CASE STUDY
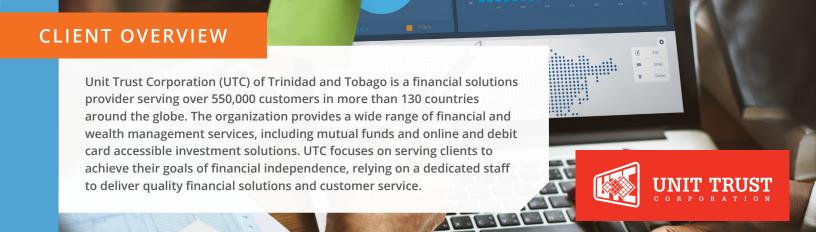
Unit Trust Corporation (UTC)

Efficiencies in moving from On Premise to Cloud-Based SAP SuccessFactors® Solutions

HRZ CLOUD HCM
powered by SAP SuccessFactors

HRZ EXECUTION
Implementation Services

HRZ EVOLUTION
Post Go-Live Services

Unit Trust Corporation (UTC) of Trinidad and Tobago is a financial solutions provider serving over 550,000 customers in more than 130 countries around the globe. The organization provides a wide range of financial and wealth management services, including mutual funds and online and debit card accessible investment solutions. UTC focuses on serving clients to achieve their goals of financial independence, relying on a dedicated staff to deliver quality financial solutions and customer service.

UNIT TRUST
CORPORATION

Project Challenges

HRIZONS sales and solution consultants, in partnership with SAP SuccessFactors® Sales and Customer Engagement teams, faced a key challenge prior to this project. They knew that UTC needed a business driven HR solution that would not require extensive involvement from their internal IT organization. UTC had previously attempted an IT-centric solution with another implementation vendor that did not adequately meet their organizational and business needs, and they looked to HRIZONS to provide a more streamlined, cloud-based human capital management (HCM) solution.

The HRIZONS team was a crucial factor in establishing an alliance with UTC to deliver the best of breed SAP SuccessFactors solution. HRIZONS sales and services consultants made the effort to understand and address the challenges that UTC had previously faced, building trust over months of discussions and shared problem-solving. This level of engagement prior to the sale ensured that all stakeholders were aligned on the optimal approach and objectives for this project.

Implementation Objectives

UTC leadership knew that as a public company in the highly regulated financial sector, it needed best of breed HCM systems to ensure regulatory compliance and the achievement of their organizational objectives. UTC management was also aware that an on-premise solution required more resources and greater IT and project management involvement than the more streamlined cloud-based solution. As a result, they selected SAP SuccessFactors, a cloud-based solution, because it provided for a simpler and quicker implementation and afforded the flexibility needed to fit their resource capabilities while still addressing their business, compliance and performance requirements.

The goal of the project was to automate a full suite of HCM processes using the SAP SuccessFactors technology platform, including: Employee Central as their core HR system-of-record, Payroll 123, a third-party payroll solution that HRIZONS provides in the Caribbean, Performance and Goals, Recruitment, Compensation, Learning Management, and Succession Planning. UTC was transforming itself and making bold moves to get the organization much higher on the maturity curve by moving from paper-based documents and spreadsheets to a fully automated and integrated HCM platform in the cloud. This involved significant review and updates to their processes, as well as clear communication regarding the processes and capabilities of SAP SuccessFactors.

The HRIZONS team partnered with a lean core client team to implement eight modules within eighteen months, with UTC subject matter experts often working on multiple modules at the same time. HRIZONS consultants were highly flexible in adjusting initial configuration settings and optimizing solution design to ensure that each module fully met UTC's business and organizational requirements.

HRIZONS project management expertise and deep product knowledge with Employee Central facilitated the successful integration of Employee Central to Payroll 123, its new cloud-based payroll solution. The HRIZONS project manager had built a strong alliance with the payroll vendor, and helped in part by offering services in English/Spanish and being able to coordinate communications internally with the vendor team in Spanish while also managing the client-vendor communications in English. The resulting partnership has led to an evolving solution to integrate Employee Central and payroll.

To support UTC as the solution platforms evolve, the HRIZONS HRZ®EVOLUTION post go-live managed services offering continues to be in place to facilitate communication and testing between UTC, Payroll 123, and the SAP SuccessFactors technology team to support the long-term success of UTC's HCM cloud solution.

Successful Outcomes

UTC successfully implemented SAP SuccessFactors between August 2014 and March 2016. Significant accomplishments include:

- Employee Central implementation with full integration to Recruitment and Compensation.

- Integration of Outlook Calendar with Recruitment – first time implementation of this brand new SAP SuccessFactors feature.

- Design of optimal HCM processes as the foundation for implementing virtually all modules, based on the transition from standard paper-based systems and forms to an automated and fully integrated HCM cloud solution.

- Supplemental services to support the over-committed UTC core team, including UAT test scripts for virtually all modules.

- Successful implementation of Performance and Goals modules using the more flexible HRIZONS Accelerate to Value (ATV) implementation methodology. The Performance solution included a more complex workflow with 2nd level manager approvals required to comply with the rigorous compliance requirements of the financial sector. The Goals solution also included Goal Execution functionality, which the UTC team may later choose to include as an option for their end-users.

- Approval to move forward with a successful implementation of the Succession Planning.

- Successful user training and coaching provided through HRIZONS' HRZ®EVOLUTION program to address user challenges becoming comfortable with the new recruitment processes and system functionality.

- Exceptional project management partnership between HRIZONS and the UTC project manager brought in to manage the client side of the project.

Lessons Learned & Best Practices

- Importance of accurate assessment of client core team resources and subject-matter-experts in relation to projected project timelines. Especially important with a full suite HCM cloud implementation.

- Careful review of client design and configuration requirements to accurately match implementation methodology to client needs and requirements.

- Critical role of project management partnership when doing complex, multi-module implementations.

- Careful vetting of third party partners involved in integrations with Employee Central to ensure product maturity and functionality meet technical requirements.

- Importance of developing a solid trusted advisor relationship as a foundation for proceeding with a complex, full suite implementation.

- Value of a strong partnership at the project management level between client and implementation core teams.

- Importance of close integration of implementation and ongoing optimization and support services, such as those provided by HRIZONS' HRZ®STRATEGY, HRZ®EXECUTION and HRZ®EVOLUTION offerings.

Conclusion

This complex multi-module project would not have happened without the close partnership of the HRIZONS and SAP SuccessFactors teams in responding to UTC's initial concerns. Successful projects of this scope require a strong trusted advisor relationship with the client and sales and implementation teams that have the business understanding and the functional, technical, and project management expertise to ensure quality results. In this case the understanding of UTC's culture and needs on the part of the HRIZONS sales and service teams was equally important to the success of this project. In the final analysis, the client reports being highly satisfied with the quality of the product and implementation services, positioning them for continued development of their HCM processes and for attracting and retaining top talent throughout their organization.

ABOUT HRIZONS®

HRIZONS is an HR Cloud Technology Company that brings cloud HCM products and services to market. As an SAP Gold Partner and Pinnacle Award Winner for SAP SuccessFactors, we offer value-add services, cloud HCM application extensions built on SAP Cloud Platform and integration solutions that help customers realize the full value of SAP SuccessFactors.

Our purpose is to help customers make the digital HR transformation and move their HR technology to the cloud to meet the needs of today's evolving workforce, to execute their business strategies, and achieve better business results.

Our unique and comprehensive approach to solution architecture incorporates six core elements: Strategy, Process, People, Technology, Content and Analytics. Our consultants' deep domain expertise helps customers to align, integrate and design HCM solutions that bridge the strategy-execution chasm. We help guide customers on a journey to an integrated platform, by providing knowledge, guidance and expertise so they can have confidence and peace of mind the project is being done right. Whenever customers need support or are ready to optimize their HCM programs, HRIZONS consultants are a dependable extension of their HR team.

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