

Australia's First TechnologyOne SaaS+ Implementation



The Client

The client is a large and influential Australian Union who play a pivotal role in representing worker interests within the healthcare sector.

CHALLENGE

Our client's project was a significant undertaking involving the implementation of a new cloud-based finance application (TechnologyOne's OneBase) and the complete migration of detailed historical finance data spanning eight years. It also included the automation of external transactions and invoice scanning capability. The challenge was to define clear, measurable, and achievable project objectives while aligning with overarching goals.

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More significantly, this implementation was the first done nationally for TechOne's SaaS+ approach – an innovative bundling of license and implementation into a single structure to accelerate and assure client delivery. This approach drove some unique needs in scoping, planning and delivery, and in managing change. Exent has developed unique intellectual property around the SaaS+ method including a comprehensive wrapper project framework, templates, tools and accelerators.

Exent worked closely with the client and encountered several challenges:

- + **First-Of-Its-Kind Deployment:** Successfully balancing alignment risk during the first national deployment of SaaS+ approach, while partnering and collaborating with TechnologyOne and the client as one team, presented a significant opportunity but also potential risk if not done well. Navigating this critical first step was essential to achieve a successful outcome.
- + **Rapid Deployment Challenge:** Striking a balance between operational and project resources to ensure adherence to critical milestones, deploying the cloud-based finance application, and migrating historical data within the agreed timeframe and budget.
- + **Legacy Systems Integration Challenge:** Driving strong integration to support detailed extensive data migration required a seamless database integration between the legacy asset management system and the new TechOne OneBase SaaS product to ensure the accurate and timely transfer of historical financial metadata – a unique approach to real-time data delivery.
- + **Team Alignment Challenge:** Effectively managing multi-disciplinary teams and diverse stakeholder interests, ensuring a cohesive project team where everyone understands their roles and responsibilities and collaborates efficiently.
- + **Technology Interoperability Challenge:** Seamlessly integrating new technologies without disrupting existing operations, ensuring the new cloud-based finance application cohesively functions with existing systems to enhance overall operational efficiency.
- + **Effective Communication Challenge:** Establishing and maintaining clear, timely information flow among all project stakeholders and throughout the organisation, implementing a strong communication strategy to keep stakeholders informed, engaged, and aware of project progress, changes, and challenges.

These challenges represent known challenges within any ERP, but also the additional complexities of a novel SaaS+ approach and the extra hurdles in Finance migration required complete fidelity in data and configuration.

Navigating these objectives was critical effectively to achieving project outcomes and client value.

APPROACH

Exent adopted a people-centric methodology to fully engage stakeholders, coupled with a modern, agile approach to project governance and delivery, supported by a blended team of talent for strong execution. We were able to support the pace that the business could sustain, and delivered the project in eight months, on schedule, ensuring stakeholder delight and a quality implementation.

This approach prioritised user experience, streamlined project delivery, improved configuration collaboration, and promoted effective communication.

Beyond standard aspects of ERP project delivery, certain aspects of our approach were novel:

- + **Rapid Deployment:** The adoption of the SaaS+ framework, delivering a fixed project around a fixed scope, required us to very accurately capture and assess current vs target states and to provide robust solutions to any transition gaps. This early work was pivotal to meeting stakeholder expectations while supporting the client's partners in TechnologyOne's consulting division.
- + **Detailed Finance Transition:** We address multiple Finance complexities at once – migrating finance operations, transitioning to a fully automated invoice scanning and matching process, replacing a legacy asset management platform with a modern cloud-based solution, deep and detailed historical data migration, and moving to a modern reporting regime.
- + **Team Alignment:** Exent brought an innovative resourcing model which supported fractional on-tap consultants to maintain economy while not sacrificing pace. We fielded a Project Manager, multiple Consultants, and a blended 'one team' approach with rituals and cadence to ensure alignment and integration between the client and TechnologyOne. Project culture was paramount to delivering well.

- + **Gap Analysis:** Recognising the constraints on solution scope, we were called on to provide depth and candour in AS-IS and TO-BE mapping, which was done extensively via process mapping and change mapping, then performing detailed gap analysis and resolution strategies.
- + **Training & Testing:** Exent developed agile approached to user training, leveraging and building IP extensively, and delivering multiple tranches of training with some innovative user-led strategies. We were called to bring rigour to testing given the significant changes from current to target state, which was deliver in multiple layers by multiple cohorts and some client-led streams to build self-sufficiency in the long term.

OUTCOMES

As a true partnership between Exent, the Client, and TechnologyOne, a key outcome was the road-testing and execution of TechnologyOne’s SaaS+ deployment approach – recognised across all parties as breaking new ground and harvesting the intellectual assets to build scale in the SaaS+ deployment approach.

To demonstrate this partnership, Exent provided a number of resources free of charge to review, align with, and build the wrapper around TechOne’s SaaS+ method - a significant investment – that has yielded unique expertise and frameworks to drive future success, and is a reflection of how the firm genuinely partners with leading technology vendors.

Key project outcomes included:

- + Delivery of agreed scope in full, project delivered completely to time, with very strong alignment and satisfaction across all parties including client, TechnologyOne and Exent’s teams.
- + Major transformation of Client’s operations across Finance function, core finance users, and out into the broader enterprise workforce for finance self-serve. Delivery of a modern, cloud SaaS platform on which to drive gains in efficiency, staff experience and scale.
- + Unique SaaS+ expertise and learnings across everything from solution configuration, design process and assets, data migration templates and practices, clarity on testing scenarios and assets, known “day zero” challenges.

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