

# American Heart Association Leverages HCM 9.0 Upgrade to Reduce Customizations and Improve Efficiency



**Industry:** Not-For-Profit

**Oracle Applications:**  
PeopleSoft HCM 9.0

## Success Metrics:

- Project completed on time and 5% under budget
- Paperwork required to process a new hires reduced by 90%
- Performance management templates were reduced from 90 to 4
- Security maintenance time reduced significantly
- Time required to maintain
- Customizations reduced significantly

## Client Feedback:

*"eVerge Group understood our needs and provided the best people possible to make sure they were met. They exceeded our expectations."*

**John Farmer**, IT Project Manager

*"eVerge Group did a good job of communicating status and their consultants were very flexible – if we needed them to come in nights or on weekends, they were there."*

**Sue Gore**, Payroll Manager

## Customization and Support Issues Drive Upgrade Decision

Although maintaining Oracle support was a major factor in American Heart Association's decision to upgrade to version 9.0, it also realized that an upgrade would offer an ideal opportunity to eliminate many software customizations that were not maintainable over the long term, as well as take advantage of new functionality available. In order to simplify future system maintenance, AHA wanted to stay as close to "out of the box" as possible in the upgrade. At the same time, the new system would need to support a new customized performance management plan into place that had just been approved by all of the AHA affiliates.

## eVerge Group Selected Based on Expertise and Commitment

After conducting a three month RFP and interview process, AHA selected eVerge Group to be its partner for the upgrade. The vendor interviews included scenario questions related to both HCM 8.3 and 9.0. "It was clear that the eVerge Group consultants knew what they were talking about," according to Shannon Harrington, HRIS Manager. "They didn't just say 'yes' to everything we thought should be done; they pushed back on issues they felt were important."

## Re-implementation Effort Includes Efficiency-Improving Initiatives

Taking into consideration the upgrade path required to go from 8.3 to 9.0, as well as the number of customizations in the existing system, the decision was made to do a re-implementation rather than a traditional upgrade. Major initiatives within the re-implementation included:

- Replacement of department tree security with business unit security levels - eliminating the need to maintain and create department trees;
- Implementation of new hire template functionality – reducing paperwork required to process new hires from 10 pages down to 1 page;
- Replacement of AHA's highly customized online performance management application with the ePerformance module customized slightly to accommodate AHA's specific management scoring process.

The successful reimplementation of HCM 9.0 has positioned AHA to significantly reduce ongoing system maintenance costs and take advantage of functionality available within additional PeopleSoft modules. "The project went as planned," according to Farmer, adding "We even came in 5% under our budget – which says a lot." AHA committed the right amount and type of resources to the project, and eVerge Group staffed the team with experienced consultants. Ultimately, team members from both AHA and eVerge Group developed an excellent working relationship that translated into project success.



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