



# MCCS Solution Discovery Workshop Agenda

## Meeting Description

The primary purpose of these sessions is for the Anthology Team to understand the institution's current processes. The "Subject Matter Experts" will discuss the current policies and procedures that define the business flow for their departments to include challenges and wins.

## Meeting Objectives

- Listen to the client's current business processes
- Discover and document challenges/pain points in current business processes/systems
- Define and understand the future landscape of their ERP solutions

## Desired Outcomes

- Align current processes to industry best practices and software capabilities
- Completion of the appropriate Discovery Process Recommendations, Future Landscape, and understanding of all third-party vendors that will require integration
- Documentation of any identified Gaps

## Pre-requisites

- Pre-Discovery Questionnaire sent /Received
- Catalog
- ECARs
- Existing Chart of Accounts - on PTS
- Sample of the current application(s), the current process for assigning recruiter
- Technical Landscape Overview of your current state
- Any current Business Process Review documentation created as part of ERP RFP (existing process maps or job aids would be helpful) - on PTS
- 10-15 Sample Students: transcripts, financial aid summary, and copy of ledger card
- Term Class Schedule containing Course

## Meeting Agenda

The following is the agenda for the three-day Discovery session for Enterprise system delivery. The agenda indicates which product will be discussed during the session,



Additional columns include the facilitator, the topic of discussion, the date of the session, and the timeframe.

**Day 1: Kick-off, Technical Overview, Data Migration Overview, Reporting Overview – REMOTE**

Dial sessions will be sent out

11/4/2022

\*All times are EST

<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>Kick-Off</i>	Dave Gumbiner and Tiffany Owens	ALL	Kick-Off of MCCS project	9:00 am – 11:00 am	All attendees
<i>Reporting Operational</i>	Lynne Culverhouse	All	Reporting Overview	11:15 – 12:15 pm	All Attendees
<i>Lunch</i>	TBD		Lunch	12:15 pm -1:30 pm	
<i>Technical Overview</i>	Sandeep Kulkarni Roman Civalero Magesh Shanmugam Jason Ostensen	ALL	Technical Overview	1:30 am –3:45 pm	Team members in IT or functional who are familiar with the existing 3 <sup>rd</sup> Party integrations
<i>Data Migration Overview – Student, Finance, Reach</i>	David Siebert	ALL	Data Migration Overview	4:00 – 5:00 pm	Anyone who will be involved in the conversion process – IT or Functional team members who know the data

**Day 2: Anthology Reach + Marketing - 11/8/2022**

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<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>Inclusive</i>	Dave Gumbiner		Introduction	8:00 am – 8:15 am	
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Inbound Interests	8:15 am – 8:45 am	Admissions
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Territory Assignment	8:45 am – 9:15 am	Admissions

<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Prospecting Process	9:15 am – 9:45 am	Admissions
			<b>Break</b>	9:45 am-10:00 am	
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Application Management	10:00 am – 12:00 pm	Admissions, Application Processors (WFD)(IT-current APPs)
			<b>Lunch</b>	12:00 – 1:00 pm	
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Events and Travel	1:00 pm – 1:30 pm	Admissions, any department that travels for prospect management
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Marketing Strategy	1:30 pm – 2:00 pm	Admissions, Marketing
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Success Plans and Success Networks	2:00 pm– 2:30 pm	Advising, Student Support, Retention
			<b>Break</b>	2:30 pm – 2:45 pm	
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Advising Appointments/Case Management	2:45 pm– 3:15 pm	Advising, Student Support, Retention
<i>Reach</i>	Matt Shorkey/Melissa Jaramillo		Reach Scoring Model	3:15 – 3:45 pm	Advising, Student Support, Retention
	Matt Shorkey/Melissa Jaramillo /Dave Gumbiner		Wrap Up	3:45 – 4:00 pm	All

### Day 3: Anthology Student - 11/9/2022

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<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>All</i>	Dave Gumbiner	All	<b>Kick-Off</b>	8:00 – 8:15 am	
Academic Records	Beth Violet/Nora Brettschneider	TBD	Admissions Process (including placement requirements & transfer credit eval)	8:15 – 8:45 am	Recruiting and Admissions (WFD)



<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
Academic Records	Beth Violette/Nora Brettschneider	TBD	Managing Student Profile Prospect/Application Statuses	8:45 – 9:15 am	Recruiting and Admissions(WFD)
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Master Class Schedule	9:15 – 9:45 am	Scheduling, Course Maintenance and Registrar
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Registration	9:45 – 10:15 am	Registrars(WFD)
		All	<b>Break</b>	10:15 – 10:30 am	
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Student Life Cycle Classifications	10:30 – 11:00 am	Admissions, Registrars, and Advising (WFD)
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Student Services (Veterans, Housing, Engagement)	11:00 – 11:30 am	Student Services
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Program Offerings, Dual Major/Degree, AOS, Program Changes	11:30 – 11:45 am	Registrar and Course Maintenance
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Grading & Academic Evaluation	11:45 – 12:00 pm	Registrar, LMS and Faculty (WFD)(IUT)
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Attendance or Census Tracking	12:00 – 12:15 pm	Faculty and Registrar
<i>Academic Records</i>	Beth Violette /Nora Brettschneider	TBD	Graduation Clearance Process	12:15 – 12:30 pm	Registrar and advising
		All	<b>Lunch</b>	12:30 – 1:30 pm	
<i>Financial Aid</i>	Beth Violette /Nora Brettschneider	TBD	ISIR Processing, Awarding Aid	1:30 – 2:00 pm	Financial Aid
<i>Financial Aid</i>	Beth Violette /Nora Brettschneider	TBD	SAP	2:00 – 2:15 pm	Financial Aid
<i>Financial Aid</i>	Beth Violette /Nora Brettschneider	TBD	Refund/Stipend Process Reconciliation Process	2:15 – 2:45 pm	Financial Aid/ Student Accounts
		All	<b>Break</b>	2:45 – 3:00 pm	
<i>Student Accounts</i>	Beth Violette /Nora Brettschneider	TBD	Charges and Billing Processing Payments	3:00 – 3:30 pm	Student Accounts



<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>Student Accounts</i>	Beth Violette /Nora Brettschneider	TBD	Revenue Recognition Release to GL	3:30 – 4:00 pm	Student Accounts/Finance
<i>Student Accounts</i>	Beth Violette /Nora Brettschneider	TBD	Collections	4:00 –4:15 pm	Student Accounts/Finance
<i>Career Services</i>	Beth Violette /Nora Brettschneider	TBD	Career Services	4:15 – 4:30 pm	Career Services (IT-3 <sup>rd</sup> parties)
<i>All</i>	Dave Gumbiner	All	<b>Wrap Up</b>	4:30 –5:00 pm	



**Day 4: Anthology Finance - 11/10/2022**

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<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
<i>Finance</i>	Dave Gumbiner	All	<b>Kick-Off</b>	8:00 -8:15 am	All SMEs and PMs
	Ankush Maggu/Amanda Cunningham	TBD	Charts and Accounts/General Ledger Grant & Project Mgmt	8:15 -9:30 am	From Anthology: Finance SMEs From Client: CFO, Account Manager, Accountants, Grant Manager
			<b>Break</b>	9:30 -9:45 am	
	Ankush Maggu/Amanda Cunningham	TBD	Procure to Pay	9:45 - 10:30 am	From Anthology: Finance SMEs From Client: CFO, AP Clerk, Purchasing Team, Accountants
	Ankush Maggu	TBD	Banking	10:30 - 10:45 am	From Anthology: Finance SMEs From Client: CFO, Account Manager, Accountants
	Ankush Maggu	TBD	Budgeting	10:45 – 11:00 am	From Anthology: Finance SMEs From Client: CFO, Account Manager, Accountants, Budget Managers
	Ankush Maggu	TBD	Fixed Assets	11:00 - 11:30 am	From Anthology: Finance SMEs From Client: CFO, Account Manager, Accountants, Fixed Assets Manager



<i>Module</i>	<i>Facilitator</i>	<i>SME/Owner</i>	<i>Topic</i>	<i>Time</i>	<i>Recommended Attendees</i>
	Amanda Cunningham	TBD	Expense Management	11:30 am-12 pm	From Anthology: Finance SMEs From Client: CFO, Account Manager, Accountants, Expense Report Manager, AP Clerk
			<b>Lunch</b>	12:00 - 1:00 pm	
	Ankush Maggu/Amanda Cunningham	TBD	Non Student AR/Student Integration	1:00 -2:00 pm	From Anthology: Finance SMEs, Student SMEs From Client: CFO, Account Manager, Accountants, Student Accounting Team, AR Clerk
All		All	<b>Wrap Up</b>	2:00-2:15 pm	