KPMG

cutting through complexity ™

Advisory Services:
**HR Transformation
Enabled by Technology:
Scott & White Case Study**
April 2013

With you today

Joe Parente

*Principal, KPMG
Healthcare & Life Sciences Leader*

Lisa Massman

*Partner, KPMG
HR Technology Enabled
Transformation Leader*

Jeremy Pelley

*Director, Scott & White
Business Applications
Leader*

Tracy Martin

*Senior Director, Oracle
HCM Strategy Leader*

Doug Stockel

*Director, KPMG
HR Technology Enabled
Transformation*

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Agenda

Moderator:

Joe Parente
Principal, KPMG
Healthcare Network Leader

Speakers:

Jeremy Pelley
Director, Scott & White
Business Applications

Lisa Massman
Principal, KPMG
Oracle HCM Practice Leader

Tracy Martin
Senior Director, Oracle
HCM Product Strategy

Doug Stockel
Director, KPMG
Oracle HCM Practice

| 1	Introductions
2	Oracle PeopleSoft HCM 9.2 Overview
3	Scott & White PeopleSoft HCM 9.2 Project Overview
4	Key Focus Areas
5	Scott & White Future Roadmap
6	Q&A and Next Steps

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PEOPLESOFT

Oracle PeopleSoft HCM 9.2

Tracy Martin
Senior Director, HCM Strategy

Safe Harbor Agreement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.
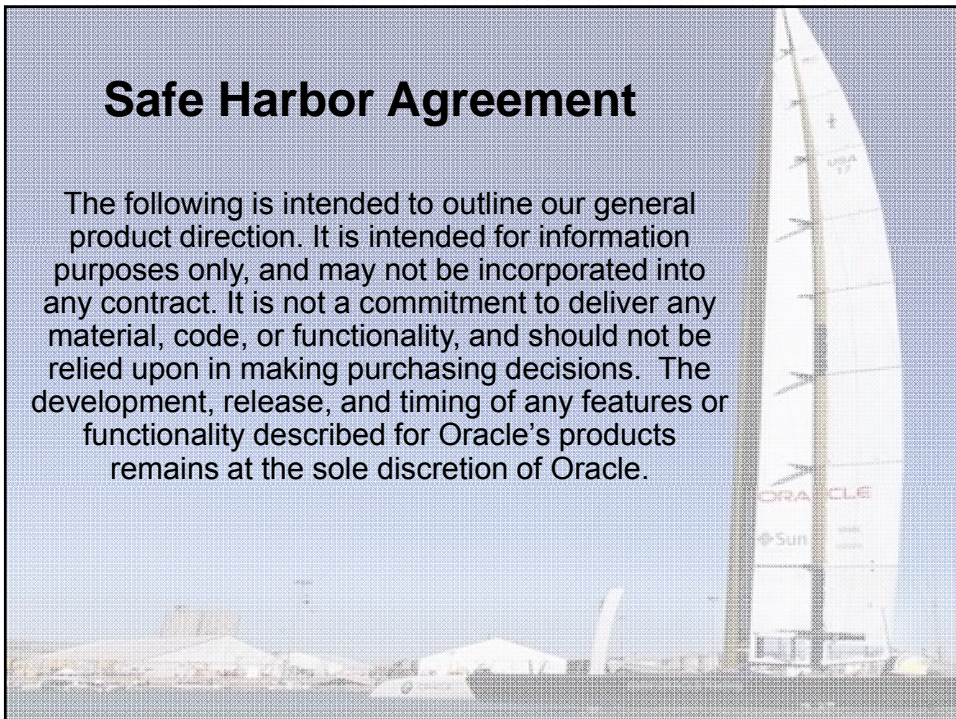
It's All About You - Our Customers

Program Agenda

- **Key Investments for PeopleSoft**

- PeopleSoft HCM 9.2

- Learn More

Oracle Strategy

PeopleSoft's Place within Oracle's Strategy

Hardware and Software
Engineered to Work Together

ORACLE APPLICATIONS

ORACLE CLOUD

ORACLE PEOPLESOFT

- In Memory Applications
- Optimized Performance
- Consolidation

- Continued Investment
  - User Experience
  - Industry Capabilities
  - Lower TCO
- Coexistence

- Coexistence
  - Fusion Applications
  - Taleo Applications
- Private Cloud

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Oracle's Applications Unlimited Strategy
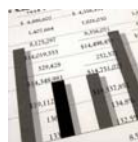Delivering More

Choice
- **Remain on existing applications**
- **Upgrade to new release**
- **Deploy additional modules**
- **Adopt Fusion Technology**

Value
- **Dedicated development teams**
- **Continued product releases**

Visibility
- **Customer driven product roadmaps**

Time
- **No forced upgrade**
- **Oracle life time support**

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Customer Needs

Investment Strategy Starts with Our Customers

- Applications that are *SIMPLER* and *MORE INTUITIVE* to use

- Complete solutions that require little to *NO CUSTOMIZATIONS*
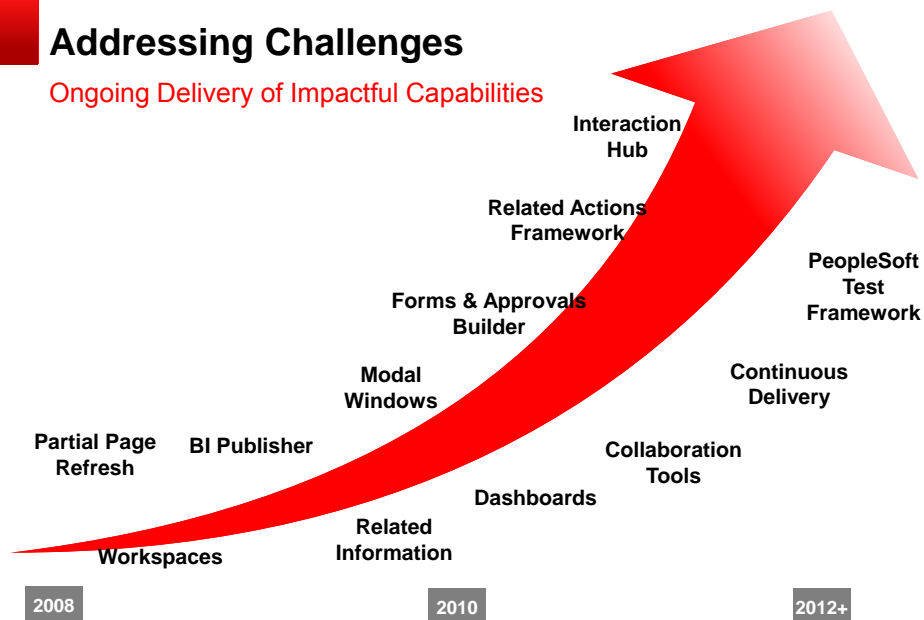
- *STAYING CURRENT* more easily and at a lower cost

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Addressing Challenges

Ongoing Delivery of Impactful Capabilities

Interaction Hub

Related Actions Framework

Forms & Approvals Builder

PeopleSoft Test Framework

Modal Windows

Continuous Delivery

Partial Page Refresh

BI Publisher

Collaboration Tools

Dashboards

Related Information

Workspaces

2008

2010

2012+

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12

6

Strategic Investments Across Release 9.2

Alignment of Investments to Customer Needs

- Global Search ❯ Effortless Navigation & Information Retrieval

- Activity Guides / Train Stops ❯ Intuitive Self-Service & Business Process Flows

- Pivot Grids ❯ Access to Actionable Information

- Workcenters ❯ Increased User Job Effectiveness

- PeopleSoft Update Manager ❯ Cost Effective Means of Staying Current

- Mobile Solutions ❯ Enablement of a Mobile Workforce

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Acknowledging Your Reality

PeopleSoft Maintenance

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Adapting to the Realities of Our Customers

PeopleSoft Update Manager Transforms PeopleSoft Maintenance

Then	Now

Rigid, Oracle Defined Maintenance Process	Flexible, Customer Tailored Maintenance Process

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Adapting to the Realities of Our Customers

PeopleSoft Maintenance of the Future

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Creates Changes
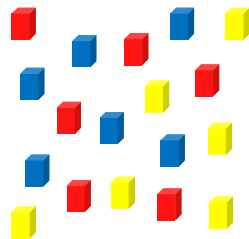
CUSTOMER
Packages Changes

CUSTOMER
Consumes Changes

CUSTOMER
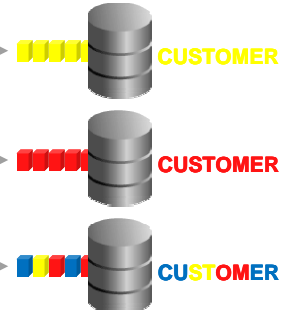
CUSTOMER

CUSTOMER

In the Future, Customers Package Changes Tailored to Them

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Delivering Unprecedented Value

PeopleSoft Update Manager Benefits

	Change Packages Tailored to a Customer's Unique Needs and Maintenance History

	Get Current Regardless of Prior Maintenance Level		Apply Maintenance on Your Schedule
	Enables Maintenance Best Practices		Single Change Package Streamlines Maintenance Process

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Program Agenda

- Key Investments for PeopleSoft

- **PeopleSoft HCM 9.2**

- Learn More

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PeopleSoft HCM
Strategy and Roadmap…

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PeopleSoft HCM 9.2 Key Concepts

✓**Intuitive Usability**
- Redefining How Work Gets Done
- Efficient Workcenters and Dashboards
- Continuing Web 2.0 User Experience

Mobile Workforce

✓**Strengthened Self Service Experie...**
- Next Generation Landing Page
- Deepen Product Capabilities
- Expansion of Global / Industry functionality

ORA...
PEOPLESOFT E...

Actionable Information

✓**Comprehensive Capabilities**
- Enabling Mobile in the Workforce
- Embedded Actionable Information
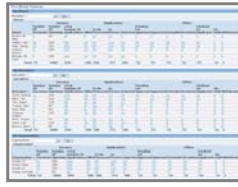- Fusion and Taleo Application Interoperability

Interoperability

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PRODUCT OVERVIEW

PeopleSoft HCM Analytic Solutions
Available Today

Standard Reports	Embedded Analytics	OBI Analytics
• Standard Reports • Reports Converted to BI Publisher (Our Next Gen toolset) • End User Layer Provided for custom reports	• Within Talent Apps • ePerformance, Compensation • Examples are Compensation Allocation, Performance Distribution, Goals Alignment	• Multi Source Data Warehouse Based Approach • OBIA 7.9.6 now has metrics for HCM, Talent, Recruiting • Tight integration with Oracle HCM & ERP • Leverage full functionality of Oracle BI/EPM

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Embedded HCM Analytics

via Pivot Grids Native to PeopleSoft HCM Applications

• Self-service, interactive analytical grids and charts that allow users to slice and filter data

• Embedded within transactional pages to support key personnel, organizational, and compensation decisions

• Native PeopleTools functionality that transforms a PS Query into an Excel-like pivot table or chart

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Embedded Actionable Information

Intelligence in HCM 9.2 and Leveraging Oracle Business Intelligence

• **HCM Pivot Grids**
- Attendance Violations
- Absence Types
- Processing Monitor
- Gross Pay by Department
- Net Pay by Department
- Headcount Movement
- Current Headcount
- Learning Compliance
- Survey Results
- Job Openings Trend
- Job Openings Aging Analysis
- In Process Applicants
- Time to Fill
- Salary Analysis
- Compensation Distribution
- Compensation by Performance
- Salary Increase by Performance
- Cycle Tracking
- Cycle Guideline AI

Human Resources Analytics (225+ reports)
- Top 5 Hire Sources
- Employee Transfers
- At Risk Top Performers
- Offer Rejection Reasons
- New Hire Transfers
- Training Results
- Voluntary Turnover Reason
- Return on Human Capital
- Recruitment Pipeline
- Employee Productivity
- Chronic Under-Performers
- Monthly New Hires Pending Starts
- Headcount Demographics
- Staffing Level by Job
- Supervisor Demographics
- Bonus and Promotion Trend
- Employee Performance by Job
- Management Ratio Analysis
- Total Enrollments
- Open Requisition Aging
- Turnover Trends
- Absence Trend by Category
- Working Days Lost

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Enablement of a Mobile Workforce

HCM Mobile Solutions

- Delivered HTML5 Solutions
  – Mobile Company Directory

- Planned HTML5 Solutions
  – Time and Labor
  – Absence Management
  – HR Self-Service

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Planned Capabilities

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PeopleSoft Human Capital Management 9.2

- Performance Management Workcenter
- Mid-Period Performance Evaluations
- Life Events Using Activity Guides
- Paycheck Modeling
- Learning Dashboard with Social Capabilities
- Revamped Recruiting Application Process
- Recruiting Dashboard
- Global Payroll Monitoring
- Desktop Integration with Absence Management
- Reconfigured Time Reporting
- Bi-Directional Integration with Taleo
- Mobile Applications (Company Directory)

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PeopleSoft Update & Product Roadmap

Key Take-Aways

- Compelling Investments in PeopleSoft 9.2

- New PeopleSoft Maintenance Solution

- Mobile Solutions for PeopleSoft

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Program Agenda

- Key Investments for PeopleSoft

- PeopleSoft HCM 9.2

- **Learn More**

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Get Connect and Stay Informed

PeopleSoft in Social Media

twitter

@PeopleSoft_Info

Linked in

**Oracle PeopleSoft
Development Group**

ORACLE®

Blogs

Facebook

Oracle PeopleSoft Page

You Tube

**Oracle PeopleSoft
Channel**

ORACLE

Click Images For More Information

Learn More

PeopleSoft Information Development Resources

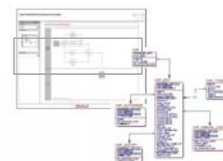**Information Portal**

**Hosted & Mobile
PeopleBooks**

**Video Feature Overviews on
YouTube**

Transfer of Information (TOIs)

**Cumulative Feature Overview &
Upgrade Resource Report Tools**

**Business Process Maps & Entity
Relationship Diagrams**

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Click Images For More Information

Learn More

PeopleSoft 9.2 Information Portal

Questions **and Answers**

KPMG Overview

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KPMG Overview

KPMG International is a global network of professional firms providing audit, tax, and advisory services.

- We offer the benefit of working with an **international network of member firms,** drawing from the skills and experiences of **145,000 colleagues in 152 countries**.

- KPMG's member firms provide services to **79 percent of the Global 1200**, managing large projects with global methods and standards.

- Our worldwide presence enables us to leverage **specific skill sets and industry knowledge** for the benefit of our clients

KPMG LLP, the US member firm, proudly provides services to many of the world's largest entities with services, including **75 companies in the FORTUNE 100**.

KPMG Services

KPMG is independent from any suppliers or products.
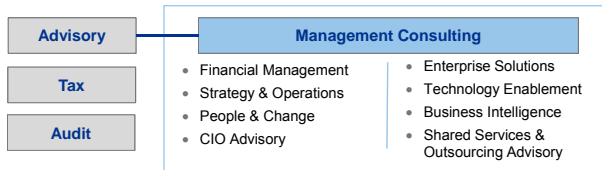
KPMG International
- Countries: 152
- Professionals: 145,000+
- Partners: 8,000
- Revenue: $22.7 billion

Global Advisory Professionals:

Americas	EMEA	ASPAC
7,000	20,000	5,000

100+ global methods and toolkits to bring **the organization's vast knowledge** to each client
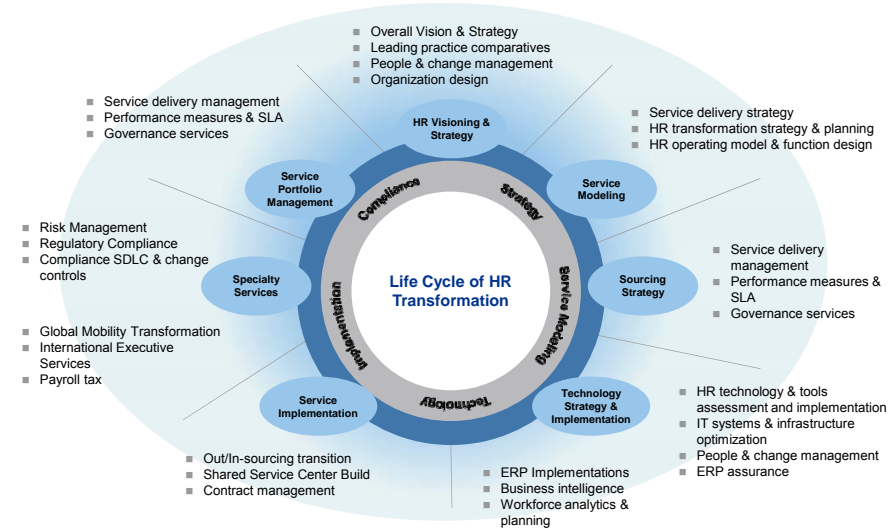
KPMG LLP (US)
- Offices: 87
- Professionals: 23,000+
- Partners: 1,882
- Revenue: $6 billion

Advisory	Management Consulting	
Tax	• Financial Management • Strategy & Operations • People & Change • CIO Advisory	• Enterprise Solutions • Technology Enablement • Business Intelligence • Shared Services & Outsourcing Advisory
Audit		

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KPMG Advisory Capabilities Span the Life Cycle of HR Transformation

- Overall Vision & Strategy
- Leading practice comparatives
- People & change management
- Organization design

- Service delivery management
- Performance measures & SLA
- Governance services

- Service delivery strategy
- HR transformation strategy & planning
- HR operating model & function design

- Risk Management
- Regulatory Compliance
- Compliance SDLC & change controls

- Service delivery management
- Performance measures & SLA
- Governance services

- Global Mobility Transformation
- International Executive Services
- Payroll tax

- HR technology & tools assessment and implementation
- IT systems & infrastructure optimization
- People & change management
- ERP assurance

- Out/In-sourcing transition
- Shared Service Center Build
- Contract management

- ERP Implementations
- Business intelligence
- Workforce analytics & planning

Circle labels: HR Visioning & Strategy · Service Modeling · Sourcing Strategy · Technology Strategy & Implementation · Service Implementation · Specialty Services · Service Portfolio Management

Ring labels: Strategy · Service Modeling · Technology · Implementation · Compliance

Center: **Life Cycle of HR Transformation**

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KPMG's Oracle Product Leadership

ORACLE
E-BUSINESS SUITE

One of the 1st to successfully implement Oracle E-Business R12.

ORACLE
PEOPLESOFT

Primary launch partner for v9.2 and foremost implementer of v9.1.

1st to implement HCM v9.1 and 8.9.

ORACLE
BUSINESS INTELLIGENCE

Leading implementer of Oracle BI solutions, including OBI EE and BI Analytic Applications.

One of the 1st to implement Project and HR Analytics 7.9.6

Advanced Specialization

Advanced Specialization

Advanced Specialization

ORACLE
GOVERNANCE, RISK, AND COMPLIANCE MANAGER

A leader in GRC Transformation services.

The 1st to successfully implement Oracle EGRCM 8.6.

ORACLE
FUSION APPLICATIONS
HUMAN CAPITAL MANAGEMENT

A preferred Fusion HCM Partner, one of only 8 selected globally.

KPMG is Oracle certified "Rapid Start Ready on Fusion HCM"

ORACLE
HYPERION

Deep experience implementing Oracle EPM solutions, including Hyperion and Essbase.

The 1st to successfully implement HFM Fusion.

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PeopleSoft and Fusion HCM Credentials

ORACLE Platinum Partner

Advanced Specialized
PeopleSoft Human Capital Management

Specialized
Oracle Fusion Human Capital Management

Specialized
PeopleSoft PeopleTools

"We're very excited to have KPMG leading a few of our very first PeopleSoft Enterprise HCM v9.2 projects. KPMG has consistently demonstrated their expertise in implementing HCM solutions and HR leading practices and their early leadership in this area will be extremely valuable to customers considering an upgrade to the v9.2 release."

— Paco Aubrejuan,

Vice President & General Manager of PeopleSoft, Oracle

We are a Foremost Implementer of HCM Solutions

- Selected as a **key launch Partner for the latest PeopleSoft releases**, specifically working closely with Oracle's PeopleSoft Product Development team on v9.2 since early 2012

- Currently **leading two of the industry's first PeopleSoft 9.2 HCM implementations;** including Scott & White

- Led the **very first PeopleSoft 9.1 implementation** that went live in March 2010, which was the first amongst **well over three dozen PeopleSoft 9.1 initiatives** completed or underway

- **Early access to PeopleSoft v9.2 HCM environment** enabling hands-on v9.2 experience by participating in Oracle's extensive internal v9.2 release testing since December 2012

- Our experience with the Fusion HCM Suite dates back to our work with the Oracle Fusion HCM Product Strategy Team in early 2010 and continues through our **Oracle KPMG Fusion Adoption & Readiness joint initiatives**

- **Lead one of the first Fusion SaaS HCM implementations** for Fusion Early Adopter clients spanning full HR, Benefits, Talent Management, Compensation, and Payroll deployments in the cloud

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KPMG's Approach

Qualifications

✓ Currently leading two of the industry's first PeopleSoft 9.2 HCM implementations; including Scott & White

✓ Led the very first PeopleSoft 9.1 implementation that went live in March 2010, which is among over three-dozen projects completed or underway

✓ Oracle's preferred PeopleSoft Partner, selected as the lead partner for Oracle's release of PeopleSoft 9.1

✓ Industry-leading knowledge and insight into the opportunities and challenges of implementing and upgrading PeopleSoft solutions

✓ Extensive track record of managing successful large-scale, multi-phased PeopleSoft implementations and upgrades for numerous clients across a gamut of industries

9.1 ORACLE 2010 TITAN AWARD WINNING
RAPID SOLUTION

THE RIGHT SOLUTION. THE RIGHT APPROACH. RIGHT NOW.

» Proprietary upgrade process developed for v8x data structure changes, continually enhanced and maintained for current releases

» Stand alone upgrade process, or as complimentary to delivered process

» Streamlines identifying and loading core foundation elements not currently a part of the source release

» Platform independent and transparent

» Easily modified to accommodate custom data elements from PeopleSoft and other sources

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Scott & White PeopleSoft HCM v9.2 Project Overview

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Scott & White: Company Snapshot

SCOTT&WHITE Healthcare

- **About:** Scott & White Healthcare is a **non-profit collaborative health care system** established in 1897 in Temple, Texas. Among the leading health systems **encompassing one of the nation's largest multi-specialty group practices**, Scott & White provides personalized, comprehensive, high-quality care enhanced by medical education and research to residents in a 29,000-square-mile service area. The system **owns, partners or manages 12 hospital sites, two additional announced facilities**, more than 65 clinic locations providing care in 46 medical specialties, and a **215,000+-member health plan**

- **Mission:** To provide the **most personalized, comprehensive and highest quality health care**, enhanced by medical education and research.

- **Research and Education:** Principal clinical research and education campus for **The Texas A&M Health Science Center (HSC) College of Medicine**

- **At a Glance:** More than **14,000 employees**; more than **1,000 physicians** and scientists; more than **2.5 million patient visits** in 2012

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Scott & White: Current PeopleSoft Footprint

SCOTT&WHITE Healthcare

PeopleSoft HCM Functional Environment

- Recruiting: highly customized
- Core HR: no multiple jobs or non-employee functionality
- Employee / Manager Self Service: numerous customizations
- Profile Management: small footprint
- Benefits Administration
- North American Payroll
- Highly Custom Payroll to GL Interface
- Workflow: traditional, not AWE-enabled

PeopleSoft Financials / Supply Chain Management 9.1

PeopleSoft Enterprise Portal 9.0

- Used only for HCM
- Highly Customized

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Implementation Approach Options

1 OPTION

Pure Technical Upgrade

Shorter Duration

- ✓ Supported platform (v9.2) more quickly
- ✓ Shorter initial timeline; fewer resources
- ✗ High probability for rework in future phases
- ✗ Risk of never completing transformation initiatives
- ✗ Wasted technical effort on retrofitting unnecessary customizations
- ✗ Limited process efficiencies and functionality enhancements

Fees: Short term = $
         Long-term = $$$$

2 OPTION

PS Technology Enabled Transformation

Medium Duration

- ✓ Provides value to both Business and IT
- ✓ Builds foundation that better positions Scott & White to execute future strategic initiatives
- ✓ Ability to take advantage of high business value functionality enhancements
- ✓ Eliminates the retrofit of unnecessary customizations
- ✗ Slightly longer timeframe to be on supported platform (v9.2)
- ✗ Increased resource participation

Fees: Short term = $$
         Long-term = $$

3 OPTION

Full Business Transformation

Longer Duration

- ✓ Provides value to both Business and IT
- ✓ Addresses majority of Scott & White's requirements in one project
- ✓ Leverages all PeopleSoft functionality owned by Scott & White
- ✗ Significantly longer timeframe to be on supported platform (v9.2)
- ✗ Significantly higher risk from a people, process and technology standpoint
- ✗ High resource participation

Fees: Short term = $$$$
         Long-term = $

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Scott & White: Business Drivers for 9.2 Upgrade

Below are the primary goals of Scott & White's PeopleSoft HCM 8.9 to 9.2 initiative:

Reduce Maintenance Costs	Implement Delivered	Improve Usability	Standardize Master Data
▪ Upgrade from PeopleSoft HCM 8.9 to 9.2 by December 2013 to be on a supported version; and mitigate the costs and risks associated with an aging application	▪ Standardize, streamline and simplify business processes by adopting industry leading practices inherent in the PeopleSoft application. ▪ Specifically target customizations in the Recruiting and Manager Self Service modules	▪ Leverage "out-of-the-box" functionality and delivered configurations to eliminate manual processes, customizations, achieve operational efficiencies and maximize the return on the PeopleSoft investment. ▪ Specifically target the Approval Workflow Engine, Self Service Life Events, & W-2 and I-9 functionality	▪ Convert historical EMPLIDs to a standard format ▪ Assess the impact of company configurations on Benefits and Payroll flexibility

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Project Guiding Principals

These Guiding Principles are followed through the course of implementation to help guide team interactions, scope decision making and set priorities for the team.

Guiding Principles

1	Leverage best-practices inherent in PeopleSoft	6	Silence is agreement
2	Drive accountability through clearly defined roles and responsibilities	7	Honor commitments and deadlines
3	Do not let perfection get in the way of good	8	Raise issues quickly
4	Utilize Lean principles of process improvement	9	Deal with issues proactively and collaboratively
5	Clear, concise and transparent communication	10	Be on time and prepared

Objectives

Outcomes
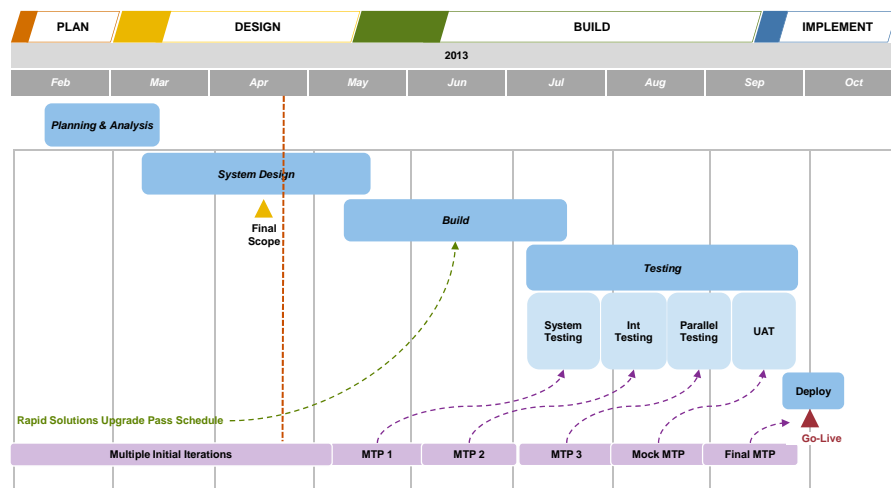
- Reduced total cost of ownership through zero customizations
- Standardize, streamline and simplify business processes
- Technology solution that more effectively supports the business needs

- Foundation to implement future enhancements and provide application scalability
- Be better prepared for future mergers and acquisitions

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Scott & White: Project Timeline and Key Milestones

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Scott & White: Team Structure
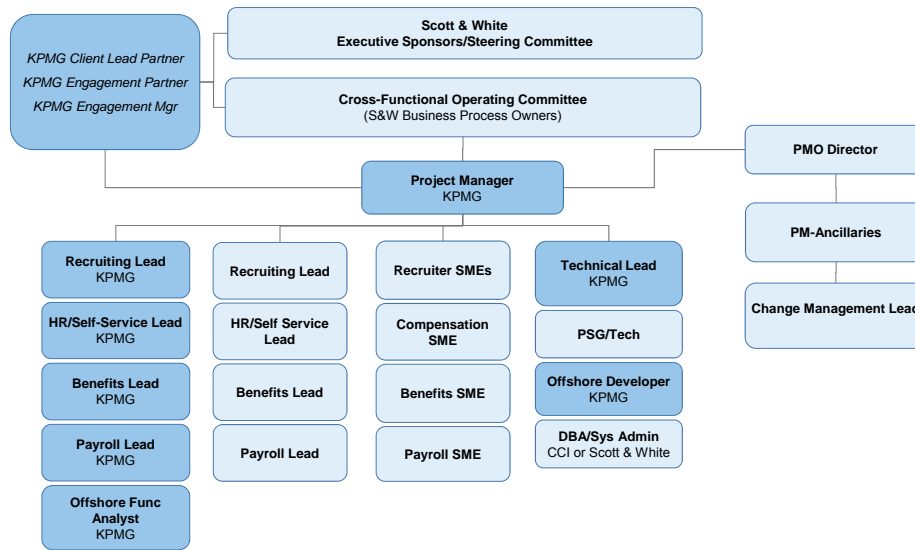
```
KPMG Client Lead Partner          Scott & White
                            Executive Sponsors/Steering Committee
KPMG Engagement Partner

KPMG Engagement Mgr           Cross-Functional Operating Committee
                                  (S&W Business Process Owners)

                                                                    PMO Director

                              Project Manager
                                  KPMG                              PM-Ancillaries


Recruiting Lead    Recruiting Lead    Recruiter SMEs    Technical Lead    Change Management Lead
    KPMG                                                   KPMG

HR/Self-Service Lead   HR/Self Service   Compensation      PSG/Tech
    KPMG                   Lead              SME

Benefits Lead       Benefits Lead     Benefits SME    Offshore Developer
    KPMG                                                   KPMG

Payroll Lead        Payroll Lead      Payroll SME     DBA/Sys Admin
    KPMG                                             CCI or Scott & White

Offshore Func
   Analyst
    KPMG
```

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Critical Success Factors

Key Components

- Clearly Communicated Goals and Objectives
- **Executive Management Sponsorship; Organizational & Key User Buy-In**
- Clear Understanding of Requirements and Current Business Processes
- **Utilize Highly Experienced Teams**
- Effective Communication and Decision Making
- **Integrated Project Governance**
- End User Participation Throughout the Project
- Effective Knowledge Transfer – S&W and KPMG blended team
- Structured Change Management Plan
- **Robust and Structured System, Integration and User Acceptance Testing**

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Summary of Project Risks and Mitigation

Project Risks	Mitigation Strategies
Early Adoption of PeopleSoft HCM v9.2	- KPMG will have early access to v9.2 in Dec 2012, well ahead of general release to prepare for project - KPMG will be participating in v9.2 release testing with Oracle during Dec 2012 - Pair KPMG and Scott & White resources through the project so continual knowledge transfer can occur - Leverage proven Titan Award Winning RapidSolution scripts for 9.1 and retrofit for 9.2 eliminating unknowns with Oracle upgrade scripts
Changes to Project Scope	- Perform thorough business requirements gathering and fit/gap analysis - Obtain signoff of project scope following the fit/gap analysis and communicate to all stakeholders - Define change control process at the beginning of the project which includes forcing all changes to be approved by the executive steering committee after all options and the associated impacts are evaluated
Readiness for and ability to Absorb Change	- Develop detailed organizational Change Management strategy and communications plan early in the project taking into account other projects - Coordinate closely with Scott and White PMO and Project Phoenix - Provide resource dedicated at least 50% to project to execute plan
Resource Contention due to Other Company Activities	- Pro-active, pre-scheduling of Scott & White resources while leverage KPMG deep solution expertise - Backfill of key Scott & White resources - Clearly documented roles and responsibilities early in the project
Interruption of Project Timeline due to Delay in Decision Making	- Defined and closely adhered to decision escalation process from project team through management levels - Actively involved Operating and Executive Steering Committee

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Scott & White
Project Key Focus Areas
05

Scott & White: Key Focus Areas

SCOTT&WHITE Healthcare

1) **General Usability**

2) **Recruiting Reimplementation**

3) **Position Management**

4) **Payroll & Compensation**

5) **Significant De-customization**

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Scott & White: Key Focus Area – General Usability

SCOTT&WHITE Healthcare

Background – General Usability:
- Keen focus on Self Service functionality
- PeopleSoft FSCM 9.1 Upgrade completed in 2012
- Strong desire to capitalize on new Tools 8.5x features

Scott & White 9.2 Design:
- Deploy additional ESS functionality – Life Events, I-9, W-2, etc
- Configure newly enabled AWE transactions to streamline business process workflow
- Leverage Activity Guides, Pivot Grids, Related Actions / Content, etc
- Upgrade PeopleSoft Portal / Interaction Hub in parallel
- Review and Redesign of Benefits Eligibility and Event rules

Key 9.2 Benefits for Scott & White:
- Enhanced end-user experience
- Usability driven through configurations rather than customizations
- Consistent look-and-feel across Scott & White PeopleSoft footprint

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Scott & White: Key Focus Area – Recruiting

Background – Recruiting:
- Highly customized PeopleSoft 8.9 deployment; challenge to stay current with maintenance and delivered enhancements.
- Disparate systems for physician vs. staff recruiting
- Applicant screening mostly a manual process

Scott & White 9.2 Design:
- Consolidate all Scott & White recruitment activities into PeopleSoft
- Adopt enhanced screening tools to identify the best talent
- Leverage online functionality to replace manual processes
- Utilize latest PeopleTools functionality to satisfy business requirements traditionally requiring customization.

Key 9.2 Benefits for Scott & White:
- Recruitment professionals are able to screen and review more applicants in less time; reducing the average time to fill positions
- More accurate reporting and analytics by having all recruitment data in PeopleSoft
- Easy to configure dashboard to monitor recruitment performance

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Scott & White: Key Focus Area – Position Management

Background – Position Management:
- Inaccurate data and reporting of position movement within organization
- Manual effort to populate JOB attributes that could be derived
- Job Postings may be out of sync with Position openings

Scott & White 9.2 Recommended Design:
- Implement Position Management for the organization
- Minor customization to control benefits eligibility and payroll processing
- Proactively address the significant Change Management implications:
  - Begin business process change ahead of 9.2 system go-live
  - Effectively communicate benefits of improved position control

Key 9.2 Benefits for Scott & White:
- Reduced customizations for HR, Payroll, and Recruitment
- Tighter controls around position planning and budgeting
- Better data quality with less manual intervention

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Scott & White: Key Focus Area – Payroll and Compensation

SCOTT&WHITE Healthcare

Background – Payroll and Compensation:
- Purely custom Payroll to GL Interface
- Manual activities within payroll processing
- Dissimilar ChartField and DEPTID values between HCM and FSCM
- Decommission 8.9 eCompensation

Scott & White 9.2 Recommended Design:
- Implement Variable Compensation with business process change
- Convert HCM DEPTIDs and enable delivered FSCM to HCM syncs
- Deploy delivered Payroll to GL Interface
- Leverage Excel to CI functionality to streamline manual activities

Key 9.2 Benefits for Scott & White:
- Standardized Chartfield footprint across PeopleSoft applications
- Cleaner foundation upon which to grow (organically or via mergers)
- Improved payroll processing timelines and accuracy

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Scott & White: Key Focus Area – Significant De-customization – Go Vanilla

SCOTT&WHITE Healthcare

Background – De-customization:
- Numerous customizations due to inconsistent EMPLIDs
- Highly customized Recruiting module
- Entirely custom Payroll to GL Interface
- Resulting in significant challenge to stay current with maintenance

Scott & White 9.2 Design:
- **85% customization reduction**
- Deploy Position Management
- Standardize EMPLID format
- Only 1 net-new customization with 9.2

Key 9.2 Benefits for Scott & White:
- Improved data quality across the application
- Cleaner footprint for deploying delivered maintenance
- Reduced Total Cost of Ownership (TCO)

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Results So Far - De-customization Statistics

Module	# of Current System Customizations	# of Recommended Carry Forward Customizations	Percentage Decrease	# of Net-New Customizations
Benefits	45	16-20	~60%	0
Human Resources*	61	2 (Self Service) 1 (HR)	90%	1
Payroll**	53	15	70%	0
Recruiting***	75	3	95%	0
Total	**234**	**<40**	**~80-85%**	**1**

Excludes Reports & Interfaces

Next Steps and Q&A

07

KPMG's PS HCM v9.2 Assessment and Roadmap Services

1 HealthCheck	2 Workshop	3 Assessment
2-5 days (complimentary)	**7-14 days**	**7-10 weeks**

1 HealthCheck — 2-5 days (complimentary)
- Maturity model high-level review and analysis
- Technology transformation assessment and report
- Roadmap alternatives and high level alternative assessment
- Oracle Cloud and Globalization Awareness Summary
- +1 item from "Additional Items" list

2 Workshop — 7-14 days
- Maturity model high-level review and analysis and summary
- Review and analysis of current systems and processes
- **Critical** system and process area improvement opportunity workshop
- Assessment Summary of workshop findings and recommendations
- Roadmap alternatives and high level alternative sizing
- Oracle Transformation Strategy and high-level Roadmap
- **PeopleSoft / Fusion Adoption Business Case Summary**
- + 2 items from "Additional Items" list

3 Assessment — 7-10 weeks
- Maturity model review, analysis, summary, and detailed actionable recommendations
- Review and analysis of current HR IT systems and processes
- **Comprehensive** system and process area improvement opportunity workshops
- Detailed assessment summary of workshop findings and recommendations
- Oracle Transformation Strategy & Roadmap
- **PeopleSoft / Fusion Adoption Business Case**
- Relevant items from "Additional Items"

Additional Items
- Process Transformation Assessment and Strategy
- Pre-implementation Organizational Readiness Assessment
- Service Delivery Transformation Assessment and Strategy
- Business Intelligence Transformation Assessment & Strategy
- Transformation Governance and Controls Assessment & Strategy

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cutting through complexity ™

Contacts

Lisa Massman, Principal
Oracle HCM Practice Leader
S&W Engagement Partner
355 South Grand Avenue
Los Angeles, CA 94110
Phone: (213) 955-1524
Mobile: (805) 801-6168
Email: **lmassman@kpmg.com**

Doug Stockel, Director
Oracle HCM Practice
S&W Engagement Manager
4747 Executive Drive
Suite 600
San Diego, CA 92121
Phone: (858) 750-7052
Mobile: (619) 890-1773
Email : **dstockel@kpmg.com**