Global transformational cloud deployment of HCM, ERP and more at GP Strategies

CON1389
Dan Mills, Grant Thornton
Pat Begley, GP Strategies
Our session today

GP Strategies Corporation is a worldwide brand in global performance improvement solutions. The company has undertaken a strategic transformation to modernize its back office HR and Accounting functions. Attend this session to learn more about GP Strategies' decision to change how its organization operates, why it chose to move to the cloud, how it selected Oracle Cloud, and the latest on its HCM transformation.

Pat Begley
Executive Officer

Dan Mills
Managing Director
Today's discussion

1. About GP Strategies Corporation
2. Our Oracle Cloud journey
3. Lessons learned
GP Strategies...making a meaningful **IMPACT**

for our customers and their employees.

- **1966**
  Business Founded

- **Headquarters**
  Columbia, MD USA

- **Global Presence**
  75 Offices in 31 Countries throughout Americas, EMEA, and APAC

- **148**
  of Fortune 500 Companies

- **90% Repeat Customers**
  Year-after-year

- **$509M**
  2017 Revenue

- **3,500+**
  Employees

- **GPX**
  LISTED
  NYSE
  Publicly Traded
  NYSE (GPX)

- **148**
  of Fortune 500 Companies
Our Purpose

To enable people and businesses to perform at their highest potential
Choosing Oracle Cloud

Make better, sound, conscious, and coordinated investments

- Global consistency and a more accurate view of the client by market sector to inform and drive our strategic direction
- An information, analytical, and knowledge engine that supports real-time collaboration and rapid decision making across our extended enterprise
- Access to a wealth of information with reporting that allows prescriptive analytics and demographics
- Increased transparency – reporting and access to data – and ability to view a report by product line or business unit GLOBALLY
- Bold innovation, geographic expansion, and acquisitions will be the engine for our sustained growth
Partnering with Grant Thornton

Office locations
59 offices spread across 30 states and Washington D.C.

Reach
Serve 36% of companies on the 2017 Fortune 500 list and 25% of companies on the Russell 2000 list

People
More than 8,300 professionals in the U.S.

Partners
615 partners serving more than 8,000 clients in the nation

Our services
• Assurance • Tax • Advisory

Revenue
GT U.S. net revenue equals $1.75 billion
Our Oracle Cloud journey
Project objectives

Replace a legacy system that had been in place for 20 years with a transformational cloud solution that could be deployed across:

- 43 Business units
- 28 unique currencies
- 31 Countries
- ~3500 Employees
- ~500 Contingent workers
Project challenges

A global organization that has grown by acquisition
- Inconsistent business processes across BUs and geographies
- Differences in how key roles are performed

Varied needs of impacted audiences
- Broad audience for ESS tasks
- Large distributed audience for project management

Strong need for sustainable solution
- Continuing acquisitions
- Cloud software
Project expectations

Strategic investment in a new HR solution
• Integrate time and attendance and payroll systems
• Instill a set of HR best practices and processes, thereby eliminating custom applications

Alignment with strategic architecture – cornerstones
• Develop a foundation of stronger service delivery model, talent management framework, and overall enhanced employee life cycle
• Standardize processes and eliminate custom applications
• Introduce manager self-service and employee self service
• Enable faster decision making with best in class time Analytics

Alignment with strategic architecture – accelerators
• Attract better talent with a modern platform.
• Ux of application relevant to driving adoption
• Support Talent needs of company
The cloud solution

**Deployed**

- ERP
- VM
- HCM
- EPM

**Business Functionality**

- Project management
- Expense management
- Customer master data
- Back office and accounting
- International and domestic tax filing
- Government contracting
- Vendor/subcontractor management
- Purchasing/procurement
- Supplier Self Service (SSS) Portal
- Time management
- Human capital management
- Payroll
- Planning and forecasting

© Grant Thornton LLP | All rights reserved | U.S. member firm of Grant Thornton International Ltd
ERP/VM program scope

Intelligence
- ERP analytics and reports

Financials
- Customer master data
- General ledger
- Accounts payable
- Accounts receivable
- Fixed asset management
- Government Contracting
- Expense management
- Project management
- Accounts payable
- International and domestic tax filing and management

Vendor Management
- Vendor/Subcontractor management
- Purchasing/Procurement
- Supplier Self Service (SSS) Portal
## HCM program scope

<table>
<thead>
<tr>
<th>Intelligence</th>
<th>HR analytics and reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service</td>
<td>Talent acquisition / sourcing</td>
</tr>
<tr>
<td>Talent Management</td>
<td>Manager and employee self service HR</td>
</tr>
<tr>
<td>Workforce Management</td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td>Absence management</td>
</tr>
<tr>
<td></td>
<td>Time &amp; labor (workforce management)</td>
</tr>
</tbody>
</table>
Overall project timeline

**Plan**
- Kick-off
- Vendor Management
- HCM/ERP Global Design
- Design & process docs complete

**Config**
- CRP
- Test inputs complete
- Govt Compliance

**Test**
- Integration/conversion complete
- Test

**Go-Lives**
- Milestones/events
- EPM
- Training
- GO-LIVE

© Grant Thornton LLP | All rights reserved | U.S. member firm of Grant Thornton International Ltd
Project delivery approach

The project methodology follows best practices in system implementations, targeting meeting business needs, and proceeding in an accelerated fashion.

- Incorporate best practices
- Ensure business transformation is supported by the system
- Accelerate approach through the use of deliverable templates and built-in Cloud ERP, HCM and BPM tools
- Leverage Agile development principles: allow users to visualize and experience the application early in the implementation process
- Integrate change and quality management activities
Project delivery strategies

What do you want?

- Will this work?
  - Understand capabilities
  - Leverage built-in leading practices
  - Emphasis on adapting to gaps

What do you want?

- vs.

Can we customize it?

- Is it configurable?
  - Highly-configurable options
  - Shorter test cycles
  - Predictable results

Can we customize it?

- vs.

When can we see it?

- Ready to try again?
  - Frequent visualization of solution
  - Ability to inject changes
  - Better understanding of solution prior to testing

When can we see it?

- vs.

Are we done yet?

- What's next?
  - Shorter implementation cycles
  - Multiple wins
  - Change over time

Are we done yet?

- vs.

Solution-driven

Adapt processes

Iterative

Incremental
Results and takeaways
Factors to consider

Change management impacts
• Migration from a embedded legacy system with a highly experienced user bases will present challenges on many fronts
• Time and effort to transform a large global user bases is significant and critical – don’t underestimate the importance

Project management
• Essential to build a strong cohesive PMO team
• Be disciplined, proactive and realistic
Factors to consider

Understand risk
• Accept the need to mitigate
• Be aware that timeframe expectations can be powerful motivators, but they also can create significant risk blind spots
• Big bang approaches carry significant risks that might not have optimal mitigation options

Data conversion
• Know your data and set expectations accordingly
• Non-normalized data elements will impact the time to convert
• Develop a thorough reconciliation approach

Expect productivity to dip
• New systems, processes and technologies will impede productivity initially
Benefits

Oracle Cloud is driving efficiencies in many parts of the business:

• Improved ability to forecast financial performance
• Easier budgeting process, bottom-up with project budgets linked to business unit budgets
• More timely and simplified access to financial data, including project and business unit performance
• Automated business processes, removing unnecessary manual steps
• Condensed time for monthly, quarterly, and yearly close
• Efficient consolidation of income statement results
• Technology landscape that is adaptable to growth and change
• Multi-currency, multi-country
Keys to success

• Clear definition of **scope – monitor and adjust** as business needs require
• Acceptance of cloud applications – **adapt to capabilities**
• Understand and integrate the cloud release cycle(s) into your plans
• Top management **support and commitment**
• Proper **allocation of resources** to support implementation lifecycle
• Project management including proper usage of **Oracle Implementation Success Manager**
• Proven **methodology** and project approach
• **User involvement** throughout the project to begin to create buy-in and support for the new system
• Redesign and alignment of **business processes** to support the new system
• Structured **change management** process
• Detailed **implementation plan** – and manage to it
• Develop and execute robust **testing plan**
• Ability to make **timely decisions** throughout the project
Partnering with Grant Thornton
Creating business harmony in the cloud

ERP and SCM
Financials | Revenue management | Accounting hub | Project accounting | Risk management | Project execution | Procurement | Inventory management | Cost management | Maintenance | Manufacturing | Order management | Product lifecycle and data management | Supply chain collaboration and planning

EPM Analytics
Planning and budgeting | Profitability and cost management | Financial close and consolidation | Tax reporting and provisioning | Management and operational analytics | Narrative reporting | Account reconciliation | Enterprise data management

HCM
Culture journey | Talent acquisition | Workforce administration | Talent management | Workforce development | Alumni network

Data governance & cloud integration

PaaS

Solution delivery center (off-shore and on-shore)

Industries
Construction, Real Estate & Hospitality | Consumer And Industrial Products | Energy | Financial Services | Health Care And Life Sciences | Not-For-Profit Organizations | Private Equity | Public Sector | Technology

© 2017 Grant Thornton LLP | All rights reserved | U.S. member firm of Grant Thornton International Ltd
Questions
Closing

Dan Mills
Managing Director
dan.mills@us.gt.com
Office: 913.272.2719

Pat Begley
EVP, Business Transformation
pbegley@Gpstrategies.com
Office: 443-539-8524
Don’t miss these insightful sessions

**Wednesday**

10:30–11:20 a.m.  
**Cherokee Nation Businesses creates a strategic HR advantage with Oracle Cloud**  
Don Bender, Grant Thornton and Robin Lacy, Cherokee Nation Businesses  |  Islander B – North Convention Center

10:30–11:20 a.m.  
**Building the foundation for growth with Oracle Cloud**  
Enzo Santilli, Grant Thornton and Josh Stauffer, HarbisonWalker  |  Islander D – North Convention Center

11:40 a.m.–12:30 p.m.  
**Connected planning: Integrate budgets & capital to drive growth, connect strategy**  
David Dawson, Michael Baker International | Tradewinds B – North Convention Center

1:10–1:30 p.m.  
**Are you being transformative enough with your cloud migration?**  
Devon Snyder, Grant Thornton  |  Finance Hall

**Thursday**

9:00–9:50 a.m.  
**Global transformational cloud deployment of HCM, ERP and more at GP Strategies**  
Dan Mills, Grant Thornton and Pat Begley, GP Strategies  |  Islander D – North Convention Center

9:00–9:50 a.m.  
**Caesars Entertainment’s cloud transformation: The first step in the journey**  
Jason Schwab, Grant Thornton and Alex Gilmour, Caesars Entertainment  |  Islander H – North Convention Center

1:45–2:35 p.m.  
**Penn National Insurance secures its future with Oracle Cloud**  
Devon Snyder, Grant Thornton and Thom Korber, Penn National Insurance  |  Islander D – North Convention Center

2:50–3:40 p.m.  
**Status Go: Grant Thornton’s cloud transformation**  
Devon Snyder, Grant Thornton  |  Islander G – North Convention Center

---

Visit Grant Thornton at kiosk 16 in the Finance showcase for a chance to win a Ring security camera!