



case study

# METHODIST HEALTH SYSTEM (MHS):

ERP implementation at a 6-hospital, 50-clinic Texas health system with 10,000 employees

After helping with the assessment and selection of the new Workday ERP platform, Impact Advisors provided client-side program management support while the MHS team got up to speed on the full suite of products.

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## ERP Selection & Workday Program Assurance

Choosing a new Enterprise Resource Planning system that delivered needed functionality and flexibility for MHS was paramount, but so was ensuring a successful implementation.

### Assessment & Selection

Impact Advisors first engaged with MHS to assess its current environment and document requirements for the "Next Generation" ERP system. This led to the issuance of a request for pricing from market-leading vendors and development of models to understand the full costs associated with each vendor and product.

With this due diligence complete, the team narrowed the field and conducted a formal vendor selection, including a detailed request for information, product demonstrations, reference calls, and an updated cost and value model.

### Client-Side Program Management

After facilitating the selection of Workday as the ERP system of choice, Impact Advisors was asked to stay and deliver client-side implementation support in several critical roles across Program Management, Integrations, Reporting, Security, Data Conversion, Testing, Change Management, and Training. Later, the team grew to include subject matter expert roles in Benefits, Payroll, and Finance.

The Workday ERP project involved a full-platform implementation across HCM, Finance, and Supply Chain functions. Impact Advisors managed workstream teams of both client and Workday Implementation Partner personnel to ensure a smooth installation. Due to the ongoing pandemic, much of the work was done off site, which required flexibility, responsiveness, proactive communication, and problem-solving, on top of Workday system functionality expertise.

### Results

- Supported an **on-time, full-platform Workday ERP go-live**
- Developed 300+ reports and 64 integrations across departments
- Helped client manage and close over 500 test scenarios
- Provided post-go-live support in the areas of Program Management, Integrations, Reporting, Benefits, Payroll, Production Tenant Migration, and Release Management

# Creative Problem Solving

In addition to the more tangible results realized through the Workday ERP implementation, the team tapped their considerable experience to address and overcome a few obstacles that stood in the way of fully leveraging the new system.

## Item Master System Image Upload

MHS wanted to ensure the Workday SCM platform item master displayed the correct images of products so that people placing orders would be confident they were selecting the right items, which they were unable to do with their previous system. The implementation partner shared that the client would need to manually upload all 4,000+ images from the various suppliers or convert the images to a format that could be uploaded into Workday.

Impact Advisors was able to develop a Studio program to automate the conversion of each item image to a Base64 string (over 4000 strings in total) capable of loading into Workday. This solution enabled the client to avoid a lengthy manual process and provide their staff with the advanced procurement and inventory system they envisioned.



## Ability to Generate Large Composite Reports

A critical piece of a new ERP system is the ability to generate robust reports. MHS required numerous corporate reports for month-end reporting. When these financial composite reports were initially prepared, the reporting groups were so large they brought the tenant to a halt in other areas, such as SCM, holding the other items in queue for processing until the finance reporting groups completed their run. Impact Advisors analyzed all daily scheduled items and devised a solution where the reporting groups could be run in batches at off-peak times, allowing for the data to be ready when the client needed it, but not negatively impact overall system performance.

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## Impact Advisors' Client-Side Roles

Impact Advisors provided dedicated, full-time practitioners and Workday certified configurators with a healthcare focus. Our Workday change management team provided support in crafting the change management and training strategies in addition to developing training for go-live to ensure a successful implementation.

- Program Manager
- Integrations Lead
- Reporting Lead
- Security Lead
- Test Lead/Release Coordinator
- Integrations Developers
- Report Writers
- Training Developers
- Lawson Legacy Data Conversion Expert
- Benefits Subject Matter Expert
- Payroll Subject Matter Expert
- Epic Subject Matter Expert
- Finance Subject Matter Expert