Professional Services Requires a Financials Solution with Deep Bi-Directional Integrations

Duration

9

Months

Regions
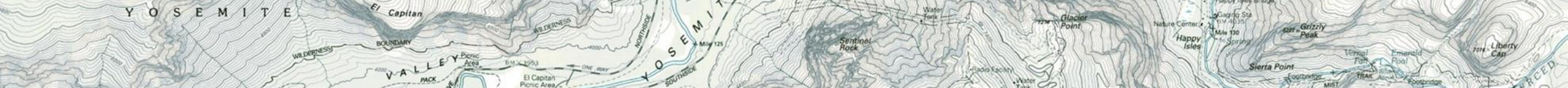
Products

20

Integrations

10

Products

Assets
Banking
Budgets
Core Financials
Core HCM
Financial Accounting
Financial reporting
Procurement
Revenue
Suppliers

From our Customers

"This whirlwind of a deployment was a success! The Invisors team was able to guide us through a complex + interdependent solution design. The integrations took a while, but they got it working!"

inVisors

OH-NO Moments ⊗

Workday + our business systems must play nicely together.

The goal is to streamline and improve our Financial Management, but there are several other critical systems working together to manage our professional services business. While installing Workday, we can't break the stuff that isn't changing.

- We manage suppliers/vendors in Workday, but those suppliers will use separate systems to manage their resources providing services to our clients.

- We will invoice clients based on the time collection from external systems.

- We monitor and coordinate Accounts Payable with Accounts Receivable; specifically, some suppliers are paid when clients have paid their invoice ("pay when paid").

AH-HA Moments ✓

Tailor the critical components, but still be open to adopt workday best practices.

Our Professional Services Business is a blend of corporate employees + Independent contractors + strategic sourcing suppliers: Matching client needs against our pool of qualified consultants. We were primarily deploying Workday Financial Management, with a slim core of HCM for our corporate employees. We needed guidance on how to best design an efficient Workday solution, based on our broader system architecture.

- Focused on our NEED TO HAVE items: "It's critical that we invoice customers and pay our suppliers." The trickiest part of this deployment was the integration work to collect time inputs from our diverse mix of resources assigned to a specific project, then organize those inputs to invoice our clients, and finally to pay our suppliers who provided resources. This required detailed integration development of "grouping functionality" and many functional test cases, to validate that the solution was operating correctly end-to-end.

- Enjoyed some NICE TO HAVE items: "We were newly automating the Procurement and Asset processes – we didn't have detailed requirements or preset expectations." The system defaults were adopted for these processes, which was a 'win' for the team. Additionally, we were able to write some new policies to support our new asset accounting and procurement processes. We were thankful to have a systematic solution that we could fine-tune after go-live.

- Invisors worked closely with the project team to create a detailed cut-over plan to organize the activities related to freezing then shutting down legacy systems and files; additionally, providing support through the first month-end and quarter-close.