



LESSONS LEARNED CTCLINK DEPLOYMENT GROUP 5

ctcLink Project Management Office

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CTCLINK DG5 LESSONS LEARNED

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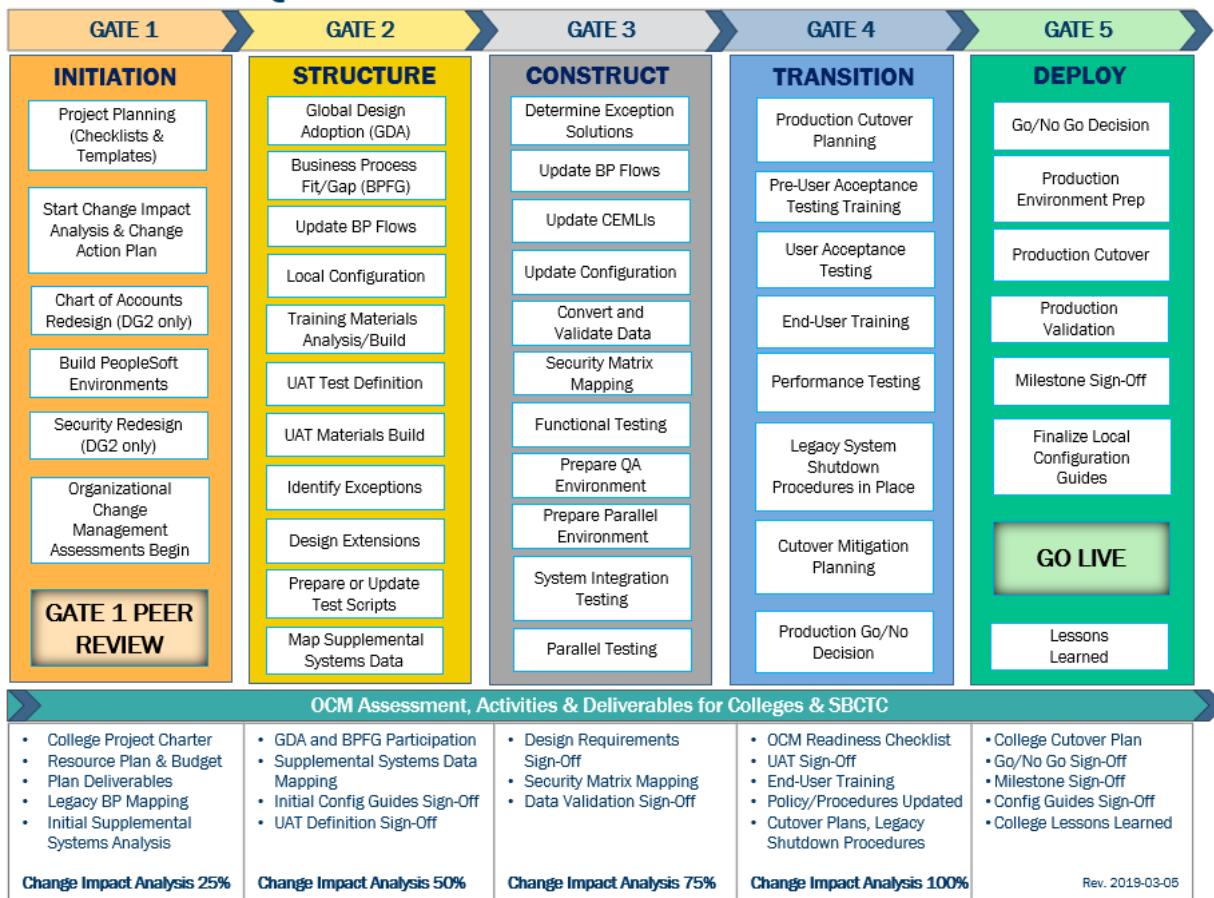
Introduction

The ctcLink Project Methodology incorporates continuous improvement during and after each deployment group's move to production. The Quality Gates illustrated below allow the ctcLink Project team to assess each activity based upon discussions with colleges, feedback from college and project staff, and surveys to understand where there may have been challenges within the Gates and opportunities for improvement for future Deployment Groups.

Documenting Lessons Learned is the final step in the implementation, per deployment group as well as for the entire project.

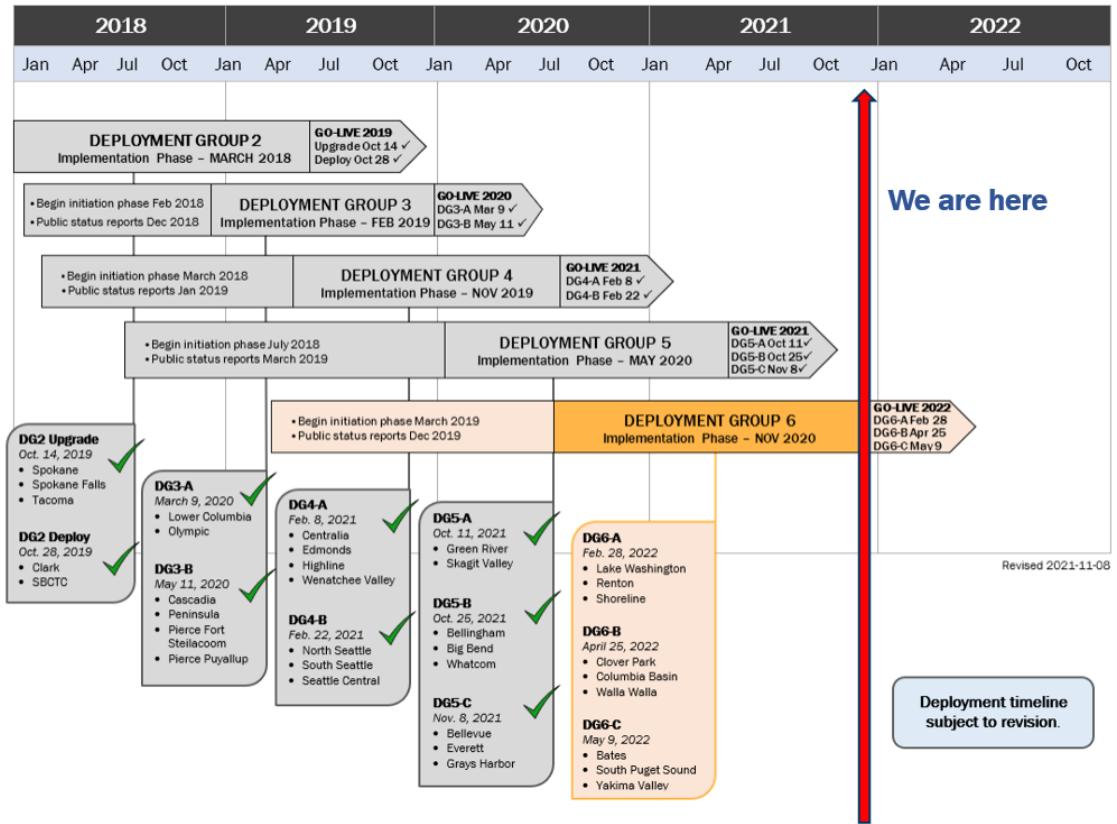
Figure 1. ctcLink Quality Gates & Milestones / [text alternative for infographic](#)

CTCLINK QUALITY GATES & MILESTONES



The Deployment Group timeline below illustrates the progress the ctcLink Project has made since 2018 and displays on the red line where we are in the deployment of ctcLink, focusing now on DG6 Deployment Groups.

Figure 2. ctcLink Deployment Group timeline, Dec. 2021 / [text alternative for infographic](#)



The Washington State Board for Community and Technical Colleges (SBCTC) ctcLink Project Team is committed to continuous improvement. After each Deployment Group is implemented into ctcLink Production, the ctcLink Project Team identifies the issues encountered and documents the corresponding improvement strategies to be implemented for the next deployment group. This document represents the deployment group five lessons learned.

Deployment Group 5 (DG5) consists of eight community and technical college districts: Bellevue College, Bellingham Technical College, Big Bend Community College, Everett Community College, Grays Harbor College, Green River College, Skagit Valley College, and Whatcom Community College. While the DG5 colleges prepared to go-live together, three DG5 colleges went live in three sub-deployment groups, each sub-deployment group going live two weeks apart. DG5-A went live on October 11, 2021; DG5-B went live on October 25, 2021; and DG5-C went live on November 8, 2021.

Improvements were made to the DG5 ctcLink implementation activities based on lessons learned from all previous deployment groups. In addition, real-time changes were made in response to suggestions from DG5 colleges. These real-time improvements were possible due to the close and frequent interaction between the ctcLink Project Team and college project managers (PMs) and subject matter experts (SMEs).

Methodology

The DG5 lessons learned are represented collectively as a deployment group rather than by individual college or college SME group. The lessons learned presented in this report reflect information collected from a variety of sources both during implementation and post go-live:

- Ongoing meetings with college PMs and SMEs
- DG5 PM meetings
- Executive Sponsor Meetings
- Six focus groups, one with each of the sub-deployment project managers and executive sponsors
- ctcLink Project Team focus group
- Key Informant interviews with ctcLink Project Leads

DG5 Lessons Learned: Overview

The results of the DG5 lessons learned underscore the fact that **the ctcLink project is, first and foremost, a “people project.”** The majority of the lessons learned for this deployment group relate to preparing the people and the college to transition successfully to use ctcLink for their business processes. Relative to previous deployment groups, few DG5 lessons learned relate to the ctcLink implementation project methodology—demonstrating the methodology’s maturity.

These findings are consistent with the Moran Technology Consulting, ctcLink Project Quality Assurance, November 2020 report:

DG2 and DG3 were, by most accounts, successful implementations. There were hiccups that are being addressed but, overall, the solution works. As the project has seen the deployments go smoother each time, there can be a belief that future deployment groups will have a much easier implementation. However, while the solution and the conversion processes improve each time, there is one aspect that does not change – the amount of work necessary to be completed by each college in order to have a successful implementation. There are a large number of college core business processes that will be substantially changing with ctcLink, requiring a significant commitment by each and every college in order to execute a successful implementation. - (Moran Technology Consulting, ctcLink Project Quality Assurance, Monthly Report – November 2020.)

The project management challenge

Higher education in general, and Washington’s community and technical college system specifically, is largely unaccustomed to applying industry-standard project management methodology to conduct its large-scale change initiatives. The ctcLink project management model was a primer for many.

DG5 executive sponsors and project managers alike spoke about effectiveness of employing project management methodology to keep focused on the goal and engage in the activities that bring them to that goal. One college reported they used the transition to ctcLink as a catalyst to changing the college culture with transparency, cooperation, and equity as its foundation. This college used project management principles to implement ctcLink all-the-while deliberately changing the way the college leads college-wide initiatives. Within the structure of the ctcLink project plan, the college and project leaders provided people the trust and power to innovate the work they do. They found that this method built the desire and responsibility for employees to make improvements and realize the value of their work.

The human factor

In addition to an intellectual activity, the learning process is, by its nature, an emotional experience. The fact that ctcLink is a “people project” became even more evident due to the layers of stress caused by the pandemic, social unrest, racial inequity, and high employee turn-over rates; in some cases, entire departments turned over.

These challenges were daunting for all the DG5 deployment group colleges, Washington State Board for Community Colleges (SBCTC) ctcLink Project implementation team, and SBCTC ctcLink Support teams. Adding to these challenges were the unsettled landscape of the current remote and hybrid operations (including the impact to college Human Resource subject matter experts (SMEs) to track the vaccine mandate), college and SBCTC teams met one challenging task after another over the past year and a half, all while running a complex go-live process.

Continuous improvement

Notably, few lessons learned identified by DG4 were also identified by DG5. Consistent with the ctcLink Project team’s commitment to continuous improvement, the absence of repeating lessons between the two deployments indicate the ctcLink project team effectively implemented continuous improvement strategies identified from DG4 Lessons Learned. Highlights of these improvements include the following:

- New and improved strategies, training, and communication related to student financials
- Increase in meetings with individual college project managers and teams
- Guiding colleges through preparing for post go-live
- Impact of the additional practice of final data validation activities during Cycle 4 data validation, Mock Go-Live Dry-Run
- Significant improvements in learning and applying security
- Substantially reduced conversion errors due to increased completion of User Acceptance Testing and data clean-up
- DG5 colleges requested more “advanced” ctcLink post go-live support sessions

DG5 Lessons Learned: Summarized Themes

The lessons learned in this report are summarized by themes and detailed in the following section by categories.

Importance of College Leadership Engagement

- Executive sponsors need to have the resources and authority to mitigate barriers, including college culture resistant to change and financial/resource. (college)
- Executive leadership needs to reach out to change-resistors and subject matter experts on their teams. (college)
- PMs should meet regularly with President, Executive Sponsor, and executive leadership to provide the executive leaders with the necessary information to budget, allocate, and manage resources necessary to complete ctcLink activities. (college)
- Executive sponsors should not hold another role in the ctcLink Project structure, e.g., pillar lead. (college)

- Engage supervisors early and make sure they are knowledgeable about what to expect from the change to ctcLink; they will be key to communicating with and supporting the training of their teams. (college)
- Frequently recognize people for the ctcLink work they do, including compensation, public recognition, and celebrations. (college)

Preparing for Go-Live

- Prioritize Legacy data clean-up activities; it is one of the most important factors in a successful go-live experience. (college)
- Map security roles for all employees prior to UAT. (college)
- Make sure college offices are closed to finalize transactions in Legacy and for at least the first two weeks post go-live to fully participate in the ctcLink Support Webex Sessions. (college)
- Plan for the budget tools that budget managers use after go-live, e.g., query access, commitment control budget reports, Tableau budget tool, etc.; connect with ctcLink-live colleges who have created budget tools. (college)
- Capitalize on User Acceptance Testing (UAT) as an opportunity to practice cross-pillar work, especially financial aid and student financials; enrollment services, financial aid, and finance office; and work study, human resources, and payroll. (college and ctcLink project)
- Reinforce how configuration decisions impact ctcLink during UAT. (college and ctcLink project)
- Practice final data validation activities during Cycle 4 data validation, Mock Go-Live Dry-Run. (ctcLink project)

Resource Planning

- Revisit and revise the college's Resource Plan & Budget to ensure adequate resources are dedicated to complete the ctcLink activities prior to go-live and post go-live. Include the following items: (college)
 - Hire business analysts early; they are instrumental in preparing and stabilizing ctcLink.
 - Assign at least one person full-time, with back-up, as Local Security Administrators (LSA).
 - Hire faculty advocates to serve as points of contacts, liaisons, and lead-trainers. They are also great resources to lead other faculty to support students in the transition to ctcLink.
- Revisit and revise the college's Communication Plan; attend Communication Meetings and use the [ctcLink Student Communication Resource Guide](#), [ctcLink Executive Sponsor Guide](#) (under Communications Planning Resources), and [Post Go-Live Planning Guide](#). (college)

Training

- Assign a local training lead and ensure the college community is engaged and taking the training; publicly track training for all employees. (college)
- Offer college-sponsored post go-live open support session for each full day from when employees begin to activate their accounts through next quarter student registration. The sessions should be staffed by two to ten people to problem-solve account activation, security issues, reporting time and leave, enrollment processes, and other processes that non-SME people encounter. (college)
- Hold Key Concepts training before the UAT relevant test cases. (ctcLink project)

- Increase training prior on go-live on dual processing in financial aid. (*ctcLink project and support*)
- Increase training to on how the sub-modules and payroll flow to general ledger. (*ctcLink project and support*)
- Within the Quick Reference Guides (QRGs), indicate the order of operations (e.g. this is step 1, 2, 7 or step 18) for each business process' component parts to give context within the overall business process described (*ctcLink project and support*)
- Centralize the branding of the QRGs to become the colleges' How-To Guides where appropriate. (*ctcLink support*)

Security

- Engage college's Legacy security leads in the security work prior to go-live so their knowledge and responsibility can be more aligned with ctcLink security requirements. (*college*)
- Offer colleges Visio and other documentation to provide them the environment details they would need to work in the environment, including data snap-shots, corresponding security roles, and usage. (*ctcLink project*)
- Develop more job aids to crosswalk job roles/duties to the necessary security roles (i.e., business operations by job descriptions that match to security roles). (*ctcLink project*)
- Provide a link for LSAs in the QRGs that identify which security role(s) is needed for each business operation explained in the QRG. (*ctcLink project and support*)

Transition to Support

- Make sure the right people are present and actively engaged in the Webex Support Sessions. (*college*)
- Partner with another ctcLink-live college and use the relevant ctcLink listserv to receive mentorship and learn best practices; these actions will enhance go-live support. (*college*)
- Engage ctcLink Support team throughout the implementation activities prior to go-live for an easier transition. (*ctcLink project and support*)
- Ensure the scheduled post go-live Webex Support Sessions are in alignment with the time of go-live and sequences of business processes. (*ctcLink support*)

DG5 Lessons Learned: Details

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
BPFG	<p>Configuration decisions were made before colleges felt like they really understood the ctcLink system. After being in the system, they wished they had made different configuration decisions.</p> <p>Colleges felt like they spent too much time mapping Legacy business processes and not enough time mapping future state business processes.</p>	<p>Make configuration decisions after there is a better understanding about how the ctcLink works.</p> <p>Spend more time understanding the ctcLink system and mapping out future state business processes.</p>	DG5 ES DG5 PM ctcLink Project	<p>Include this in overall Project Lessons Learned.</p> <p>Reinforce how configuration impacts ctcLink in UAT with DG6.</p>
College Leadership	<p>Make sure the President and Executive Sponsor are visibly engaged and supportive of the work and transition to ctcLink.</p> <p>Colleges struggled, at times, with change management strategies. These could be mitigated with more common understanding of change management practices and effective executive sponsor engagement.</p> <p>PM should regularly meet with the Executive Sponsor and the President individually.</p> <p>Colleges stressed the importance of regularly meeting with executive leadership and individual meetings with the president. This will help other executive leaders be accountable to the ctcLink work. And, the regular engagement will allow the executive leaders to plan and more fully support their employees.</p>	<p>Incorporate ctcLink content into the President's message.</p> <p>Executive Sponsor should frequently communicate with the college community and supervisors.</p> <p>Executive leadership needs to be reaching out to change-resistors and subject matter experts on their teams.</p> <p>Engage employees in Prosci change management OCM training.</p> <p>PM should meet regularly with President and Executive Sponsor individually.</p>	DG5 ES DG5 PM ctcLink Project	<p>Continue to send out monthly emails of the excerpts from the Executive Sponsor communication guides.</p> <p>Add supervisor communication templates to the DG6 Executive Sponsor guides.</p> <p>Add best practices in engaging with executive leadership to DG6 PM meetings and DG6 Executive Sponsor meetings.</p> <p>Review the role and importance of executive leadership as a lesson learned with cELC and the ctcLink Steering Committee.</p> <p>Include this in overall Project Lessons Learned.</p>
College Project Management	<p>Increase the awareness and time spent on cross-pillar work prior to go-live. Prior to go-live it is all hypothetical and then after go-live it is real.</p> <ul style="list-style-type: none"> • Work-study and Human Resources/Payroll 	Deliberately communicate and emphasize prior to go-live when the business processes in ctcLink require cross-pillar activities.	DG5 ES DG5 PM	Capitalize on User Acceptance Testing (UAT) as an opportunity to practice cross-pillar work, especially financial aid and student financials; enrollment services, financial aid, and finance office; and work study, human resources, and payroll.

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
	<ul style="list-style-type: none"> Financial Aid and Student Financials Enrollment Services and Financial Aid and Business Office, especially around student groups or attributes, program plans, and waivers Bookstore and Campus solutions (Bookstores often track the book for each class by Legacy Class-ID and in ctcLink it is different.) 			
College Project Management	<p>Colleges reported that project management is not a part of the college culture. At the time, designating a fulltime PM and hiring additional people as business analysts was a tough budget sell. DG5 Executive Sponsor and PMs said one of the only reasons they were able to secure the funding to hire business analysts was because other colleges already deployed on ctcLink did so and that created “peer pressure.”</p>	<p>Must have a full-time designated PM.</p> <p>Hire business analysts.</p> <p>Colleges should have a Resource Plan associated with the work to be completed prior to go-live and after go-live.</p>	DG5 ES DG5 PM ctcLink Project	<p>ctcLink Project recommends colleges revisit and revise their Resource Plan—as another of the recommended plans: Security, Training, Support, Communication, OCM, etc. — to ensure there are adequate resources dedicated to do the work activities throughout the implementation and post go-live.</p>
College Project Management	<p>Closing college offices to prepare for go-live is a must.</p> <p>Plan for how to catch-up on processes after go-live, especially around new hires.</p>	<p>Make sure college offices are closed to finalize transactions in Legacy and for at least the first two weeks post go-live to fully participate in the ctcLink Support Webex sessions.</p>	DG5 ES DG5 PM	<p>Add planning for office closures and impacts to a DG6 PM meeting and DG6 Executive Sponsor meeting.</p> <p>Revise the post go-live guide to include the importance of having a plan to catch up on processes post go-live.</p>
College Project Management	<p>Engage supervisors early and make sure they are knowledgeable about what to expect from the change to ctcLink. Make sure that supervisors are used as a method of communication and to ensure increase training. This may include a 30-minute daily stand-up meeting in student services, human resources, business office, and instruction office during the first two weeks post go-live to understand what issues, questions, and concerns their teams may have.</p>	<p>Make sure supervisors are trained early. Communicate with them often and offer time for them to ask questions.</p> <p>Prepare supervisors to walk their teams through activating their accounts and getting their time and leave submitted. Prepare supervisors to be the first tier of support.</p>	DG5 ES DG5 PM	<p>Add supervisor communication templates to the DG6 Executive Sponsor guides.</p> <p>Recommend to colleges to add supervisors as a vehicle to supporting ctcLink account activation and time and leave reporting post go-live.</p>

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College Project Management	Recognize people for the ctcLink work they do frequently.	<p>Compensate people.</p> <p>Executive leadership should recognize people on their teams frequently.</p> <p>Have college executive cabinet members attend Sunday's validation activities to walk around and thank people.</p> <p>Hold celebrations that honors people – virtual and social distanced.</p>	DG5 ES DG5 PM	<p>Emphasize the components of the DG6 Executive Sponsor guide that suggest colleges hold celebrations to honor the people who work on ctcLink implementation activities.</p> <p>Revise the post go-live guide to include recommending college hold celebrations that honors people, make sure people are compensated for their extra work, and that executive cabinet members attend the Sunday validation activities to go around and thank people.</p> <p>Add the importance of recognizing people for the work they do to a DG6 PM meeting.</p>
College Project Management	<p>Colleges either were very proud of hiring the back-fill positions (sometimes leadership forcing the hires) or wished they had done more hiring for the back-fill of work.</p> <p>Small colleges were stressed and taxed the most because everyone has multiple jobs/roles at the college and ctcLink is on top of those multiple jobs. They asked for understanding and compassion.</p>	Hire back-fill early, even if the pillar leads and SMEs are resistant.	DG5 ES DG5 PM	ctcLink Project recommends colleges revisit and revise their Resource Plan—as another of the recommended plans: Security, Training, Support, Communication, OCM, etc. — to ensure there are adequate resources dedicated to do the work activities throughout the implementation and post go-live.
College Project Management	<p>Supplemental systems were an after-thought and after colleges went live, they scrambled to prioritize and plan how to bring them on.</p> <p>Bookstore and Campus Solutions: Bookstores often track the book for each class by Legacy Class-ID and in ctcLink it is different.</p>	<p>Colleges need to prioritize and plan prior to go-live how to get supplemental systems back on line after colleges go live with ctcLink.</p> <p>Get data into DataLink earlier.</p>	DG5 ES DG5 PM	<p>Remind DG6 PM to revisit and revise the Supplemental Systems Analysis.</p> <p>Begin readiness assessment earlier in the process and spend more time on supplemental systems.</p>
College Project Management	Faculty and students adopted change much easier when the colleges hired and invested in faculty advocates for the ctcLink project.	<p>Hire faculty advocates to serve as points of contacts, liaisons, and lead trainers.</p> <p>Faculty advocates should lead other faculty to support students in the transition to ctcLink.</p>	DG5 ES DG5 PM	Continue to reinforce in meetings with PMs, Executive Sponsors, and communication leads that having faculty advocates on the colleges' ctcLink Project teams provide a lot of benefit.

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
College Project Management	Some colleges did not plan out their post go-live training well.	Prioritize the development of the post go-live training plan. Make sure it is actionable.	DG5 ES DG5 PM	Include training plan best practices in DG6 PM meeting.
College Project Management	<p>Executive Sponsor engagement is key to the successful implementation of ctcLink. If the executive sponsor and leadership are cynical and/or distracted by other responsibilities, the college doesn't prioritize the ctcLink strategies.</p> <p>One person cannot make the project successful, even if all of the boxes are checked.</p>	<p>Executive sponsors should not hold another role in the ctcLink Project structure, e.g., pillar lead.</p> <p>Executive sponsors should be a visible leader throughout the project.</p> <p>Executive sponsors should tie mission to the ctcLink Project for the college.</p> <p>Executive sponsors need to have the resources and authority to mitigate barriers—including college culture and financial/resource—to getting the ctcLink work activities accomplished.</p>	DG5 ES DG5 PM ctcLink Project	<p>Continue to work directly with the executive sponsors. Attend the DG6 ES meetings and offer to meet individually with them.</p> <p>Introduce the idea of meeting monthly with executive sponsors from sub-deployment groups. Within the meetings be sure to facilitate the conversations to identify what colleges are struggling with and connect them to helpful resources as well as building on the collective resources of each deployment group, e.g., Bellevue's plans and communication helped Grays Harbor. In addition, be intentional about facilitating the partnership between college PM and Executive Sponsor, including reinforcing the Executive Sponsor's key role of clearing roadblocks for the PM.</p> <p>Connect DG6 Executive Sponsors to peer Executive Sponsors at colleges which have previously deployed ctcLink.</p>
College Project Management	Colleges reported that the support sessions they offered to the college community, including students for the first three weeks of go-live is a source of pride for them.	Offer college-sponsored open support session for each full day, staffed by two to 10 people. The purpose of these support sessions is to problem-solve account activation, security issues, reporting time and leave, enrollment processes, and other processes that non-SME people encounter.	DG5 ES DG5 PM	Add planning for college-sponsored open support sessions to a DG6 PM meeting. Included college-sponsored support sessions in post go-live guide.
College Project Management	Colleges emphasized the importance of a college-produced schedule and framework for completing the work packages, including UAT, to the success of the project. For some colleges, there was a fear that it was micro-managing people or that people would already know how to do it.	College Project Management should provide a schedule and framework for all of the work packages to be completed.	DG5 ES DG5 PM	Share DG5 PM feedback regarding the effectiveness of providing tracking tools and frameworks for their college teams to complete the work with the DG6 PMs.

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
College Project Management and ctcLink Project Management	Both on the college side and the ctcLink Project side, having a good understanding of Legacy and ctcLink was beneficial to all work packages, especially data validation.	On the college side, engage Legacy leads in the ctcLink implementation work as much as possible.	DG5 ES DG5 PM	Share DG5 PM feedback regarding the benefits of having the Legacy leads engaged in ctcLink work with the DG6 PMs. Include this in overall Project Lessons Learned.
College Project Management and FM	Colleges didn't understand the budget tools available to them and had to scramble post go-live.	Research and plan what budget managers will need and do after go-live, e.g., query access, commitment control budget reports, Tableau budget tool, etc.	DG5 ES	Connect DG6 PMs and ESs to colleges previously deployed ctcLink who have budget tools.
Communication	<p>Customer Service should be improved:</p> <ul style="list-style-type: none"> • Not taking ownership of and not communicating last-minute changes in project. • Not acknowledging and clearly communicating rationale of changes in project timeline. • Consistency in homework assignment and submission between pillars. • From the colleges' perspective the SBCTC is one agency. Do not blame different departments for mistakes. • Don't be offended when asked to repeat information. "Colleges are drinking from a firehose of information and everything is moving so fast." Don't expect people to remember everything. 	<p>Proactively communicate schedule changes and rationale for changes. Repeat everything often and communicate everything in multiple ways.</p> <p>Engage Support more with the colleges so that transition and knowledge between support and project is seamless.</p> <p>Assign a friendly and professional Project liaison to each college. The liaison can get questions answered and organize additional support if/when needed.</p> <p>Increase the frequency of meeting individually with ctcLink college advisor and college PMs individually earlier on.</p>	DG5 ES DG5 PM	<p>Review and repeat dates. Immediately communicate dates changes and rationale of date changes.</p> <p>Increase the communication/warning that the colleges should plan for additional assignment requests with a quick turnaround within the last month up to go-live. These assignments depend on the college's configuration and results of conversion; therefore, it cannot be assigned earlier.</p>
Communication	DG5 Communications Planning meetings were very helpful. The communications that the DG5 colleges were most proud of were inspired by the Communication guides. They found them helpful and received a lot of good feedback from the college employees, including faculty members. People were referring back to the Communications guide to find their	Use the provided Communication guide and Executive Sponsor guides to help organize college communication about ctcLink.	DG5 ES DG5 PM ctcLink Project	<p>Continue to send out monthly emails of the excerpts from the Executive Sponsor communication guides.</p> <p>Continue the communication meetings with DG6 and review best practices strategies, topics, and timing related to change management, college-wide communication, student communication, and supervisor communication.</p> <p>Check in with communication leads at individual</p>

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
	answers.			colleges and offer time to meet individually.
Communication	A couple of incidents involving not communicating configuration errors occurred immediately after go-live. With their limited knowledge of ctcLink, they spent so much time troubleshooting when the ctcLink Project people knew it didn't convert. (DRS and faculty workload compensation)	Communicate conversion errors immediately to colleges. ctcLink Project to provide a list of conversion errors to each college.	DG5B ES DG5B PM	ctcLink project leadership took corrective action to address this situation when it was discovered. Assurances are in place to prevent similar miscommunication in the future.
Configuration	Colleges did not understand fully which parts of ctcLink configuration are something they can control and what they cannot control. In other words, they did not know/remember which parts they can change and what parts they cannot. Colleges also do not remember what was globally configured. They are told they cannot change what was globally configured; however, there is a possibility to change the globally designed configuration when the decision is made collectively. There is a sense some of the configuration decisions made may change based on the additional experience. Colleges would benefit from more guidance on how to self-manage their local configurations and what to expect from the configuration decisions post go-live. Sometimes, ctcLink Project team said some processes were optional. Some colleges discovered that some of those processes were not optional for them.	Develop a crosswalk for configuration decisions that identifies what was globally designed, what is hard-coded by Oracle, and what is the result of configuration decisions made by the college. Develop local configuration tools/guides to help colleges understand, maintain, and make decisions to change local configurations, including consequences to those changes. Provide individual college context, so they understand the consequences of not doing the optional processes.	DG5 ES DG5 PM ctcLink Project	Redirect PMs back to the configuration guides where appropriate to help them use the guides as tools. Provide a reminder and overview of the ctcLink Governance process. Provide individual college context, so they understand the consequences of not doing the optional processes.
ctcLink Project Management	The DG5 PM meetings were more effective when there was time offered to meet in sub-deployment groups.	Continue to organize the PM meetings with everyone for a part of the meeting and then conduct breakout sessions by sub-deployment group.	ctcLink Project	Organize the DG6 PM meeting with everyone together at the beginning of the meeting and then break out into sub deployment groups for the last part of the meeting.
ctcLink Project	The early mock dry-run in Cycle 4 was a success and helped colleges develop	Continue to do the early mock go-live	DG5 PM	Continue to do the early mock go-live dry-run in

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
Management	confidence in the process and provided them the knowledge of what to do and expect during go-live weekend. The ctcLink Project team and colleges were able to make course corrections before they went live with ctcLink. The process also provided the project team an opportunity to improve the data validation guide.	dry-run in Cycle 4 for DG6.	ctcLink Project	Cycle 4 for DG6 deployments.
ctcLink Project Management	Lock and unlocking access to make changes to course and classes worked well. The process allows colleges to make changes in AAR and curriculum maps to get ready for go-live. The process also helped colleges keep aspects of courses and classes top of mind – Class production included fees and instructor assignment. This was a more holistic approach.	Continue to lock and unlock access to make changes to course and classes.	ctcLink Project	Continue to lock and unlock access to make changes to course and classes. Clearly communicate dates to colleges and indicate what work can continue.
Data Clean-up and College Project Management	Colleges either were very proud of the data clean-up they did or wished they had done prioritized data clean-up.	Prioritize data clean-up activities. It is one of the most important factors in a successful go-live experience.	DG5 ES DG5 PM	Revise the post go-live guide to include the importance of data clean-up in the success of go-live. Find multiple ways to communicate and remind people about the importance of data clean-up. Add a cover page that consists of a check-off list of each CS data clean-up assignment in the month prior to go-live.
Financial Aid	Run disbursement in “Report Only” for the first time. Colleges felt like it was soft recommendation.	Emphasize that the financial aid should be run in “Report Only” for the first time.	DG5 ES DG5 PM	Emphasize that the financial aid should be run in “Report Only” for the first time.
Payroll	The colleges did not fully understand how closely payroll and finance have to work together to complete payroll. Colleges realized the two areas were not in sync post go-live. Colleges also were not aware that their local issues could shut down and delay the processing of payroll for the <i>entire</i> state.	The ctcLink Project team could review and improve the step-by-step guide created by Clark College and spend time prior to go-live going through the process. Specifically, more information needs to be distributed about how payroll works and what and how to identify issues so colleges can proactively catch and fix the issues.	DG5 ES DG5 PM	Continue to communicate that their local issues could shut down and delay the processing of payroll for the <i>entire</i> state.

Category	Lessons Learned Description	Recommendation	Source	ctcLink Status/Response
Security	<p>It was difficult to understand the crosswalk from Legacy to ctcLink in relation to security.</p> <p>The crosswalk between ctcLink ID and SID that the ctcLink Project Team provided missed people. The colleges wished they understood they couldn't rely on that crosswalk.</p>	<p>Engage Legacy leads in the security work prior to go-live so their knowledge and responsibility can be more aligned with ctcLink security requirements.</p>	DG5 ES DG5 PM	Continue to hold "security safe rooms" and working one-on-one with colleges to deepen their knowledge of security in ctcLink.
Security	<p>Colleges wish they would have understood the security workbook earlier. The application used for the security workbook (Google Sheets) was not appropriate for what it is intended to do; it caused further confusion.</p>	<p>Introduce the security workbook earlier. Continue to offer the security sessions and safe-room.</p> <p>Include recommendations about what security roles are needed for what type of employees, in general.</p> <p>Use a more appropriate tool for the security workbook.</p>	DG5 ES DG5 PM ctcLink Project	Develop more job aids to crosswalk job roles/duties to the necessary security roles (i.e., business operations by job descriptions that match to security roles).
Security and College Project Management	<p>Security is complex pre-go-live and post go-live.</p> <p>Colleges had a hard time understanding the multiple environments and differences of the security roles within them.</p> <p>Colleges were scrambling to get the security roles worked out during UAT.</p> <p>Colleges benefitted from having someone concentrate fulltime on security roles.</p>	<p>Offer colleges more instruction on the environments and corresponding security roles within them.</p> <p>Map all security roles prior to go-live, not just the ones the ctcLink Project directs colleges to set.</p> <p>Hire a person to manage security fulltime post go-live.</p>	DG5 ES DG5 PM ctcLink Project	<p>Security should be a component in the college's Resource Plan.</p> <p>Develop more job aids (descriptions of business operations by job descriptions and within offices that match to security roles).</p> <p>Provide a link for LSAs in the QRGs that identify what security role is needed for the business operation explained in the QRG.</p> <p>Continue to remind DG6 PMs to map security roles for all employees prior to UAT.</p>
Support	<p>The transition from ctcLink Project to the ctcLink Support did not feel like an easy transition. The ctcLink Support team were not familiar with the state of readiness for each college or sub-deployment group.</p>	<p>Increase the interactions between support and colleges prior to go-live to plan for the support sessions that would be most effective for the sub-deployment groups.</p>	DG5 ES DG5 PM	After DG5 colleges went live, many of the ctcLink project team members will begin working, part-time initially, with the ctcLink support teams. This change will facilitate the continuity in transition from project to support.
Support	<p>Consider when go-live occurs in relation to time when the business processes are needed, including the order (sequence) of the business process.</p>	<p>Rearrange some of the scheduled sessions to reflect the time of the quarter of go-live and sequences of business processes.</p> <p>Do not run finance and student</p>	DG5 ES DG5 PM ctcLink Project	DG6 post go-live Webex Support Sessions will be scheduled in alignment with the time of go-live and sequences of business processes.

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		finance simultaneously. Small colleges cannot attend both.		Finance and student finance post go-live support sessions schedules were rearranged for DG5-B and DG5-C.
Support	Not all business processes were supported during the first two weeks post go-live. Tickets were submitted for issues that could have resolved with a quick Q&A opportunity.	Extend post go-live support sessions longer than two weeks to have question/answer open support sessions.	DG5 ES DG5 PM	Question and Answer open sessions by pillar are planned and scheduled for DG5 colleges. The DG6 sub-deployment groups are not all timed two-weeks apart; this will provide more opportunity/capacity for ctcLink support to respond to live colleges in the third week of post go-live.
Support	Support sessions spent too much time in the beginning with introductions.	Spend time prior to go-live getting to know support people, what to expect after go-live, and how to submit service desk tickets—including the responsibilities of what should happen when submitting a ticket, how to manage it, as well as understand when to submit tickets. Consider having breakout rooms for each college so they can ask questions within the context of their individual college business processes.	DG5 ES DG5 PM	After DG5 colleges went live, many of the ctcLink project team members will begin working, part-time initially, with the ctcLink support teams. This change will facilitate the continuity in transition from project to support. Support will host a Meet and Greet prior to go-live, for each group, to talk about what to expect during the few weeks following post go-live.
Support and College Project Management	Make sure the Webex support links are shared with those who are supposed to be there. Some colleges had too many people there and other colleges didn't have enough. PMs noted frustration about including people from other sub-deployment groups in their support session.	Make sure the right people are at and actively engaged in the Webex Support Sessions. Do not mix sub-deployment groups in the two-week post go-live Webex sessions.	DG5 ES DG5 PM	Add how best to make sure the right people are attending the two-week post go-live support sessions to a DG6 PM meeting.
Support and Training	The QRGs for financial aid disbursements were difficult to understand because they did not coincide with college processes. Colleges found that they knew more about the financial aid processes in ctcLink than dual processing.	Provide more time in the support sessions for financial aid, including hands-on walk-throughs of all of the financial aid disbursement processes. Partner with another college that has gone live—the college would	DG5 ES DG5 PM	Provide financial aid process/activity post go-live workshops aligned to financial aid deadlines, similar to the supportive HCM Payroll workshops. Dual processing cannot be simulated prior to go-live because the data is not available. The lack of data prohibits more in-depth/hands-on walk-

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		<p>provide the newly live college mentorship.</p> <p>Do more training prior to go-live on dual processing in financial aid.</p>		throughs of financial aid dual processing.
Training	<p>QRGs are good, but do not usually align with the colleges' business processes.</p> <p>Non-SME people do not know about the QRGs. This was a missed opportunity for efficient work. Many of the colleges developed their own how-to guides that were based on the QRGs.</p> <p>The QRGs rarely indicate the required order/sequence of business processes.</p>	<p>Rename QRGs to How-To Guides for common language purposes.</p> <p>Find a way to centralize the branding of the QRGs to become the colleges' How-To Guides.</p> <p>Indicate the placement of the business process within the larger context of business processes in each QRG where relevant.</p>	DG5 ES DG5 PM	<p>Long-term, the Quick Reference Guides will be evolved into How-To Guides, they will incorporate why and how to do the business process as well as what to do if issues arise.</p> <p>Financial Aid has a business process guide that outlines the sequence of business processes.</p>
Training	<p>Key concepts trainings were offered too late.</p> <p>Colleges need additional support in faculty workload (FWL).</p>	<p>Offer key concepts training earlier in the process, before BPFGs and UAT.</p> <p>Have FWL training early in the UAT process and add another training after their hands-on experience.</p>	DG5 PM	Plan to hold key concepts training earlier; FWL key concepts training will be held prior to UAT FWL activities.
Training and College Project Management	Make sure the college community is engaged and taking the training.	<p>Publicly track training.</p> <p>Include as many people as possible in the UAT walk-throughs, but only the SMEs in the UAT work. Allow people to get into the environment to explore the ctcLink space.</p> <p>Encourage SMEs doing the UAT to lead other people through the business processes prior to go-live.</p>	DG5 ES DG5 PM ctcLink Project	<p>Add best practices in training and motivate completion of training at a DG6 PM meeting and DG6 Executive Sponsor meeting.</p> <p>Share DG5 PM feedback regarding including as many people in the UAT walk-throughs with the DG6 PMs.</p>
Training	Colleges needed a better understanding about how sub-modules and payroll flow to general ledger and how to balance the processes. They were given queries but no training.	<p>Offer training to on how the sub-modules flow to general ledger.</p> <p>Increase training on how payroll flows to general ledger.</p>	DG5 ES DG5 PM	Enhance training on accounting processes as well as business process flow for submodules.
UAT	Colleges expressed a concern about the completion of UAT activities as a competition than making sure colleges learned what they needed to from the UAT	<p>Don't make completion of UAT activities a competition.</p> <p>Rather than reviewing completion statistics, review learning outcomes</p>	DG5 ES DG5 PM	Connect proactively with colleges that are not meeting deadlines or when there is concern they will not meet the deadlines.

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	experience.	of the UATs.		
UAT	The time spent on planning, walk-throughs, and having colleges come up with their own data scenarios resulted in higher completion of UAT; which prepared colleges more for go-live.	Repeat the process to prepare for UAT for DG6 with key concepts training earlier.	DG5 ES DG5 PM ctcLink Project	Repeat the process to prepare for UAT for DG6 with key concepts training earlier. Continue to improve the walk-throughs with more tangible directions to improve how they start with the process to improve the outcomes.
UAT and College Project Management	College personnel did not thoroughly test and understand combo-codes.	Prioritize testing combo-codes in UAT.	DG5 ES DG5 PM	Emphasize the importance of testing combo-code during UAT.

Next Steps

DG5 LESSONS LEARNED DISTRIBUTION	DATE
Moran Technology Consultants review draft DG5 Lessons Learned report	December 2021
Present Lessons Learned to ctcLink Steering Committee	December 14, 2021
Distribute to DG5 PMs and ESs	December 14, 2021
Post Final Report	December 14, 2021
DG5 Lessons Learned ctcLink Connect blog post	December 17, 2021
Present Lessons Learned to DG6 Executive Sponsors	December 20, 2021
Post Lessons Learned report deliverable to OCIO website	January 5, 2022
Present Lessons Learned to All-PM Meeting	January 5, 2022
Present Lessons Learned to cELC	January 26, 2022