Advancing to
Performance Management Solutions

Emory Finance Systems and Data Analytics Organization:
Overview and Enhancements
Emory Enterprise Finance Organization: The Vision

A finance “organization” that has fewer boundaries and fosters alliances among school, units, and support unit finance leaders to work effectively

- Embraces a talent development and succession planning system, which results in defined career paths
- Fosters financial investment which demonstrates return on value and/or investment to guide resource management decision making
- Guides and implements business plans driven by strategic plans and executed with annual budgets
Benefits of Emory Enterprise Finance

- More efficient resource usage
- Less rework & duplicate checking of activities
- Reduced outcome variances
- Less frustration from uncertainty
- More time for direct mission activity
- Strong foundation to pursue research and academic activities
- Better understanding
- Improved controls & less fraud
Enterprise Opportunities

Data Driven Decisions

Multiple Data Points . . . . Multiple Delivery Options . . . . One Source
Organizational Enhancements

Enterprise Performance Management (EPM) - Financial Systems and Data Analytics

**Structure Highlights:**
- BI is leveraged for **increased results**
- Technical and functional resources are **integrated**
- New functional areas added to support **CFO vision**
- Additional opportunity for **career growth** and development within the finance organization
- Increased **alignment** and oversight for complimentary solution areas within the department
- Enhanced **communication** and **collaboration**
- Enhanced **financial reporting**

**Potential Challenges:**
- Need to build new relationships
- Will be identifying key metrics and measurements
- Move to decision-driving analytics in addition to historical reporting
- New role for the institution-education is critical
- New functions may require skill development
EPM Department Functions Overview

- Enterprise Performance Management & EBI
- Financial Systems Administration
- Data Integration
- Client Support Center
Enterprise Performance Management & EBI:  
**Senior Director, Enterprise Performance Management**

- Work cross-functionally with business and campus leaders to determine and meet reporting and analytic needs
- Collaborate with business leaders to develop customized analytic solutions
- Identify occurrences, causes, and solutions to ensure data integrity
- Ensure naming conventions are up to date in PeopleSoft to data warehouse
- Design and deliver financial dashboards
- Prepare and develop financial data analytics
- Enhance reports
**Financial Systems Administration: Senior Director, Financial Systems Administration**

- Manage Financial and Accounting systems administration
- Ensure systems security
- Manage and execute the Compass upgrade project
- Manage monthly and annual closing activities
- Manage workflow and work center
- Execute troubleshooting and system configuration
- Execute PUM strategy for future upgrades
- Identify occurrences, causes, and solutions to ensure data integrity

**Excludes LITS technical teams**
EPM Department Functions Overview

Data Integration:
Manager, BI Developer & Data Integration

- Report to both Finance Systems and Data Analytics & Enterprise Applications LITS
- Support through development initiatives, enterprise data management, analytics and reporting
- Develop complex reports and designs
- Ensure data warehouse full capability and architecture
- Identify occurrences, causes, and solutions to ensure data integrity
Client Support Center:
*Director, Client Support Center*

- Provide centralized helpdesk support for finance and EBI systems/modules
- Develop and deliver engaging and proactive systems training to support user needs and encourage adaptation and utilization of system and reporting resources
- Provide website and policy updates for finance
- Standardize and optimize client training for various campus units
- Execute business process and procedure mapping
- Develop and distribute training material
- Identify occurrences, causes, and solutions to ensure data integrity
Organization Alignment – New Structure

Data Integration
- Manager – BI Developer
- ETL Developers (2)
- Data Warehouse Architect
- OBIEE Developer (2)
- Security (0.5)

Enterprise Performance Management & EBI
- Sr Director – EPM & EBI
- Data Analyst (2-3)
- Reporting Analysts (2-3)
- Testing Lead for Data Integrity & Quality

Client Support Center
- Director Client Support Center
- Training & Communications (2-3)
- Client Support Analysts (2-3)

Compass Upgrade Team & Financial Systems Administration
- Sr. Director Compass Upgrade
- Sr. Director Financial Systems (2)
- Accounting System Administrators (6-7)
- Business Analysts (1-3)
- Security Analysts (1-2)
# Performance Management Implementation Plan

## Stage 1: Strategy
- **Clear Strategy Ready for Communication**
  - Define executive goals
  - Map timeline and targets
  - Identify key stakeholders
  - Identify opportunities and challenges to plan
  - Identify business needs
  - Identify value proposal for Emory

## Stage 2: Infrastructure
- **Direction & Infrastructure Defined; Key Alliances Formed**
  - Complete staffing decisions and timeline
  - Developing enterprise performance management frameworks
  - Inventory of common measures is explored so data needs are clear
  - Communicate strategy & obtain input from CBOs and Deans.
  - Communicate strategy with current EBI governance groups

## Stage 3: Implementation Plan
- **Complete Performance Management Implementation Plan**
  - Prioritize performance measures for release
  - Create Scorecard Framework and Data Maps
  - Creation of the Decision Support Group (DSG)
  - Creation of strategic advisory group
  - Form relationships with other data owners (Student, HR, research, etc) to evaluate Dean/VP needs

## Stage 4: Build
- **Demonstrations of new visual framework**
  - Draft plan to create a performance focused culture
  - Establish Accountability For Performance
  - Develop best-practice visualizations and charts to communicate KPIs and performance data based on agreed-upon priorities
  - Demo results of top priority item(s) With CFO

## Continuing Improvement
- **Satisfied Stakeholders & Improved Decision Making at all levels**
  - Activity/process owners use performance information for continuous improvement

### Key Partners in Stage
- **Chief Finance Officer**
- **Chief Budget Officer**
- **Major Unit Chief Business Officers**
- **EBI Consultants & Staff**

### Target Completion Date
- **April 30, 2015**
  - 60 Days
- **June 30, 2015**
  - 90 Days
- **September 30, 2015**
  - 90 Days
- **March 1, 2016**
  - Ongoing
Navigating to EPM – Next Steps

• CFO will continue to communicate the strategy to key partners and stakeholders

• New organization senior leadership role(s) transition:
  – AVP, Finance Systems & Data Analytics
  – Controller
  – Senior Advisor (Training Support)

• Staffing and onboarding of new positions and/or skillsets

• Discussions with management regarding any modifications to roles and responsibilities to support vision

• Training opportunities for skill development assessed and executed where applicable

• Ongoing communication and discussions with finance leadership as this plan is rolled out to provide opportunities to give input and voice any concerns
Questions or Concerns?