

WEBINAR

Mastering Workday: Ask an Expert Series

Session: **Business Process Management with Workday HCM**



Engagement Encouraged!



- **Interactive Q&A Sessions:**
Get your specific Workday questions answered live by our experts, ensuring you leave with practical solutions tailored to your needs.
- **Expert Insights & Tips:**
Gain exclusive access to professionals who will share valuable insights, tips, and best practices to enhance your Workday experience.
- **Real-World Case Studies:**
Learn from real-world use cases that showcase how other organizations are successfully leveraging Workday to solve common challenges and drive business success.

WELCOME

Today's Experts



Beth Taggart

Workday HCM Solution Architect
Armanino



Taylor Jackson

Workday FINS Solution Architect
Armanino

Today's Session

Business Process Management

- Implement best practices for core staffing workflows in Workday
- An Agile Approach
- Software Development Life Cycle (SDLC) principles to address:
 - Backlogged change requests
 - Evaluating cross-functional impacts
 - Optimizing testing strategies for effectiveness
 - Learn how to seamlessly migrate changes through well-documented production sprints for enhanced efficiency and productivity



Workday Business Process Best Practices

A Business Process is a workflow used to complete an event that contains a series of configurable steps.

- Workday delivers 700+ Business Process Types across 90+ functional areas
- Workday owns creating new business process types
- Customers configure business process definitions to meet unique business needs
- Default definitions are provided as a starting point

View Business Process Definition Hire (Default Definition) [icon]

Effective Date: 10/02/2024 Security Group Restrictions
Time Zone: GMT-08:00 Pacific Time (Los Angeles)
Most Recent Used Date: 03/25/2014
Due Date: 2 Weeks
View Diagram

Business Process Steps: 24 items

Step	Order	If	Type	Specify	Optional	Group	Additional Information
CL	a		Initiation		No		
CL	b	Country is not USA?	To Do	Local Employee Documentation	No	HR Partner	Restriction: Subject Alternative Manager (relative to excluded)



Who?



What?



When?

Ideally, the business process framework provides the backbone to your system, offering a high level of configurability while also standardizing and consistency for everyday processes.

■ Design

- Remove steps and approvals that don't have a very specific business reason to reduce backlogging business processes
- Condition rules - separate rules vs large complex condition rules
- Notifications – turn off system notifications, reduce custom notifications to end user employees
- Rule Based Business Processes – helpful if you have a decentralized organization and different business units have completely different processes

■ Security

- Mass Cancel / Mass Rescind – LIMIT security
- Refine the business process policy access so the employee can view things appropriately

■ Testing

- When you test end to end processes try to use the actual workers with no proxy so you are testing real use cases
- All stakeholders involved, if you're a live client test in SBX, and ensure end users have correct education on any changes
- Test integrations – as part of the planning effort make sure you understand the downstream impacts to integrations

■ Audit reports

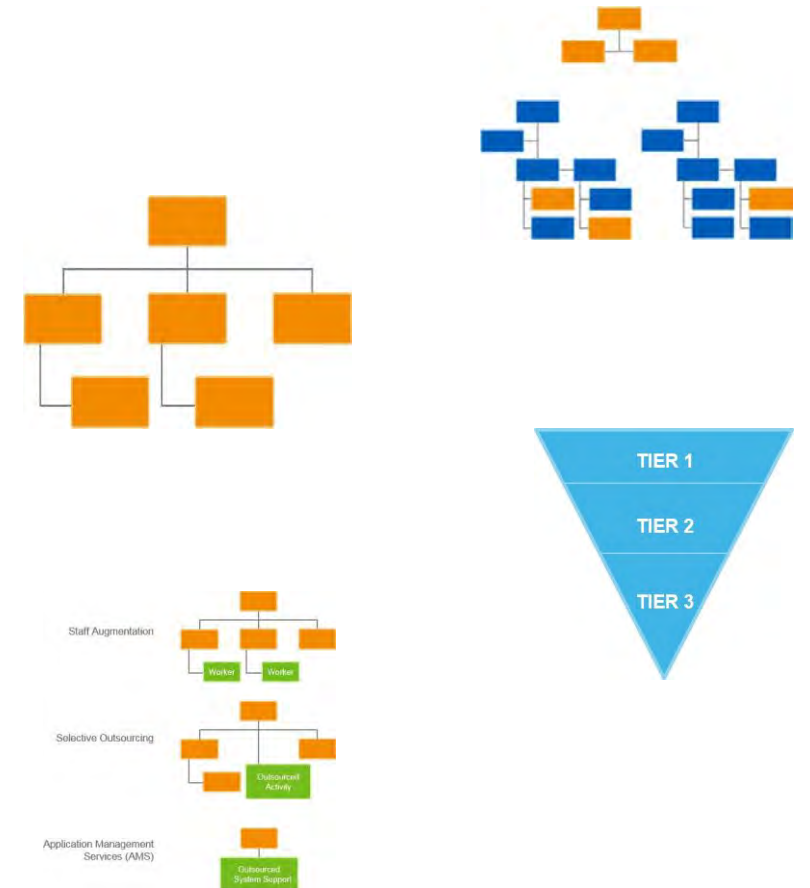
- Utilize Workday delivered audit reports to ensure employees have the correct security access and processes

Why is Governance Important?

A stylized compass rose with a central needle pointing towards the top right, set against a background of a torn orange paper effect. The compass has multiple points and a circular scale around the perimeter. The needle is a darker shade of orange than the background.

In general, there are four types of Workday support team models to consider and evaluate within the context of your broader organizational structure.

- Decentralized – Distributed team alignment to functions, business units, or other organizational units
- Centralized – Central IT and Functional (FIN/HR) team alignment
- Shared Services – Tiered model leveraging shared services infrastructure
- Outsourced Capacity – Team utilizing staff augmentation, selective sourcing, or application management



Governance aligns and creates more efficient team members!

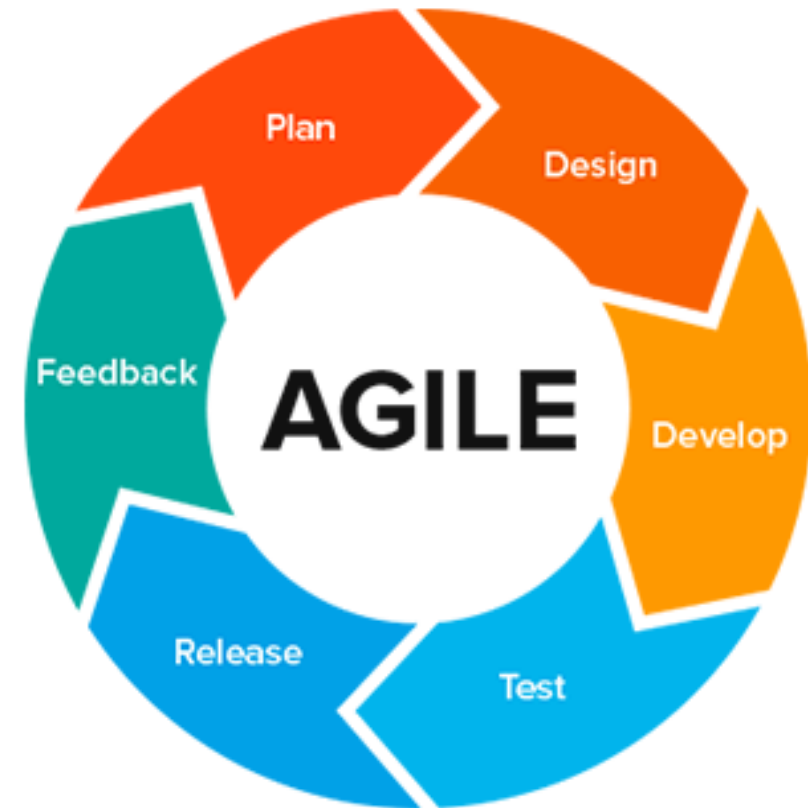
- **Accountability:** Governance establishes accountability and transparency for a company's actions and behavior.
 - This in turn builds **Trust** between employees, stakeholders investors, and third parties.
 - Clarity on roles and responsibilities within your team!
- **Efficiency:** Consistency breeds efficiency which increases productivity.
- **Error Visibility:** Lose fast! Make mistakes quickly! So you can fix them quickly :)
 - Take time to actually encourage your team to be honest and open in the retrospective activity at the end of the sprint.
- **Risk mitigation:** governance helps reduce financial and reputational risks.
- **Adaptability:** Governance helps organizations adapt to changing market conditions, turnover, and organizational changes.



An Agile Approach

A project management framework that focuses on collaboration, adaptability, and continuous improvement. Breaking the project into phases and emphasizes continuous collaboration and improvement.

- Iterative
- Collaborative
- Adaptive
- Stakeholder-focused
- Quick delivery
- Prioritizes individuals



Scrum, Kanban, XP, Lean Development, Crystal, etc.



Workday and Agile

Do's

- DO solidify and collaborate on the core tenants of agile you and your team want to follow
- DO break up larger features (ie projects) into smaller pieces to tackle
- DO be aware of team burnout and the repetitive cycle that Agile can create, plan breaks in the cycle!

Don'ts

- DON'T be afraid to follow a more blended governance approach
- DON'T just focus on moving 'faster'
- DON'T let groupthink take a hold

Use Case



Feature: Business process Change Job redesign needs to take place, due to influx of questions coming from managers and employees while working through promotions and transfers.

Backlog Refinement

- What are the root causes of the ticket?
- What is the end goal of this change?
- What domains are impacted / involved?
- Who is impacted?

Sprint Planning

- What are we changing in the system?
- What business process are impacted?
- Are there data changes that need to occur?
- Which integrations are impacted or is an integration impact analysis needed?

Feature: Business process Change Job redesign needs to take place, due to influx of questions coming from managers and employees while working through promotions and transfers.

User Story Sprint 1:

[Research] Change Job Re-design

User Stories Sprint 2:

[Config] Change Job Re-Design: BP Updates
[Config] Change Job Re-Design: Notification Updates
[Config]: Change Job Re-design: Reason Code Updates
[Impact Analysis]: Reason Code changes on INTs

User Story Sprint 3:

[Testing] Change Job Re-Design: BP Updates
[Testing] Change Job Re-Design: Notification Updates
[Testing]: Change Job Re-design: Reason Code Updates
[Dev]: Reason Code changes on INT001

User Story Sprint 3:

[Testing] Change Job Re-Design E2E Testing

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Sprint Review

- What is changing in the system to address the feature?
- What end users are impacted?
- What changes to job aids might be needed?

Retrospective

- Is there anything that we can make easier for next time a similar ticket pops up?
- Are there any gotchas that happened?
- If a mistake was made is there a way we can get in front of it next time?

Thank you for
attending

Additional Questions?

Reach out to us at

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