficult, especially when Dx might represent new roles and responsibilities. Staff understanding and buy-in and training related to the changes that need to be made is critical, and institutions can't overestimate the level of change their institution and staff will experience. As Baylor team leader Brett Dalton noted, "You can't go from an antiquated system to a state-of-the-art system and expect that there's not going to be change in how you do business, who does that business, what the roles are, and how you organize yourself."
- **Don't take your hands off the wheel.** Dx alters practices and processes at the institution and introduces new capabilities that will demand nurturing and care. The Baylor team reflected on their discovery of continuous improvement as a new capability that grew out of their Dx efforts, a capability and practice that didn't fit with what the institutional culture had previously been. It's a "hands-on all the time" kind of capability, but one that can be extremely rewarding for those institutions that can maintain focus and commitment.
- **Focus on people.** Dx begins and ends with the people at an institution. They make up the relationships that are critical for moving important pieces of Dx work forward. They embody the cultures and practices that Dx efforts are intended to shift. And they are the brains and hearts and hands and feet that will need to understand, develop, and support the work that needs to be done in service to the institution's mission. Communication, collaboration, and caring—these are key ingredients that have made Dx successful so far at Baylor and can help make it successful at other institutions as well.

Where to Learn More

To connect directly with the Baylor University team, or to learn more about their ERP and Dx initiatives, email Peter Granick, Associate VP of Business Services and Chief Procurement Officer, at **Peter_Granick@baylor.edu**.

To learn more about partnering with Huron, email Ted Simpson, Managing Director, at **tsimpson@hcg.com**.

Visit the **EDUCAUSE Library entry** for this case study for related topics and resources.

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