



MOVING TO THE CLOUD?

Critical Steps to a Successful Cloud Transformation



AN EDUCATION DIVE PLAYBOOK



ext-generation cloud technologies can help universities streamline student engagement, trim costs, predict growth scenarios and unify their technology environments.

Across the higher education landscape, institutions are looking to unload legacy systems and embrace the latest, greatest example of processes, services, and infrastructure hosted in the cloud. Cloud technologies broadly expand mobile capability, hitting students and staff where they live — in their smartphones. In addition, they meet a school's craving for predictive analytics in their backend systems.

“Our members understand that for all this potential, moving to the cloud can be fraught with perils. It's imperative that institutions adopt a careful, rigorous cloud-implementation framework based on core principles that guide every phase of the process. In fact, Huron has developed a cloud readiness certification badge so that our members understand what's important in planning the cloud implementation,” says Lew Conner, HEUG executive director.



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A BETTER WAY TO INVEST IN NEXT-GENERATION CLOUD TECHNOLOGIES

Cloud technologies can transform key business operations of a university, slicing costs, improving service delivery and making everything more efficient. That's what university leaders want when they invest millions of dollars and thousands of hours moving their technologies into the cloud.

"We've seen that deploying cloud technology can transform and modernize universities so that they are better able to meet the needs of their students and stakeholders and achieve their mission well into the future," Joy Walton, managing director and leader of Huron's Higher Education Technology team.

But some wake up to an unpleasant reality when the new system goes live.

"A University invests a tremendous amount of time and money doing these large scale enterprise implementations and then in the end, they don't feel like they're much better off. That's incredibly frustrating," says Aubrey Fulmer, executive program director at the University of Washington (UW), where she is coordinating the transition to a cloud-based payroll and human resources management technology suite.

Like many institutions, the University of Washington had an old, nearly obsolete payroll/HR system that needed to be replaced. Acknowledg-



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AUBREY FULMER, executive program director at the University of Washington

ing the scope and complexity of the challenge before them, UW leaders created a dedicated program to implement the project, and placed Fulmer at its helm.

Fulmer has managed similar projects at the University of Chicago and Carnegie Mellon University. One thing she has learned over the years is moving to the cloud must be tied directly to a school’s core mission. “At the end of the day, if you’re not really focused on the things that matter, you’re going to end up implementing something that doesn’t work for you,” Fulmer says.

For universities, a successful implementation of next-generation cloud technologies has five crucial components:

1. **PROGRAM MANAGEMENT**
2. **CHANGE MANAGEMENT**
3. **SERVICE DELIVERY ASSESSMENTS**
4. **TECHNOLOGY STRATEGY**
5. **PROCESS TRANSFORMATION**

Read on for insight on coordinating these components and avoiding key pitfalls in a transition to next-generation cloud technologies.



PART 1: **PROGRAM MANAGEMENT**

THE CHALLENGE:

A cloud transformation needs a program management structure that ties everything together consistently — from student information systems to finance to HR — to ensure a smooth conversion with limited downtime.

SOLUTIONS:

- **Establish** your business case and guiding principles early in the process.
- **Develop** a governance structure and project implementation methodology with roadmaps, timeframes and work plans.
- **Implement** a performance improvement assessment. Get a baseline so you'll have metrics that illustrate effective improvements and demonstrate ROI.

Effective program management starts with a full appreciation of the complexities in front of you, says Mike Hofherr, chief information officer and vice president at The Ohio State University (OSU), which has 60,000 students, 40,000 employees and more than 300 buildings.

Leading a transformative technology initiative at a large institution might seem like commanding a ship at sea. Not so, says Hofherr, who's in the midst of a major cloud project at OSU.

"It's not like steering a ship," he says. "It's like directing a flotilla of ships. Getting them to all

go the same direction is a challenge because some are slower, some are really fast, some are big and some are small. Some are more modern and some aren't."

"The key to program management in higher education is really getting the university community to move toward that vision together and understand what the benefits of that vision are."

Strong program management starts as early in the process as possible — perhaps before the cloud initiative has even been formally approved.

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MIKE HOFHERR, chief information officer and vice president at the Ohio State University

Let's say a school has a straightforward problem: Aging systems that are out of support and must be replaced. "Even in those cases, you really need to understand the business case for doing this, why are we moving forward and what value we expect to get out of this implementation," says Huron's Joy Walton.

People are bound to disagree — often vehemently — on the best route forward in a project. "Keeping people grounded in the business case will help you get through those difficult times," Walton says.

The prime goal: Form a robust program management structure that anticipates pitfalls and prevents early omissions from causing problems that cascade through the entire program.

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JOY WALTON, managing director, Huron



CLOUD EXAMPLE: GRANTS MANAGEMENT IN HIGHER EDUCATION

From academic departments to administrative divisions, higher education institutions must grapple with a multitude of domain-specific financial, technical and practical challenges when adopting cloud-technologies. Research serves a critical role at many institutions. It can be used to attract faculty and elevate a university's brand position. There are also inherent risks involved with research, and an institution can find itself in an untenable position when the unique requirements of supporting a research function are not met.

While cloud solutions can empower organizations to fortify, standardize and automate their research and grants management processes, deploying them successfully depends on careful, thoughtful planning as many of the cloud solutions built for higher education are relatively new to the market. Four elements should be considered when planning any grants management deployment in the cloud:

- **Transparency.** Effective grants management programs must provide visibility into every grant to ensure it is being managed and accounted for properly, invoiced and reported properly, and data is shared appropriately with other system modules. Each research university has slightly different demands in this regard, and your cloud implementation partner must design sub-configurations that enable you to perform these functions in the future state.
- **Indirect costs.** The system must reflect the facilities and administrative costs of research while addressing multiple cost-combination scenarios.
- **Roles.** The roles structure from leading cloud providers must be configured properly so that principal investigators and grants administrators are able to perform their work productively when the project goes live.
- **Invoicing.** New technology must adapt to multiple modes of awards (e.g., fixed price vs. prepaid) to avoid nasty surprises when the system is up and running.

“Cloud applications have been developed to reflect best practices across multiple industries. In higher education-specific applications, especially critical applications like research, we’ve seen that to be successful you have to be thoughtful and knowledgeable about the process,” said Joy Walton of Huron.





PART 2: **CHANGE MANAGEMENT**

THE CHALLENGE:

People are resistant to change; legacy systems stall progress.

SOLUTIONS:

Implement the five pillars of change management:

- 1 Sponsorship network.** Assign a group of leaders who are personally accountable for collaborating to create a smooth transition.
- 2 Communications.** Provide the right information at the right time while enabling two-way conversations between the people implementing the project and those who will be affected by it.
- 3 Training.** Make sure everybody can learn what they need to know about using the new cloud technology — including just-in-time learning on the whys and hows of the new system and its processes.
- 4 Readiness.** Ensure users and the institution alike are prepared for the full scope of the transformation.
- 5 End-user support.** Ease the transition and answer common questions.

“The best way to get people to adopt a change is to show them how it helps them do their job more effectively or be better at their job,” says Mike Hofherr at The Ohio State. This goes back to the business case: fundamentally understanding the value the cloud initiative delivers.

When you're clear on the value add, the next step is to start thinking about the full breadth of your stakeholders, says Bill Cronin, a managing director at Huron and leader of Huron's Higher Education Workday Solutions team. He suggests asking: "Who's going to be impacted by this move to the cloud? Do you really have a handle, from an overall governance perspective, on who from the university needs to be involved and why?"

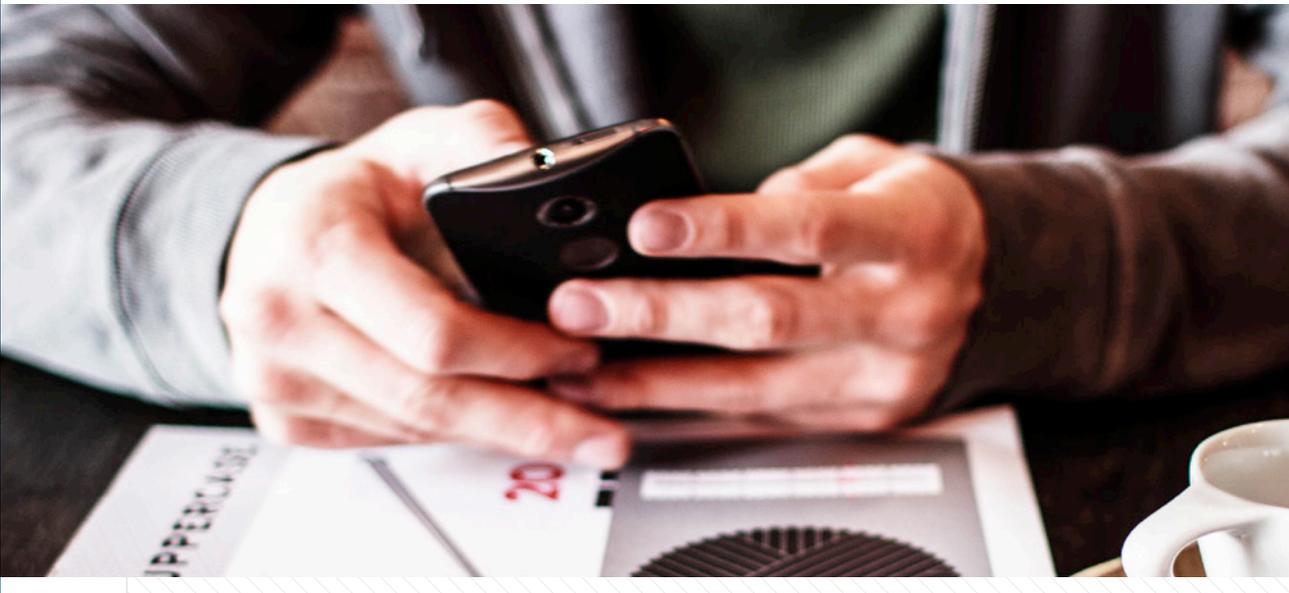
Creating accountability means developing a sponsorship network of top leaders who are account-

able for the full scope of your change management plan. These leaders need to understand what the technology can accomplish and have some experience in driving transformational change. That can be a significant challenge for any university.

"Leadership is absolutely critical. A little experience and expertise will take you a long way. I've seen executive teams unite to do amazing things," says Aubrey Fulmer of The University of Washington.

Nicole Oeser, program director of Vanderbilt University's cloud implementation, says that to

be successful the university's leadership needed to be completely committed to the project and to be willing to be strong advocates for it. Once leadership was completely on board, the team then worked to build buy-in and acceptance from faculty and staff. "To achieve this, we developed a communication strategy to build excitement around the cloud transformation. We started by branding our project SkyVU and then began communicating regularly through webinars, a dedicated website, emails, town halls and more."



Creating accountability means **developing a sponsorship network of top leaders** who are accountable for the full scope of your change management plan.



PART 3: **SERVICE DELIVERY ASSESSMENTS**

THE CHALLENGE:

Service delivery under legacy systems is decentralized and inconsistent, creating multiple inefficiencies.

SOLUTIONS:

Develop service delivery assessments that:

- **Present service delivery options** that compare savings in money, infrastructure and FTEs.
- **Help answer key questions** about routing and workflow approvals.
- **Improve service delivery** by implementing high-quality service levels and key performance goals.

Next-generation cloud technologies let you update current services and enable new ones. This is a great time to identify any inefficiencies and correct them.

For instance, under a legacy system, an employee with a question about her vacation pay might have to call HR, Benefits and Payroll to get a straight answer. Your service delivery assessments should identify these kinds of process inefficiencies and, in effect, reduce those calls from three to one.

Assessing and improving service delivery requires people who can understand the requirements of multiple users, departments and disciplines, says Steve Kish, managing director and leader of Huron's Higher Education Oracle Cloud Solutions team. "You really need individuals who don't get locked into their individual silo," he says.

One component of these assessments is planning for service delivery when the new system goes live. Fulmer cautions against trying to keep old and new systems working at the same time. "It'll be a huge financial drain for the organization," she says, because you're trying to keep doing things the old way when you need to be transforming into doing things the new way.



Next-gen cloud technologies let you **update current services and enable new ones.**



PART 4: **TECHNICAL STRATEGY**

THE CHALLENGE:

Cloud conversion is extremely complex because it must account for an institution's entire IT infrastructure, including personnel, financial, student and legacy systems.

SOLUTIONS:

Develop a technical strategy that accounts for:

- **Data conversion.** Enabling a smooth migration of data, files and software.
- **Integration and reporting strategy.** Ensuring all the moving parts and data in your infrastructure flow smoothly before, during and after the transformation and are supported by skilled people.

- **Security.** Putting controls in place to protect important data and cope with unwanted intruders.
- **Shadow IT.** Make sure you know about all the customized systems running throughout your institution and how they will be addressed in the future state.

A key component of a technical strategy is making sure you can accurately project how much work lies ahead of you, says Randy Hendricks, a senior executive leader in higher education at Huron. Don't be distracted by the prospect of cloud technology eliminating a broad swath of customizations that your legacy system is built upon.

"There's still a fixed amount of work that has to be estimated reasonably, accurately or the project teams will be understaffed," Hendricks says.

In the same vein, the cloud does not replace entire categories of technology. You'll still have a mixture of cloud desktop apps, client-server apps and mainframe apps. As Cronin at Huron



puts it: “You’re really thinking how does this fit into the overall architecture that we already have?”

Exhaustive testing of your software before you go live is essential. “You can’t put enough testing in your plan,” Aubrey Fulmer says. “Whatever your software partner says, you should probably double.”



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AUBREY FULMER, executive program director at the University of Washington





PART 5: PROCESS TRANSFORMATION



THE CHALLENGE:

New technologies require new processes. How do you transform old processes into new ones with minimal disruption?

SOLUTIONS:

- **Document existing processes** and project how they need to look in the future.
- **Make sure all departments' technologies, processes and systems are integrated** into your transformation plans.

Carefully recruiting leaders you trust to get on board with your cloud initiative can go a long way toward ensuring smooth process transformations. "If you have the right people involved at the outset, there's going to be no surprises on what those changes will be," Kish says.

A lot of process transformation comes down to the language leaders use to convey the critical importance of the new technology. "I say stop using the word 'standardization,' first and foremost," Fulmer says. "It typically really hits a

nerve, and contradicts how a campus is used to operating."

The key, Fulmer says, is helping people understand that there is a proper place for streamlined, unified systems.

"Teaching and research are the places where it makes sense to be unique, innovative and different," Fulmer says. But if you show people the benefits of consistent, repeatable processes in specific areas like finance and operations, they tend to be more easily persuaded, she says.

CONCLUSION

“Just surprise me” — said no one ever in the history of major technology transformations.

Applications need to work as expected. People need to be ready and properly trained to use them. Leaders must spell out everything that’s coming and anticipate how new technologies and processes will affect the people using them.

All this requires a well-thought-out program grounded in the business case for the cloud initiative. With a robust plan that accounts for program management, change management, service delivery assessments, technology strategy and process transformation, university leaders can avoid surprises and reap the full benefits of next-generation cloud technologies.





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