

## Chevron Corporation migration from SuccessFactor to Workday platform. A case-study about data transformation, integration, archival and analytics.



### ABOUT THE DATA PROJECT

With an aggressive deadline, Chevron corporation who is one of the leading energy sector company transitioned from its legacy SuccessFactors HCM to a new Workday SaaS HR platform. Propelex enabled a safe and successful data transformation journey.

### MODERNIZE, CLOUD-BASED DIGITAL HR SOLUTIONS

Chevron had been using a SuccessFactors solution as their primary human capital management system for nearly a decade. Implementation of an enterprise-wide data transformation program in 2020 required decommissioning in favor of a new SaaS HRM solution, and the Client selected Workday as the target platform. Following were the key element of the projects.

- Data mapping, extraction, migration, cleansing, transformation, archiving, and integration
- Prepare the data for migration to SaaS HRM Workday platform
- 100,000+ employees and contractors data
- Full process reporting
- Employee profile and background management
- Employee onboarding, education, development, compensation
- Employee performance and goal management
- Recruitment management system
- Learning management system
- Extensive interfaces with connected and downstream systems

### OUR APPROACH

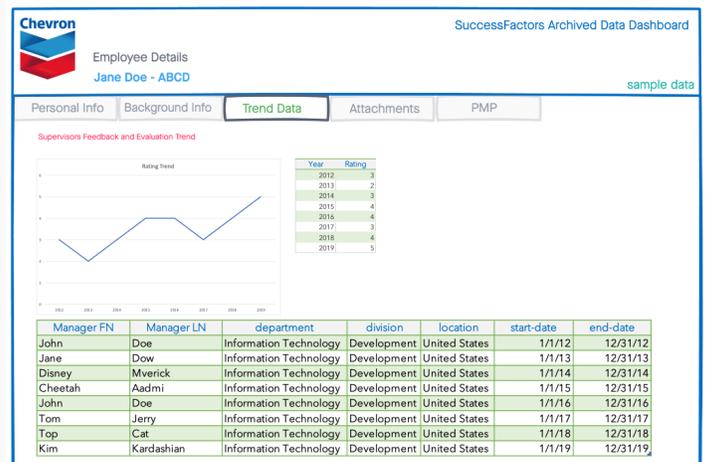
A large scale platform migration encompasses a range of significant challenges – a manual operation was beyond the Client's in-house IT capabilities. Event complexity requires detailed planning and rigorous testing of all phases. Accurate timing of detailed dependencies is critical, with accommodations made for multiple parties,



standards, processes, regions, and organizational units.

Our approach took these factors into account and was engineered to minimize risk of organizational impact:

1. Comprehensive discovery session, to understand current SuccessFactors infrastructure and scope of requirements for Workday data migration and archiving.
2. Identify stakeholders: workflow users, relevant access and grants.
3. Understand Client file systems and target repository infrastructure (CSV and PDF).
4. Catalog data attributes to be captured
5. Frame out security, roles, and access privileges.
6. Modeling the extracted data
7. Transforming the data in collaboration with stakeholders
8. Prepare the data for dashboard and analytics
9. Define the acceptance criteria.



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### SUCCESSFUL SOLUTIONS DELIVERED

As an HRM SaaS solution, Workday delivers significantly better cost and time-to-benefit performance than the SuccessFactors platform. Propelex created a complete data migration plan, to ensure data was ready for and successfully delivered to the Workday implementation.

#### Data mapping and modeling

Data migration operation was initiated with a thorough data mapping and modeling process, to ensure data was well understood, accurate, and intact. A comprehensive data model was developed to ensure data integrity for analytics and future data utilization. Data templates were used to segregate undesired data.

#### Data extraction

ETL process was managed start-to-finish by the Propelex team. Automated resources were used for routine process tasks, with team specialists available to oversee more complex manual operations.

#### Data cleansing

Incompletely formatted, corrupted, duplicate, and otherwise undesired data was fixed or removed. Structural errors were corrected and all data was subjected to a validation and quality assurance operation.

#### Data archiving

Inactive data was identified and moved out of production systems into long term storage. An archival data management system was installed, to ensure legacy data can be retrieved easily as needed, for instances of HR, employee, regulatory, or compliance-related issues.

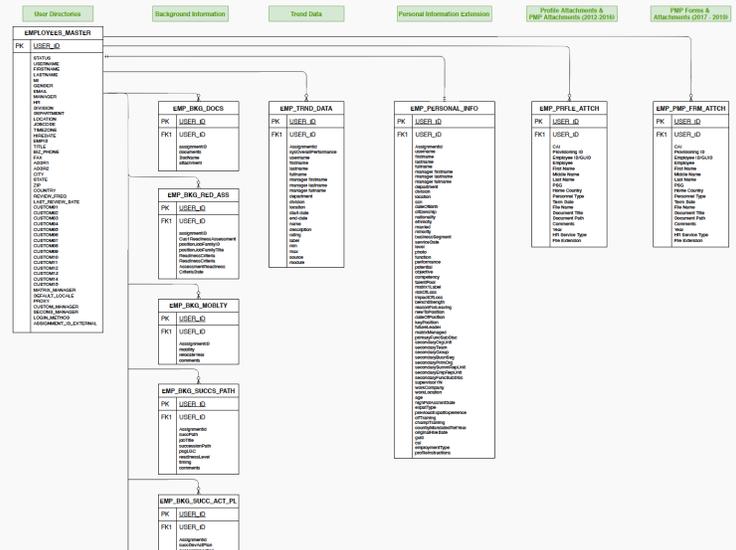
#### Final data validation and quality assurance.

Accuracy and quality of data were reassessed and confirmed at source and destination. Platform configuration was completed as the final step in the migration process.

#### Data analytics and reporting functions

Robust reporting allows data to be leveraged for additional, ongoing value. Data analytics and business intelligence applications empower better, faster decision making. Reporting functions for all legacy data are included.

SuccessFactors Archived Data - Model for Employee Information, PMP & Attachments



### MEETING CUSTOMER NEEDS

Successful data extraction, transformation and data analytics from the legacy platform to Workday's cloud SaaS platform has allowed the Client to implement their new HRM solution. Propelex was able to accomplish migration without service disruption and no noticeable impact to operations. Despite a tight deadline and significant process complexity, the project was completed on time and to all specifications.