



Planning and learning for life

Algonquin College goes live with the first implementation and integration of Workday Adaptive Planning with Workday in the Canadian higher education sector

Based in Ontario, Canada, Algonquin College is a publicly funded college, with annual enrollment of 50,000+ and campuses in three locations: Ottawa, Perth, and Pembroke. The faculty and administrators at Algonquin, even those charged with backoffice functions, are laser-focused on the school's mission: to transform hopes and dreams into life-long success. With this in mind, the seminal question for the finance and administrative team is: how can we improve the experiences of our learners and our employees? In recent years, a big part of the answer required digital transformation. To support their staff and the school's mission, leaders at Algonquin decided to migrate several core systems to the cloud. The first leg of the journey involved implementing Workday Finance, HCM and Payroll. The next leg sought to build upon the lessons learned from those deployments

to transform the school's budgeting, planning and forecasting capabilities. To enable this transformation, Algonquin selected Deloitte, largely because it was the only systems integrator in Canada that had deep experience with Workday Adaptive Planning, the institution's chosen planning platform.

"The learner is at the center of all of our decisions here at the college, even in our back-office functions."

Duane McNair,
Vice President, Finance and Administration, Algonquin College

The challenge

Having implemented Workday Finance, HCM and Payroll in early 2019, updating the budgeting and planning solution was the next logical step in Algonquin's digital transformation journey. In fact, delivering new planning and budgeting capabilities had become an urgent priority. The finance and administrative team at the school had been using an antiquated, home-grown budgeting solution that was nearly 30 years old. This legacy solution had become difficult to support and maintain, and it was no longer capable of informing decisions in support of the school's mission.

To address this situation, the finance and administrative team sought to develop and deploy a transparent, standardized budgeting solution across the entire organization. As the team explored different solutions, Workday Adaptive Planning emerged as the clear front-runner. It met Algonquin's criteria of flexibility, usability and scalability, and it consistently ranked high among analysts. In addition, Workday Adaptive Planning already had a strong presence in the higher education sector.

Great timing also played a role. While the team was evaluating its options, Workday acquired Workday Adaptive Planning. Since Algonquin was already using Workday as its cloud-based ERP system, this development "sealed the deal." The main objective of the project was to modernize Algonquin's budgeting, planning and forecasting processes by deploying Workday Adaptive Planning and integrating it with Workday Financials, Workday HCM and the legacy student information system for enrollment data. The functional scope included:

- Enrollment Planning
- Revenue Planning
- Operating and Nonoperating Expenses
- Income Statement
- Financial & Management

Reporting, including management and operational dashboards. The analytical capabilities of Workday Adaptive Planning, when integrated with the Workday ERP platform, would give Algonquin's administrators the means to make better use of the institution's data during the budgeting and planning processes. The ability to analyze financial data in conjunction with enrollment data and model a variety of scenarios would be critical to supporting the organization's student-centric mission.

The transformation

The planning and budgeting phase of Algonquin's digital transformation journey built upon several lessons learned from earlier stages. Chief among them was a clearer understanding of what they were looking for in an implementation partner. In addition to a deep understanding of the Workday Adaptive Planning and Workday products, finance and administrative leaders sought a service provider who had extensive process knowledge, experience in the education sector, and most importantly, a strong local presence. Having experienced delays and frustrations with previous systems integrators who were not familiar with the market and the requirements of a Canadian institution of higher education, finance and administrative leaders wanted an implementation partner who could staff a local subject matter expert (SME) on site for the duration of the project. Deloitte quickly stood out as the candidate who had the requisite experience and who was both willing and able to make this commitment.

"When we're in a budgeting process, we're making decisions that will ultimately impact the services we can offer to our learners."

**Grant Perry, Chief Financial Officer,
Algonquin College**

Contributing its experience, methodologies, and on-site leadership, Deloitte was chosen to help the College to transform its budgeting, planning and forecasting processes. Together, the joint project team:

- Engaged with more than 80 stakeholders across the College to ensure adequate representation during the requirements gathering process.
- Designed and implemented a standardized solution in Workday Adaptive Planning for the entire College in an aggressive timeline of six months.
- Overcame some unavoidable integration challenges associated with the newness of Workday Adaptive Planning within the Workday family of products.
- Drove rapid adoption by conducting 10+ knowledge transfer sessions and by employing a train-the-trainer approach.
- Leveraged relationships with Workday Adaptive Planning as well as Workday for quality assurance and architecture review.

Although all of the above were important, Algonquin's finance and administrative leaders pointed to having a full-time Deloitte consultant working on site alongside dedicated Algonquin College employees as a primary success factor. Kunal Bathija, a manager with Deloitte Canada who served as project manager and solution architect, quickly became an integral part of the on-site team. Known for his creative problemsolving, his exceptional value contribution became even more apparent when he was unexpectedly called away. Despite Deloitte's responsiveness and Kunal's continued involvement from afar, the project slowed during his absence. Although the team was ultimately able to adjust, this situation underscored the imperative of having a dedicated implementer on site.

The results

Within an aggressive time-frame of six short months, the project team, comprising Algonquin College, Deloitte and Workday Adaptive Planning, rolled out the fully integrated Workday Adaptive Planning solution to 250+ users on-time and on-budget. As a result of the implementation, Algonquin College is well on its way toward:

- Transitioning from annual budgeting to detailed monthly budgeting, which enables the finance and administrative team to analyze monthly variances against actuals.
- Improving speed, transparency, and overall quality of financial reporting, budgeting and planning, and management decision-making.
- Performing three-year strategic enrollment planning, which will enable administrators to forecast domestic and international student enrollment for various schools and programs.
- Refining their program-investment strategies by helping different schools to identify and analyze high- and low-demand programs.

In addition to these achievements, the College is also recognizing that there are many benefits to having its data and applications in the cloud, since each step in the digital transformation journey enhances the return on investment from the overall platform. These benefits include cost savings from eliminating on-premise data warehouses and antiquated systems, predictable fees associated with the Software as a Service (SaaS) model, and greater cyber security resilience. Overall, Deloitte delivered value through its deep Workday Adaptive Planning experience and commitment to working side-by-side with Algonquin's staff. Today, Algonquin College stands as a pioneer in the digital-transformation space, since the project marked the first successful implementation of Workday Adaptive Planning leveraging native Workday integration capabilities in the higher education sector. By enabling distributed planning, this leg of the digital transformation journey put the finance and administrative team on course to learn and grow for years to come right alongside Algonquin's students.

“We’ve learned there are no substitutes for having our implementer on site: Deloitte was with us every step of the way.”

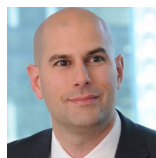
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