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Client Success Story

Modernizing Research Administration: Preparing a Leading Health Sciences Institution for ERP Transformation

Summary

The Deloitte team collaborated with a top-ranked health sciences research university to assess and redesign research administration processes in preparation for a major ERP and grants management system implementation.

Background

A premier health sciences research institution, consistently ranked among the world's top universities for biomedical research and medical innovation, recognized a critical juncture in its evolution. With faculty and researchers at the forefront of scientific discovery and medical advancement, the institution embarked on an ambitious initiative to replace its aging financial system and grants management platform.

The university's research enterprise had grown significantly over the years, but the systems and processes supporting that growth had not kept pace. Researchers and administrators struggled with fragmented workflows, manual workarounds, and disconnected systems that created inefficiencies across the research lifecycle. The institution's leadership understood that simply replacing technology would not solve these challenges—they needed to fundamentally rethink how research administration operated.

The university sought a collaborator with deep experience in both research administration and enterprise system implementations. They

needed an organization that could not only assess current state operations but also envision what research administration should look like in the future. Deloitte's Research Administration Capability team was selected to lead this critical engagement, bringing together subject matter specialists with experience across leading research institutions and complex system transformations.

The engagement's objective was clear: understand the current state of research administration across pre-award, post-award finance, financial reporting, and systems administration; identify opportunities for improvement; and develop a comprehensive roadmap for future state processes that would support the institution's continued excellence in research.

Approach

Phase 1: Discovery and Current State Assessment

The Deloitte team began with an intensive discovery phase designed to build a comprehensive understanding of how research administration functioned across the institution. Over the course of several months, the team conducted more than 25 in-depth workshops with research leadership, administrators, faculty, and staff spanning all critical functions of the research enterprise.

These workshops included representatives from:

- Pre-award administration teams responsible for proposal development and submission
- Post-award finance teams managing grant expenditures and compliance
- Financial reporting staff responsible for sponsor invoicing and reporting
- Research systems administrators supporting technology infrastructure
- Central research and finance leadership setting strategic direction
- Department-level administrators working directly with faculty

The workshops were designed not just to document processes, but to understand the "why" behind current practices. The Deloitte team worked collaboratively with stakeholders to map workflows, identify pain points, and uncover the root causes of inefficiencies. Facilitators created an environment where administrators felt comfortable sharing challenges and proposing potential solutions.

In parallel with the workshop series, the Deloitte team undertook an extensive document review, analyzing over 100 research-related process documents, policy manuals, standard operating procedures, and compliance guidelines. This comprehensive review served multiple purposes: validating what was heard in workshops, identifying gaps between documented processes and actual practice, and confirming functional requirements for the future state.

The team's research administration subject matter specialists provided crucial industry perspective throughout the discovery process, helping the institution understand how their practices compared to peer institutions and where opportunities existed for meaningful improvement.

Phase 2: Analysis and Future State Design

With a thorough understanding of the current state, the Deloitte team shifted focus to designing the future. This phase emphasized collaboration with institutional stakeholders to confirm that recommendations would be both ambitious and achievable, aligned with the university's culture while pushing the organization toward leading practices.

The team established a set of guiding principles to inform future state design:

- Stakeholder-Centered Approach: Recommendations are designed to enhance the experience of faculty researchers and research administrators, reducing burden and enabling them to focus on advancing science rather than navigating systems.
- Compliance Without Complexity: Future processes maintain rigorous compliance with sponsor requirements while streamlining unnecessary complexity that had built up over time.
- Leveraging Technology: The new ERP and grants management systems should be configured to support optimal processes, not simply automate existing inefficient workflows.
- Scalability for Growth: Solutions position the institution to support continued research growth without proportional increases in administrative burden.
- Change Management Focus: Recognizing that technology alone would not drive transformation, recommendations include robust change management strategies.

Using these principles, the Deloitte team developed comprehensive future state process maps for each stage of the research administration lifecycle. These detailed visualizations illustrated how work would flow in the future environment, clearly delineating roles and responsibilities, decision points, and system interactions.

The team identified specific policies and procedures that would require updates to accommodate the future state, providing detailed guidance on necessary changes. They also highlighted opportunities to consolidate redundant policies, eliminate outdated requirements, and simplify language to improve accessibility for faculty and staff.

Phase 3: Validation and Refinement

Throughout the design process, the Deloitte team maintained on-going engagement with research leadership and working-level administrators. Draft recommendations were socialized through review sessions that allowed stakeholders to provide feedback, raise concerns, and refine approaches. This iterative process confirmed that final recommendations reflected institutional realities while maintaining the ambition necessary to drive meaningful change.

The team also conducted impact assessments, helping the institution understand the magnitude of change different stakeholder groups would experience and identifying where additional change management support would be critical.

Impact

At the conclusion of the engagement, Deloitte delivered a transformation roadmap that positioned the institution for success in its ERP implementation and beyond.

- **Detailed Recommendations:** The team provided specific, actionable recommendations for every stage of research administration processes, from pre-award proposal development through post-award closeout. Each recommendation included clear rationale, implementation considerations, and expected benefits.
- **Visual Process Maps:** Future state process maps provided intuitive illustrations of how work would flow in the new environment, including the workflow between the electronic research administration (eRA) system and ERP, serving as valuable tools for system configuration, training development, and change communication.

- **Policy Guidance:** The team identified specific policies requiring updates and provided detailed guidance on necessary changes, helping the institution align its policy framework with future state processes.
- **Implementation Prioritization:** Recognizing that not all changes could be implemented simultaneously, the team provided a prioritized roadmap that balanced quick wins with longer-term transformational initiatives.

Perhaps most importantly, the engagement created momentum for change. By involving diverse stakeholders in the design process and clearly articulating the benefits of transformation, the Deloitte team helped build organizational commitment to the journey ahead.

The institution is now moving forward with confidence with its eRA and ERP transformations, equipped with a clear vision for the future of research administration and a detailed roadmap to get there. Faculty and administrators will benefit from streamlined processes that reduce administrative burden, enabling them to focus on what matters most: advancing scientific discovery and improving human health.

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