



Network for Change and Continuous Innovation

Transforming
Solutions Inc
people - process - technology



Power 60

Digital Transformation Awesomeness

June 12, 2024

 www.transforming.com



My Commitment

Today
IS A
happy
DAY

Being more awesome at DT will:

- Reduce Anxiety + Stress
- Improve your overall and work-related well-being

What can we dive into and/or talk about so you can feel more prepared?



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Agenda

1. Introductions and Overview
2. Concepts and Components of Digital Transformation
3. Current Approaches and Common Pitfalls
4. Brief Overview: Digital Transformation Leading Practices including TSI's Approach
5. Tool Drill Down – IT Strategy Beginning with An Effective IT/Application Inventory
6. What to Expect in the Pre-Conference Workshop
7. Q&A





Acknowledgements

Several leading thinkers and influencers in the field of digital transformation have made significant contributions through their insights, research, and practical implementations. Here are some of the most notable figures:

- Clayton Christensen
- Thomas H. Davenport
- Dr. Jeff Selingo
- Jeanne W. Ross
- David L. Rogers
- Forrester Research, McKinsey, Educause, MIT and others.



1

Introductions and Overview



Let's get to know each other

- Share a little info:
 - In a few words, what do you hope to learn more about today?
 - Briefly describe the process or functional area(s) where you have done some digital transformation work?
- If you have not yet done a project like that, that's perfectly OK – mention that using chat.



 [Go to whiteboard](#)

Digital Transformation



Digital Transformation



Erie Community College to Spend \$5.2M Replacing Disastrous ERP System. Initially believing the WorkDay ERP system might save them millions, SUNY public college officials say it cost them \$12 million while failing to meet their needs, and now they'd rather replace it than spend more to fix it.

Montclair State University is suing Oracle over an allegedly botched ERP (enterprise resource planning) software project, saying a series of missteps and delays could ultimately cost the school some \$20 million more than originally planned

But in a counterclaim, Oracle argued that Montclair State officials didn't understand what steps were required for a successful project and were difficult to work with. *"Instead of cooperating with Oracle and resolving issues through discussions and collaboration, MSU's project leadership, motivated by their own agenda and fearful of being blamed for delays, escalated manageable differences into major disputes,"* Oracle said in a court filing at the time. Montclair's actions have amounted to a "scorched earth" campaign meant to deflect blame from Montclair to Oracle, the vendor alleged.

Digital Transformation





Today's Objectives

Think	Thinking differently about digital transformation in the context of what YOU are working on.
Understand	Understanding that there are different approaches with different outcomes.
Know	Knowing how to use a few tools to improve your organization's success rate.
Begin	Beginning to apply your knowledge to give you and your organization/institution the expertise needed to succeed.

We Are...



Transforming Solutions Inc

people - process - technology





Company Overview



29 years in business



25 consultants



6 of the top 13 public universities are TSI clients



200+ BPI/Transformation projects



17 years in higher education

What We Do

Successfully lead **high-profile projects** throughout U.S. and globally where we can make a difference

- Strategic Planning
- Process Improvement
- Technology Strategy
- Software Evaluation & Selection
- Organizational Change, Program, and Project Management, including setting up PMOs and consulting groups within a university.

Who We Are

Vendor-neutral and Technology agnostic - no conflict of interest

Holistic focus on People, Process, and Technology

Blend leading practices in and outside of Higher Education

Average consultant has **15+** years of experience

Client Testimonial

*"TSI continues to amaze me in their ability to **balance scope of work** and **flexibility and adaptability** to the different cultural environments at the university. The **engagement quality** is always **top-notch** regardless of the number of curve balls we throw at them. They are truly **strategic partners**."*

- CIO, from a Top 10 Public and R1 University



Representative Higher Education and Non-Profit Clients



Dan Feely – Managing Partner (He/Him)

- 30+ years of technology strategy, digital transformation, process improvement and OCM
- Led transformation projects at over 100 organizations – including University of Illinois, UFlorida, NYU, Yale, PepsiCo, Abbott, UChicago, and other key clients
- BS in Operations Management and Information Systems, Northern Illinois University
- Started career at Accenture; launched TSI in 1995





Ling Sirivong – Associate Consultant (She/Her)

- Expertise in IT requirements and process definition, BPI, OCM, marketing, and project/program management.
- Served as the Program Manager for an ERP implementation.
- Involved in Advancement CRM selection projects at the University of Rhode Island, University of Mississippi, and Northern Illinois University
- Involved in BPI projects at various Universities and Non-Profits.
- BS in Leadership and Management; minors in Data Analytics and Business Innovation and Entrepreneurship from Northern Illinois University with academic honors
- Business Analytics SAS Software Certified





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Concepts and Components of Digital Transformation





Digital Transformation (DT) – Let's Talk about This

1. DT is a strategic initiative that incorporates digital technology across all areas of an organization. It evaluates and modernizes an organization's processes, products, operations and technology stack to enable continual, rapid, customer-driven innovation.
2. DT is a cultural, workforce, and technological shift fundamentally altering how institutions achieve their missions and strategic goals.
3. DT is the fundamental rewiring of how an organization operates. The goal of a digital transformation, should be to build a competitive advantage by continuously deploying tech at scale to improve customer experience and lower costs.

 [Go to Poll](#)



Did You Know?



Transformations are hard, and digital ones are

harder

The success rate for these efforts is consistently low: less than

30%

Succeed



Even digitally savvy industries, such as high tech, media, and telecom, are struggling. Among these industries, the success rate does not exceed

26%



Only

16%

of respondents say their organizations' digital transformations have successfully improved performance and also equipped them to sustain changes in the long term.



An additional

7%

say that performance improved but was not sustained.



44%

of **colleges** lack a **strategic plan** to invest in and use technologies for large-scale changes

59%

of **four-year colleges** list increasing **enrollment** as a very **important priority** related to digital transformation



What can we dive into and/or talk about so you can feel more prepared?



3

Current Approaches and Common Pitfalls





Clients Ask TSI to:

- Assess our technology (organization, applications and architecture, processes and governance)
- Review the performance of our project(s)
- Develop a business case
- Select New Technology
- Manage the implementation with a strong focus on OCM

Current State:

- No Technology Inventory or Strategic Plan
- No effective project plan
- Limited Resources
- Limited vision of:
 - Student experience, faculty experience...
 - How they will benefit
 - What it will cost
 - How long it should take
 - What to watch out for...



Current Practices – “How does YOUR Organization go about Technology Change?”

- Formal RFP process
- Go to conferences and have vendors show (but mostly) talk
- Benchmark other universities that are “like us”
- What else?
- Are you sensing that we COULD be doing something else?



What if we....

1. Imagined how we want to operate?
2. Understood where we are today?
3. Captured and quantified the “gap”?
4. Identified stakeholders who saw the opportunity in these areas.





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**Brief Overview:
Digital Transformation
Leading Practices
Including TSI's
Approach**



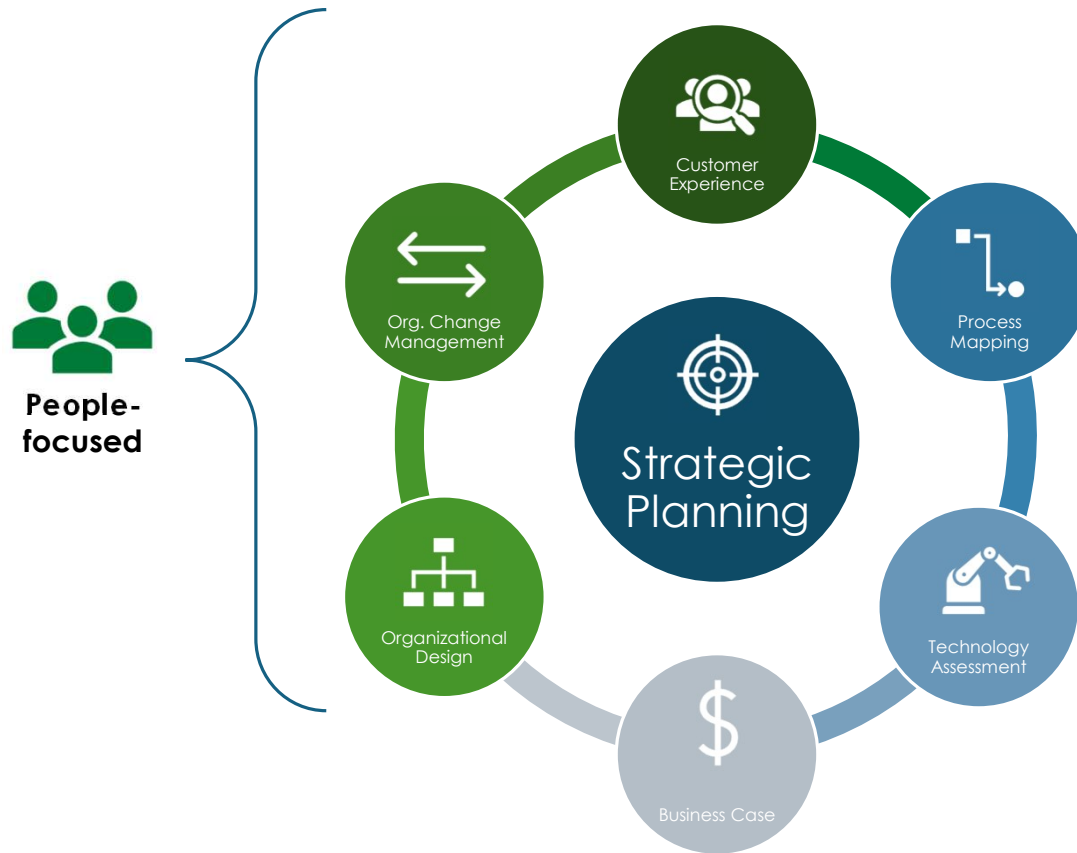
Would You Rather...

Lift and Shift vs. Transformation and Change





Components of Digital Transformation





Components of Digital Transformation



Checklist:

- How current is the strategic plan, and how does the DT initiative align with it?
- What capabilities are you expecting from the new system?
- Is your data ready?
- How will it work with other systems?
- Do you have a Technology Inventory?
- What is your vision for your “Constituent” Experience and process work?
- Business Case with accurate costs and quantified benefits?
- How ready and able are various parts of the organization to change?
- How will roles and staffing levels change (w/l and outside of IT)?

Can you think of anything else we should ask?

So What?

- What if we are asked to take on a DT project but the university is NOT willing to do some or any of these tasks?





What can we dive into and/or talk about so you can feel more prepared?



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**Tool Drill Down - IT
Strategy
Development:
An Effective
IT/Application
Inventory**





Fun “Fact” (according to TSI)

Most

Organizations do NOT
have a comprehensive
inventory of the
technology that is in
place

All

Of our clients did not
have an accurate
estimate of what they
spend on technology



IT/Application Inventory

- **What is it:**
 - A comprehensive listing of ALL applications and related services in the functional areas that form the scope of the Digital Transformation
- **What forms does it come in:**
 - Spreadsheet list (simple)
 - Detailed spreadsheet
 - IT Application Inventory application
 - Technology Architecture/Information Flow Diagram
- **How You Benefit**
 - Comprehensive picture of the applications + services
 - Current cost
 - Information flows (and the applications that make that happen)



IT/Application Inventory

- **Why did we select it for this Power60?**
- **Walk through suggested template:**
 - Inventory capture
 - Analysis
 - Applications
 - Integrations that exchange data with other applications
 - Feed into the business case



IT/Application Inventory

Application Inventory							
Application	Purpose/Key Strengths	Functions Performed (e.g., CRM, Reporting, BI, Event Management)	ARD or ITS Supported	System vs. Interface	Categorization (High/Med/Low)	Known gaps and/or Critical issues	Estimated number of Active Users (N/A = Not needed)
AIS	Peoplesoft - student system	Student enrollment, financial aid processing, student engagement - College, student, degree, parent info, etc.	ITS	I/F	Med	None	N/A
Alumni Magnet	Directories/communities	Alumni directory, event management, membership management, career development	ITS	Sys	Med	None	
ARC GIS	Geographic information (mapping) system for Bio, Engagement, and Prospect Data	Create geographic maps for Bio, Engagement, and Prospect data	ARD	Sys	Low	None	4, analytics team
Arthur	ARD Data Warehouse	ARD DW; houses time-sliced data that sits in Griffin for reporting purposes. Customized instance of SAP BO for Uuniversity ARD.	ITS	Sys	High	Data snapshot storage (should store all), historical trends & realization rate Phase 3 and 4 CapEx support ran out Issue: Users are running queries, maintaining snapshots and spreadsheets from Arthur on Desktop or personal Drive. Tech Structure: there are currently no data cubes in Arthur	300+

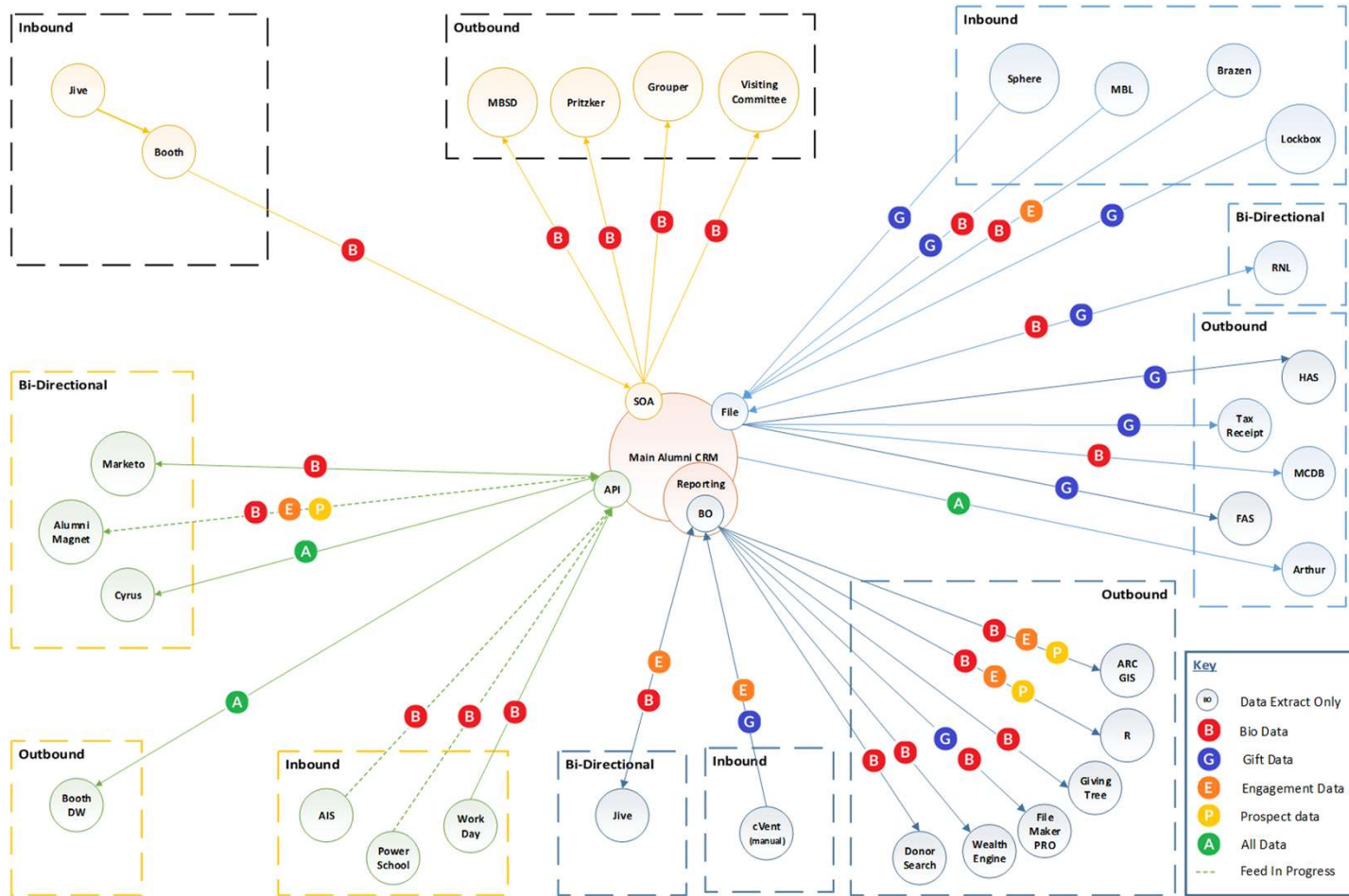


IT/Application Inventory

Today's Applications	Functions Performed	Comments	Keep	Modify	Replace	Pros	Cons
Alumni Magnet (AM)	Alumni directory, event management, membership management, career development	This is an umbrella app whose functions can be done in other apps. How do we prevent using AM for events, rather than cVent, for instance? As a portal for alumni, AM does not satisfy all of University's requirements, although it does cover several. Interface with Griffin was completed recently. If the functionality of AM can be expanded (donor search of their own giving, reprint donor receipts, can non-alumni use this too, is the membership integrated into identity management, and so forth), need to make sure its functions are not duplicating other UC systems.				Alumni directory and communities software	There is overlap between AM and other systems, such as cVent for event management. Need to make sure the appropriate system handles the functionality needed by ARD, and do not duplicate - only one system for each function.
ARC GIS	Create geographic maps for Bio, Engagement, and Prospect data	Geographic mapping of ARD Bio, Engagement, and Prospect data elements.				Already in use	There may be other mapping software that is better integrated with the new CRM
Brazen	Online software for chat-based and real-time admissions, recruiting, hiring, communications. Used for mentoring in University network	Online software for chat-based and real-time admissions, recruiting, hiring, communications. Used for mentoring in University network.				Already in use	The Griffin replacement may have communication tool similar to this one.
cVent	Meeting management & management of large events.	Perhaps the new Griffin would also have event management, in which case we would not need cVent.				Already in use	Using cVent to full capability? Is it worth the expense? Other event mgmt. software available, such as Eventbrite
Cyrus	Modem search functionality (and mobile friendly) – frontline fundraisers - includes mobile search application	Cyrus can pull directly from a CRM, which EverTrue is starting to do with its first client in Sept 2017. EverTrue is a more mature product. In the mid-long term, Cyrus may likely get replaced with functionality of the core CRM or another "package" that has a more robust footprint in the market.				Already installed & customized to existing business processes	Not wide adoption with many other institutions. On the front end of the application, it does not have functionality which EverTrue has, such as mapping of constituents, access to constituent information via mobile, integration with social. Also has volunteer management and PTP fundraising.
Donor Search	Search functionality for University donors; subscription service	Wealth Engine is used by more schools, and we don't need two products that do the same thing.				Already in use	Multiple products which do the same thing.

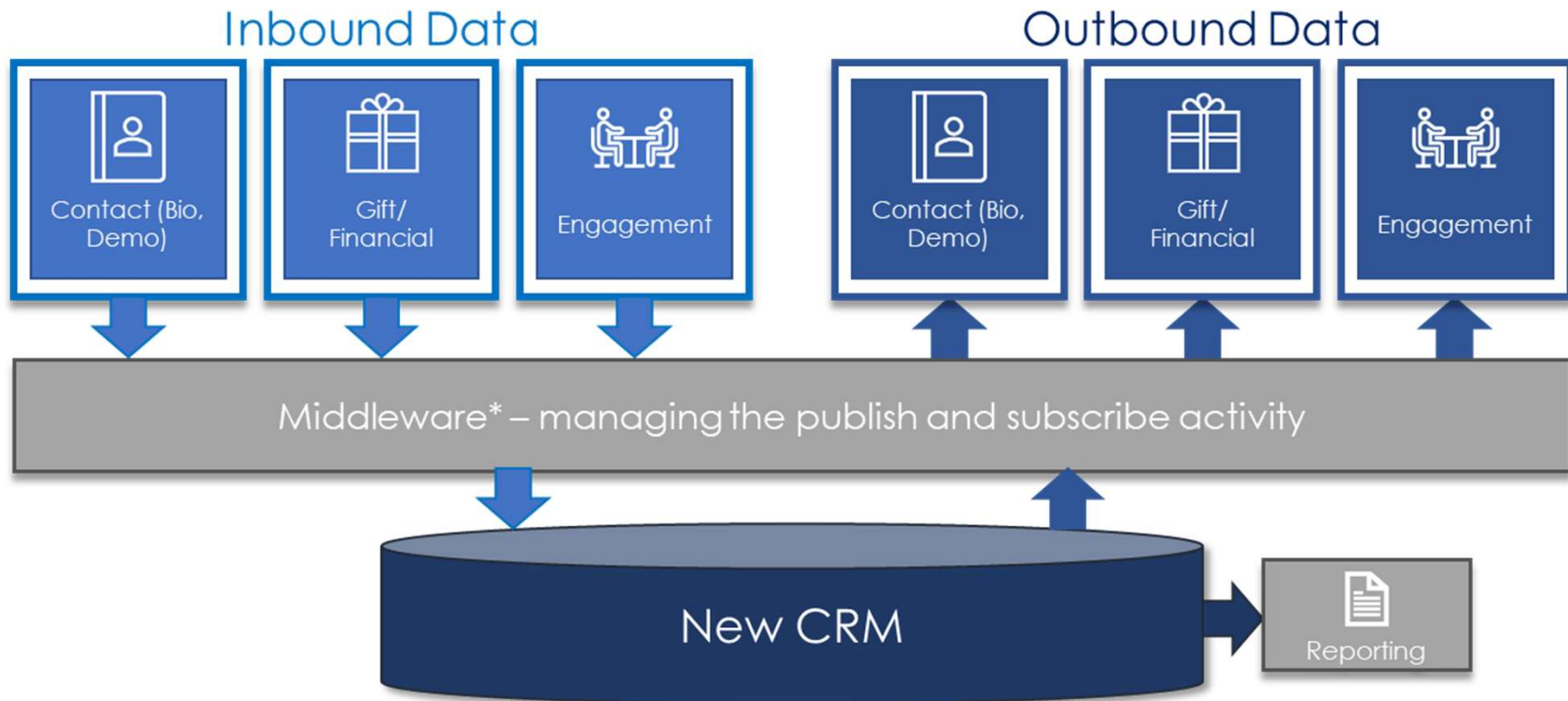


Information Flow Diagram





Information Flow Diagram

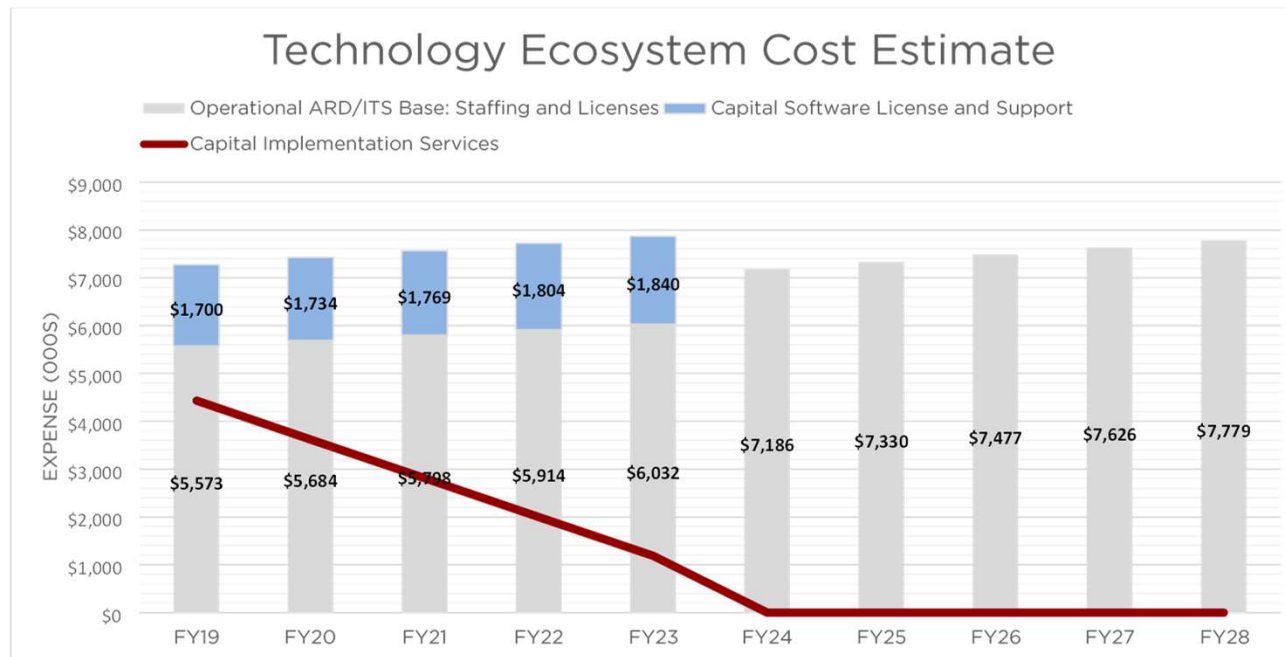


**The use of middleware enables the ability to allow multiple campuses and entities to publish and subscribe to data within the new CRM.*



IT/Application Inventory- Input into Business Case

Costs Eliminated Due to Griffin Replacement		\$000s
Total		\$827
Hardware - Griffin Technology Infrastructure (on-premise)		\$53
Servers (35)		53
Software - Griffin CRM (Ellucian)		\$170
Griffin CRM Software Maintenance - Ellucian		170
Software - Engagement tier functionality overlap		\$604



IT Inventory – Now What?



Just a start

Leads to the Vision

**Foundation for the
Business Case**

**Awareness Can
Influence Change**



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What to Expect in The Pre- Conference Workshop

Wednesday, July 24, 1–5 p.m.



THE
GOOD
STUFF < Really, Really



Preconference Details

<https://ncci-cu.org/education/annual-conference/#preconference>

Digital Transformation Excellence

Wednesday, July 24, 1–5 p.m.
Rancho Mirage, CA

Speakers: Dan Feely, Managing Partner, TSI; Becky Sowers, Senior Associate – Organizational Excellence, University of Virginia

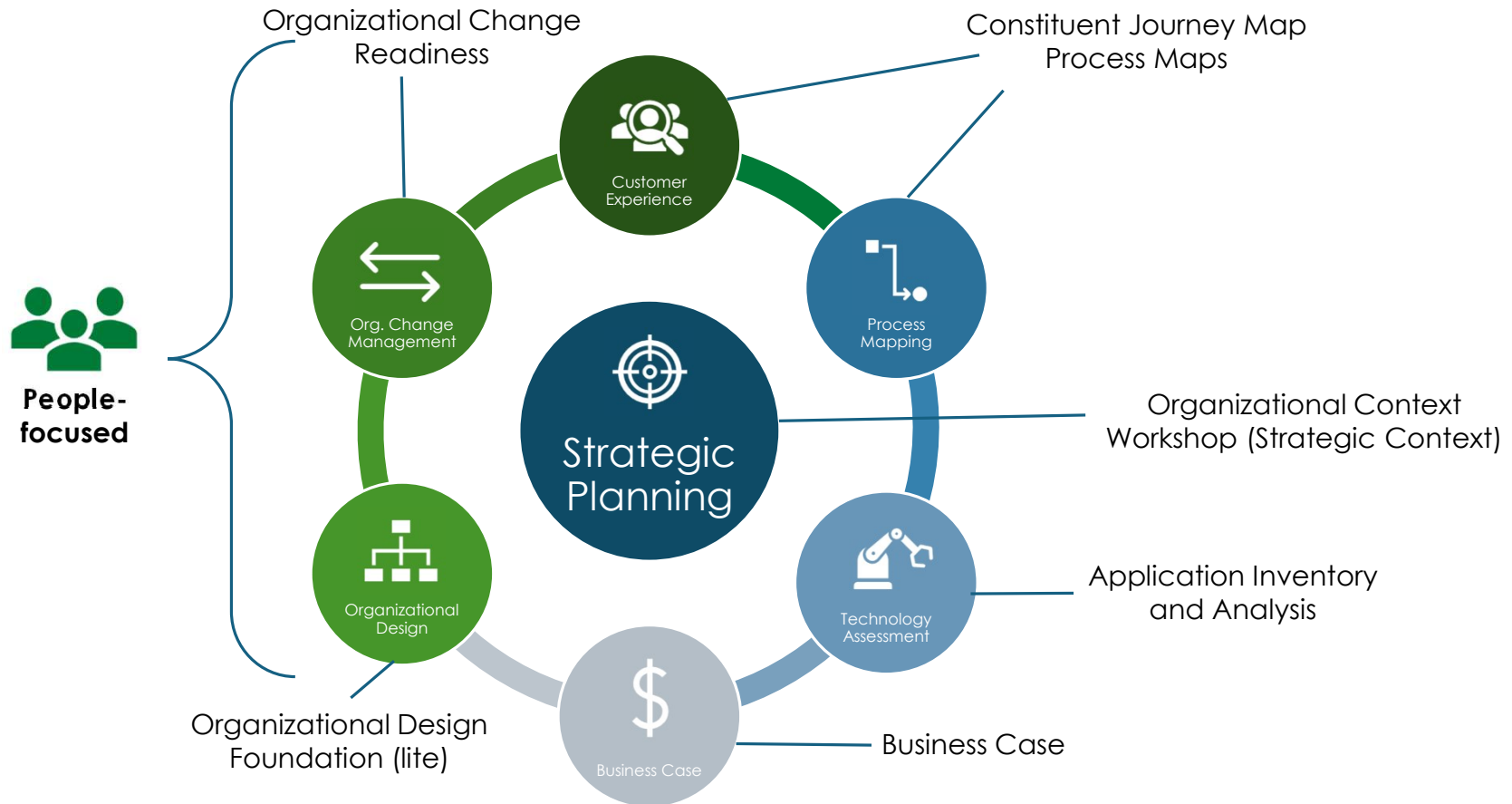
- Take a hands on, case-study approach
- Walk through our DT Tools and Methodology **in detail**
- Hear how UVa has approached some of their projects
- Allow time for you to ask questions about your current projects.
- Give you a chance to share with your peers.

How do we think about technology catalysts (AI, CRM, advanced analytics, etc.) as catalysts for our institution's strategy?

How do we leverage this vision and align people, process, technology and strategy so that what you envision largely directs your next reality...



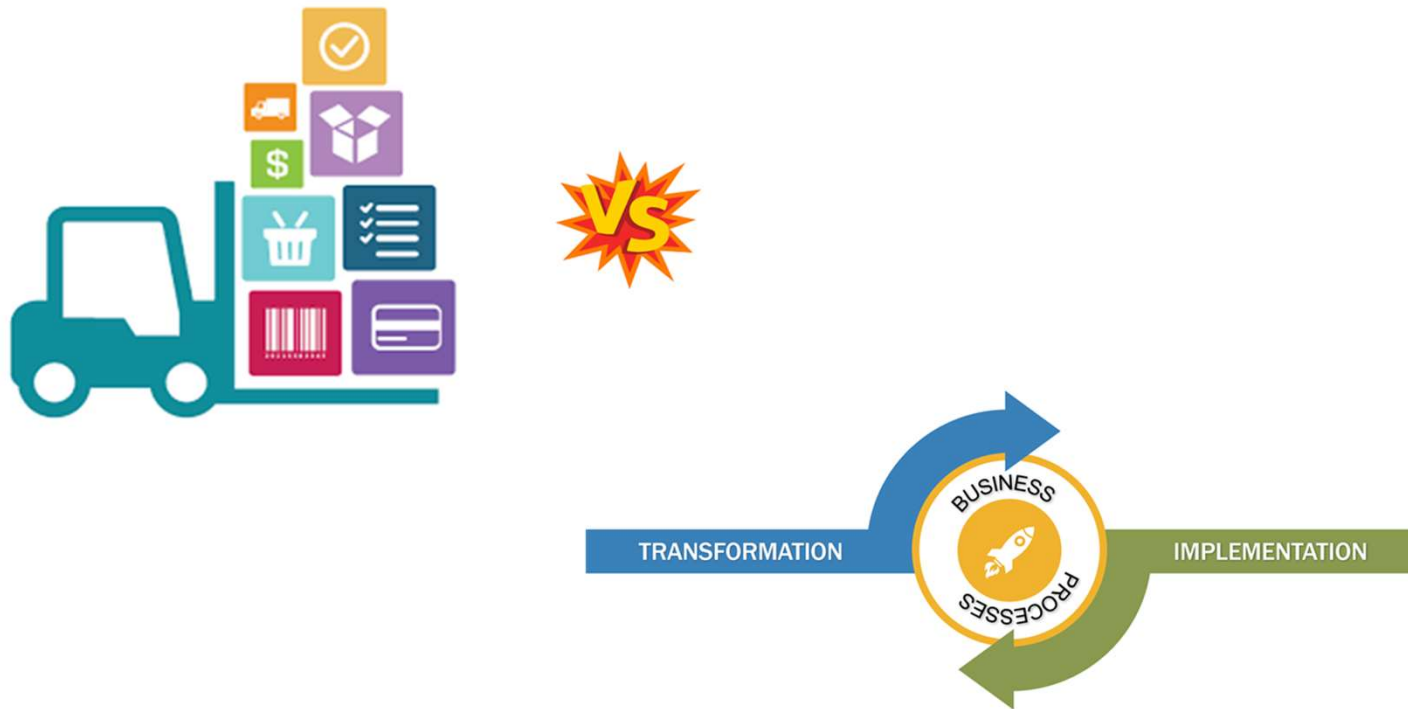
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Q & A

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