CASE HISTORY OVERVIEW

THE CHALLENGE:

A Cleveland-based financial holding company sought to capitalize on the upgrade of PeopleSoft (version 7 to version 8) by creating an opportunity to build a stronger foundation for its future. In moving towards a self-service environment to enhance productivity and reduce overall administrative costs, the company needed to utilize PeopleSoft's web-based automation features. This required installing a new web-based architecture to migrate from the current client-server technology. Testing played a vital role to ensure that the system response time on the new architecture was acceptable.

Additionally, to incorporate the software's best practices, a large amount of custom coding within the PeopleSoft application needed to be eliminated. This required selling the idea and seeking buy-in from the business units throughout the organization – all within an aggressive time schedule.

THE SOLUTION:

To sell the idea, garner support, and staff the project with the best people from across all business units to participate in the design and implementation. To lead the implementation, select the project and technical management expertise of Right Team – specialists in PeopleSoft software implementations and other human resources systems.

THE RESULTS:

Version 8 was launched within an aggressive timeline, and a strong foundation was set for the company's future. As various components of the new software are deployed, employees are experiencing new functionalities and other self-service offerings.

BUILDING A STRONGER FOUNDATION FOR THE FUTURE

After completing a record year for revenue and earnings in 2001, National City Corporation (NCC) achieved another significant milestone. In January 2002, the Human Resources Projects and Technology Services team completed an aggressive PeopleSoft upgrade that began in January 2001.

PeopleSoft enables NCC's human resources staff to provide a variety of services to its approximately 34,000 employees. The PeopleSoft HRMS application tracks and reports on activity related to recruitment, new hires, benefit and payroll processing, and manages changes that occur during an employee's lifecycle. PeopleSoft also provides tax rules and rates to properly manage payroll. Without the upgrade, support of its new rules and rates would have been discontinued in December 2001.

More than just a software upgrade, the team approached the project as an opportunity to lay an even stronger foundation for the future. Their vision included migrating from a client-server based to a web-based architecture. PeopleSoft had completely rewritten version 8. For NCC to utilize its self-service automation features, this required installing new web-based architecture. The new web-based foundation and its self-service environment are designed to result in a reduction of overall administrative costs.

Prior to December 2001, a team of cross-functional business people, human resources, and information technology staff, led by Senior Vice President and Director of Human Resources Projects and Technology Services Todd Saporito did a complete assessment of the situation. After considering other alternatives, the team recommended the company continue with PeopleSoft, and upgrade to version 8.

Recognizing the robust functionality and best practices that version 8 offered, the team recommended that the business take a painful step of change and revert to using much more of PeopleSoft's native functions. To deploy the best practices, approximately 75% of non-essential PeopleSoft HRMS custom coding was targeted for elimination.

BUSINESS BUY IN

Knowing that version 8 was significantly different than the previous PeopleSoft versions that NCC had been using since 1995, the team was challenged to introduce the new system and its vision to its business colleagues. Their vision included introducing the self-service concept and how it streamlines paperwork in the human resources function.

"We spent two months introducing the project to the entire management team and explaining why this large investment of time, talent and cost was critical to the success of our future," Saporito remembers. "We also ensured that as the user community lost their customizations, they knew exactly what the loss would be, and where they would find the new and improved features in the new product."

With overall buy-in from the management team, and their agreement to resource the project with the best and brightest employees from the business, the project was staffed overall with approximately 20 core business team members, 20 core information technology (IT) professionals, and a number of additional human resources and IT professionals.

Additionally, Saporito selected the services of Right Team, NCC partners that are specialists in project management and implementing PeopleSoft and other technology and business practices in the human resources environment. "Working with Right Team clearly saved us money. They provided us with a very solid project and their time to deliver was shortened by their working knowledge of our company," Saporito explains.

PROJECT & TECHNICAL MANAGEMENT AT ITS BEST

Diane DeRubertis, human resources project team lead, found the delivery of the project to be "by far the best project we have ever delivered." DeRubertis cites the right resources at the right time, and the detailed project plan as two key drivers behind the teams' success.

DeRubertis also credits Right Team's Gwen Braverman, overall project manager, for her project management skills and with keeping the large project on track. "We had several issues with scope creep, and even with the added requirements, we were able to deliver this project on time," DeRubertis adds. "With Right Team's project management methodology, we significantly reduced the duration of this project."

Another piece of the team's overall success was the important technical component, led by Right Team's Ed Walters. Walters was responsible for implementing the new architecture to support version 8 and managed the technical team through coding and testing the new system. Testing played a key role in ensuring the overall integrity of the data and the acceptable performance of the system. It also contributed to the successful reengineering of business processes to accommodate the new software.

"I'm very proud of our entire team and what we established for the future of NCC," Saporito notes. "Our people dedicated their entire heart and soul to the project, often working a significant amount of extra hours to make this project happen. Today, I believe we are one of the first companies of our size to implement this version of PeopleSoft in one year."

BUSINESS TODAY

The PeopleSoft manager self-service offerings acquired by NCC included eCompensation and eProfile. Employee self-service features, acquired as part of the foundation, but currently not deployed include: eCompensation; eBenefits; eRecruit; eDevelopment; ePay; and eProfile.

All of these feature sets were not launched during the initial roll out. Instead, Saporito's team began the initial roll out of the manager self-service modules, e-Compensation and e-Profile, renaming their version, eManager. This tool helps managers bring all of their management work events to one screen. Currently, this includes automating salary administration and some talent planning data collection. Today NCC managers have the capability to nominate employees for increases, bonuses, and promotions æ all from their desktops. Additionally the talent planning capability enables managers to chart their employee's next promotion, complete with proactive plans to develop their skills for the next position.

"While significant inroads were made for the launch of version 8, we want to manage expectations that it is the first step in a series of many," Saporito emphasizes. "As more functionality is turned on, version 8 becomes a very robust human capital decision management tool. We are very pleased about that."