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Laurentian University
Université Laurentienne

Laurentian University Transformation

Executive Summary and Transformation Roadmaps- Draft

Joint Audit and Risk and Human Resources Committees Meeting October 24th, 2023

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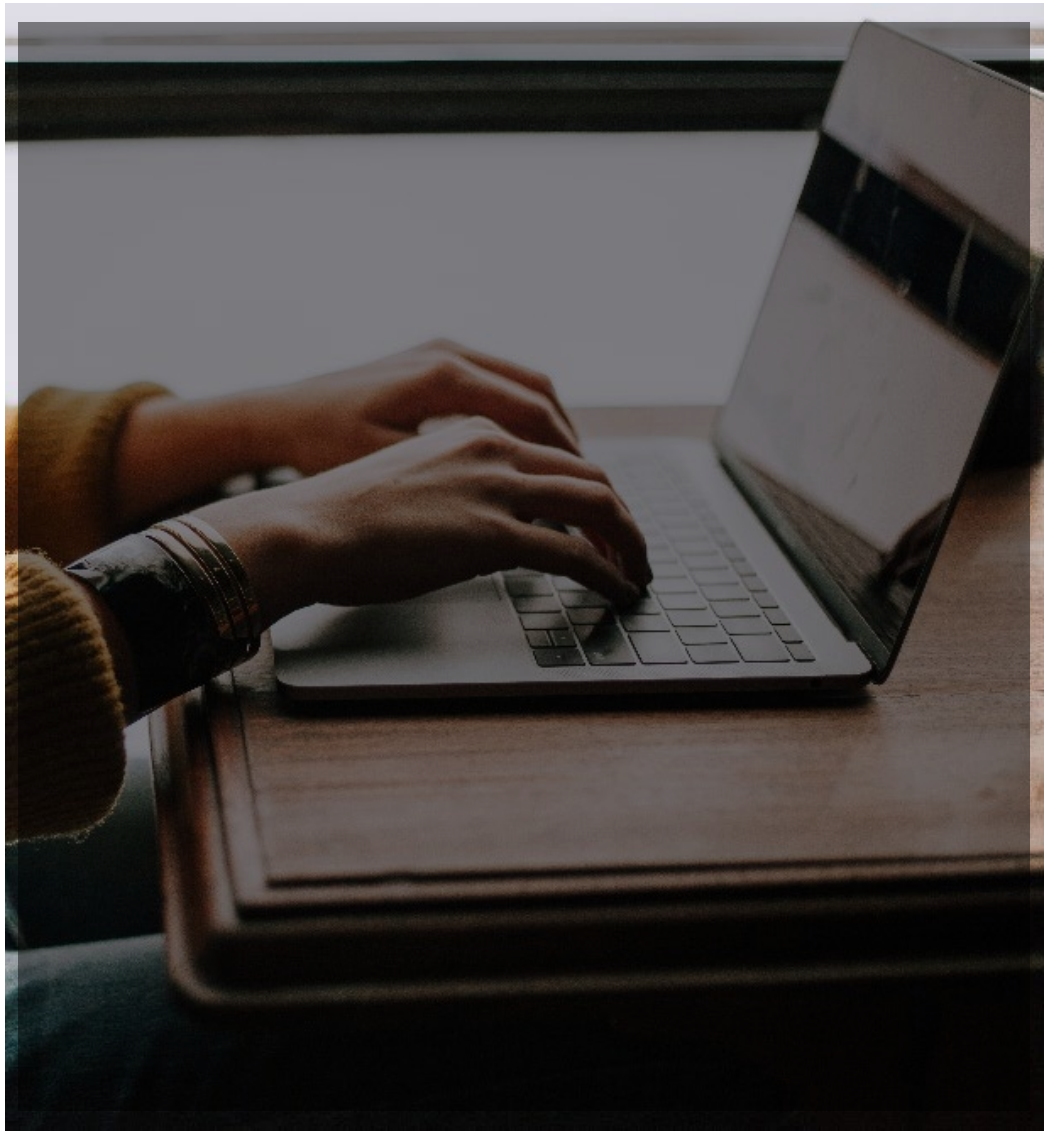

*NOTE: THE LAURENTIAN TRANSFORMATION PLAN HAS BEEN DEVELOPED IN CONSULTATION WITH OUR LABOUR PARTNERS AND IMPLEMENTATION OF WORK ACTIVITIES WILL RESPECT COLLECTIVE AGREEMENTS WHERE APPLICABLE.

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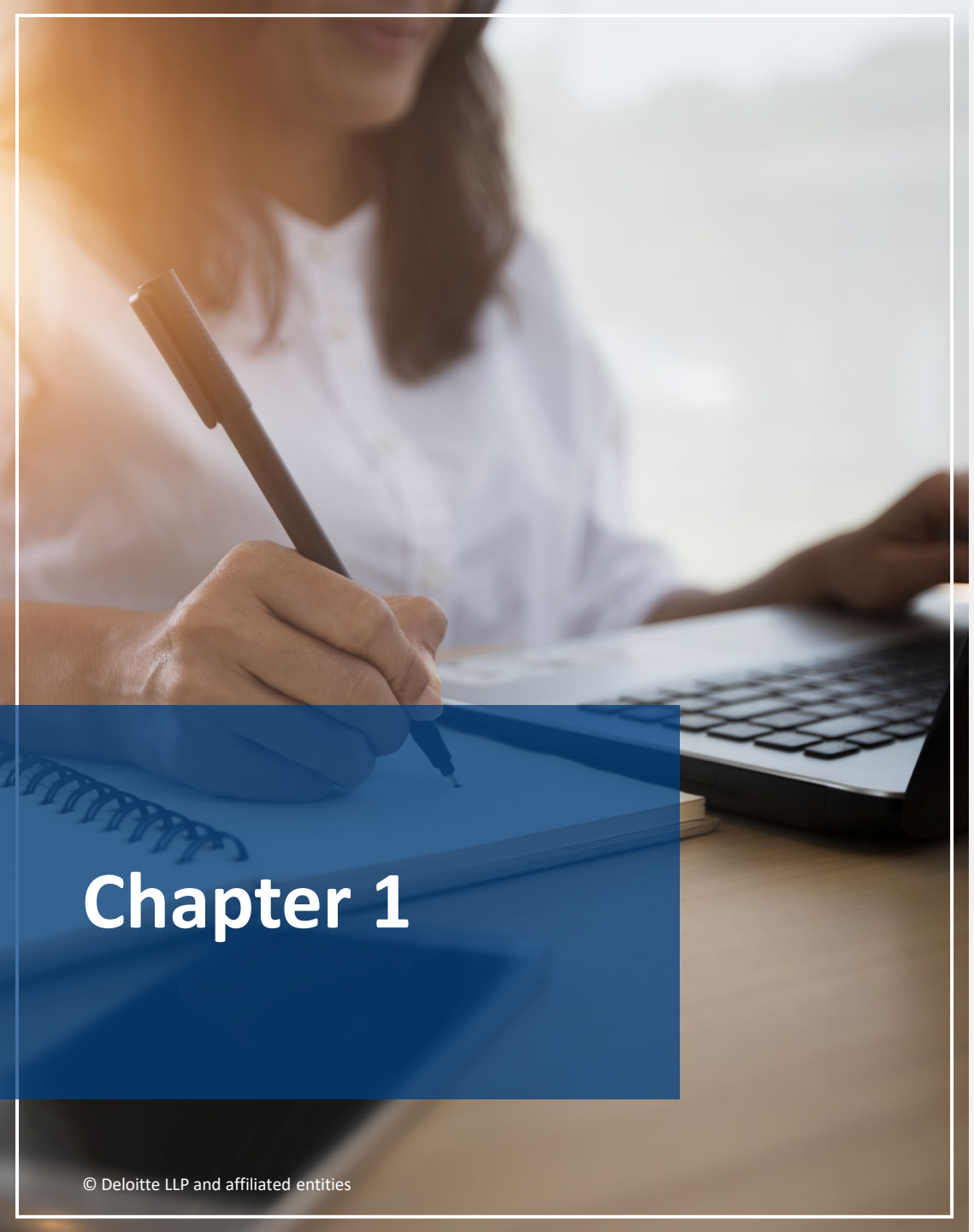

Chapter 1

Executive Summary

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Background and scope

Background

- Laurentian University is a publicly-funded, bilingual and tri-cultural postsecondary institution, and has become an integral part of Northern Ontario since its inception in 1960. Following the emergence from the Companies' Creditors Arrangement Act ("CCAA") protection obtained in February 2021, Laurentian is set to embark on a comprehensive, multi-year transformation program.
- Deloitte was engaged on April 28th, 2023, to support planning for the transformation program. Deloitte's work was substantially completed within the span of 120 days between April 28th and August 28th.
- The objective of the transformation is to provide the University with the systems, processes and policies to best support its academic and research missions.

Objective and Scope

Deloitte has been engaged to assist Laurentian University **develop a detailed operational transformation plan** within **120 calendar days** that includes identification of priorities, required steps, resources, timing, sequencing, goals and deliverables. The transformation plan should be implementation-ready accompanied by trackable detailed workplans that are aligned across work streams to manage interdependencies. The objective of the transformation is to provide the University with the systems, processes and policies to best support its academic and research missions.

The transformation plan will consider the following:

1. A focus on both **operational** and **governance transformation,** based upon recommendations from external and independent reviews as well as reports commissioned by the University.
2. Laurentian University has a **tri-cultural mandate** that must be **incorporated into** the transformation planning and implementation phases.

NOTE THAT THE STRATEGIC REVIEW OF THE UNIVERSITY'S ACADEMIC AND RESEARCH PROGRAMS IS EXCLUDED FROM THE CURRENT SCOPE, AND THE LAURENTIAN TRANSFORMATION PLAN HAS BEEN DEVELOPED IN CONSULTATION WITH OUR LABOUR PARTNERS AND IMPLEMENTATION OF WORK ACTIVITIES WILL RESPECT COLLECTIVE AGREEMENTS WHERE APPLICABLE.

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The Laurentian University transformation plan was co-created and led by LU Leaders with support and validation from the Deloitte team

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Deloitte's commitment to precision and detail, combined with a thoughtful approach to engagement, has paved the way for a transformative blueprint and workplan to build a better Laurentian. By engaging with participants at all levels of the organization, Deloitte was able to gain a deep understanding of the University's unique challenges and opportunities. This approach allowed for the development of a tailored plan that addresses the specific needs of the University, while also aligning with broader industry trends and leading practices.

Mobilization

- **Over 135 documents** were provided by Laurentian University for review including the **Nous Report, Auditor General Report, and** existing **collective agreements.**
- Based on careful analysis of the Nous and Auditor General reports, Deloitte identified four foundational work streams (which would feed into the other cross-functional areas in implementation):

1. **Human Resources (HR)**
2. **Finance (FIN)**
3. **Registration Services & Student Affairs (RSSA)**
4. **Information Technology (IT)**

- Leaders were assigned for each work stream – **In-scope and out-of-scope categories** for each work stream were validated by the respective LU members.
- A comprehensive approach was used to establish project governance and the Transformation Project Management Office (TPMO), including defining its goals and objectives and ensuring effective oversight and decision-making.

Integrated Blueprinting Planning

- **Over 120 Laurentian community members** provided insights into the current state of the university to the Deloitte Team. The different deliverables throughout the transformation planning were co-created with the Laurentian team and validated against Deloitte expertise in leading practices in the sector.
- Deloitte facilitated **6 listening sessions for** students, faculty, and staff to share insights and feedback about their experience with university operations.
- LU work stream members, working with the Deloitte Team, **created a charter per work stream** to detail the main areas for improvement and validate Auditor General and Nous reports findings.
- **80+ Blueprinting sessions** were conducted with process owners **to capture** current state processes, challenges, and a vision for future state.
- Deloitte conducted **multiple weekly roadmap and detailed workplan validation sessions,** for over 4 weeks, with each work stream to review content as it was being developed.
- **Deloitte facilitated 2 alignment workshops with all LU work stream members** to align on charters, milestones and dependencies across the different work streams.
- **5 departmental work stream** sessions were led by the client with the support of Deloitte to communicate the roadmaps highlighting the key milestones.
- Deloitte facilitated **6 bi-weekly meetings** with the **Transformation Consulting Group,** to communicate developments and seek feedback as the transformation plan progressed**.**

Detailed Planning

Workplan Alignment & Execution Readiness

- Throughout the engagement, Deloitte worked closely with university leadership to identify and address potential roadblocks to the successful execution of the workplan.
- The involvement of **LU participants** in the development of the **charters, blueprints and workplans** was crucial to the success of the transformation planning.
- A **RAIDD log** was created to identify and manage transformation risks, actions, issues, decisions and dependencies. In total, **40 risks**, **35 issues**, **11 decisions** and **219 dependencies** were captured by Deloitte by the time of issuing the final report.
- Deloitte collaborated with the LU work stream members to develop a comprehensive detailed plan that outlined **key milestones, sequence, timelines, resourcing and responsibilities.**
- **Participant feedback was solicited regularly** to ensure effective communication and address concerns.

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List of Deliverables

The table below lists all the agreed upon deliverables and indicates the medium of delivery

Deliverable	Delivered	Description of Purpose	Medium
Project Kick-Off Package	✓	• To mobilize the Transformation Project Management Office (TPMO) and Work stream activities	Meeting conducted April 18th and emailed April 19th to TPMO
Improvement Area Prioritization	✓	• To prioritize functional areas based on the urgency for improvement	Included in work stream Charters
Work Stream Charters	✓	• To identify leaders for each work stream, and a vision for the transformation in each area • To define in-scope and out of scope areas for each work stream and prioritization	Presented by work stream leads June 19th and emailed to TPMO
Functional Blueprints	✓	• To document the current state of each process and establish the root cause of current challenges • To document the target state for each process and sub-process	Each excel blueprint has been emailed to work stream leads and TPMO
Detailed Workplans	✓	• A project management tool to track and assign necessary tasks to complete the transformation. The detailed workplans are subject to refinement once implementation efforts are underway	Each excel workplan has been emailed to work stream leads and TPMO
Transformation Roadmaps	✓	• A visual representation of the milestones and sub-work streams in each workplan, to illustrate milestones, sequencing, ownership, timing, and dependencies	Included in Chapter 2. Included by phase in Appendix B
Alignment Workshops	✓	• To first align the charters, and then the detailed workplans across all work streams; and to identify risks, issues & interdependencies	Facilitated by Deloitte on June 19th and August 22nd
RAIDD Log	✓	• Document Identified Risks, Actions, Issues, Decisions and horizontal Dependencies for the transformation	Master RAIDD Log in excel has been emailed to TPMO

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Transformation final report composition, purpose, and guidance

The transformation final report is comprised of 1) the Executive Summary & Transformation Roadmaps, 2) the Transformation Plan Final Report, and 3) the Transformation Plan User Guide

Laurentian University Transformation Plan

	Executive Summary & Transformation Roadmaps	Transformation Plan Final Report	Transformation Plan User Guide
Purpose	To provide a high-level understanding of the following: • Background information, summary of findings and how was the plan developed • The key themes that need to be addressed in order to achieve a successful transformation • Each work stream's transformation roadmap including dependencies and activity sequencing	To provide details on: • The structure and content of the transformation plan. • Differences between transformation planning and transformation implementation, including critical implementation outcomes and keys to success. • Each work stream's transformation plan including dependencies and activity sequencing.	• To equip the transformation implementation team with a user manual to guide them on how to use each of the provided transformation planning tools and how to effectively utilize them throughout implementation.
Content	• A summary of how the plan was developed. • A summary of the key observations and themes critical to achieving an impactful transformation at Laurentian University. • An overview of each work stream's transformation roadmaps including significant transformation milestones, activities, and dependencies.	• An overview of the approach and methods used to develop the blueprints, detailed workplans and high-level roadmaps. • A summary of the current and future state understanding developed through blueprinting sessions • An overview of the transformation roadmaps as seen in the executive summary.	• A guide on how to use the work stream charters, RAIDD log, functional blueprints, detailed workplans and high-level roadmaps in the transformation implementation.
Intended Users	• Board of Directors • Executive team • Ministry of Colleges and Universities • All other users who are looking for a high-level understanding of the plan in condensed format	• Any Laurentian University community member who is interested to learn the detailed information of the Transformation Plan and its outcome.	• Staff • Faculty • Other individuals who are responsible for the implementation of the Transformation Plan

Current Report

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Summary by work stream

The Transformation Plan addresses the specific needs of each of the four work streams to achieve the desired future state. While there are differences in the structure and maturity of each of these areas, the Enterprise Resource Planning (ERP) transformation is an overarching stream of work that is critical to the path to success. In addition, change management across the entire transformation is significant for its success.

Work Stream	Summary of Observations	Impact on Implementation Plan
HR	The Human Resources department has gaps in the processes and policies that are core to their operations. These gaps cause a lack of clarity on the standards, roles, and responsibilities, resulting in inconsistencies in the delivery of Human Resource services, which impact the wider Laurentian University community. Additionally, the Human Resources team relies on manual tools to implement processes which creates bottlenecks and inefficiencies.	• The Human Resources transformation plan will significantly impact the organization by establishing standards, streamlining operations, and increasing efficiency. Skilled talent recruitment will bring capacity and capabilities, stabilizing operations and improving overall performance. • After the establishment of foundational processes and policies, the detailed workplan shifts its focus towards the implementation of a Service Delivery Ticketing (Case Management) System and a Human Resources Information System (HRIS). This automation of processes aims to eliminate inefficiencies and integrate with the larger ERP strategy of the university.
Finance	The Finance department is limited by several factors, mainly: 1) aging technology, as the ERP for the Finance modules has not had a significant evolution since it was rolled out; 2) absence of internal experts in the ERP; 3) insufficient documentation of current processes, hindering employee training; and 4) lack of adherence to defined processes across the University, resulting in manual workarounds, bottlenecks and inefficiencies in Finance.	• Finance's transformation plan has a considerable effort on identifying, selecting, and implementing the systems required to support a modern Finance function. Consequently, the transformation plan relies heavily on the ERP strategy of the university. • In parallel, enhancements to the current systems and processes will be prioritized and implemented. • Obtaining and mobilizing the resources to support the transformation and to become the future ERP power users is a key success factor of the plan.
RSSA	The registration services and student affairs work stream encompasses a large hive of student-facing offices all interacting in a siloed manner. Despite individual efforts, units are interacting in an ad hoc fashion and lack of clarity on roles and responsibilities is creating friction and misalignment with the institutional mission. Multiple points of entry for services is confusing for students, staff and faculty, and there is a lack of access to data, and a single source of truth.	• The primary focus for this workplan is to clarify the content and services available for staff, faculty and students, to best support the operational and academic mission of the University to conduct research, teach and matriculate students, including a supportive and intentional approach to student life. • Bottlenecks will be reduced by implementing systems, automating data integration, and providing staff support and training to eliminate single points of failure and ensure a sustainable level of service excellence for constituents.
IT	The effectiveness and operational efficiency of technology across Laurentian has been impeded through several challenges: 1) a lack of clarity on roles and responsibilities with functional areas; 2) limited understanding on the role of IT and the services that should be provided; 3) significant vacancies within the IT Department impacting the capacity to complete operational activities; and 4) ineffective service management practices and low customer satisfaction.	• The IT transformation plan focuses on uplifting technology related governance and frameworks to better define roles/ responsibilities, drive accountability, and improve decision making and transparency. This includes project governance, system access policies, master data management and asset management. • Additionally, IT services will be formally captured and communicated through a Service Catalogue, which will include service level targets to better set expectations with users around timeframes. • In parallel, IT will need to support transformation initiatives across the other work streams.

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Foundational themes are essential to the successful implementation of the plan

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Extensive discussion and consultation with Laurentian University participants and other stakeholders revealed several key themes impacting operations at all levels that must be addressed to ensure a successful transformation and a sustainable future for the University. The identified themes informed the plan and were addressed through the detailed activities defined for each sub-work stream

- Commit to **building a culture of trust** with the wider community by demonstrating **integrity** at all levels and through all processes
- Take action towards **establishing ownership and accountability** across the University through clearly defined roles and responsibilities and data stewardship
- **Commit to transparency and openness** throughout all processes and communications with internal and external stakeholders
- Break down silos and **develop a culture of collaboration and communication;** prioritizing equity, diversity, inclusion, Indigeneity, and accessibility (EDII-A)
- **Optimize and create efficient processes** utilizing technology to drive operational efficiency and reduce manual work
- **Prioritize service delivery excellence** and transparency throughout the service delivery process
- **Create and implement an operational strategy** and measure performance against strategic objectives
- **Build operational capabilities** that meet the University's requirements and commit to develop a culture of continuous improvement

- **How do the themes influence the detailed workplans ?**

  The themes that emerged from the consultations while gathering information about the current state of the University's' operations informed the changes that need to take place to successfully achieve the future state. These themes are consistent across the university.

- **For a successful transformation, the foundational themes need to become the guiding principles for the implementation. Therefore, the themes are embedded in the detailed workplans through the activities that focus on the following areas:**

Leadership | **Process** | **People** | **Technology**

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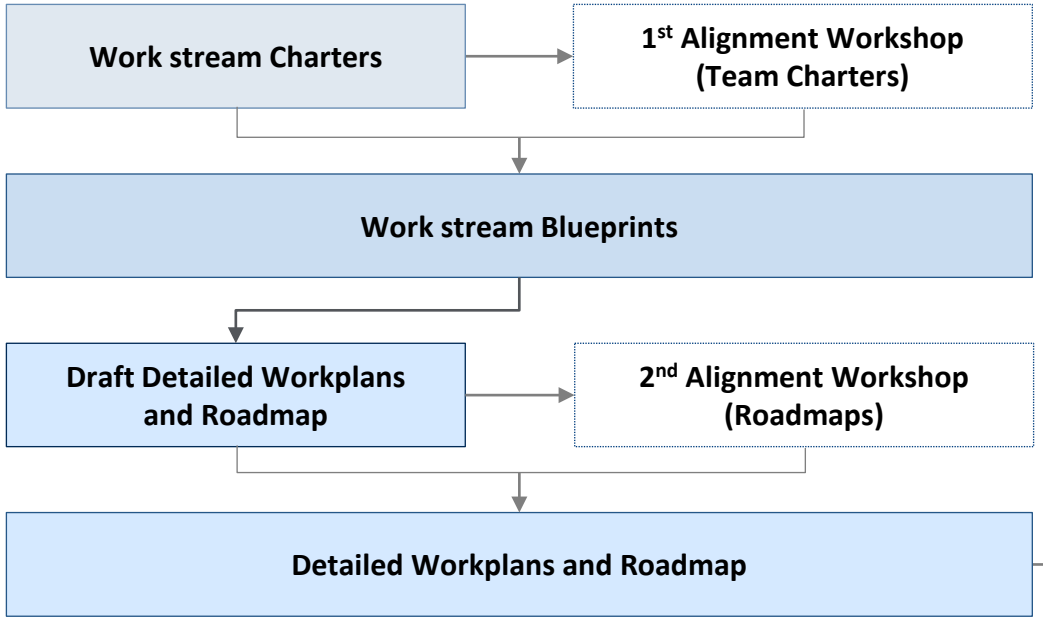
Moving from transformation planning to transformation implementation

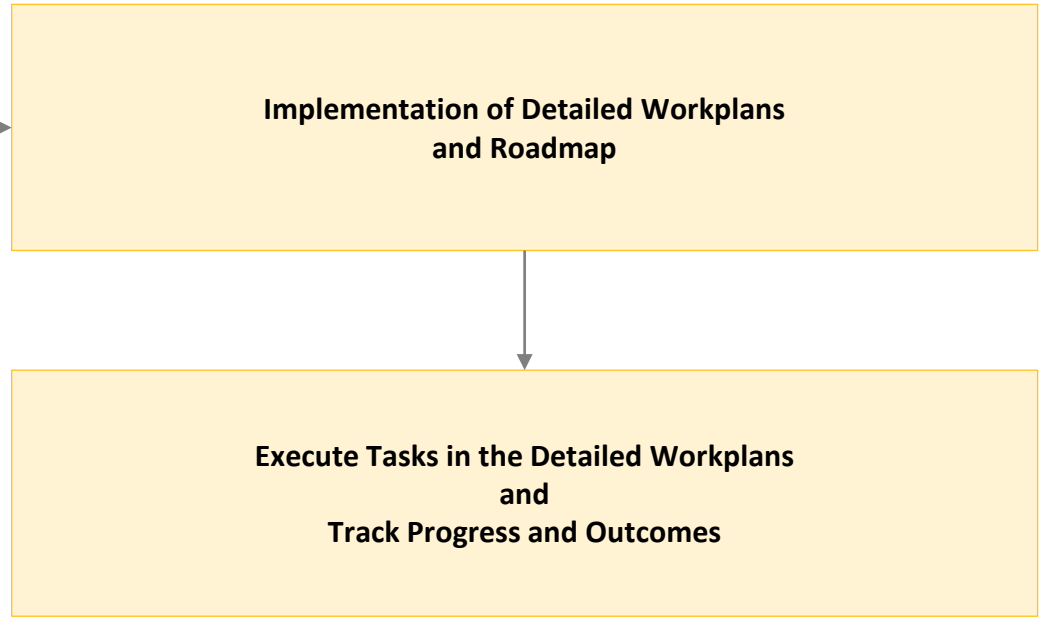
The phased approach to transformation will position Laurentian University to effect institution-wide change while protecting operational continuity. The tools developed during transformation planning will be used to support the transition to transformation implementation

01 Transformation Planning



- Collaborate with Work streams to define the scope and prioritized areas for the transformation.
- Interview key stakeholders and work stream participants to identify current state processes, challenges and define the future state.
- Develop a detailed and actionable workplan including (tasks, timing and resources) to move from the identified current state towards the desired future state.

02 Transformation Implementation



- Begin implementing the detailed workplans and roadmaps by mobilizing resources, following sequencing and executing the listed tasks for each work package.
- Track progress of implementation against prescribed deadlines and ensure critical path milestones are being met.
- Make active use of the deliverables created during the planning stage: Charters, Blueprints, RAIDD log, Roadmaps and Detailed Workplans.
- Measure performance of new processes and systems using Key Performance Indicators (KPIs) post-transformation.

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Implementation success factors

Multiple risks and issues were raised by stakeholders across Laurentian University when forming the transformation plan. Success factors have been identified to mitigate key risks to ensure the successful delivery of the Transformation Program

Implementation Success Factors

- The implementation success factors are the key areas, factors, or activities that will need to be addressed for the successful delivery of the Transformation Program, to achieve planned objectives and to realize expected benefits.
- It is important to identify these success factors and the associated risks during planning to guide the Transformation Program as it transitions into the implementation phase.
- These implementation success factors have been identified over the course of transformation planning by first identifying and capturing the risks and issues in the RAIDD log, identifying key risks to implementation and grouping them to form the success factors.

Funding: Funding is essential for the Transformation Program at Laurentian, to ensure that it has the necessary resources, support, and alignment needed to succeed.

Staff Resourcing: Resourcing will need to be planned for in advance, prior to beginning the implementation, to ensure that there is capability and capacity to deliver the in-scope initiatives.

Governance: Overarching program governance needs to be established to govern the Transformation Program, with clear accountability, responsibilities and outcomes. This governance body will need to manage key risks, issues and dependencies associated with work streams as well as other related initiatives.

Change Management: A structured approach to change management is essential to the success of the Transformation Program. It impacts the effectiveness of each transformation initiative by improving engagement with stakeholders, increasing adoption of new tools, processes and policies, building buy-in of transformation activities, and managing resistance to change.

Strategic Alignment: Given the number of organizational initiatives at Laurentian University, alignment on direction, objectives and benefits are required to ensure that there is clarity on what success looks like. This includes alignment between the Transformation Program, the Strategic Plan, and the recommendations from other external reviews and audits.

Leadership: Effective leadership will be required to guide the Transformation Program to ensure delivery of planned outcomes. Leaders must be committed to the program, with clear vision and direction for all the transformation initiatives and transparently communicate their importance, while also providing the necessary resources and support.

External Oversight: The external audit conducted by the Auditor General included recommendations which Laurentian University needs to align to and demonstrate progress. Laurentian University will also need to demonstrate compliance with directions/mandates with other relevant external parties.

Risk Management: An enterprise risk management framework will need to be established in order to identify, assess, and manage risks/issues in a standardized manner across Laurentian University. It will improve Laurentian's ability to manage risks, assess their potential impact, and develop strategies to mitigate or manage those risks.

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Integrating the Indigenous Programs Strategic Business Plan

Office of Academic and Indigenous Programs, staff, faculty, LUNEC, and organizational partners developed an Indigenous Programs Strategic Business plan in a parallel process to the development of the LU Strategic and the Operational Transformation Plan. Operational recommendations from the Indigenous Programs Strategic Business plan were incorporated into the Operational Transformation Plan.

The Indigenous Program Strategic Business Plan goals

The LU Indigenous Programs Strategic Business Plan outlines recommended strategic directions and outcomes for each of the following strategic priority areas:

- Staffing Renewal
- Programs and Degrees
- Indigenous Research
- Space and Faculties

While Staffing Renewal recommendation goals have been addressed under the Operational Transformation Plan, the other areas were to be considered under the Strategic Transformation Plan work where Programs, Research and Governance will be captured.

The Operations Transformation Plan documented the Academic and Indigenous Programs office and the Indigenous Programs Strategic Business Plan as dependencies during the implementation stage

The operations transformation plan incorporated dependencies and activities that reference the Indigenous Program Strategic Business Plan goals and the Academic and Indigenous Programs office to be part of the implementation phase in the relevant operational areas

The workstream activities that intersect with the Indigenous Program Strategic Business Plan are:

- HR: Recruitment, Compensation (Specifically job descriptions), Learning and Development and EDII-A
- RSSA: Student Portal Development and Service Level Expectations, and Recruitment and Admissions Data
- Finance: Social Procurement Considerations

- The implementation activities include explicit community engagement and are expressed as dependencies
- More specifically, the Office of Academic and Indigenous Programs has been intentionally included as a group, and should be consulted broadly during implementation

Implementation Success Factors

The success factors listed on page 11 establish the foundation to integrate the Indigenous Program Strategic Business Plan into the Operational Transformation, including the following considerations:

- Strategic Alignment with LU executive leadership on the definition of the Tri-Cultural Mandate, its goals and path to implementation
- Establishing an overarching EDII-A strategy institution wide that guides operations to facilitate its implementation
- Engaging LUNEC and all relevant stakeholders to achieve alignment on EDII-A strategy and goals

The Indigenous Program Strategic Business Plan has informed the Operations Transformation Plan in the areas that impact the Tri-Cultural mandate and guided identifying relevant dependencies and activities in the plan

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Proposed transformation program next steps

The transformation implementation phase should build from the learnings gained in the planning phase. The proposed steps for the implementation team below support a seamless transition from planning to execution

Next Steps	Description of Purpose
Develop Implementation Program Governance	• Establish Governance structure and formalize pathway, including when/how to include the Senate and Board; who should be on the Steering Committee and Transformation Program Implementation Office (TPIO); and the decision framework and escalation pathways
Communicate with Constituents	• Develop a communication plan and communicate with the broader university community regarding the implementation, including soliciting names for participation on work streams and oversight groups
Oversee the Program	• Stand up the TPIO and determine its responsibilities, such as: drive pace, monitor progress and timelines, remove roadblocks, mitigate risks, manage dependencies and solve issues between work streams, etc.
Allocate Resources	• Allocate, recruit and onboard the resources identified in the detailed workplan to run a successful transformation implementation program • Select and onboard vendors
Review existing cycles and staff	• Develop a plan and timeline for business as usual (BAU) work; clarify staffing required
Hire/second implementation focused staff	• Review critical staffing for implementation and create job descriptions and recruit for these roles
Assign work packages to teams	• Assign work stream leads and sub-work stream teams to work packages from the detailed plan
Monitor and report on progress	• Use the tools provided (RAIDD log and Detailed Workplans) to monitor progress • Set meeting and reporting cadence for monitoring progress

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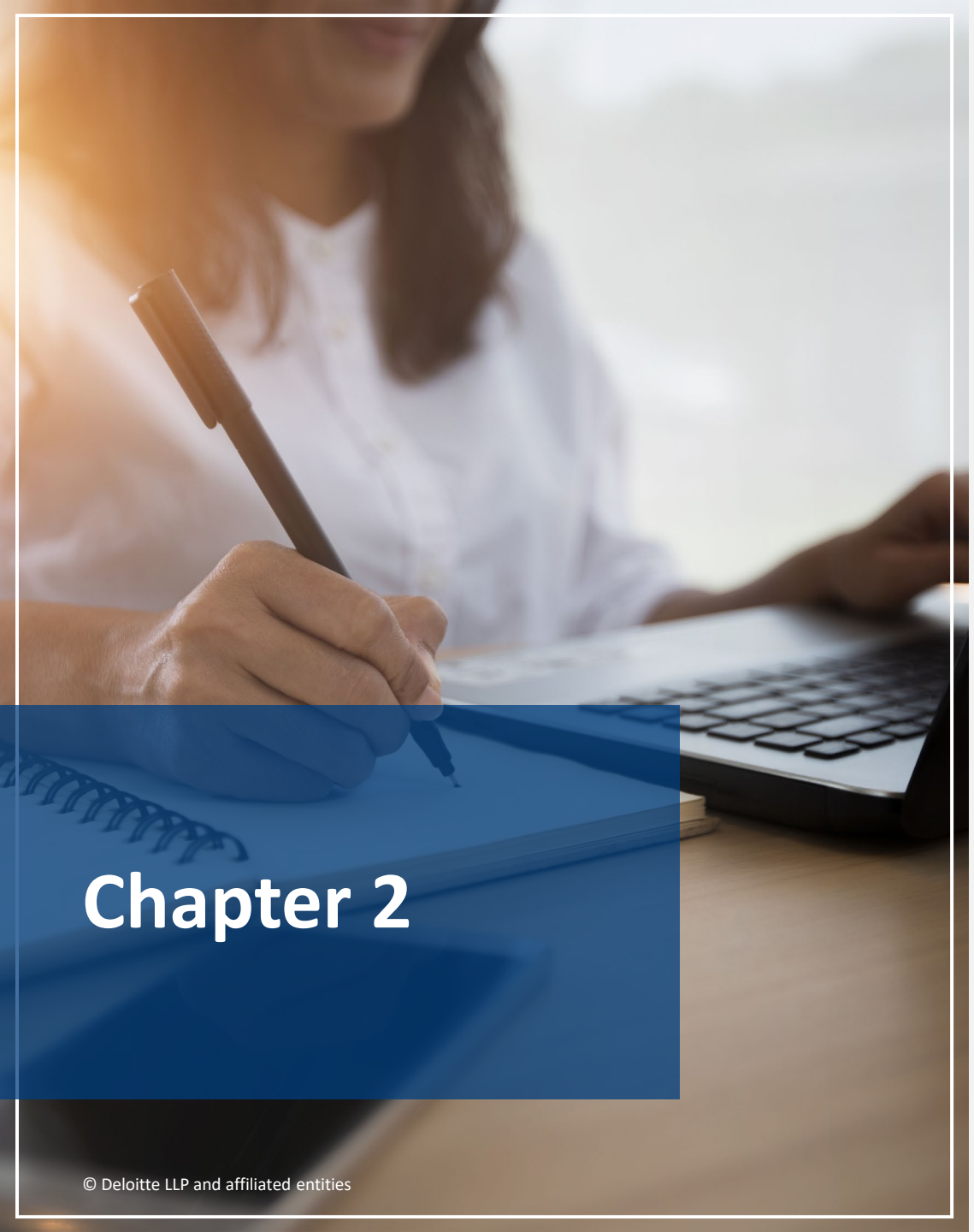

Chapter 2

Transformation roadmaps

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What is the transformation roadmap and what is its purpose?

The transformation roadmaps are an important deliverable as they lay out a view of the main milestones that will take place for each work stream in the implementation phase. For a table summary of the milestones please go to Appendix B. The detailed workplans are separate spreadsheets in an excel format.

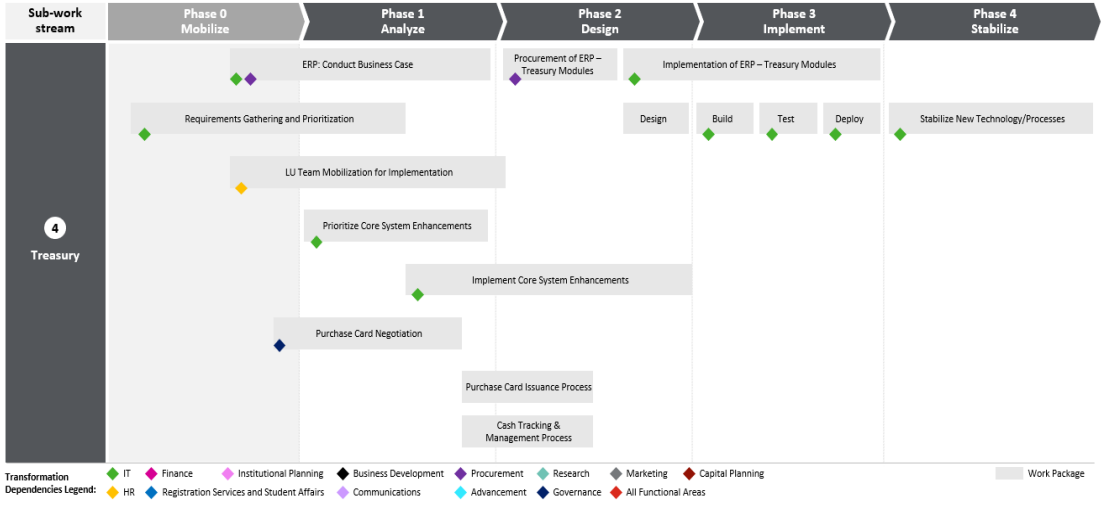
01 Detailed Workplan

Work package details											
Task ID	Work stream line item ID	Sub Work stream	Work Package	Description of Milestone / Task	Milestone	Nous Initiative	Blueprint ID Link	Artifacts / Processes / Business Case Requirements and Commitments		Priority	Project Phase
1	**WP_FIN-Treasury-1**	**Treasury**	**ERP: Conduct Business Case**	**Based on a gap analysis of the current process and tools, a decision is made regarding the best solution to adopt at LU, short term and long term**	**Yes**	**06 Technology & Digital**				**Priority 1**	**Phase 1**
1.01	**WP_FIN-Treasury-1.01**	**Treasury**	**ERP: Conduct Business Case**	**Identify and document functional requirements and assign a priority: "must have" vs. "nice to have"**	**Yes**	**06 Technology & Digital**		**Requirements document**		**Priority 1**	**Phase 1**
1.02	WP_FIN-Treasury-1.02	Treasury	ERP: Conduct Business Case	Fit-Gap Analysis: Evaluate if whether Colleague can be extended or configured to address any functional gaps or shortcomings.	No	06 Technology & Digital Platforms				Priority 1	Phase 1
1.03	WP_FIN-Treasury-1.03	Treasury	ERP: Conduct Business Case	Conduct Market Scan and Cost Analysis: Understand the ERP landscape across other comparable universities, analyst research, and proven solutions						Priority 1	Phase 1
1.04	WP_FIN-Treasury-1.04	Treasury	ERP: Conduct Business Case	Business Case development and analysis: If Colleague can be extended, is it worth the cost / effort to configure, customize and extend vs other solutions (business case from a cost, architectural fit perspective)	No	06 Technology & Digital Platforms		Business Case document		Priority 1	Phase 1
1.05	**WP_FIN-Treasury-1.05**	**Treasury**	**ERP: Conduct Business Case**	**Make ERP decision: Colleague – Colleague partners – Other solutions**	**Yes**	**06 Technology & Digital**				**Priority 1**	**Phase 1**
2.00	**WP_FIN-Treasury-2**	**Treasury**	**Procure ERP Product(s)/Module(s)/Partner(s) (if needed) – Procure to Pay – Expense management**	**ERP and Partner to implement it is selected and procured - Procurement process**	**Yes**	**06 Technology & Digital Platforms**		**Vendor contract(s)**		**Priority 1**	**Phase 2**
2.01	WP_FIN-Treasury-2.01	Treasury	Procure ERP Product(s)/Module(s)/Partner(s) (if needed) – Procure to Pay – Expense management	Identify and engage potential vendors	No	06 Technology & Digital Platforms				Priority 1	Phase 2
2.02	WP_FIN-Treasury-2.02	Treasury	Procure ERP Product(s)/Module(s)/Partner(s) (if needed) – Procure to Pay – Expense management	Apply standard procurement process based on thresholds	No	06 Technology & Digital Platforms				Priority 1	Phase 2
2.03	WP_FIN-Treasury-2.03	Treasury	Procure ERP Product(s)/Module(s)/Partner(s) (if needed) – Procure to Pay – Expense management	Select vendor(s) and complete procurement process and contract negotiation	No	06 Technology & Digital Platforms		Vendor contract(s)		Priority 1	Phase 2

The detailed workplans, which are detailed spreadsheets in an excel format, provide a granular view of all activities and milestones required to successfully transform and includes information such as:

- Timing (by day)
- Specific ownership and accountability
- Dependencies
- Activities and milestone status

02 Transformation Roadmap



The transformation roadmap contains only the most relevant information to the transformation including:

- High-level milestones (e.g., Enterprise Resource Planning implementation, process re-design, policy establishment, etc.)
- Sequencing and Timing (at the phase level)
- High-level view of dependencies

The transformation roadmaps are designed to provide a high-level sequential view of the milestones and their respective dependencies for each work stream.

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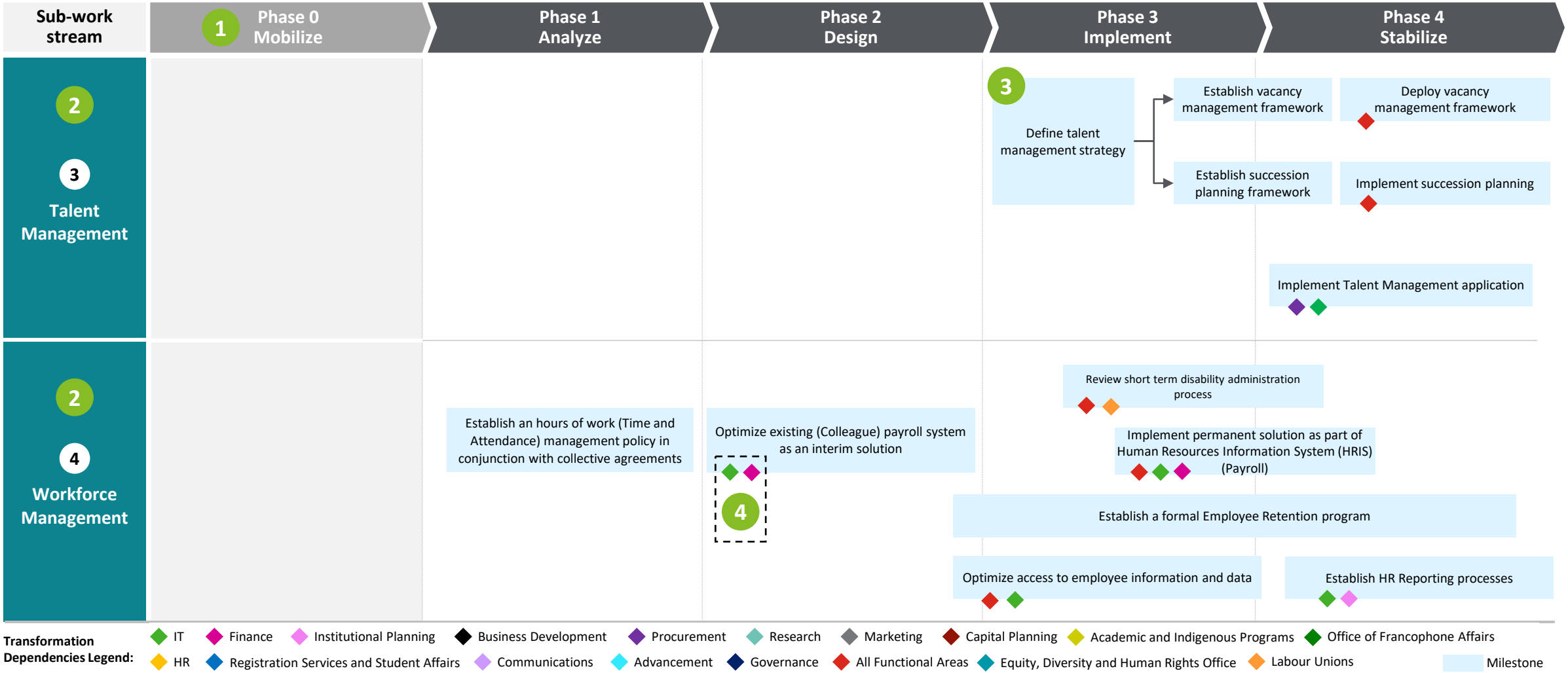
Transformation roadmap composition (1/2)

The roadmap summarizes information taken directly from the detailed workplans and are formed by of the following 4 components: Phase, Sub-Work Stream, Milestones, and Dependencies. Please see the following slide for a detailed explanation of each numbered component.



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Transformation roadmap composition (2/2)

The roadmap summarizes sub-work streams and milestones taken directly from the detailed workplans that will lead Laurentian University through it's transformative journey spanning 3-5 years. Comprising four phases, this strategic approach offers flexibility, empowering the university to adapt to evolving conditions and achieve the transformation goals.

Component	Description
1 | Phase	The transformation can be broken down into four phases taking place over the course of three to five years – one mobilization phase (Phase 0) and four implementation phases (Phases 1 – 4). Organizing the project in this manner provides a clear direction for each stage of the transformation while also enabling the sequencing and prioritization of transformation related tasks. • **Phase 0 – Mobilize:** In Phase 0, the focus will be on identifying, standing up, and mobilizing the appropriate resources and teams required to undertake the transformation. To support team construction during this phase, there will be an emphasis on recruitment to address identified resource gaps. • **Phase 1 – Analyze:** During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state. • **Phase 2 – Design:** Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules. • **Phase 3 – Implement:** In Phase 3, the focus will be on building, configuring, testing, and deploying the selected ERP products / modules / interfaces. Other focus areas include establishing process design changes, training staff on new processes / technology, etc. • **Phase 4 – Stabilize:** Phase 4 will be a period of operational stabilization after the implementation of many new processes and systems. During this phase, the focus will be on rapidly acclimating staff to different workflows and systems while also addressing smaller inevitable issues such as bugs, system reconfiguration, etc.
2 | Sub-Work Stream	Sub-work streams are the core functions of each work stream that drive ad support the operations of the University (e.g., Talent Management in HR, Accounting in Finance, etc.). The sub-work streams are used to appropriately categorize and group together relevant transformation work packages and help provide a structure to transformation planning.
3 | Milestone	Milestones are groupings of major activities whose completion are vital to achieving the desired outcomes of the sub-work stream transformation. The milestones are transformation focused and represent key implementation initiatives. These have been identified during discussions with work stream participants and are part of the detailed workplans.
4 | Dependencies	Dependencies arise when there are transformation activities that require support or consultation from another work stream. Identifying, cataloguing, and addressing these dependencies enables more accurate resource planning and will result in a smoother transformation. Dependencies are denoted by diamonds with each function having a corresponding colour.

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Human Resources

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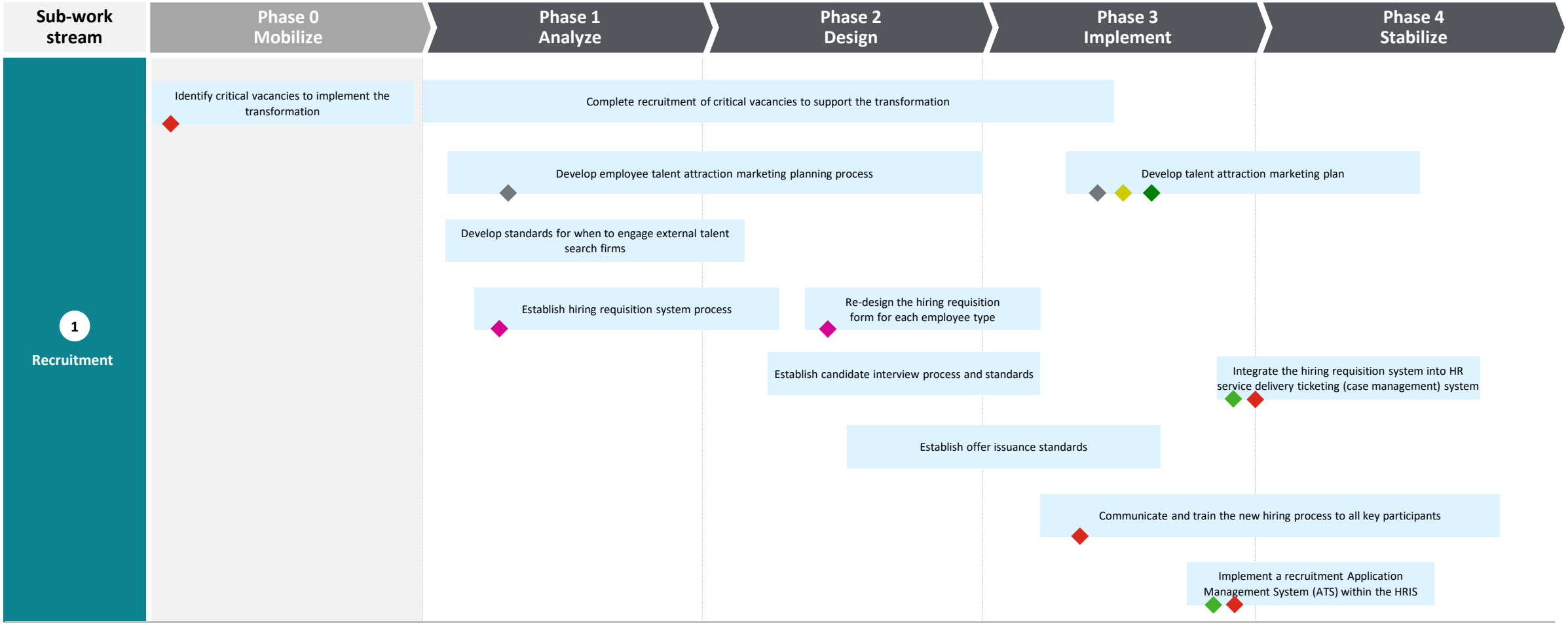
Human Resources Roadmap (1/6)

The recruitment sub-work stream focuses on re-branding the university in the higher education sector to attract talent and re-design the hiring processes to establish governance, transparency and clear accountabilities. Recruiting critical roles is essential for the success of the transformation and will be the first step in the mobilization phase.



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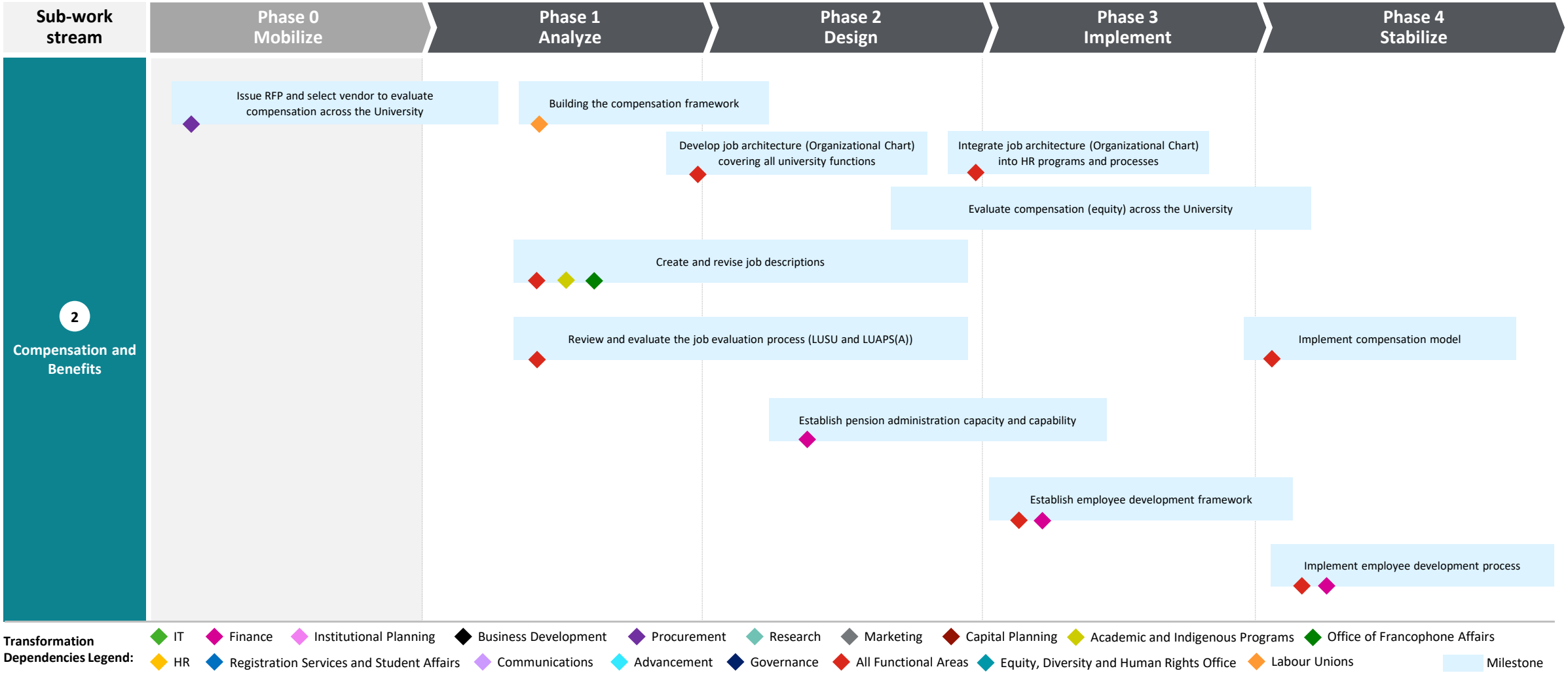
Human Resources Roadmap (2/6)

A compensation framework that is aligned with the university's strategy and competitively positions the university in the higher education sector will be essential to attracting and retaining talent. Collaboration with all functional areas will be essential to understand each role at the university and ensure a comprehensive and transparent job evaluation process.



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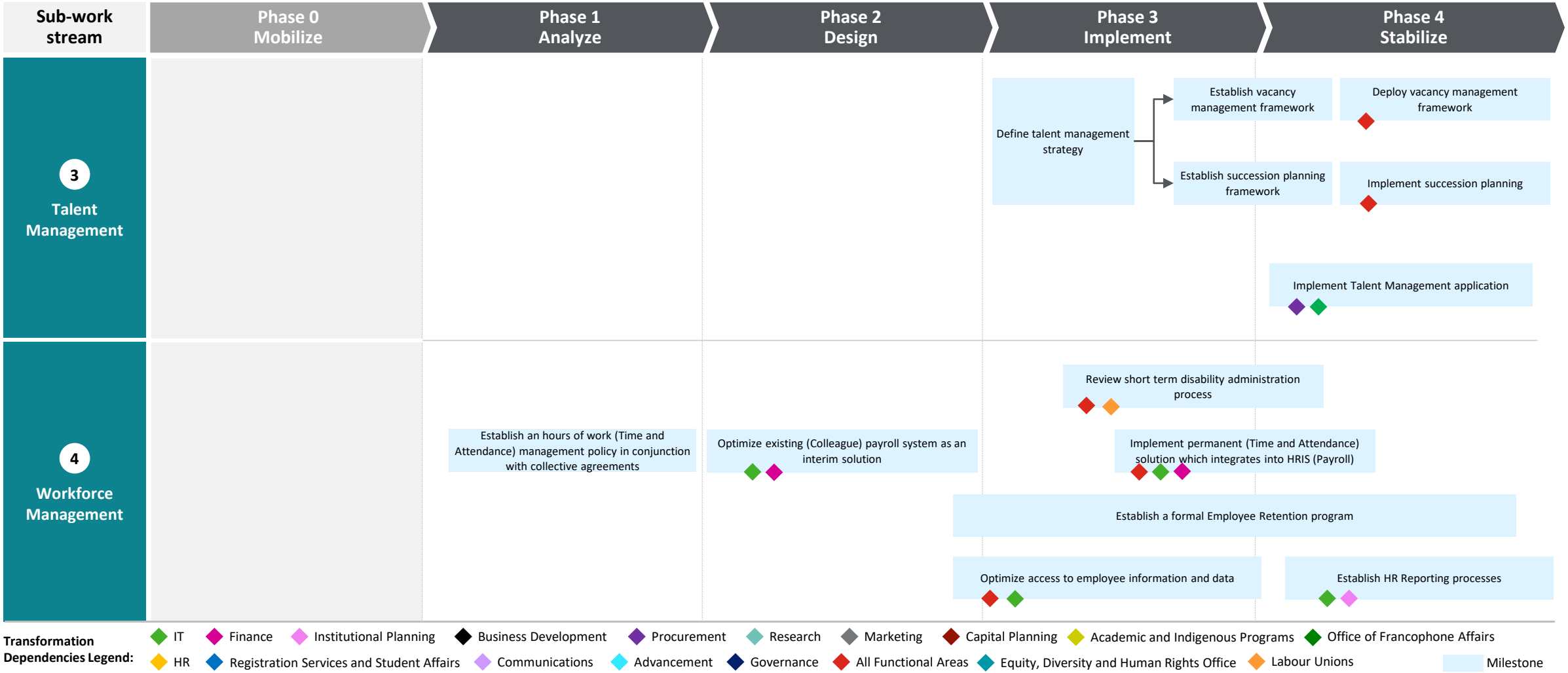
Human Resources Roadmap (3/6)

Talent management is a critical component of the retention strategy, providing staff with professional development opportunities and pipelining leadership skills. The workforce management sub-work stream will establish formal policies and processes that will be developed and integrated in collaboration with Finance and IT.



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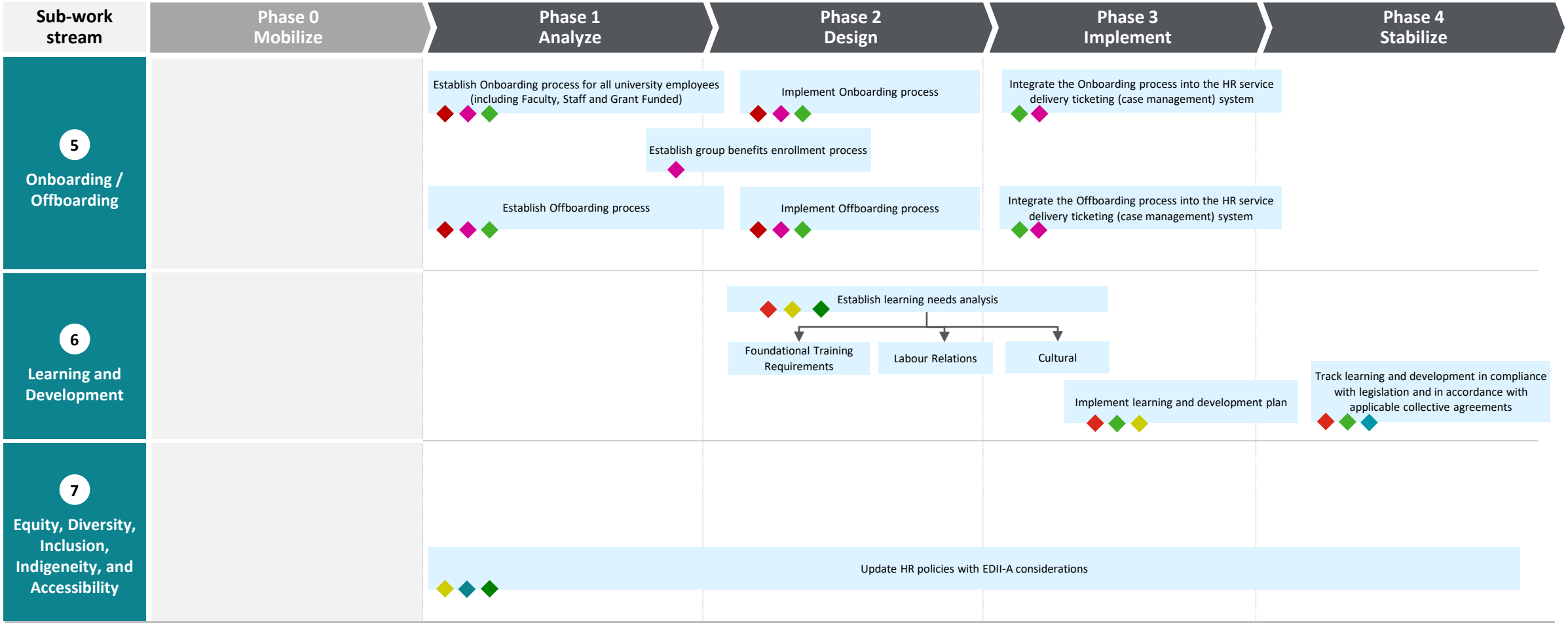
Human Resources Roadmap (4/6)

Onboarding and Offboarding functions will be developed to help the university create clarity in roles and responsibilities and help mitigate risks during times of transition. The learning and development area will ensure people have the information they need and ensure core compliance is met. The EDII-A area is one part of the larger institutional strategy.



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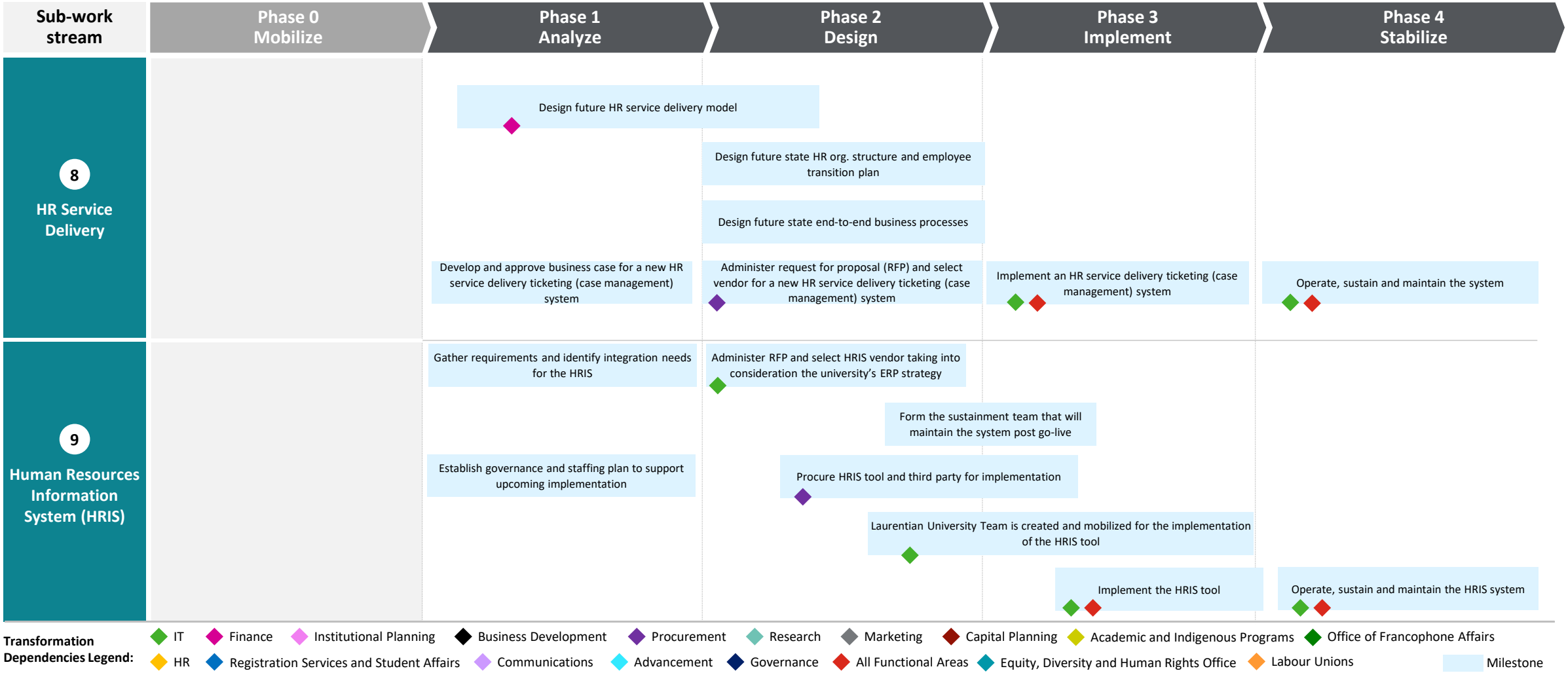
Human Resources Roadmap (5/6)

Implementing a case management system for service delivery will positively transform the way HR serves the university employees to allow them to be successful and increase satisfaction. A Human Resources Information System (HRIS) will also optimize the way HR operates and integrates with other administrative functions to enable them to perform their work.



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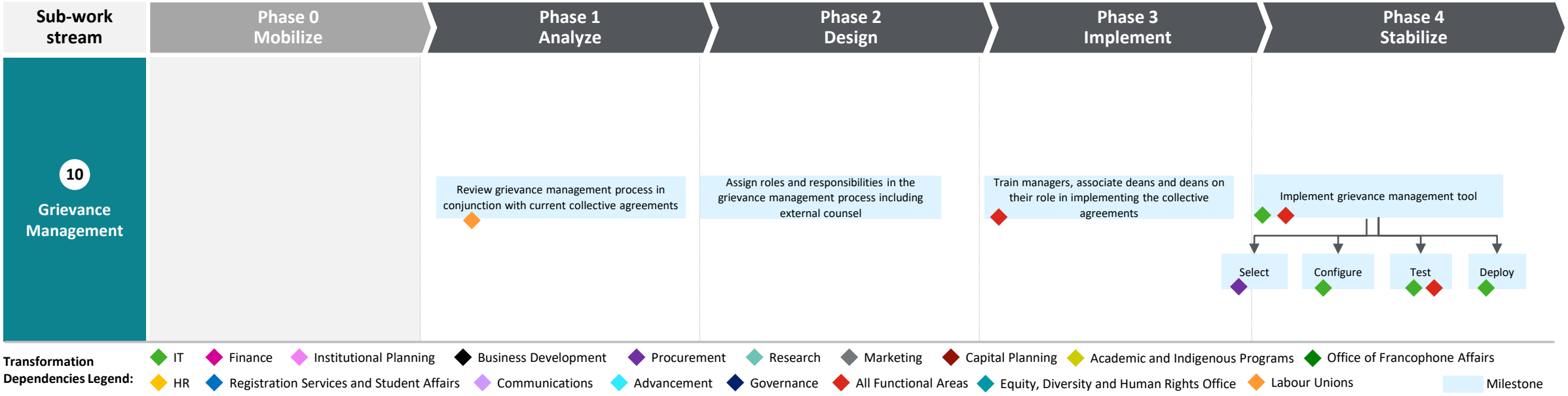
Human Resources Roadmap (6/6)

Reviewing the grievance management process will allow holistic changes to policy inputs as well as provide more clarity around roles and responsibilities across the institution and leverage more technology to help better manage cases.



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Registration Services and Student Affairs

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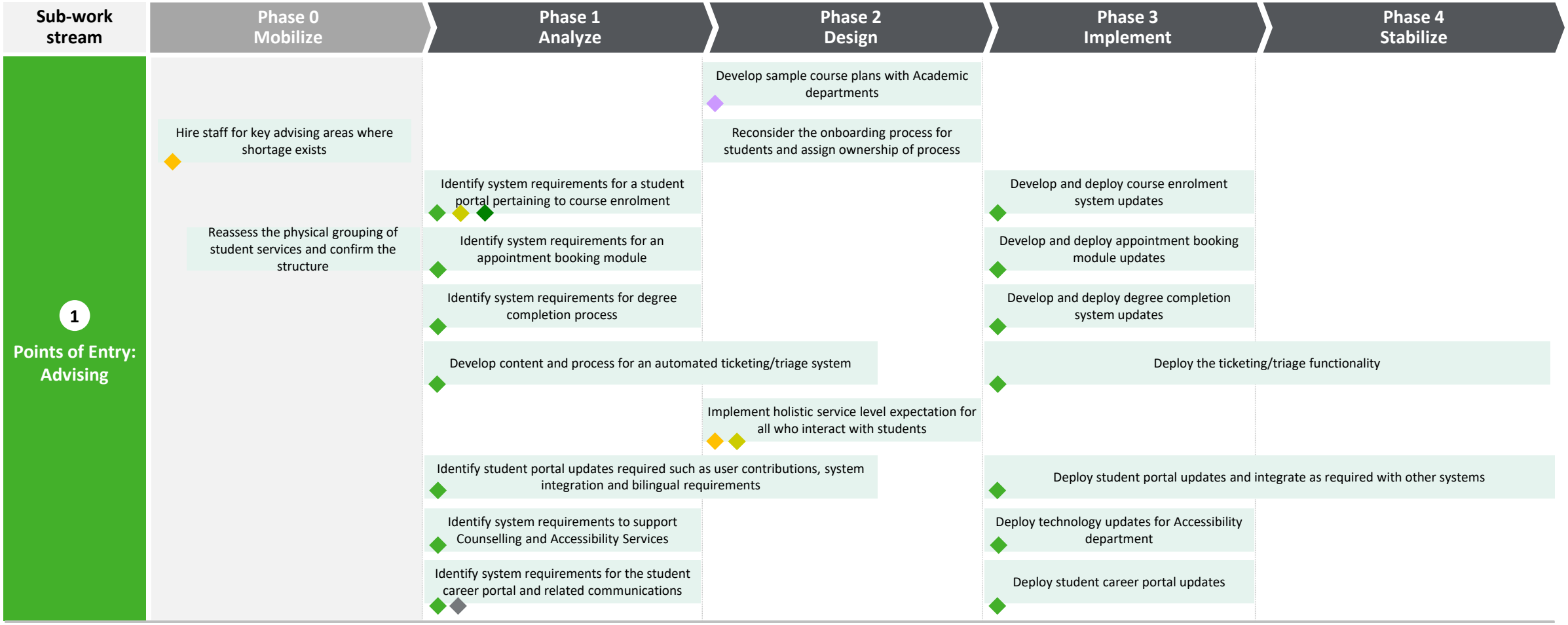
Registration Services and Student Affairs roadmap (1/5)

The first area of focus is Points of Entry: Advising for students, as this emerged as a core pain point. By focusing on the redesign of the structure and physical grouping of student services and how key information is accessed, all users will be directed towards a single point of entry and have access to the right information at the right time.



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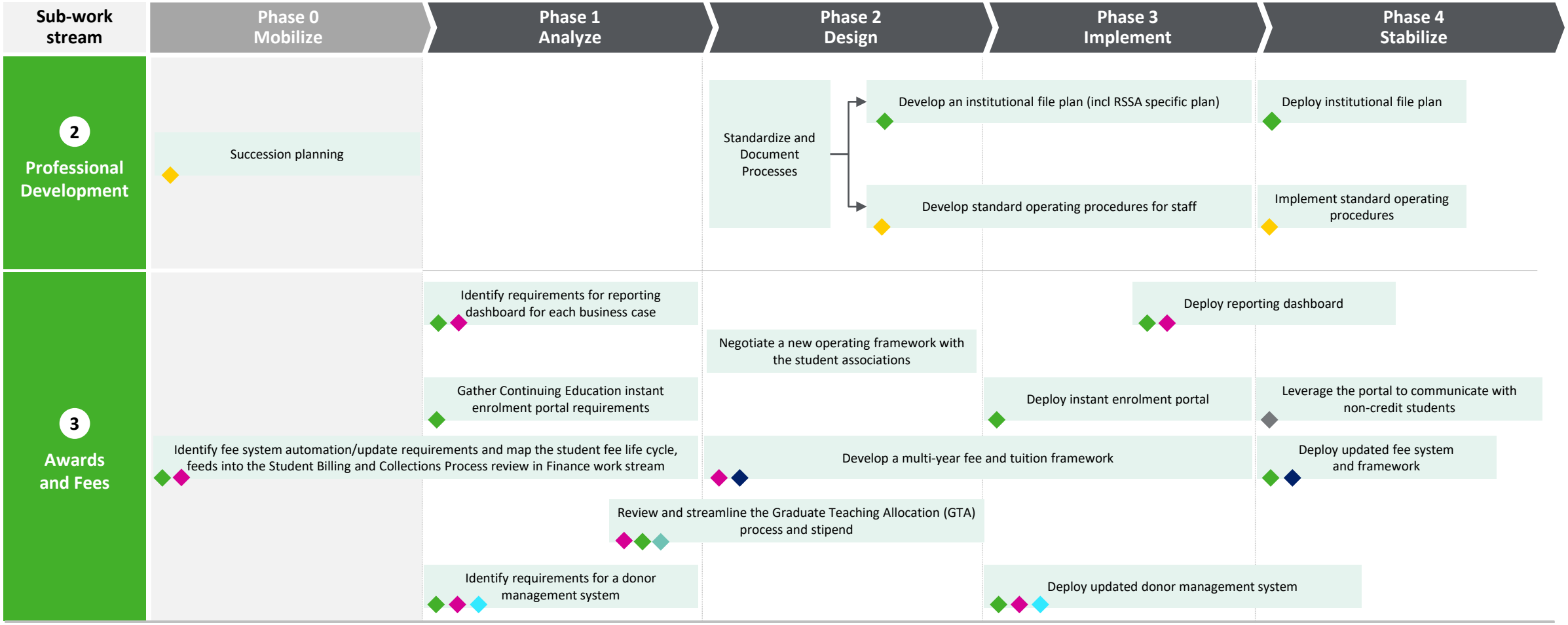
Registration Services and Student Affairs roadmap (2/5)

The second area of focus surrounds the professional development of the teams, including onboarding, training, and creating standard operating procedures to ensure critical tasks are completed and the process is resilient to transitions and vacancies. The third area is awards and fees, a critical part of the student journey which needs reconceptualization.



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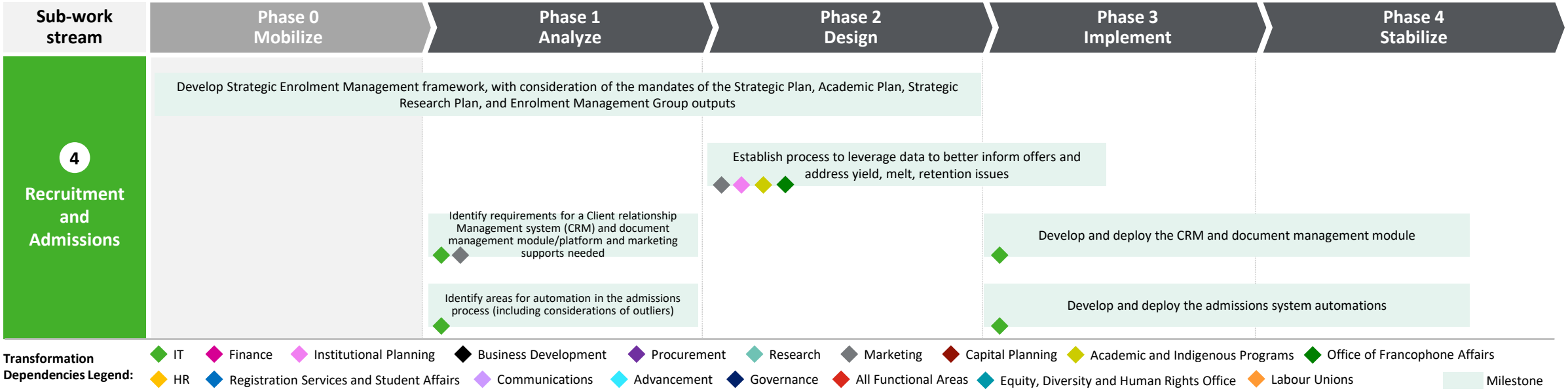
Registration Services and Student Affairs roadmap (3/5)

The recruitment and admissions portfolio is high volume and a critical first connection point for interested students. Updating and optimizing the framework around the various drivers and implementing additional technical solutions to support the work will help to stabilize this critical function.



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Registration Services and Student Affairs roadmap (4/5)

The registrarial processes need to be optimized to reduce the volume of outliers to be resolved, and to have a single source for policies, processes, dates and deadlines. This will optimize interactions between the various community members who need this information, including faculty, students and staff.

Sub-work stream	Phase 0 Mobilize	Phase 1 Analyze	Phase 2 Design	Phase 3 Implement	Phase 4 Stabilize
5 Registrarial Processes		Identify system requirements to enhance/automate the course timetable process		Develop and deploy the course timetable system enhancements	
		Identify system requirements for a repository of Registrarial policies and guidelines	Develop a framework to update/create Registrarial policies, regulations; and inform the university community about governance pathways & the updated policies	Develop and deploy the document management system with revised policies	
			Enhance the academic calendar virtual information, faculty handbook and onboarding package		
		Identify the requirements for a case management system	Streamline the academic integrity process and develop/deploy case management system		
		Define exam scheduling enhancements and automations, incl. conflicts and deferrals	Reassess Exam scheduling timing and order of operations	Deploy revised exam scheduling enhancements and automations	
		Identify requirements for a non-credit self service portal		Develop and deploy the portal	
			Review D2L Access and adjust as necessary		
		Identify requirements for automations in the ministry reporting process		Develop and deploy automations in ministry reporting process	
			Streamline the process for academic integrity, petitions and appeals instances		
			Implement a process for marketing governance over communications	Leverage updated system functionality to ensure communications are targeted and comprehensive	

Transformation Dependencies Legend: IT, Finance, Institutional Planning, Business Development, Procurement, Research, Marketing, Capital Planning, Academic and Indigenous Programs, Office of Francophone Affairs, HR, Registration Services and Student Affairs, Communications, Advancement, Governance, All Functional Areas, Equity, Diversity and Human Rights Office, Labour Unions, Milestone

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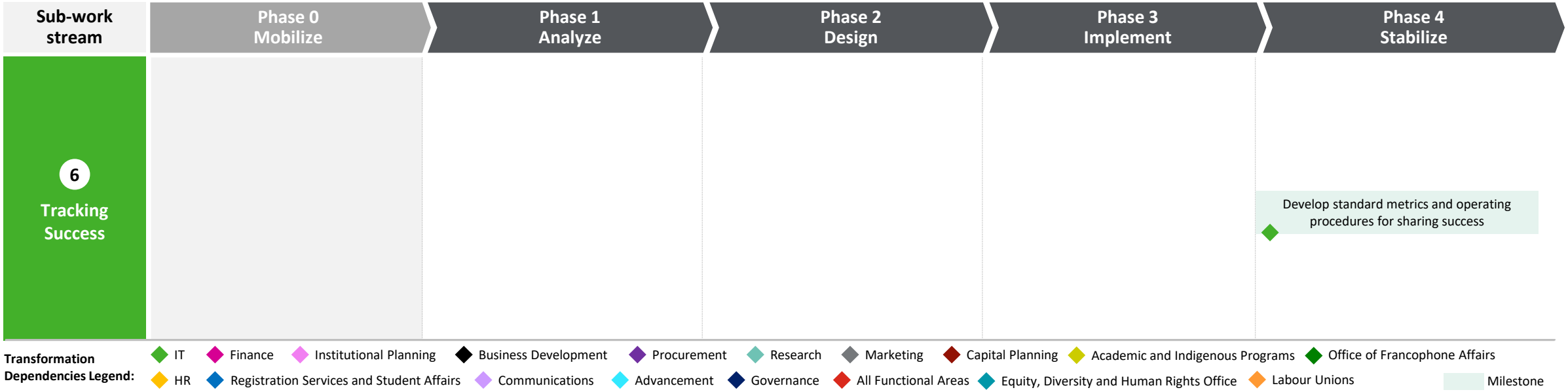
Registration Services and Student Affairs roadmap (5/5)

This final area is the basis for continuous improvement, to measure the outcomes of the technological, policy and process changes over the course of the transformation. By setting data-driven metrics, based on the newly improved processes, the university can remain flexible and responsive to new friction points and give members of the community the opportunity to provide feedback.



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Finance

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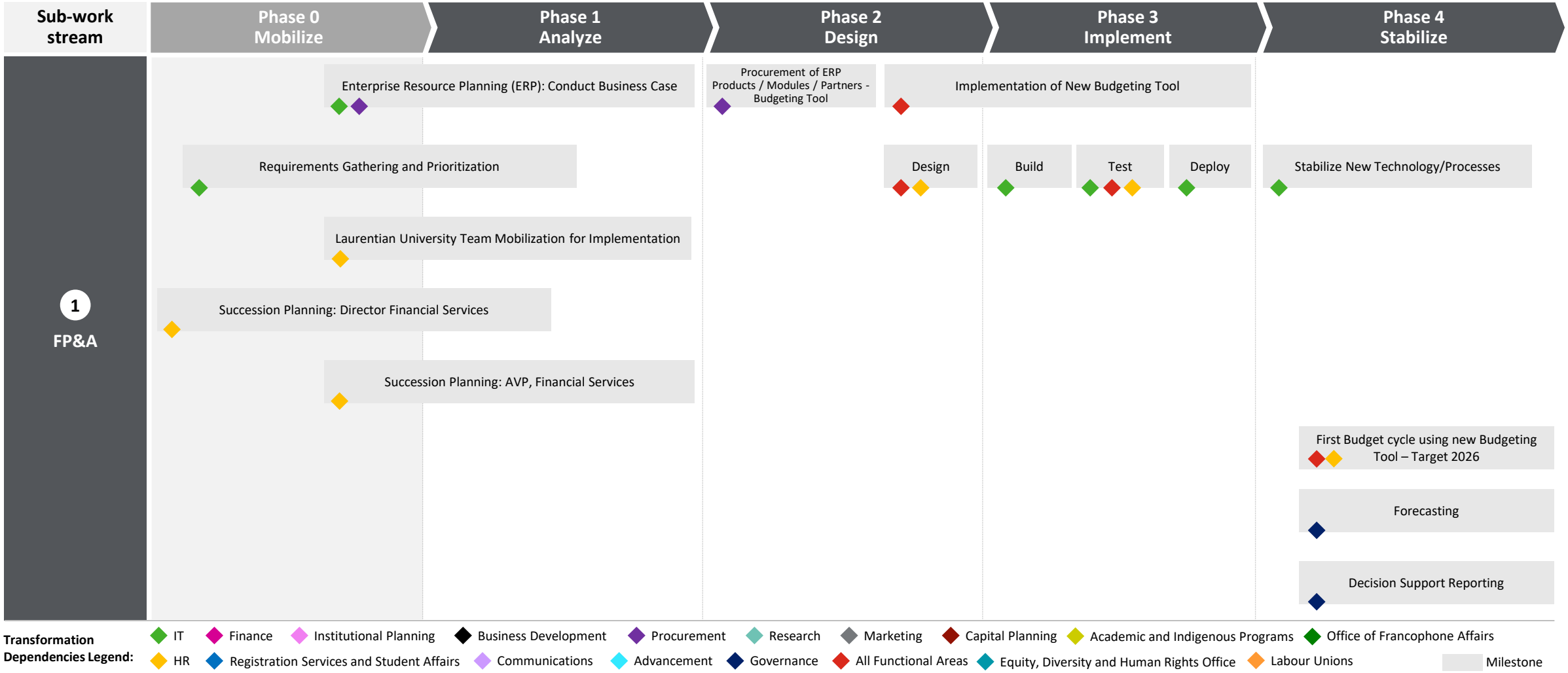
Finance roadmap (1/6)

Identification and implementation of a modern budgeting tool will be priority during the transformation of Laurentian University's Financial Planning and Analysis (FP&A) function. This initiative will depend extensively on HR, IT and Procurement, and when the time comes to design and test the tool's reports and features, active participation of all functional areas and budget holders will be key.



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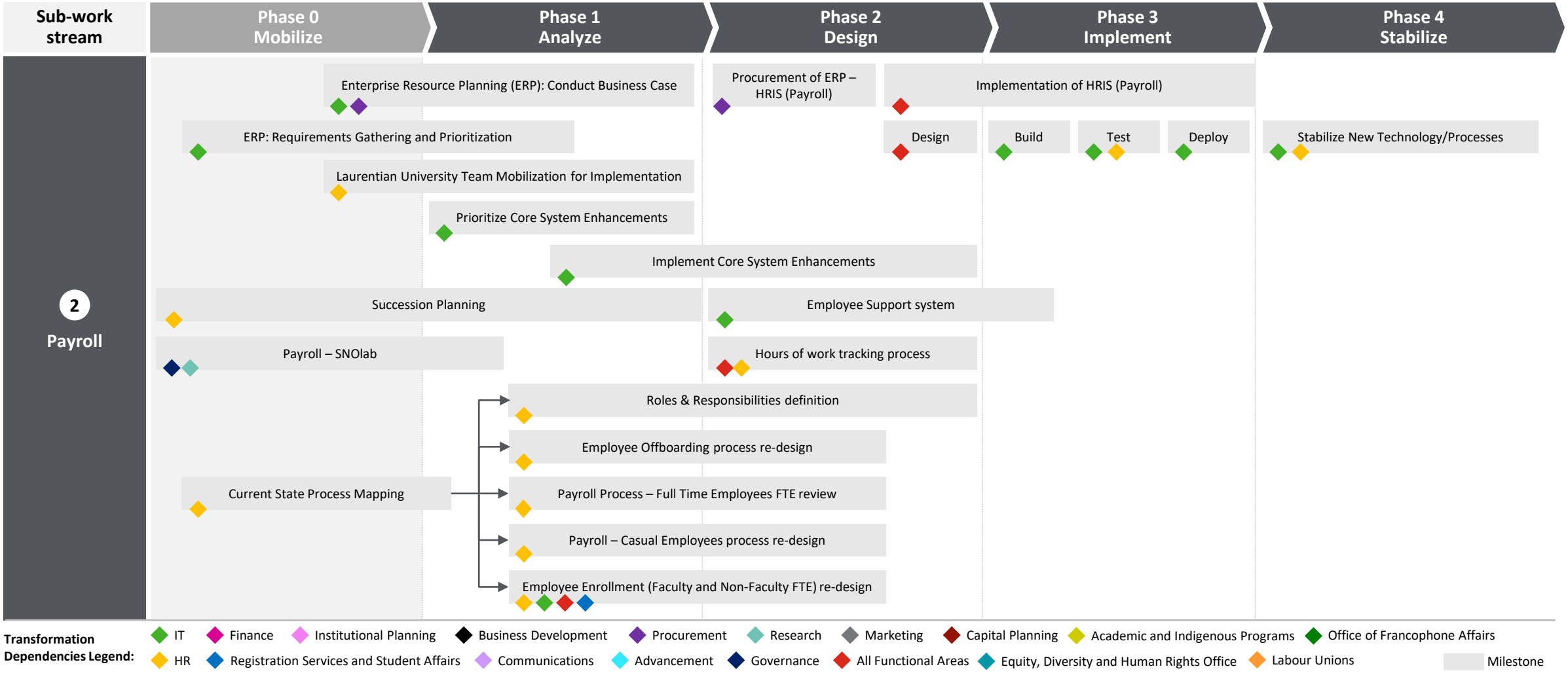
Finance roadmap (2/6)

A thorough review of current processes in conjunction with HR, in order to redesign the Payroll function will be required. In parallel, a selection process for a Human Resources Information System (HRIS) will take place, to be deployed during phase 3 of the project. In the short term, enhancements to the current system will be prioritized and implemented, in collaboration with IT.



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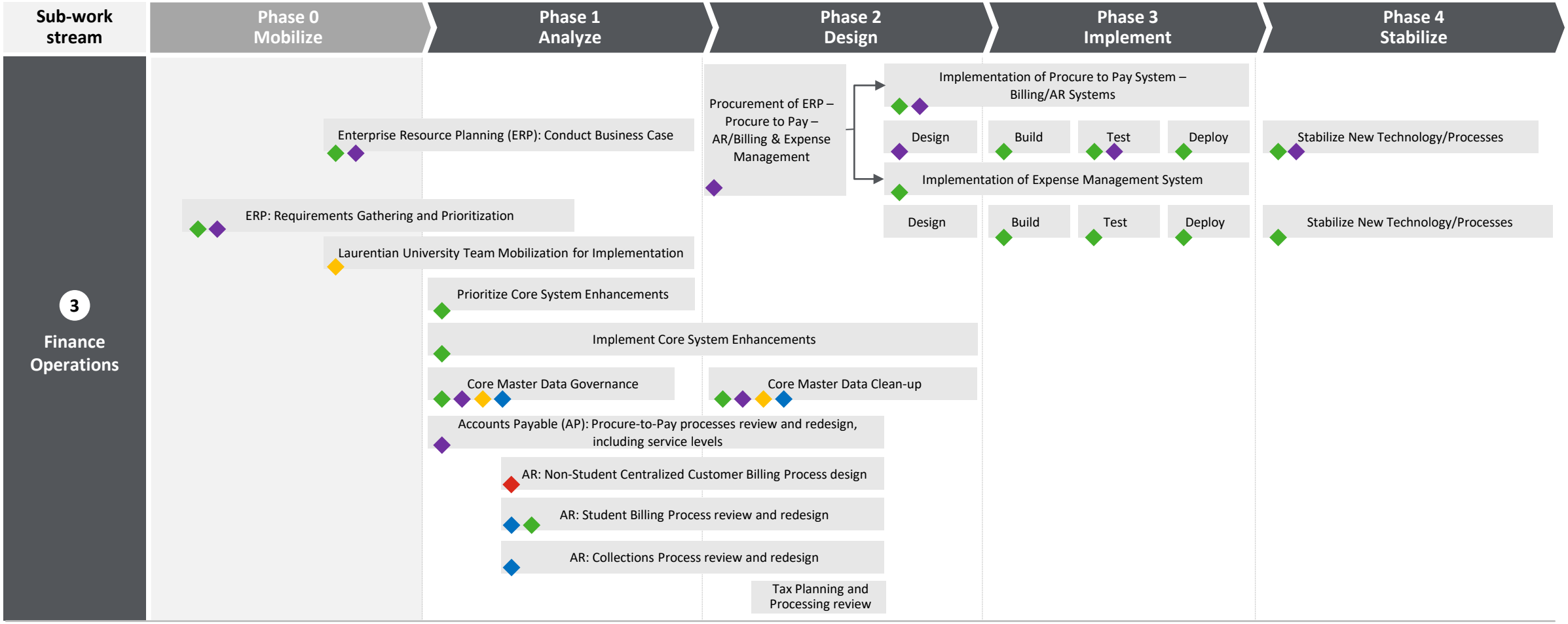
Finance roadmap (3/6)

Finance Operations transformation will focus on revamping the Procure-to-Pay, Billing, and Accounts Receivable (AR) processes with support required from IT and Procurement on the selection and implementation of tools. With the aim of providing a better service to the university in the interim, enhancements to the current processes and systems will be implemented.



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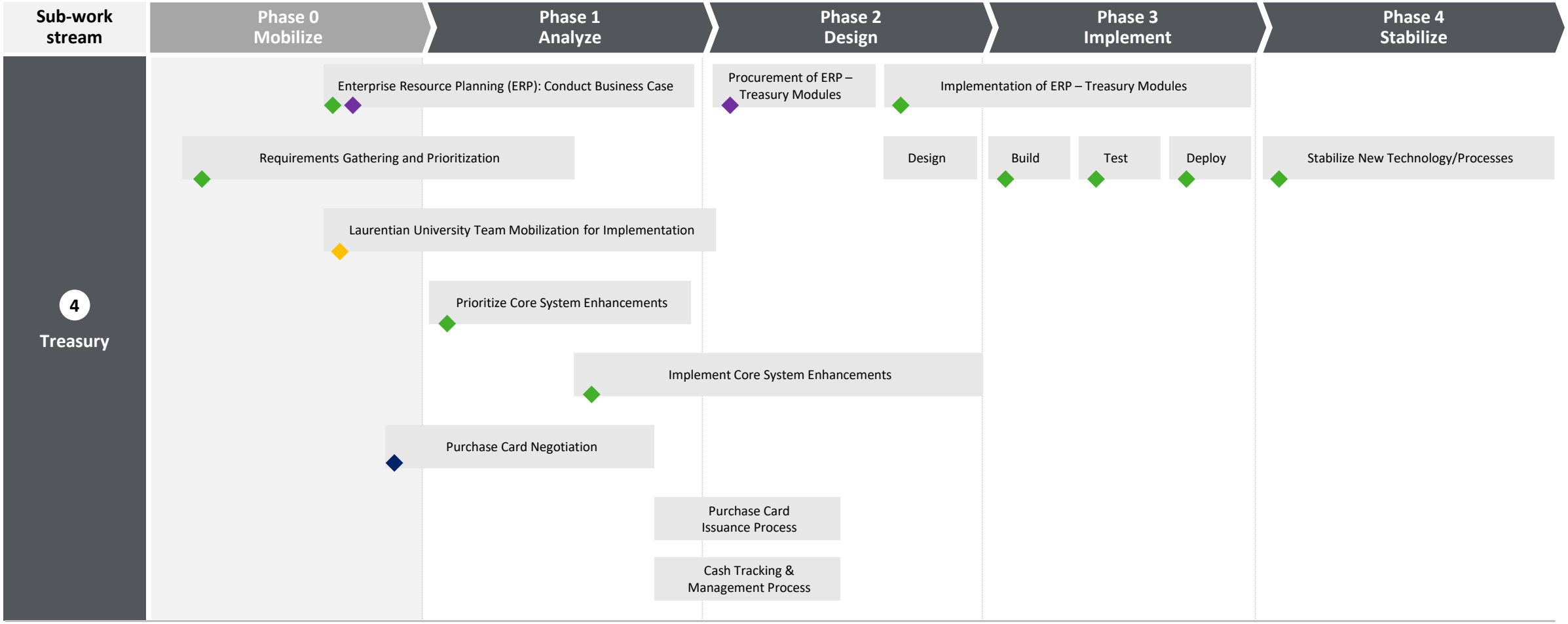
Finance roadmap (4/6)

Treasury's transformation plan seeks to create a modern Treasury function, implementing tools that will allow proactive and efficient management of working capital, enabling the team to effectively anticipate and manage risks, all while optimizing banking relations with terms favorable to the university.



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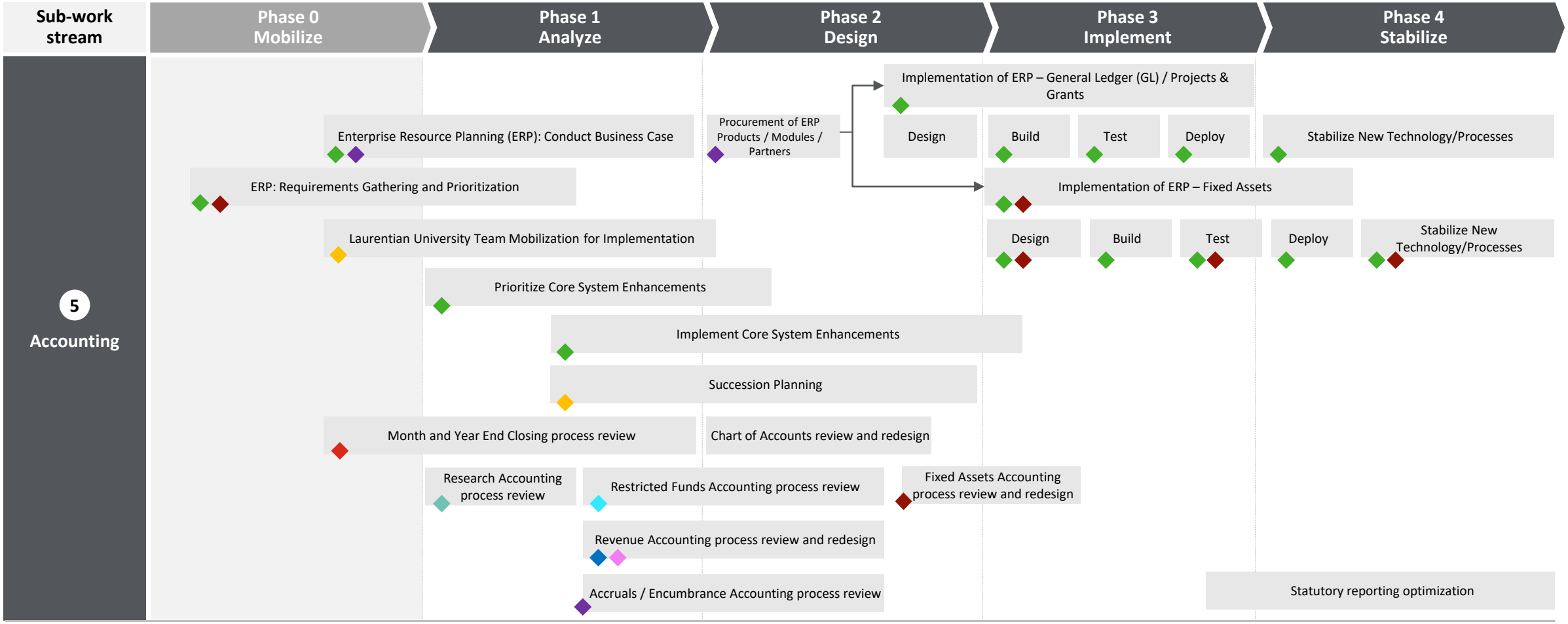
Finance roadmap (5/6)

The focus will be the design and implementation of processes that will provide the team with the ability to deliver timely and accurate financial information to the university to support decision-making processes. It includes the implementation of tools to track projects and grants more efficiently, as well as a tool to track the University's fixed assets.



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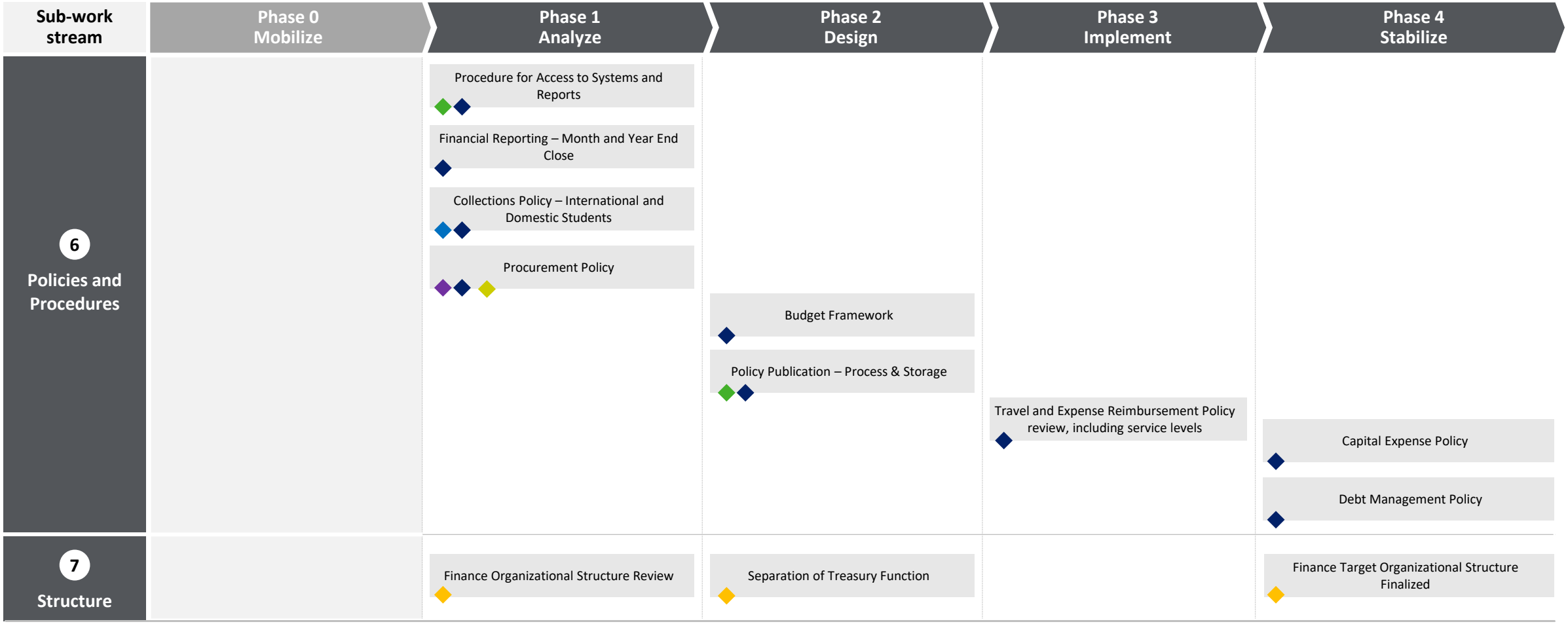
Finance roadmap (6/6)

Laurentian University / Université Laurentienne

Along the transformation roadmap, Finance will devote efforts to document its future state procedures and review finance policies to ensure alignment with the new improved processes and tools. Also, the team will review its current organizational structure, in order to design and implement the ideal structure to support future state processes.



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Information Technology

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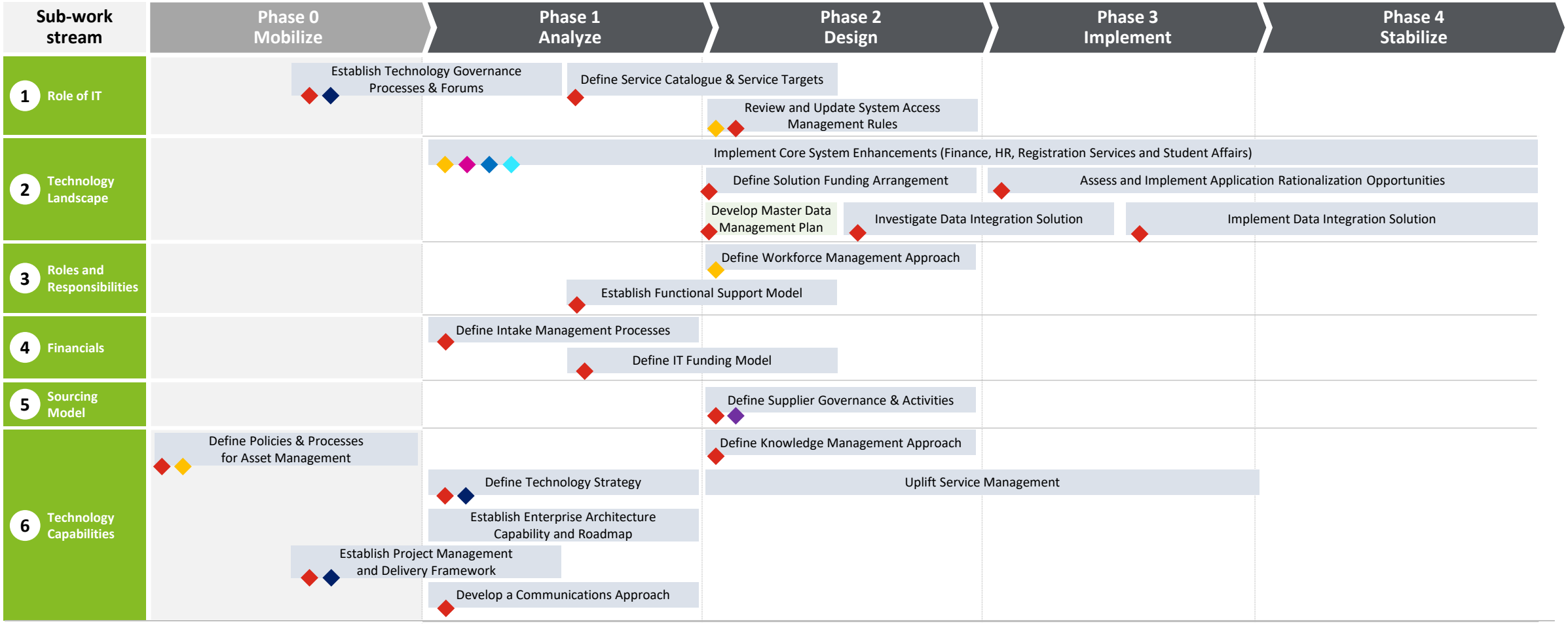
Information Technology roadmap

The recommended work packages will guide transformation within the IT department and across Laurentian University. These work packages focus on uplifting technology capabilities, processes and tools and establishing revised governance models and frameworks to improve the effectiveness of technology and its operational efficiency.



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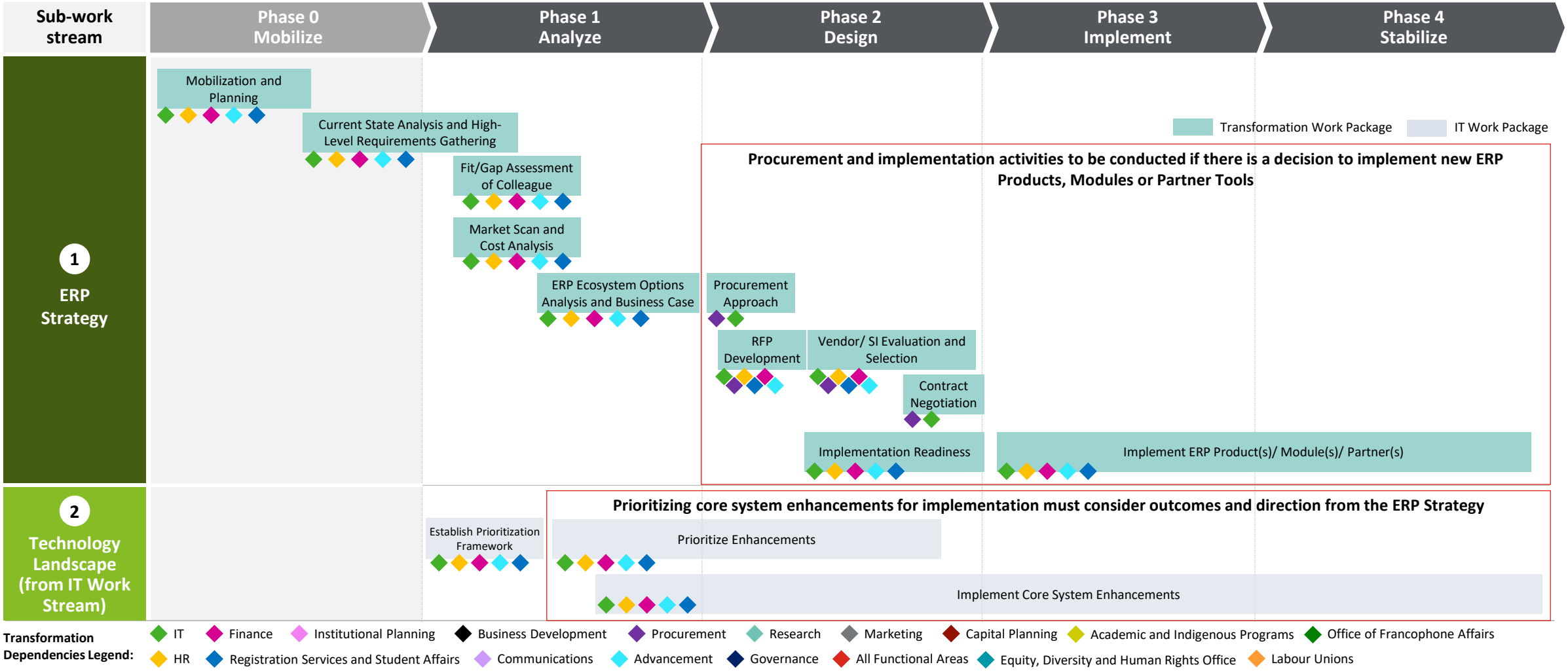
ERP strategy

A comprehensive Enterprise Resource Planning (ERP) strategy needs to be undertaken to determine whether Colleague can and should continue to be the core solution for the University. This strategy should uncover whether Colleague has the needed capabilities across Finance, HR, RSSA and advancement or whether other solutions may be more appropriate for Laurentian University's longer term needs.



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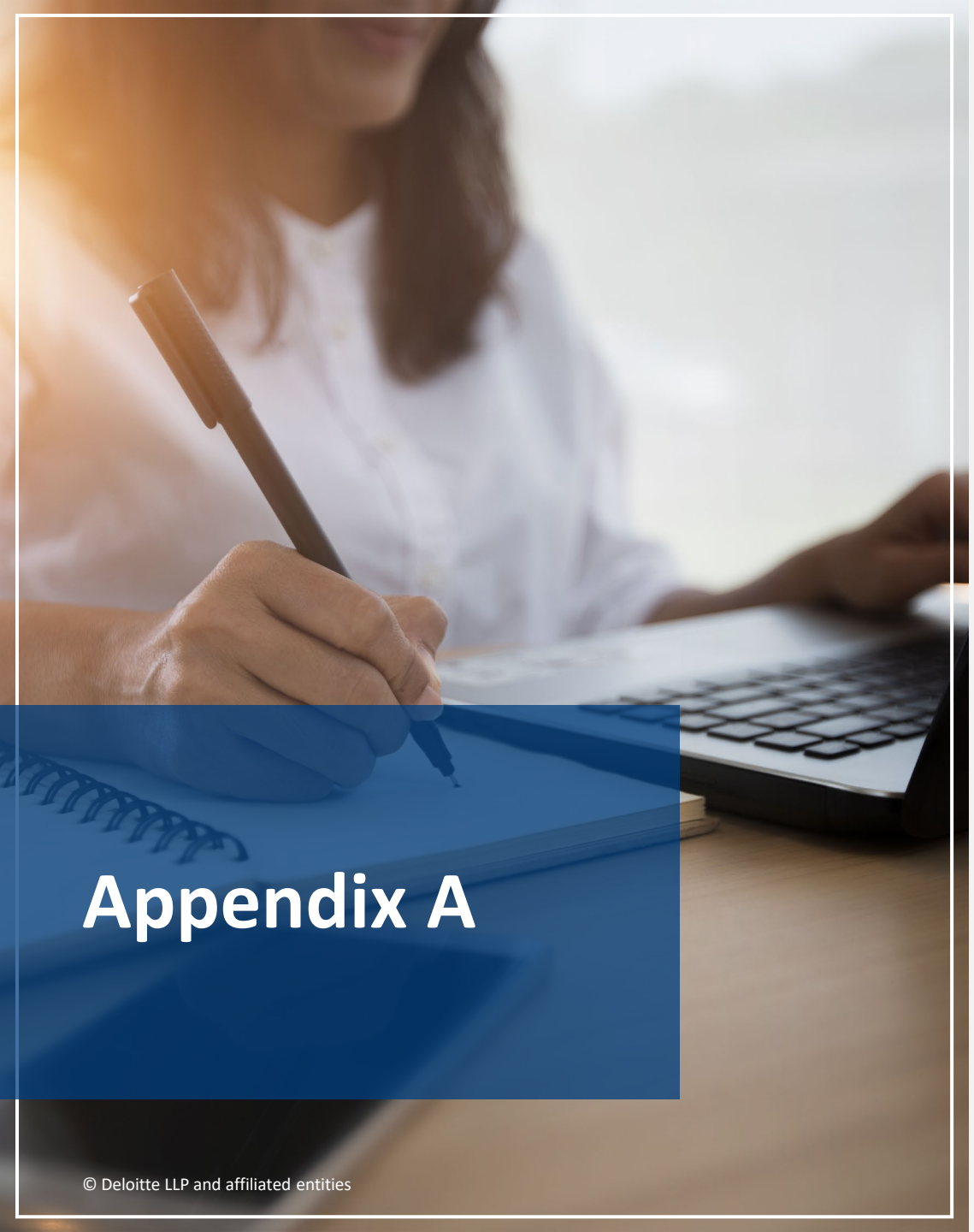

Appendix A

List of consultations

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Input from Key University Participants (1/3)

The participants have been consulted for the purpose of understanding the current state in the planning stage. In the implementation stage, more participants will be consulted from across the University to implement all the transformation activities listed in the workplans

Name	Position
Abdirahman Jama	Security Analyst
Alain Lamothe	Associate Librarian Chair, Library & Archives
Albrecht Schulte-Hostedde	Full Professor, School of Natural Sciences
Alexie Foucault-Forest	Human Resources Clerk
Aliki Economides	Assistant Professor, McEwen School of Architecture
André Whissell	Manager, Treasury & Payroll
Andree Noiseux	Research Advisor
Andrew Dale	Student Employment Advisor
Ann Hodgson	Interim Associate University Secretary
Athanase Simbagoye	Full Professor, School of Education
Avery Morin	Students' General Association Representative
Benjamin Demianiuk	Director, Business Development
Bettina Brockerhoff-Macdonald	Director of Continuing Learning, Centre for Academic Excellence
Brenda Brouwer	Interim Provost
Brent Roe	AVP, Academic (Student Success) & University Librarian
Casey Sigurdson	Administrative Assistant
Céleste Boyer	General Counsel
Chantal Veilleux	Assistant to the Provost & Vice-President Academic
Chloé Lavigne	Human Resources Advisor
Christina Larocque	Student Engagement Coordinator
Christina Sckopke	Manager, Micro-Credentials & Non-Credit Programming

Name	Position
Christopher McTiernan	Research Advisor
Colette Rainville	Graduation Coordinator
Corine Loranger	Placement Coordinator, Faculty of Science, Engineering and Architecture
Curtis Radey	Manager, Student Awards Fees & Mylaurentian Hub
Dan Robidoux	Manager, IT Service Desk
Daniel Scott	Associate Librarian
David Deloye	Residence Coordinator
Dayna Hicks	Administrative Officer
Deb Sullivan	Manager, OD & Learning
Diane Roy	Associate Registrar
Dominic Beaudry	AVP, Academic & Indigenous Programs
Elizabeth Carlson-Manathara	Associate Professor, School of Social Work
Erfan Azadehfar	Graduate Student, CUPE representative
Ernst Gerhardt	Associate Professor, School of Liberal Arts
Fabrice Colin	Associate Professor, Bharti School of Engineering and Computation, Science, Engineering and Architecture
Francine Lalonde	Labor & Staff Relations Assistant
Francis Tousignant	Audio Visual Technician
Gabrielle Courtemanche	Manager, Counselling and Accessibility Services
Ginette Gervais	Manager, Library Operations
Gisele Roberts	Director, Research & Innovation Services
Heather Dufour	Innovation & Commercialization Coordinator

Names and titles included have been provided by Laurentian University HR and IT Departments

Note: Deloitte held interviews with participants who prefer to remain anonymous and thus have been excluded from the list above

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Input from Key University Participants (2/3)

The participants have been consulted for the purpose of understanding the current state in the planning stage. In the implementation stage, more participants will be consulted from across the University to implement all the transformation activities listed in the workplans

Name	Position
Imane Ricard	Manager, Records & Systems
Ishmeet Singh Ahuja	Manager, Enterprise Resource Planning(ERP) Development
Ivana McCue	Project Manager
James Ketchen	Assistant Professor, School of Liberal Arts
Jean-Paul Rains	Director, Communications & Digital Strategy (Communications Contact)
Jeff Battistuzzi	Manager, Operations & Student Financial
Jeff St-Jean	Space Coordinator
Jen Dowdall	Interim Co-Director, EDHRO
Joanne Goudreault	Director, Financial Services
Jody Tverdal	Administrative Lead
Joy Gray-Munro	Dean, Faculty of Science, Engineering & Architecture
Julie Birnie	Executive Administrative Assistant
Julie Ceming	Manager, Business Development
Julie Richer	Benefits & Disability Advisor
Kimberley Fitzgerald	Enterprise Resource Planning(ERP) Administrator
Kristine Montpellier St.Jean	Human Resources Advisor
Laura Geryk	Director, Information Management & Systems
Leeanne Croteau	Manager, Procurement & Contracts
Lily Racine-Bouchard	Manager, Advancement
Linda St. Pierre	LUFA Representative, Sessional Member, Faculty of Science, Engineering and Architecture, Faculty of Arts
Lise Carrière	Post-Awards Research Officer

Name	Position
Lise Dignard	Scheduling & Examinations Coordinator
Lise Nastuk	Database Administrator
Louise Tremblay-Croxall	Director, Planning & Budgeting
Luc Roy	AVP, Information Technology
Lyne Rivet	Manager, Health and Wellness Services
Marie-Lynne Michaud	Director, Marketing
Mark Thompson	Manager, Information Technology Operations
Mary Laur	Acting Director, Indigenous Sharing & Learning Center
Matthew Faubert	Business Analyst
Maxine Vincent	Research Accountant
Meghan Fielding	Office Manager
Melissa Ouimette	Manager, Applicant Services
Melissa Wiman	Sessional Member, Faculty of Arts, Centre of Academic Excellence
Meredith Teller	Business Manager, Faculty of Arts, Co-Chair TCG
Michel Piché	VP, Finance & Administration
Mona Ali	Project Manager
Morgan Reynolds	Enterprise Resource Planning(ERP) System Analyst
Nicole Roy	Supervisor, Payroll Services
Nicole St. Georges	Director, Faculty & Staff Relationships
Nicole St. Marseille	Director, Campus Safety
Normand Lavallée	AVP Financial Services

Names and titles included have been provided by Laurentian University HR and IT Departments

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Input from Key University Participants (3/3)

The participants have been consulted for the purpose of understanding the current state in the planning stage. In the implementation stage, more participants will be consulted from across the University to implement all the transformation activities listed in the workplans

Name	Position
Peter Hellstrom	Director, Laurentian Voyageur Athletics and Recreation
Pierre Fontaine	Director, Maintenance & Operations
Pieter Breijer	Manager, Domestic Recruitment
Rachel Trudeau	Business Manager, Faculty of Science, Engineering and Architecture
Ralf Meyer	Associate Professor, School of Engineering and Computation Science
Renée Renaud	Admin Assistant
Roberta Heale	Full Professor, School of Nursing
Roch Gallien	Special Advisor of Francophone Affairs
Roxane Marois	Manager, Buildings & Grounds
Scott Fairgrieve	Full Professor, Vice-Dean, Faculty of Science, Engineering & Architecture
Serge Demers	AVP, Student Affairs, Registrar & Secretary of Senate
Shannon Goffin	Interim Co-Director, EDHRO
Shauna Lehtimaki	Director, Institutional Planning
Shawn Frappier	Director of Faculty and Staff Relations
Sheila Embleton	Interim President & Vice-Chancellor
Shelley Carpenter-Wright	AVP Human Resources & Organizational Development
Stacy Sathaseevan	Information Officer
Sue Radey	Special Advisor to AVP Finance
Sylvie Chrétien-Makela	Buyer, Procurement & Contracts
Tammy Eger	VP, Research
Tania Montpellier	Part-Time Staff, Financial Services

Name	Position
Tanya Shute	LUFA Representative, Associate Professor
Thomas Fenske	Laboratory Technologist & LUSU President
Thomas Matheson	Postal Coordinator
Tracy Fleury	Director, Accounting & Reporting
Tracy MacLeod	Chief Advancement Officer
Victoria Kannen	Research Equity, Diversity & Inclusion Advisor
Xuan Zhao	Manager, International Recruitment

Names and titles included have been provided by Laurentian University HR and IT Departments

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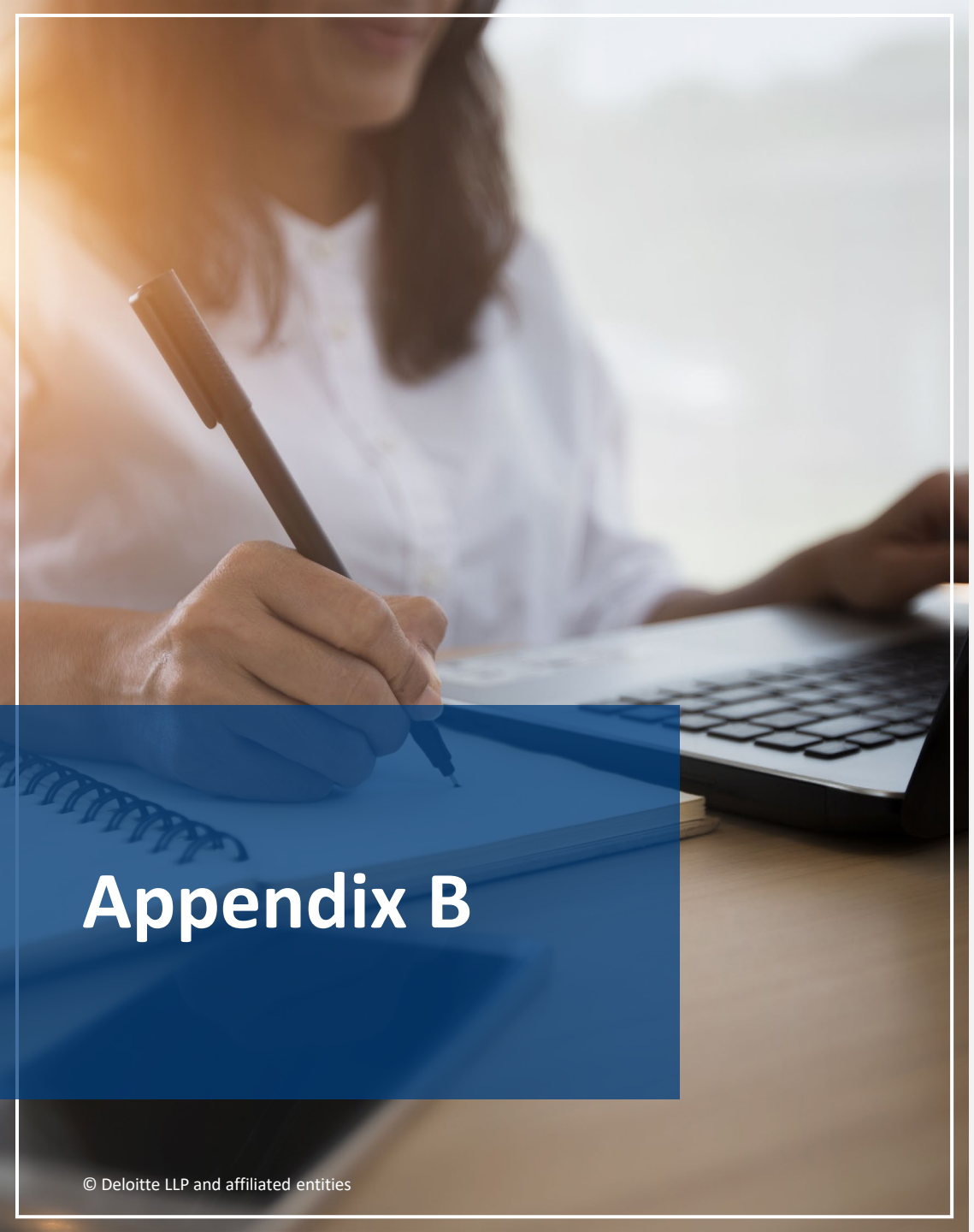

Appendix B

List of all milestones by Phase

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Phased Roadmap Summary (1/20)

In Phase 0, the focus will be on identifying, standing up, and mobilizing the appropriate resources and teams required to undertake the transformation. To support team construction during this phase, there will be an emphasis on recruitment to address identified resource gaps.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 0	HR	Recruitment	Identify critical vacancies to implement the transformation	All Functional Areas
	HR	Compensation and Benefits	Issue RFP and select vendor to evaluate compensation across the University	Procurement
	RSSA	Points of Entry: Advising	Hire staff for key advising areas where shortage exists	HR
	RSSA	Points of Entry: Advising	Reassess the physical grouping of student services and confirm the structure	
	RSSA	Professional Development	Succession Planning	HR
	RSSA	Awards and Fees	Identify fee system automation/ update requirements and map the student fee life cycle	IT, Finance
	RSSA	Recruitment and Admissions	Develop Strategic Enrolment Management framework	
	RSSA	Registrarial Processes	Identify system requirements to enhance/automate the course timetable process	IT
	Finance	FP&A	Enterprise Resource Planning (ERP): Conduct Business Case	IT, Procurement
	Finance	FP&A	Requirements Gathering and Prioritization	IT
	Finance	FP&A	Laurentian University Team Mobilization for Implementation	HR
	Finance	FP&A	Succession Planning: Director Financial Services	HR
	Finance	FP&A	Succession Planning: AVP, Financial Services	HR
	Finance	Payroll	ERP: Conduct Business Case	IT, Procurement

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Phased Roadmap Summary (2/20)

In Phase 0, the focus will be on identifying, standing up, and mobilizing the appropriate resources and teams required to undertake the transformation. To support team construction during this phase, there will be an emphasis on recruitment to address identified resource gaps.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 0	Finance	Payroll	Enterprise Resource Planning (ERP): Requirements Gathering and Prioritization	IT
	Finance	Payroll	Laurentian University Team Mobilization for Implementation	HR
	Finance	Payroll	Succession Planning	HR
	Finance	Payroll	Payroll - SNOlab	Research, Governance
	Finance	Payroll	Current State Process Mapping (Roles & Responsibilities definition, Employee Offboarding re-design, Payroll process review, Casual Employee process re-design, Employee Enrolment redesign)	HR
	Finance	Finance Operations	ERP: Conduct Business Case	IT, Procurement
	Finance	Finance Operations	ERP: Requirements Gathering and Prioritization	IT, Procurement
	Finance	Finance Operations	Laurentian University Team Mobilization for Implementation	HR
	Finance	Treasury	ERP: Conduct Business Case	IT, Procurement
	Finance	Treasury	Requirements Gathering and Prioritization	IT
	Finance	Treasury	Laurentian University Team Mobilization for Implementation	HR
	Finance	Treasury	Purchase Card Negotiation	Governance
	Finance	Accounting	ERP: Conduct Business Case	IT, Procurement
	Finance	Accounting	Requirements Gathering and Prioritization	IT, Capital Planning

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Phased Roadmap Summary (3/20)

In Phase 0, the focus will be on identifying, standing up, and mobilizing the appropriate resources and teams required to undertake the transformation. To support team construction during this phase, there will be an emphasis on recruitment to address identified resource gaps.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 0	Finance	Accounting	Laurentian University Team Mobilization for Implementation	HR
	Finance	Accounting	Month and Year End Closing Process Review	All Functional Areas
	IT	Role of IT and Services	Establish Technology Governance Processes and Forums	All Functional Areas, Governance
	IT	Technology Capabilities	Define Policies & Processes for Asset Management	All Functional Areas, HR
	IT	Technology Capabilities	Establish IT Project Management and Delivery Framework	All Functional Areas, Governance
	Enterprise Resource Planning (ERP) Strategy	ERP Strategy	Develop ERP Modernization Business Case	HR, Finance, Advancement, RSSA

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Phased Roadmap Summary (4/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	HR	Recruitment	Complete recruitment of critical vacancies to support the transformation	
	HR	Recruitment	Develop employee talent attraction marketing planning process	Marketing
	HR	Recruitment	Develop standards for when to engage external talent search firms	
	HR	Recruitment	Establish hiring requisition system process	Finance
	HR	Compensation and Benefits	Building the compensation framework	Labour Unions
	HR	Compensation and Benefits	Develop job architecture (Organizational Chart) covering all university functions	All Functional Areas
	HR	Compensation and Benefits	Create and revise job descriptions	All Functional Areas, AIP, OFA
	HR	Compensation and Benefits	Review and evaluate the job evaluation process (LUSU and LUAPS(A))	All Functional Areas
	HR	Workforce Management	Establish an hours of work (Time and Attendance) management policy in conjunction with collective agreements	
	HR	Onboarding/Offboarding	Onboarding Process established for all university employees (including Faculty, Staff and Grant Funded)	All Functional Areas, Finance, IT
	HR	Onboarding/Offboarding	Offboarding Process established	All Functional Areas, Finance, IT
	HR	Onboarding/Offboarding	Establish group benefits enrollment process	Finance

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Phased Roadmap Summary (5/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	HR	Equity, Diversity, Inclusion, Indigeneity, and Accessibility	Update HR policies with EDII-A considerations	Academic and Indigenous (AIP) Programs, EDHRO, Office of Francophone Affairs (OFA)
	HR	HR Service Delivery	Design future HR service delivery model	Finance
	HR	HR Service Delivery	Develop and approve business case for a new HR service delivery ticketing (case management) system	
	HR	HRIS	Gather requirements and identify integration needs for HRIS	
	HR	HRIS	Establish governance and staffing plan to support upcoming implementation	
	HR	Grievance Management	Review grievance management process starting in conjunction with current collective agreements	Labour Unions
	RSSA	Points of Entry: Advising	Identify system requirements for a student portal pertaining to course enrolment	IT, AIP, OFA
	RSSA	Points of Entry: Advising	Identify system requirements for an appointment booking module	IT
	RSSA	Points of Entry: Advising	Identify system requirements for degree completion process	IT
	RSSA	Points of Entry: Advising	Develop content and process for an automated ticketing/triage system	IT
	RSSA	Points of Entry: Advising	Identify student portal updates required such as user contributions, system integration and bilingual requirements	IT
	RSSA	Points of Entry: Advising	Identify system requirements to support Counselling and Accessibility services	IT
	RSSA	Points of Entry: Advising	Identify system requirements for the student career portal and related communications	IT, Marketing

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Phased Roadmap Summary (6/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	RSSA	Awards and Fees	Identify requirements for reporting dashboard for each business case	IT, Finance
	RSSA	Awards and Fees	Gather Continuing Education instant enrolment portal requirements	IT
	RSSA	Awards and Fees	Identify requirements for a donor management system	IT, Finance, Advancement
	RSSA	Awards and Fees	Review and streamline the GTA allocation process and stipend	IT, Finance, Research
	RSSA	Recruitment and Admissions	Identify requirements for a CRM and document management module/platform supports needed	IT, Marketing
	RSSA	Recruitment and Admissions	Identify areas for automation in the admissions process (including considerations of outliers)	IT
	RSSA	Registrarial Processes	Identify system requirements for a repository of Registrarial policies and guidelines	IT
	RSSA	Registrarial Processes	Identify the requirements for a case management system	IT
	RSSA	Registrarial Processes	Define exam scheduling enhancements and automations, incl. conflicts and deferrals	IT
	RSSA	Registrarial Processes	Identify requirements for a non-credit self-service portal	IT, Communications
	RSSA	Registrarial Processes	Identify requirements for automations in the ministry reporting process	IT, Institutional Planning
	Finance	Payroll	Prioritize Core System Enhancements	IT
	Finance	Payroll	Implement Core System Enhancements	IT
	Finance	Payroll	Roles & Responsibilities definition	HR

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Phased Roadmap Summary (7/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	Finance	Payroll	Employee Offboarding process re-design	HR
	Finance	Payroll	Payroll Process – Full Time Employees FTE review	HR
	Finance	Payroll	Payroll – Casual Employees process re-design	HR
	Finance	Payroll	Employee Enrollment (Faculty and Non-Faculty FTE) re-design	All Functional Areas, HR, IT, RSSA
	Finance	Finance Operations	Prioritize Core System Enhancements	IT
	Finance	Finance Operations	Implement Core System Enhancements	IT
	Finance	Finance Operations	Core Master Data Governance	IT, Procurement, HR, RSSA
	Finance	Finance Operations	Accounts Payable (AP): Procure-to-Pay processes review and redesign, including service levels	Procurement
	Finance	Finance Operations	Accounts Receivable (AR): Non-Student Centralized Customer Billing Process design	All Functional Areas
	Finance	Finance Operations	AR: Student Billing Process review and redesign	RSSA, IT
	Finance	Finance Operations	AR: Collections Process review and redesign	RSSA
	Finance	Treasury	Prioritize Core System Enhancements	IT
	Finance	Treasury	Implement Core System Enhancements	IT
	Finance	Treasury	Purchase Card Issuance Process	

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Phased Roadmap Summary (8/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	Finance	Treasury	Cash Tracking & Management Process	
	Finance	Accounting	Prioritize Core System Enhancements	IT
	Finance	Accounting	Implement Core System Enhancements	IT
	Finance	Accounting	Research Accounting process review	Research
	Finance	Accounting	Succession Planning	HR
	Finance	Accounting	Restricted Funds Accounting process review	Advancement
	Finance	Accounting	Revenue Accounting process review and redesign	RSSA, Institutional Planning
	Finance	Accounting	Accruals / Encumbrance Accounting process review	Procurement
	Finance	Policies and Procedures	Procedure for Access to Systems and Reports	Governance, IT
	Finance	Policies and Procedures	Financial Reporting – Month and Year End Close	Governance
	Finance	Policies and Procedures	Collections Policy – International and Domestic Students	Governance, RSSA
	Finance	Policies and Procedures	Procurement Policy	Governance, Procurement, AIP
	Finance	Structure	Finance Organizational Structure Review	HR
	IT	Financials	Define Intake Management Processes	All Functional Areas

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Phased Roadmap Summary (9/20)

During Phase 1, the focus will be gathering and analyzing the current systems and processes to identify improvement areas required to achieve and support each work stream's desired future state.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 1	IT	Financials	Define IT Funding Model	All Functional Areas
	IT	Role of IT and Services	Define IT Service Catalogue & Service Targets	All Functional Areas
	IT	Roles and Responsibilities	Establish Functional Support Model	All Functional Areas
	IT	Technology Landscape	Implement Core System Enhancements for HR	HR
	IT	Technology Landscape	Implement Core System Enhancements for Finance	Finance
	IT	Technology Landscape	Implement Core System Enhancements for RSSA	RSSA
	IT	Technology Capabilities	Define Technology Strategy	Governance, All Functional Areas
	IT	Technology Capabilities	Develop a communications approach	All Functional Areas
	IT	Technology Capabilities	Establish Enterprise Architecture Capability and Roadmap	N/A

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Phased Roadmap Summary (10/20)

Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 2	HR	Recruitment	Re-design the hiring requisition form for each employee type	Finance
	HR	Recruitment	Establish candidate interview process and standards	
	HR	Recruitment	Establish offer issuance standards	
	HR	Compensation and Benefits	Establish pension administration capacity and capability	Finance
	HR	Compensation and Benefits	Integrate job architecture (Organizational Chart) into HR programs and processes	All Functional Areas
	HR	Compensation and Benefits	Evaluate compensation (equity) across the University	
	HR	Workforce Management	Optimize existing (Colleague) payroll system as an interim solution	IT, Finance
	HR	Workforce Management	Optimize access to employee information and data	IT, All Functional Areas
	HR	Workforce Management	Establish a formal Employee Retention program	
	HR	Onboarding/Offboarding	Implement Onboarding process	All Functional Areas, Finance, IT
	HR	Onboarding/Offboarding	Implement Offboarding process	All Functional Areas, Finance, IT
	HR	Learning and Development	Establish learning needs analysis	All Functional Areas, AIP, OFA

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Phased Roadmap Summary (11/20)

Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 2	HR	HR Service Delivery	Design future state HR org. structure and employee transition plan	
	HR	HR Service Delivery	Design future state end-to-end business processes	
	HR	HR Service Delivery	Administer RFP and select vendor for a new HR service delivery ticketing (case management) system	Procurement
	HR	HRIS	Administer RFP and select HRIS vendor taking into consideration the university's ERP strategy	IT
	HR	HRIS	Form the sustainment team that will maintain the system post go-live	
	HR	HRIS	Procure HRIS tool and third party for implementation	Procurement
	HR	HRIS	Laurentian University Team is created and mobilized for the implementation of the HRIS tool	IT
	HR	Grievance Management	Assign roles and responsibilities in the grievance management process including external counsel	
	RSSA	Points of Entry: Advising	Develop sample course plans with Academic departments	Communications
	RSSA	Points of Entry: Advising	Reconsider the onboarding process for students and assign ownership of process	
	RSSA	Points of Entry: Advising	Implement holistic service level expectation for all who interact with students	HR, AIP
	RSSA	Professional Development	Develop an institutional file plan (incl RSSA specific plan)	IT
	RSSA	Professional Development	Develop standard operating procedures for staff	HR

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Phased Roadmap Summary (12/20)

Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 2	RSSA	Awards and Fees	Negotiate a new operating framework with the student associations	
	RSSA	Awards and Fees	Develop a multi-year fee and tuition framework	Finance, Governance
	RSSA	Recruitment and Admissions	Establish process to leverage data to better inform offers and address yield, melt, retention issues	Marketing, Institutional Planning, AIP, OFA
	RSSA	Registrarial Processes	Develop a framework to update/create Registrarial policies, regulations; and inform the university community	
	RSSA	Registrarial Processes	Enhance the academic calendar virtual information, faculty handbook and onboarding package	Marketing, HR, Communications
	RSSA	Registrarial Processes	Streamline the academic integrity process and develop/deploy case management system	IT
	RSSA	Registrarial Processes	Reassess Exam scheduling timing and order of operations	
	RSSA	Registrarial Processes	Review D2L Access and adjust as necessary	IT
	RSSA	Registrarial Processes	Streamline the process for academic integrity, petitions and appeals instances	IT
	RSSA	Registrarial Processes	Implement a process for marketing governance over student communications	Marketing
	Finance	FP&A	Procurement of ERP Products / Modules / Partners - Budgeting Tool	Procurement
	Finance	FP&A	Implementation of New Budgeting Tool (Design, Build, Test, Deploy)	All Functional Areas, IT, HR
	Finance	Payroll	Procurement of ERP – HRIS (Payroll)	Procurement

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Phased Roadmap Summary (13/20)

Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 2	Finance	Payroll	Employee Support system	IT
	Finance	Payroll	Hours of work tracking process	All Functional Areas, HR
	Finance	Payroll	Implementation of HRIS (Payroll)	All Functional Areas, IT, HR
	Finance	Finance Operations	Procurement of ERP – Procure to Pay – AR/Billing & Expense Management	Procurement
	Finance	Finance Operations	Core Master Data Clean-up	Procurement, IT, HR, RSSA
	Finance	Finance Operations	Tax Planning and Processing review	
	Finance	Finance Operations	Implementation of Procure to Pay System – Billing/AR Systems (Design, Build, Test, Deploy)	IT, Procurement
	Finance	Finance Operations	Implementation of Expense Management System (Design, Build, Test, Deploy)	IT
	Finance	Treasury	Procurement of ERP – Treasury Modules	Procurement
	Finance	Treasury	Implementation of ERP – Treasury Modules (Design, Build, Test, Deploy)	IT
	Finance	Accounting	Procurement of ERP Products / Modules / Partners	Procurement
	Finance	Accounting	Chart of Accounts review and redesign	
	Finance	Accounting	Implementation of ERP – GL / Projects & Grants (Design, Build, Test, Deploy)	IT
	Finance	Accounting	Fixed Assets Accounting process review and redesign	Capital Planning

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Phased Roadmap Summary (14/20)

Phase 2 will focus heavily on designing and optimizing processes across all work streams as well as procuring critical Enterprise Resource Planning (ERP) products and modules.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 2	Finance	Policies and Procedures	Budget Framework	Governance
	Finance	Policies and Procedures	Policy Publication – Process & Storage	Governance, IT
	Finance	Structure	Separation of Treasury Function	HR
	IT	Role of IT and Services	Review and Update System Access Management Rules	All Functional Areas, HR
	IT	Roles and Responsibilities	Define Workforce Management Approach	HR
	IT	Sourcing Model	Define Supplier Governance & Activities	All Functional Areas, Procurement
	IT	Technology Landscape	Define Solution Funding Arrangement	All Functional Areas
	IT	Technology Landscape	Develop Master Data Management Plan	All Functional Areas
	IT	Technology Landscape	Investigate Data Integration Solution	All Functional Areas
	IT	Technology Capabilities	Define Knowledge Management Approach (within IT)	N/A
	IT	Technology Capabilities	Define Knowledge Management Approach (across all functions)	All Functional Areas
	IT	Technology Capabilities	Uplift Service Management	N/A
	ERP Strategy	ERP Strategy	Procure ERP Product(s)/ Module(s)/ Partner(s)	Procurement, HR, Finance, Advancement, RSSA

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Phased Roadmap Summary (15/20)

In Phase 3, the focus will be on building, configuring, testing, and deploying the selected Enterprise Resource Planning (ERP) products / modules / interfaces. Other focus areas include establishing process design changes, training staff on new processes / technology, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 3	HR	Recruitment	Develop talent attraction marketing plan	Marketing, AIP, OFA
	HR	Recruitment	Communicate and train the new hiring process to all key participants	All Functional Areas
	HR	Recruitment	Integrate the hiring requisition system into HR service delivery ticketing (case management) system	IT, All Functional Areas
	HR	Recruitment	Implement a recruitment applicant tracking system (ATS) within the HRIS	IT, All Functional Areas
	HR	Compensation and Benefits	Establish employee development framework	All Functional Areas, Finance
	HR	Compensation and Benefits	Implement compensation model	All Functional Areas
	HR	Talent Management	Define talent management strategy	
	HR	Talent Management	Establish vacancy management framework	
	HR	Talent Management	Establish succession planning framework	
	HR	Workforce Management	Review short term disability administration process	Labour Unions, All Functional Areas
	HR	Workforce Management	Implement permanent (Time and Attendance) solution which integrates into HRIS (Payroll)	All Functional Areas, IT, Finance
	HR	Workforce Management	Optimize access to employee information and data	All Functional Areas, IT
	HR	Onboarding/Offboarding	Integrate the onboarding process into the HR service delivery ticketing system	IT, Finance

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Phased Roadmap Summary (16/20)

In Phase 3, the focus will be on building, configuring, testing, and deploying the selected Enterprise Resource Planning (ERP) products / modules / interfaces. Other focus areas include establishing process design changes, training staff on new processes / technology, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 3	HR	Onboarding/Offboarding	Integrate the offboarding process into the HR service delivery ticketing system	IT, Finance
	HR	Learning and Development	Implement learning and development plan	IT, All Functional Areas, AIP
	HR	HR Service Delivery	Implement an HR service delivery ticketing (case management) system	IT, All Functional Areas
	HR	HRIS	Implement the HRIS tool	IT, All Functional Areas
	HR	Grievance Management	Train managers, associate deans and deans on their role in implementing the collective agreements	All Functional Areas
	RSSA	Points of Entry: Advising	Develop and deploy course enrolment system updates	IT
	RSSA	Points of Entry: Advising	Develop and deploy appointment booking module updates	IT
	RSSA	Points of Entry: Advising	Develop and deploy degree completion system updates	IT
	RSSA	Points of Entry: Advising	Deploy the ticketing/triage functionality	IT
	RSSA	Points of Entry: Advising	Deploy student portal updates and integrate as required with other systems	IT
	RSSA	Points of Entry: Advising	Deploy technology updates for Accessibility department	IT
	RSSA	Points of Entry: Advising	Deploy student career portal updates	IT
	RSSA	Awards and Fees	Deploy reporting dashboard	IT, Finance

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Phased Roadmap Summary (17/20)

In Phase 3, the focus will be on building, configuring, testing, and deploying the selected Enterprise Resource Planning (ERP) products / modules / interfaces. Other focus areas include establishing process design changes, training staff on new processes / technology, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 3	RSSA	Awards and Fees	Deploy instant enrolment portal	IT
	RSSA	Awards and Fees	Deploy updated donor management system	IT, Finance, Advancement
	RSSA	Recruitment and Admissions	Develop and deploy the CRM and document management module	IT
	RSSA	Recruitment and Admissions	Develop and deploy the admissions system automations	IT
	RSSA	Registrarial Processes	Develop and deploy the course timetable system enhancements	IT
	RSSA	Registrarial Processes	Develop and deploy the document management system with revised policies	IT, Governance
	RSSA	Registrarial Processes	Deploy revised exam scheduling enhancements and automations	IT
	RSSA	Registrarial Processes	Develop and deploy the non-credit portal	IT
	RSSA	Registrarial Processes	Develop and deploy automations in ministry reporting process	IT
	RSSA	Registrarial Processes	Leverage updated system functionality to ensure communications are targeted and comprehensive	IT, Marketing
	Finance	Accounting	Implementation of ERP – Fixed Assets (Design, Build, Test, Deploy)	IT, Capital Planning
	Finance	Accounting	Statutory reporting optimization	
	Finance	Policies and Procedures	Travel and Expense Reimbursement Policy review, including service levels	Governance

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Phased Roadmap Summary (18/20)

In Phase 3, the focus will be on building, configuring, testing, and deploying the selected Enterprise Resource Planning (ERP) products / modules / interfaces. Other focus areas include establishing process design changes, training staff on new processes / technology, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 3	IT	Technology Landscape	Assess Application Rationalization Opportunities	All Functional Areas
	IT	Technology Landscape	Implement Data Integration Solution	All Functional Areas
	ERP Strategy	ERP Strategy	Implement ERP Product(s)/ Module(s)/ Partner(s)	HR, Finance, Advancement, RSSA

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Phased Roadmap Summary (19/20)

Laurentian University Université Laurentienne

Phase 4 will be a period of operational stabilization after the implementation of many new processes and systems. During this phase, the focus will be on rapidly acclimating staff to different workflows and systems while also addressing smaller inevitable issues such as bugs, system reconfiguration, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 4	HR	Compensation and Benefits	Implement employee development process	Finance, All functional Areas
	HR	Talent Management	Deploy vacancy management framework	All Functional Areas
	HR	Talent Management	Implement succession planning	All Functional Areas
	HR	Talent Management	Implement Talent Management application	Procurement, IT
	HR	Workforce Management	Establish HR Reporting processes	IT, Institutional Planning
	HR	Learning and Development	Track learning and development in compliance with legislation and in accordance with applicable collective agreements	IT, All Functional Areas
	HR	HR Service Delivery	Operate, sustain and maintain the system	IT, All Functional Areas
	HR	HRIS	Operate, sustain and maintain the HRIS system	IT, All Functional Areas
	HR	Grievance Management	Implement grievance management tool (Select, Configure, Test, Deploy)	IT, Procurement, All Functional Areas
	RSSA	Professional Development	Deploy institutional file plan	IT
	RSSA	Professional Development	Implement Standard Operating Procedures	HR
	RSSA	Awards and Fees	Leverage the portal to communicate with non-credit students	Marketing
	RSSA	Awards and Fees	Deploy updated fee system and framework	IT, Governance

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Phased Roadmap Summary (20/20)

Laurentian University Université Laurentienne

Phase 4 will be a period of operational stabilization after the implementation of many new processes and systems. During this phase, the focus will be on rapidly acclimating staff to different workflows and systems while also addressing smaller inevitable issues such as bugs, system reconfiguration, etc.

Start Phase	Work stream	Sub-work stream	Milestone	Dependency
Phase 4	RSSA	Tracking Success	Develop standard metrics and operating procedures for sharing success	IT
	Finance	FP&A	Stabilize New Technology/Processes	IT
	Finance	FP&A	First Budget cycle using new Budgeting Tool – Target 2026	All Functional Areas, HR
	Finance	FP&A	Forecasting	Governance
	Finance	FP&A	Decision Support Reporting	Governance
	Finance	Payroll	Stabilize New Technology/Processes	IT, HR
	Finance	Finance Operations	Stabilize New Technology/Processes	IT, Procurement
	Finance	Treasury	Stabilize New Technology/Processes	IT
	Finance	Accounting	Stabilize New technology/processes	IT, Capital Planning
	Finance	Policies and Procedures	Capital Expense Policy	Governance
	Finance	Policies and Procedures	Debt Management Policy	Governance
	Finance	Structure	Finance Target Organizational Structure Finalized	HR

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