



# Key ingredients to a successful HCM SaaS journey

Session 7468



# Presenters



**Terry Again** is an Executive Director and experienced leader who possesses strong project management and communication skills, and successfully develops teams and staff through personalized motivation that result in successful software implementation projects. Terry is the Executive Director/Project Manager for the Oracle SaaS implementation at CHMA-CEI for Metaformers and successfully led the HCM team in phase 1 to go-live in January 2021. She is currently leading the ERP/EPM implementation efforts.



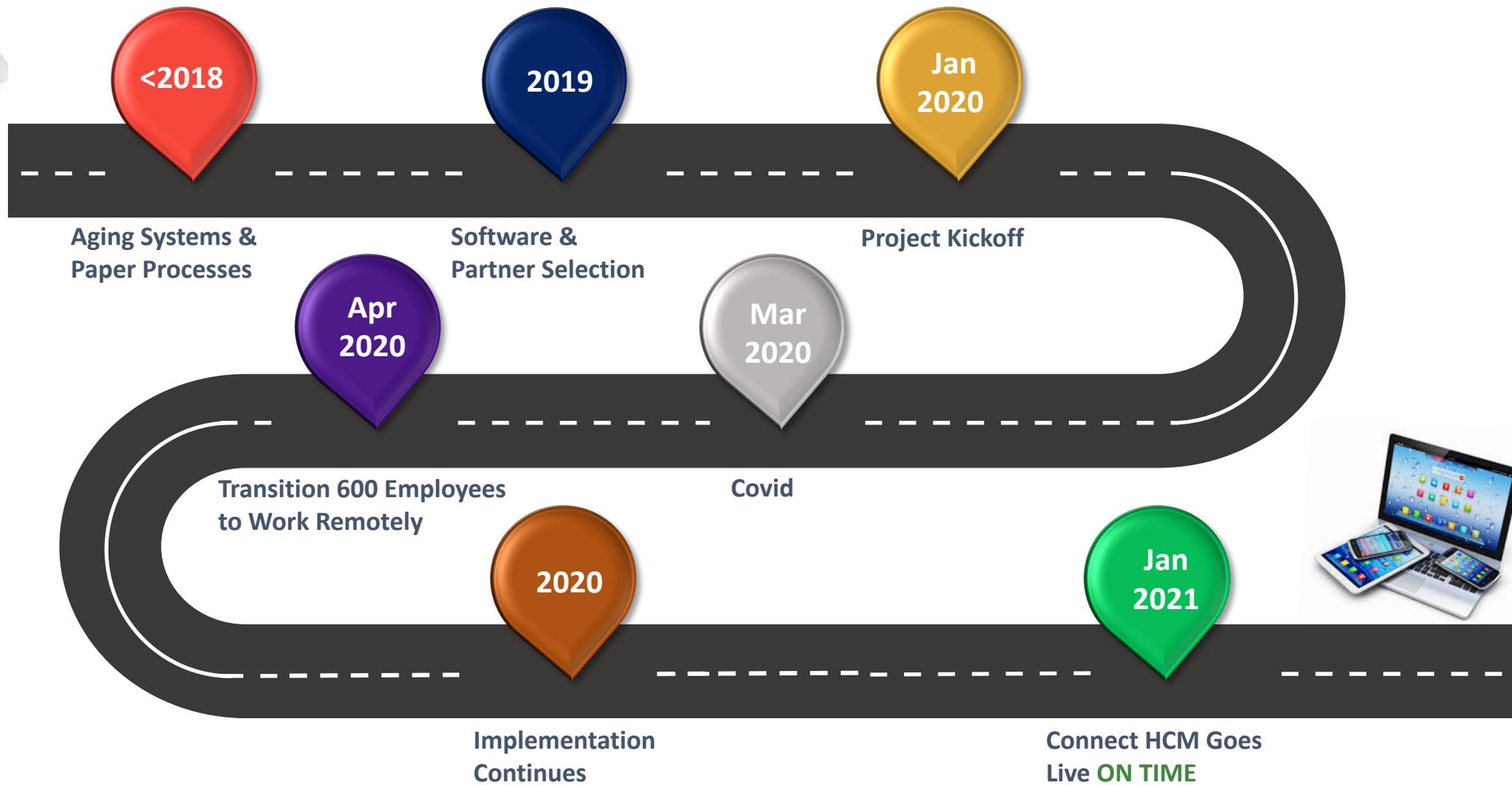
**Marieli Velez** is a Certified Oracle Cloud and PeopleSoft HCM Architect with more than 20 years of experience in software consulting, business process reengineering and all phases of system implementation. She is the lead HCM Architect for CMHA-CEI, working collaboratively with the client to move from a highly manual environment to a workflow based automated solution that began delivering ROI upon go-live.



**Sharon Blizzard** is the Chief Human Resources Officer (CHRO) for CMHA-CEI in Lansing, Michigan. The organization has over 1000 employees and provides a comprehensive set of services to over 10,000 people in the three counties. Sharon has worked within the Human Resources department for over twenty years and has held the CHRO position for 13 years. At the heart of Sharon's work is a can-do approach and a commitment to learning and opportunities for growth across the organization.

# Our journey from paper to digital. . .amidst a pandemic

Why We're Here



# Agenda

- About our Organizations
- Business Goals
- Project History
- Reality Before Oracle Cloud
- Project Scope
- Implementation Highlights
- Lessons Learned
- Success Factors
- Reality After Oracle Cloud
- Q & A

# About Metaformers



## Who We Are

Metaformers is a hybrid management consulting and cloud solutions delivery company with expertise in strategic **transformation**, business process **optimization**, technology **modernization**, and employee **education**.

## Solutions

- Transformation and Modernization
- Cloud Solutions
- On-Premise Solutions
- Change Management & Education
- Managed Services

## Industries

- Public Sector
- Healthcare
- Education
- Commercial

## Results

Enabling your executive vision by helping you realize the full potential of your enterprise solutions and operational efficiencies while achieving true people driven ROI from your technology investment.



# About CMHA-CEI

## Who We Are

Community Mental Health Authority of Clinton, Eaton and Ingham counties (CMHA- CEI) is a public agency serving people in Mid-Michigan. The agency has over 1000 employees providing services and supports to over 13,000 consumers, with an annual operating budget of \$136M.

We treat adults and children with emotional and behavioral challenges, intellectual/developmental disabilities and substance use issues.



**Community**  
MENTAL HEALTH  
CLINTON • EATON • INGHAM  
Together we can.

On Site 24 Hour - Crisis Services

Children's Intensive Crisis Stabilization Services

Urgent Care

Residential Services

Autism Services

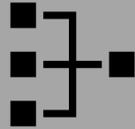
Skill Building Assistance

Case Management and Assertive Community Treatment



# An integrated ERP and HCM solution providing long term ROI through best practices

## Business Goals

	Replacement of aging legacy systems and paper-based processes
	Adoption of best practice business processes
	Automation of workflows
	Engagement and visibility for business process stakeholders
	A secure system of record with disaster recovery capability

# Process review with Government Financial Officers Association (GFOA)

## Project History



Managed the procurement cycle

Assessed organizational readiness

Focused on business process improvement

Documented future state business processes

Coordinated the RFP process

Advised on software provider & implementation vendor

### The right fit

“

We selected Metaformers as their approach best aligned with our vision for the program. Metaformers also has a strong cultural alignment with CMHA-CEI. We are eager to improve business performance, make employee jobs easier, standardize business operations and better integrate our systems across the organization.

”

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# Poll Question # 1





# Reality Before Oracle Cloud

- Paper timecards
  - Over 1000 paper timecards completed by employees and approved by managers
  - Timesheets sent to Payroll
  - High rate of timesheet errors
  - Inconsistent application of Time & Labor/Absence Mgmt. rules
- Other manual processes
  - Manual oversight of licensing and credentialing process
  - Manual longevity bonus calculations
  - Manual leave process via paper approvals
  - No integrated system to track future leaves and validate balances
  - Paper performance evaluation process



# Timeline

## Project Scope



# Implementation Highlights

- 01 Contest to . . . *Name that System*
- 02 Connectors network to expand our reach into the employee community
- 03 Continuous executive interactions with implementation team
- 04 Integration with CivicRush
- 05 Ongoing change management activities to close the knowledge gap

# Lessons Learned

01



## Test

Test, test, and test again

04



## Phase the Release

Strive for small wins being mindful of end-users

02



## Engage Early

Engage the right people early and often

05



## Be Prepared

Don't underestimate the complexities of Cloud

03



## Focus

Understand your current processes before automating

06



## Plan the Future

Quarterly updates require ongoing testing & educating

# Poll Question # 2



# Success

## Success Factors



Improved access to personal and employment data



Reduced paper driven processes



Reduced administrative functions and burden



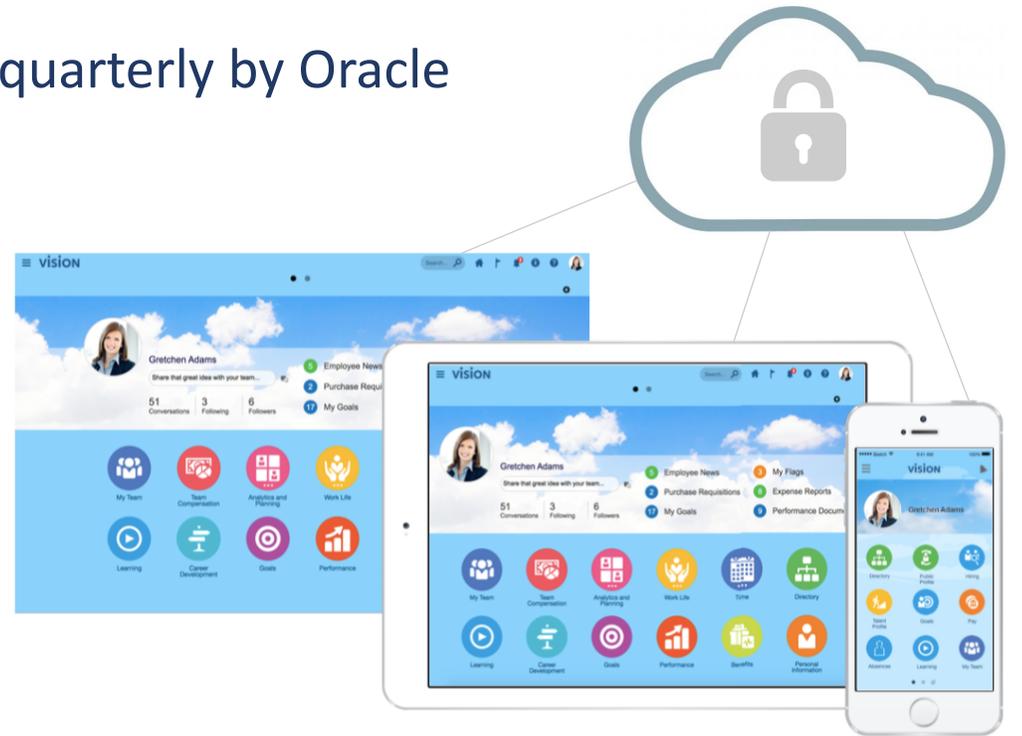
Decreased the payroll turnaround cycle



Decreased manual reporting

# Reality After Oracle Cloud

- Robust reports and analytics
- System updates delivered quarterly by Oracle
- Regular testing, change management, and employee education
- Continuous support from the Metaformers Center of Excellence



# Q&A



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And the  
winner  
is. . .

