



Designing for the Future

An Advisory-Led Workday Grants Transformation

Overview

A renowned medical school engaged Attain Partners to provide functional and technical grants support during its recent Workday implementation. The project successfully went live after completing a focused 19-month implementation timeline. With experience in higher education and sponsored research, Attain Partners supported the Client in designing the new system and converting legacy data with accuracy and integrity. The Client sought to ensure that the new system supported strong financial and grants processes without replicating outdated practices or introducing new compliance risks. Leadership prioritized a partner with deep sponsored research and technical expertise to guide design decisions and ensure the Workday solution incorporated effective internal controls across the full grant lifecycle, from award setup through reporting and closeout.

The Challenge

Implementing a new ERP system introduces considerations and risks that may not be immediately apparent to an institution navigating the process for the first time, particularly with a comprehensive platform such as Workday. The Client recognized the importance of engaging a partner with deep technical and sponsored research expertise to help anticipate risks, surface critical design considerations, and guide informed decision-making throughout the implementation. Additionally, common challenges during a system transition include managing the complexities of design and data conversion while maintaining day-to-day operational responsibilities. Implementation teams are often required to make critical configuration decisions, validate large volumes of historical data, and participate in testing cycles, all while continuing to process transactions, support faculty, meet sponsor deadlines, and ensure uninterrupted financial operations. Balancing project demands with ongoing institutional responsibilities can strain internal capacity and increase the risk of delays, incomplete requirements gathering, or overlooked compliance considerations.

The primary objective was to implement a well-designed Workday solution that incorporated research administration best practices and fully leveraged Workday functionality. Success criteria included accurate conversion of legacy grant data with validated life-to-date balances, thoroughly tested business processes aligned with compliance requirements, and reliable reporting for sponsored research.

Attain Partners collaborated closely with finance, research administration, and technical teams throughout the implementation. The team supported system design, data conversion, testing, and security review while helping stakeholders navigate complex grant-related decisions. This hands-on engagement ensured the new Workday environment addressed both operational requirements and compliance standards.

Our Approach

Our approach was organized into five workstreams: 1) System Design, 2) Data Clean-up and Transformation, 3) Data Conversion and Validation, 4) Design Confirmation and Testing, 5) Documentation and Training Support.

Workstream 1: System Design

Designing the Workday Grants solution required close coordination across Finance, HCM, Payroll, Procurement, Reporting, and technical teams to ensure grants considerations were reflected in all major design decisions. Through structured cross-functional sessions led by the implementation partner with Attain Partners serving in an advisory capacity, teams reviewed existing processes, identified areas for improvement, and determined which practices should be retained or redesigned. Sessions focused on defining award structures, establishing reporting frameworks, configuring workflows, and embedding appropriate internal controls across the grant lifecycle. Rather than replicating legacy processes, the team evaluated how Workday functionality could streamline approvals, strengthen oversight, and improve transparency. Careful attention to sponsor compliance, segregation of duties, integrations, and cross-functional impacts resulted in a tailored system design that aligned with institutional requirements while supporting leading practices in grants management.

Workstream 2: Data Clean-up and Transformation

A successful ERP implementation begins with clean, reliable data. We partnered with research administration and finance teams to conduct a comprehensive review of legacy grant data to identify inconsistencies, outdated records, duplicate fields, and structural variations that had been built over time. Data clean-up was essential to prevent legacy issues from being carried over into the new system and to support accurate reporting, compliance, and lifecycle award management within Workday.

In partnership with stakeholders, we streamlined award and grant structures, clarified key attributes, and aligned data with Workday's framework. This included mapping legacy fields to Workday objects, standardizing data definitions, restructuring hierarchies, and organizing life-to-date balances and transaction history to support Workday's reporting and controls.

Legacy award data was mapped to Workday fields with future reporting, sponsor requirements, and audit considerations in mind. By reshaping legacy data to fit Workday's model rather than forcing the new system to mirror outdated structures, the Client established a strong foundation for reliable reporting, streamlined administration, and long-term scalability.

Workstream 3: Data Conversion and Validation

Attain Partners worked with stakeholders to define the scope of historical data to be converted. Through three mock conversions and detailed reconciliation reviews, we validated both legacy data and data loaded into Workday. This collaborative process ensured that award details, life-to-date balances, unbilled expenses, and open commitments were accurate before go-live. Validation efforts provided confidence that financial and grants reporting would be consistent and audit-ready from day one.

Additionally, we partnered with finance, HCM, payroll, and other cross-functional teams to verify data elements that directly impact sponsored projects, such as cost centers, workers, payroll costing allocations, suppliers, and open transactions. We confirmed that integrations and cross-domain relationships functioned as intended, and that results aligned across modules. By taking this broader approach, we ensured grant data was not only accurate within the Grants module, but also across the connected areas that drive compliance, billing, and reporting.

Workstream 4: Design Confirmation and Testing

Following configuration and data conversion, cross-functional teams participated in structured testing cycles to confirm that the system operated as intended. Attain Partners developed detailed test case scenarios, user prompts, and anticipated outcomes to validate system configuration across the full grant lifecycle. These scenarios reflected real-world business processes and sponsor requirements, giving stakeholders the opportunity to run transactions in a controlled setting and confirm that financial, compliance, and reporting results matched expectations.

Testing included both unit testing and end-to-end testing. Unit testing focused on individual business processes and configurations, such as award setup, invoice generation, payment application, and cross-functional business processes, to confirm each component worked on its own. End-to-end testing followed transactions across the full lifecycle, from award setup through spending, billing, and reporting, to ensure that modules, integrations, and downstream impacts functioned together as expected.

Research administration and departmental teams participated to validate integrations, workflow routing, approvals, system controls, and reporting outputs. Security roles were reviewed and refined to ensure appropriate access, segregation of duties, and alignment with grants governance standards.

Workstream 5: Documentation and Training Support

As design and testing progressed, Attain Partners worked with the Client teams to document key design decisions, create job aids for business processes, and facilitate knowledge transfer training sessions. Decision documentation provided a clear reference for future system updates.

and ongoing governance. Job aids covered activities such as award setup, invoice generation, letter of credit drawdowns, and other critical award tasks. Knowledge transfer sessions included walkthroughs of configured business processes, reporting tools, and data structures, allowing research administration staff to ask implementation-specific questions in a working system environment. This approach helped ensure the organization was prepared not only for go-live, but for ongoing ownership and support of the Workday Grants environment.

The Solution

Through a close, collaborative partnership, the Client navigated the complexity of a large-scale ERP implementation with clarity and confidence. Attain Partners' technical and sponsored research expertise complemented the Client's institutional knowledge, enabling informed decision-making and disciplined execution across each workstream of the project. By working together to align system design, data integrity, cross-domain integration, and internal controls, the team delivered a Workday Grants solution that meets compliance requirements, mitigates financial risk, supports operational efficiency, and positions the Client for continued success in managing sponsored research.

Outcomes and Impact

The Client successfully converted over 8,000 grants into Workday, including validated life-to-date balances and historical transactions for over 7,000 active grants. The conversion effort included analyzing legacy data, building, and loading over 160 grant-related conversion files, supported by three mock conversions and detailed reconciliation to ensure data accuracy prior to go-live.

The team executed 370 grant-related test scenarios, including cross-functional testing across finance, grants, payroll, and related business areas. These tests confirmed appropriate approval of workflows, compliance controls, and integration points before production deployment.

Standardized award structures improved reporting consistency across business sites, strengthening confidence in sponsored research reporting. With accurate award data and validated business processes in place, the Client began invoicing within 3.5 weeks of converting life-to-date data, demonstrating operational readiness and continuity in sponsor reporting.

By providing structured guidance and hands-on support, the Attain Partners team reduced the time Client staff spent on design and data conversion, allowing them to focus on core research and administrative priorities throughout the implementation.

Comprehensive documentation and knowledge transfer sessions equipped research administration and finance teams to support the new Workday Grants environment independently. As a result, the Client now operates within a harmonized, scalable Workday environment that supports consistent award management, improved sponsor reporting, and enhanced organizational oversight across all business sites.