WolfieONE
Our Networked Enterprise

Student Experiential Learning Program (SELP)

Student Orientation
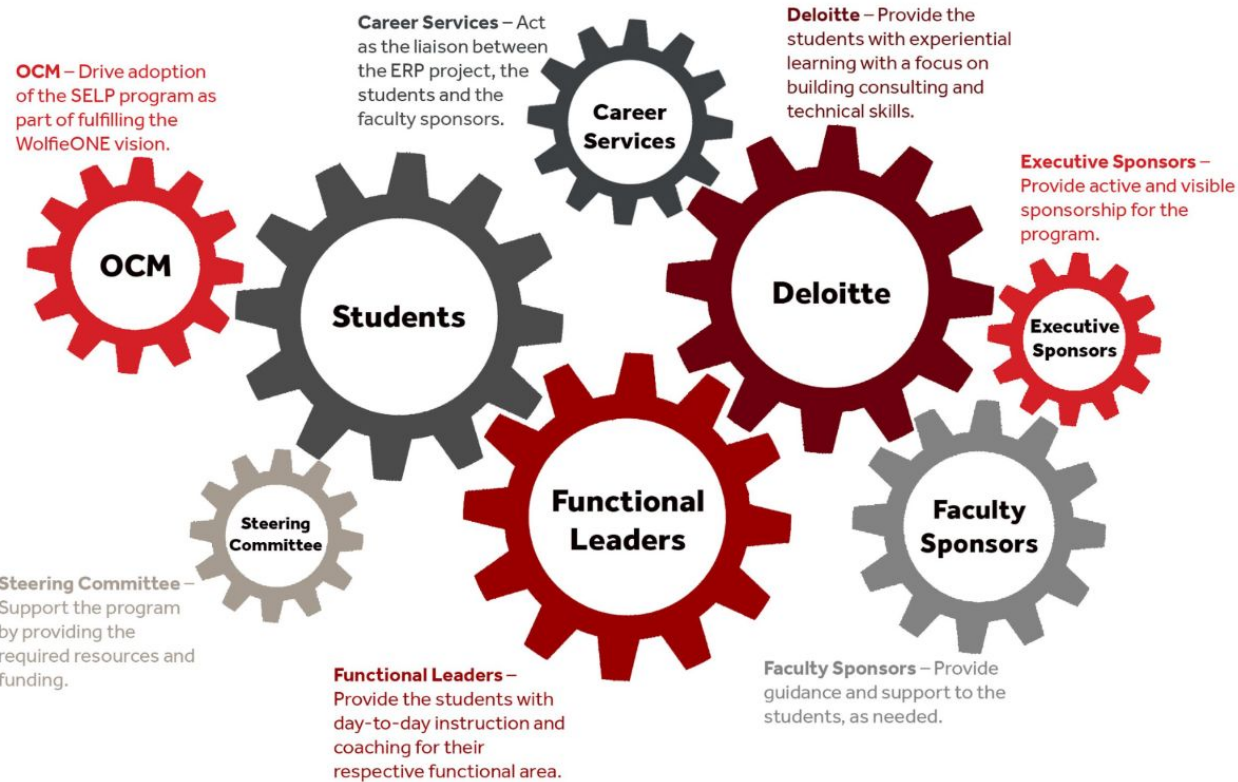
1/19/2024

Office of Change Management, Career Center, and Deloitte

Stony Brook University

FAR BEYOND

Welcome to WolfieONE!

THE PARTNERS ENABLING SELP AND ENSURING SMOOTH MOTION

OCM – Drive adoption of the SELP program as part of fulfilling the WolfieONE vision.

Career Services – Act as the liaison between the ERP project, the students and the faculty sponsors.

Deloitte – Provide the students with experiential learning with a focus on building consulting and technical skills.

Executive Sponsors – Provide active and visible sponsorship for the program.

Steering Committee – Support the program by providing the required resources and funding.

Functional Leaders – Provide the students with day-to-day instruction and coaching for their respective functional area.

Faculty Sponsors – Provide guidance and support to the students, as needed.

OCM
Career Services
Students
Deloitte
Executive Sponsors
Steering Committee
Functional Leaders
Faculty Sponsors

Agenda

WolfieONE

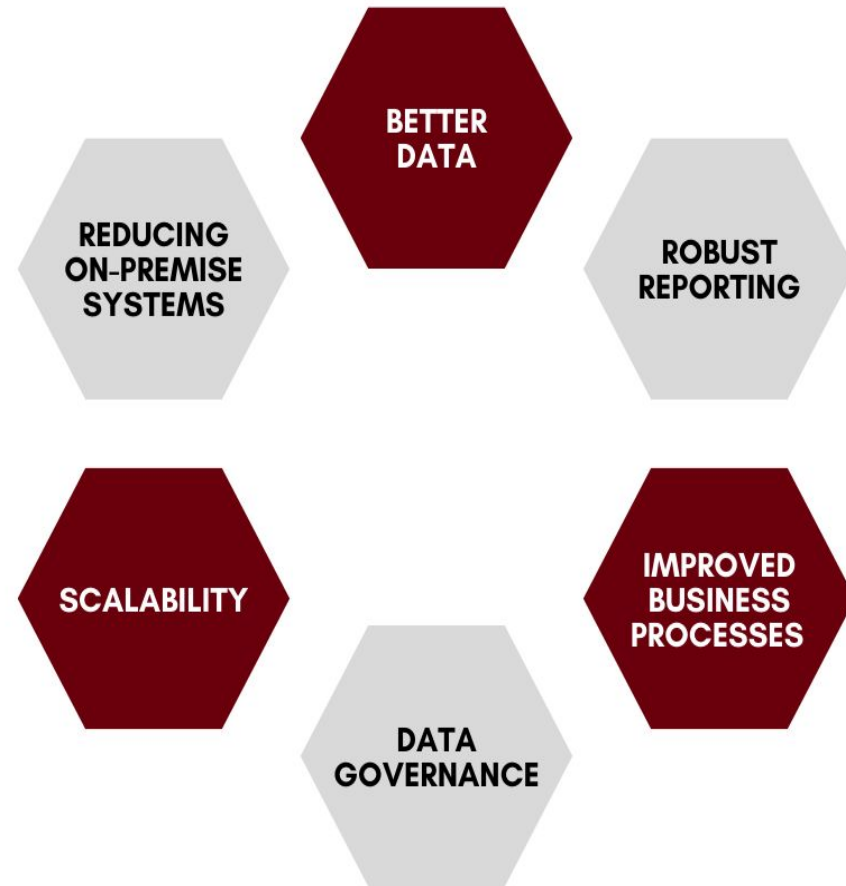| TOPIC	PRESENTER	TIME
Welcome & Introductions	Marianna Savoca	:00-15
WolfieONE Overview	Hina Kausar / Ted Simpson	:15-20
Breakout for Workstreams	Nichole Gladky	:20-30
Wolfieone CORE Curriculum / Semester Flow	Angela O'Leary / Mateline Moore / Kariley Famer	:30-40
Academic Credit	Marianna Savoca	:40-45
Logistics	Hina Kausar	:45-50
General Questions / Next Steps	Hina Kausar	:50-60

- Name

- Job title

- Role on the project

- Description of workstream / project objective

- One personal thing / fun fact

WolfieONE

- Name

- Year in School & Major

- Role on the project (which stream)

- Your career interests / aspirations
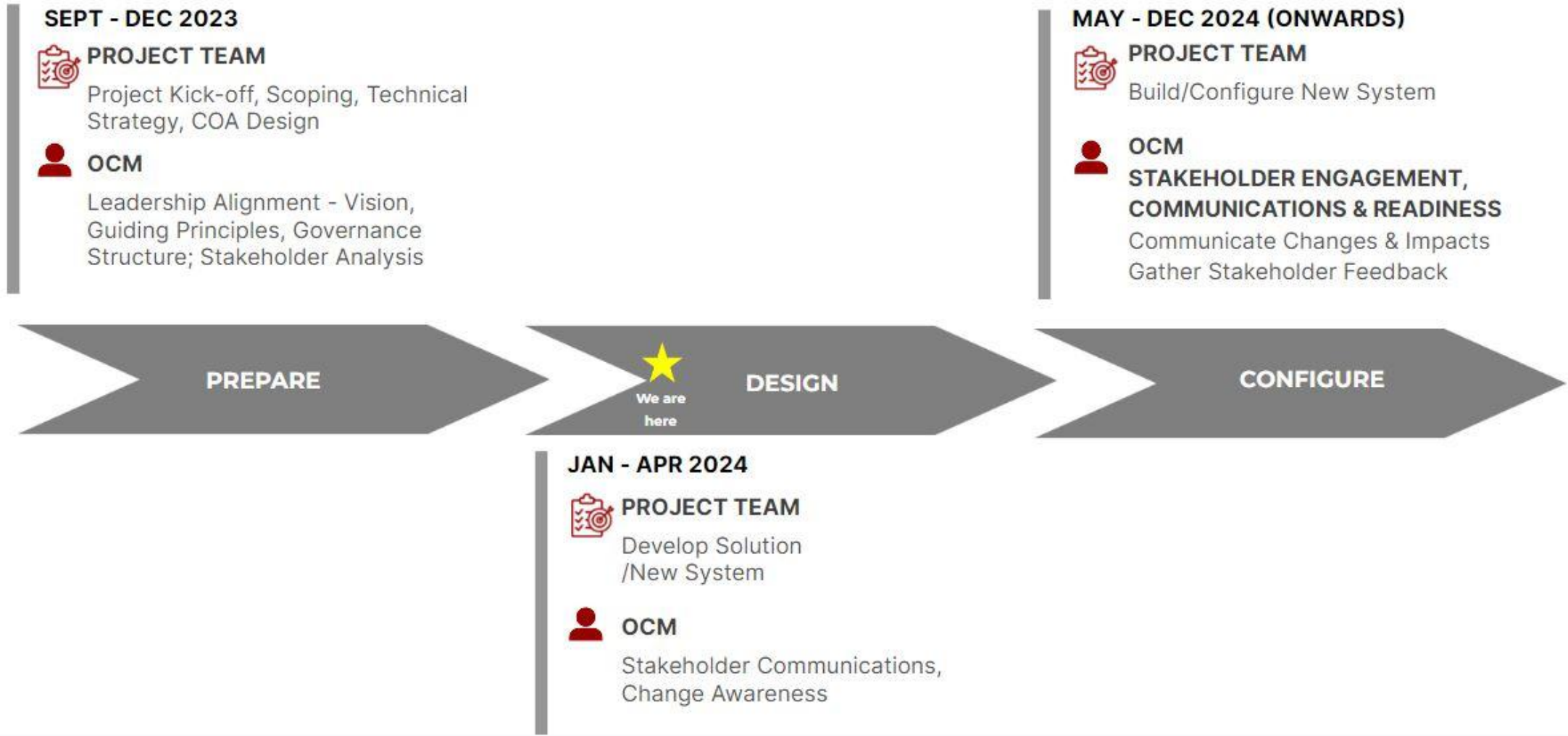
- One personal thing / fun fact

WolfieONE

Business Transformation Initiative:

WolfieONE is a strategic transformation initiative that will design and implement an Enterprise Resource Planning (ERP) ecosystem at SBU, supported by Oracle, to better support our financial, budget, HR and business operations.

The new, cloud-based software will replace some of our systems, but will also seamlessly integrate with many existing systems.
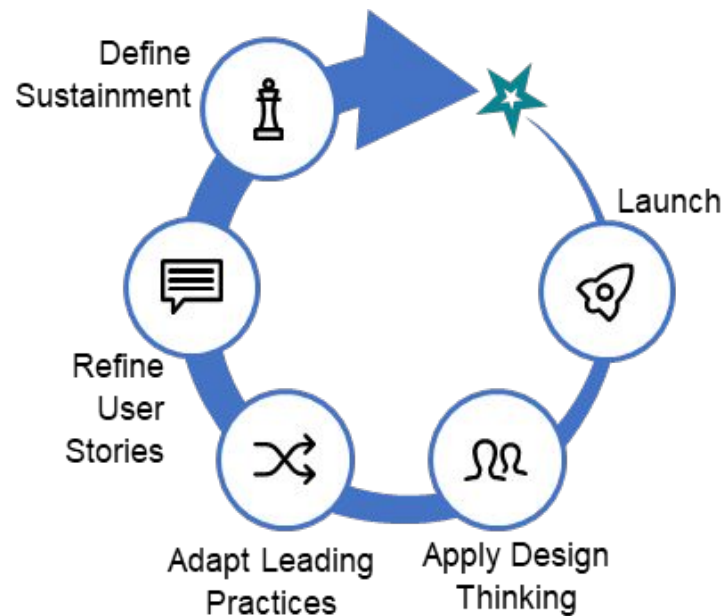
BETTER DATA

REDUCING ON-PREMISE SYSTEMS
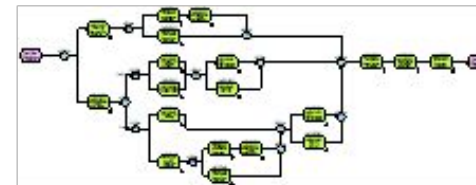
ROBUST REPORTING

SCALABILITY

IMPROVED BUSINESS PROCESSES

DATA GOVERNANCE

Project / Change Management: Timeline

WolfieONE

SEPT - DEC 2023

PROJECT TEAM

Project Kick-off, Scoping, Technical Strategy, COA Design

OCM

Leadership Alignment - Vision, Guiding Principles, Governance Structure; Stakeholder Analysis

JAN - APR 2024

PROJECT TEAM

Develop Solution /New System

OCM

Stakeholder Communications, Change Awareness

MAY - DEC 2024 (ONWARDS)

PROJECT TEAM

Build/Configure New System

OCM
STAKEHOLDER ENGAGEMENT, COMMUNICATIONS & READINESS

Communicate Changes & Impacts Gather Stakeholder Feedback

PREPARE → **DESIGN** (We are here) → **CONFIGURE**

What to Expect in 2024

Design Workshops: learning about personas, user stories, process inventory and other design elements.

Guided by Project Leads, we will gradually get used to performing tasks that allow us to clean up data for conversion, develop technical design documents and design business intelligence reports.
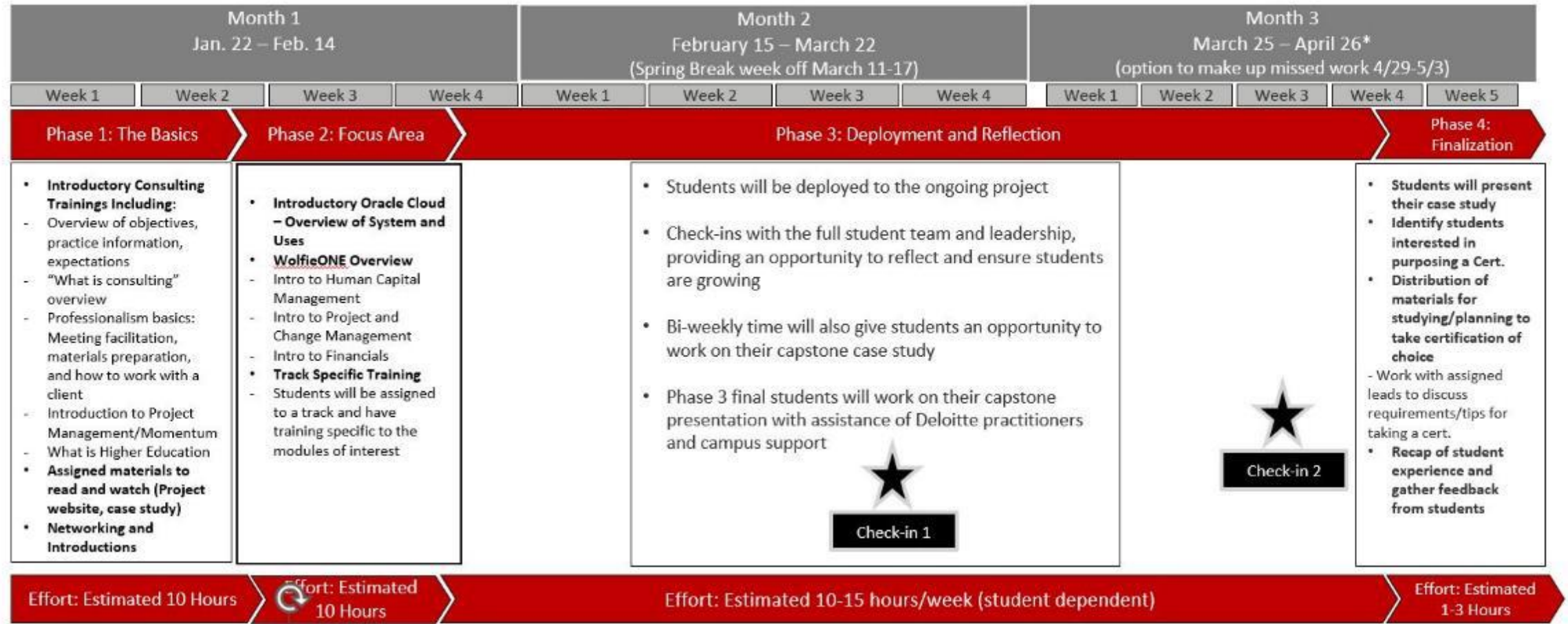
Workstream Breakouts

1. **ERP/Finance/Accounting** - Korak and Joshua
2. **EPM** - Nick and Kachun
3. **HCM** - Caleb, Tracey, Jennifer, and Clark
4. **IT** - Victor, Chandra and Scott
5. **OCM** - Hina, Ker and David
6. **PMO** - Heather, Ted and Emily

- **Consulting Skills/Terminology**
  - What is "consulting"?
  - Core Consulting skills
  - A consultant "day in the life"
- **Implementation Methodology**
  - Project Management
  - Deloitte's Momentum Methodology
- **Industry Focus**
  - Higher Education (unique needs of institutions)
- **WolfieONE Workstreams**
  - ERP (Financials, Accounting, Reporting, Chart of Accounts)
  - HCM (Human Resources)
  - EPM (Budget and Planning)
  - Technical
  - OCM (Organization Change Management)
  - PMO (Project Management Office)

WolfieONE

Month 1 Jan. 22 – Feb. 14				Month 2 February 15 – March 22 (Spring Break week off March 11-17)				Month 3 March 25 – April 26* (option to make up missed work 4/29-5/3)				
Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 5

Phase 1: The Basics → **Phase 2: Focus Area** → **Phase 3: Deployment and Reflection** → **Phase 4: Finalization**

Phase 1: The Basics
- **Introductory Consulting Trainings Including:**
- Overview of objectives, practice information, expectations
- "What is consulting" overview
- Professionalism basics: Meeting facilitation, materials preparation, and how to work with a client
- Introduction to Project Management/Momentum
- What is Higher Education
- **Assigned materials to read and watch (Project website, case study)**
- **Networking and Introductions**

Phase 2: Focus Area
- **Introductory Oracle Cloud – Overview of System and Uses**
- **WolfieONE Overview**
- Intro to Human Capital Management
- Intro to Project and Change Management
- Intro to Financials
- **Track Specific Training**
- Students will be assigned to a track and have training specific to the modules of interest

Phase 3: Deployment and Reflection
- Students will be deployed to the ongoing project
- Check-ins with the full student team and leadership, providing an opportunity to reflect and ensure students are growing
- Bi-weekly time will also give students an opportunity to work on their capstone case study
- Phase 3 final students will work on their capstone presentation with assistance of Deloitte practitioners and campus support

★ Check-in 1

★ Check-in 2

Phase 4: Finalization
- Students will present their case study
- Identify students interested in purposing a Cert.
- Distribution of materials for studying/planning to take certification of choice
- Work with assigned leads to discuss requirements/tips for taking a cert.
- Recap of student experience and gather feedback from students

Effort: Estimated 10 Hours → **Effort: Estimated 10 Hours** → **Effort: Estimated 10-15 hours/week (student dependent)** → **Effort: Estimated 1-3 Hours**

Note: Check-ins may align with the Career Center's check-ins as to what is covered and who should attend.

If credit is earned through this program, faculty may have additional requirements that will need to be completed by the student.

Asynchronous Work Assignments

- WolfieONE Project Website, particularly the News and Resources
- Watching the "ERP familiarization" recording (the file will be e-mailed to you if you can't access the hyperlink) - WEEK OF FEB 5-9TH
- Once Deloitte trainers have explained "Consulting 101" and "what is a Chart of Accounts", you will be asked to watch a Chart of Accounts recording- WEEK OF FEB 12- 16TH

EDM
Enterprise Data Management

Centralized platform to flexibly manage enterprise data while maintaining data integrity and enterprise application alignment. It will maintain and govern the Chart of Accounts elements for WolfieOne ERP and EPM systems.

Deloitte Lead: Kushan Trivedi

SBU Lead: David Ferer

Student: N/A (work has not begun)

ERP / Finance / Accounting
Enterprise Resource Planning

Leveraging cloud Enterprise Resource Planning to capture, manage, process, approve, and reconcile financial transactions across subledgers that "roll up" to the General Ledger. Managing the following:

- Fixed assets
- Cash management
- Financial dashboards
- General Ledger (including journal entries, account reconciliation and perform closing)
- Accounting hub
- Budgetary control
- Accounts receivable

Deloitte Lead: Korak Ganguly

SBU: Cassie Amadio

Student: Joshua Boone

EPM
Enterprise Performance Management

Leveraging cloud technology for:

- Strategic planning
- Target setting
- Financial planning
  - Departmental planning
  - BFP&A planning
- Multi-year forecasting
  - Departmental planning
  - BFP&A planning
- SmartView
- Narrative reporting

Deloitte Lead: Kushan Trivedi

SBU: Heather Montague

Student: Kachun Huang

HCM
Human Capital Management

Leveraging HR Cloud technology to perform functions such as:

- Reporting / employee and payroll analytics
- Workforce structures
- Employee data administration
- Employee self service
- Manager self service
- Compensation administration
- Learning administration
- Performance management administration
- Talent acquisition (recruiting and onboarding for SBU)

Deloitte Lead: Caleb Pingelton

SBU: Laura Gallagher/Tracey McEachern

Student: Clark Fischer

Technical / IT
Information Technology

Working with a team to prepare data in current systems for conversion to a new system, integrating systems (so that data will flow seamlessly between them and roll up to the General Ledger), and designing the reporting strategy/configuring reporting tools.

Deloitte Lead: Victor Loyalson

SBU: Jim Gonzales

Student: Scott Healy

Change Management (OCM)

Preparing and equipping stakeholders for change, gaining buy-in, enabling adoption, leveraging change activities, communications, and training. Measuring and monitoring progress.

Deloitte Lead: Ker Famer

Stony Brook Lead: Hina Kausar

Student: David Tagoe

Project Management (PMO)

Managing the Project Plan, cross-functional collaboration, monitoring risks, assumptions, issues and dependencies, documenting decisions, ensuring the progression and execution of tasks for each phase.

Deloitte Lead: Ted Simpson/Caleb Pingelton (Instructor for SELP is Ker Famer for Phases 1 and 2)

Stony Brook Lead: Heather McLaughlin/Marcelo Pessotto

Student: Emily Zheng

WolfieONE

- Enroll in **EXT 488** for 3 credits

  - Kevin Moriarty is the faculty sponsor
  - Academic work assigned by Dr. Moriarty

- Career Center liaison: Marianna Savoca

  - Mid-term reflection
  - Qualtrics survey evaluation in May

WolfieONE

- [SELP Calendar](#)
- [SELP Website](#)
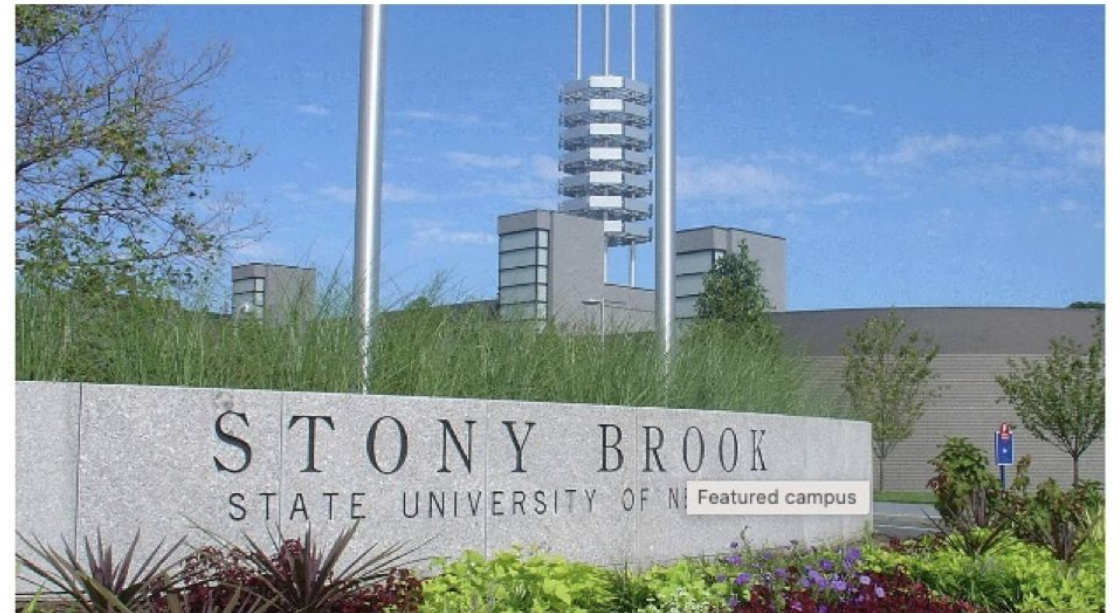- Supervision
- Payroll
- Work location
- Devices

Program Information: Next Steps

WolfieONE

- Take required training (Stony Brook SELP class- Consulting 101 - Mattie Moore, Friday, January 26·1:00 – 2:00pm; Stony Brook SELP class- Oracle 101 - Mattie Moore, Friday, January 26·2:00 – 3:00pm)
- Leads and students work on schedule
- Watch for information on work location and devices from OCM

Here we go Seawolves!

Thank YOU!

Designed for Change. Built for You.

Stony Brook ranked #1 among public universities in New York, #26 among public universities in the U.S. and #58 nationally in 2024 Best Colleges

STONY BROOK
STATE UNIVERSITY OF N   Featured campus

Appendix

FAR
BEYOND

Vision and Guiding Principles

TRANSPARENCY AND INCLUSION

GOVERNANCE

STONY BROOK FIRST

Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.

SINGLE SOURCE OF TRUTH

TRANSFORMATION

OPTIMIZED OPERATIONS & PROCESSES

Executive Sponsors

Carl Lejuez

Provost and Executive Vice President

Judith B. Greiman

Chief Deputy to the President
Senior Vice President for Government &
Community Relations

Carol Gomes

Chief Executive Officer, Chief Operating
Officer
Stony Brook University Hospital

Dr. T. Simeon Ananou

CIO
Vice President of DoIT

Dr. Gerald Kelly

CIO
Stony Brook Medicine

Jed Shivers

Senior Vice President for Finance &
Administration

Steering Committee

Braden Hosch

VP for Educational and Institutional Effectiveness

Cassie Amadio

AVP for Accounting and University Controller

Colette Brown

Chief HR Officer
Stony Brook Medicine

Heather Montague

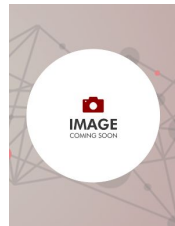Senior AVP for Budget and Financial Planning

Hina Kausar

Director
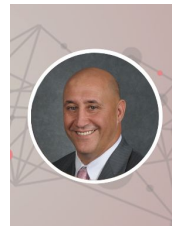Office of Change Management

Jim Gonzales

AVP Enterprise Applications and Integrations (DoIT)

John Hennessey

Chief Applications Officer
Stony Brook Medicine

Lyle Gomes

VP for Finance

Tracey McEachern

AVP HR Operations, Services, and Payroll

Dennis Gallagher

CTO
Medical Information System

Student Program Liaisons

Marianna Savoca

Kevin Moriarty

Ted Simpson

Associate Vice President for Career Readiness & Experiential Education

Undergraduate Program Director TSM

Managing Director Deloitte