

A trip to the cloud

(or how we transformed PwC in four years)



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By mid-2017, our Firm decided to globally **migrate all its back-office applications to a combination of new systems based on the Software as a Service (SaaS) concept and to migrate some legacy applications to the cloud**. This initiative is called Business Operating Solutions (BOS) Program.

In LAN (PwC Spanish-speaking South America region) the migration process started at the beginning of 2019 with the deployment of **Workday** for the Human Capital platform, followed by **Google Suite** (now known as **Google Workspace**) by mid-2019. At that moment, we began our biggest challenge, the **Oracle Fusion Cloud** implementation project, being the second PwC territory to adopt this solution and with many management processes and models having yet to evolve. Our trip to the cloud ended recently with the **Salesforce** go-live in December 2021.

A project of such magnitude, with over 8,000 users distributed in nine countries, is a source of useful expertise and working practices that may be shared with the community of professionals we interact with. This is the reason for writing this article.

In this sense, there are **eight aspects common to all projects** that are worth mentioning:

1

Adherence to the defined process model

In an extensive users community, it is key to ensure that the project management supports the need to keep the process model set and, at the same time, flexible enough to solve all deviations arising from the need to comply with local laws and regulations (taxes, accounting standards, etc.). This aspect is particularly relevant in the case of systems relating to billing, payments, collections, accounting books and computation of taxes.

Isolating the process model from regulatory changes is crucial for the project success.

2

Project Manager

Vested with the necessary authority, leads the planning and organization of working teams distributed in several territories with different time zones and languages, all of which are working remotely since April 2020. Another key task is the timely detection of risky situations for the project that must be communicated to the Steering Committee to determine the course of action to mitigate them.

3

Change Management

This was probably **the most challenging task** we undertook. A community used to working with local systems tailored to their needs and preferences that, within a matter of months, has to start working with global applications, with similar processes at a global level, which are not always adapted to local needs and practices, will definitely resist change. Leaders identified with change and ready

to share and encourage the adoption of new operating practices are essential for the success of these projects. It is also advisable to allocate time and resources of a change management team to design and perform related tasks.

4

Data migration

A very **complex issue to solve and one of the greatest risks** we faced. Defining what information to migrate and how to migrate it from legacy applications are actions that must be taken in the first stages of the project and validated with the highest management level. Before defining what we migrate, it is necessary to know whether the data exist and if they have the required quality. Data migration cannot be addressed isolated from other areas of the implementation project, such as the area of reporting, since it is important to understand how the business requires displaying data to design and map the fields to be migrated.

A key aspect, which is not always considered, is the definition of controls to validate the effectiveness of the migration conducted. In our case, we aimed at automating those controls by means of tools such as Alteryx or Power BI, achieving excellent results both in the processing speed and control effectiveness.

5

Information security and privacy

Just as the security model to be applied is related to the standard process model and must be applied with the same consistency and robustness, when we talk about **compliance with data privacy laws, new challenges emerge** due to the complexity of regulations in each country and the significant differences among them. By way of example, when implementing one of the solutions, it was necessary to allocate some countries to data centers located

in Europe, with the consequent impact on the performance (higher latency); otherwise, we would not be able to comply with privacy standards required in those countries.

6

Testing

There is no doubt about the importance of this aspect, but in the case of global systems that have been localized to ensure compliance with regulations in each country, the task becomes very complex. It is mandatory to document test cases country-by-country, and the follow-up of its execution is crucial for Go or No Go decisions.

7

Post Go-Live support

For those applications that are expected to trigger a significant user demand given their complexity, it is essential to have a support scheme in local language and in the same time zone.

8

Reporting

Most SaaS applications have configurable reporting modules, which, in many cases, meet users' requirements. The story is different when the information residing in different systems has to be combined and an extraction and transformation process (ETL) needs to be implemented to obtain the required report. Defining the reports needed by users is a complex task and requires a team specialized in tools designed for such purpose.

The creation of a middleware that enables integrating the information that must travel from one system to the other is an essential aspect for the success of the strategy of migration to SaaS-based applications, which, in many cases, is transformed along the way so that it can be understood and used. This takes place both among SaaS applications and in the information consumed by local/legacy applications obtaining information from SaaS.

This task requires experts that understand the tools of each system (APIs, templates, etc.) and identify the best way to extract information from one environment and make it available in another one. In our case, we have a team of specialists based in Argentina who performed this task for all territories involved.

Finally, we have to mention the **role of the project's Steering Committee**, formed by members with the necessary seniority to uphold decisions that, in most cases, will not be the expected ones by stakeholders but are necessary to ensure projects are implemented within the expected budgets and time frames, as happened in our case.

We could write many pages about the experience gained throughout this four-year process, two of them working remotely, in which over 100 professionals from our region and a similar number from Europe (Poland and UK), USA and India participated, but we wanted to summarize the key success factors for similar projects and thus ensure your experience is as good as ours.

We hope this content is useful for those already involved in similar projects.

Bon voyage!

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