

Workday Project Milestone Checklist

A Workday deployment moves through a series of connected phases, each with its own purpose, activities, and deliverables. Use this checklist to review what should be established, completed, or underway as your project moves from **Planning through Architect & Configure, Testing, Deploy, and transition to steady-state operations.**

Phase 1: Planning

Before Moving Into Architect & Configure

Strategy, Governance & Planning

- ☐ Program strategy is defined, including vision, guiding principles, goals, and success metrics.
- ☐ Program charter and project scope are confirmed.
- ☐ Program governance structure is established.
- ☐ Decision framework is defined.
- ☐ Program timeline and delivery schedule are established.
- ☐ Detailed project plans and timelines are developed.
- ☐ Key milestones are defined.
- ☐ Operational cycle dates are mapped.
- ☐ Planned time off and resource availability are documented.
- ☐ Resource commitments are confirmed.
- ☐ Resource augmentation needs and strategy are defined and approved.
- ☐ Resource heat map is complete.
- ☐ Key resources are onboarded and prepared through Workday training, tools training, and discovery work.
- ☐ Sustainment and production support model planning is underway.

Technical & Functional Readiness

- ☐ Functional and technical questionnaires are complete.
- ☐ Integrations are cataloged.
- ☐ Integration ownership is assigned.
- ☐ Decommissioning list is finalized.
- ☐ Data conversion planning is underway.
- ☐ Data conversion strategy is defined.
- ☐ Data delivery workbook and due dates are established.
- ☐ Reporting inventory is established.
- ☐ Environment management plan is defined.
- ☐ Tenant management strategy is defined, including refresh and change-control processes.
- ☐ An initial Workday environment is established based on institutional workbooks and questionnaires.

Phase 1: Planning (cont.)

Before Moving Into Architect & Configure

Testing & Quality

- ☐ Testing strategy is defined.
- ☐ Testing objectives and scope are established.
- ☐ Testing timeline is established.
- ☐ Testing roles and responsibilities are identified.
- ☐ Test scenario development is underway.
- ☐ Testing Scenario Tracker is established.

Change Management

- ☐ Stakeholders are mapped and analyzed.
- ☐ Change Impact Assessment is documented.
- ☐ Communication strategy and timeline are established.
- ☐ Customer success outcomes are defined.
- ☐ Success outcomes include measurable metrics.
- ☐ Readiness Assessment is defined.
- ☐ Organizational readiness baseline is established.
- ☐ Change management team is defined.
- ☐ Change agent network is defined.
- ☐ Change Management Adoption Program is established.
- ☐ Change activities are being consolidated, tracked, and monitored through the change strategy.

Planning Phase Gate

- ☐ Required deliverables are approved through the defined deliverable acceptance process.
- ☐ The organization is prepared organizationally, technically, and operationally to move into detailed design and configuration.

Phase 2: Architect & Configure

Before Moving Into Formal Testing

Strategy, Governance & Planning

- ☐ Cross-workstream dependencies are identified and resolved.
- ☐ Decision log is maintained.
- ☐ Project plan is updated to reflect configuration sequence.
- ☐ Cutover planning is underway.
- ☐ Sustainment and production support model is defined.
- ☐ Phase-gate review is complete.

Functional Design & Configuration

- ☐ Business process design decisions are confirmed across applicable workstreams.
- ☐ Cross-functional dependencies and touchpoints are resolved.
- ☐ Configuration standards and design assumptions are finalized.
- ☐ Functional configuration is complete or progressing across in-scope modules.
- ☐ Functional design documentation reflects final configuration and business process decisions.
- ☐ Security role design is complete and validated.
- ☐ IAM Persona and Security Matrix is established.
- ☐ Integration build and configuration is underway or complete.
- ☐ Integration Design Documents are complete for in-scope integrations.
- ☐ Report design and development is underway or complete.
- ☐ Custom reporting designs define requirements, ownership, and build specifications.
- ☐ Workday environments are built and validated for downstream testing.
- ☐ A second environment build is complete using institution-specific data, discovery, design, and unit testing.

Data & Testing Preparation

- ☐ Iterative data conversion loads are complete.
- ☐ Data accuracy is validated.
- ☐ Data completeness is validated.
- ☐ Unit test scenarios are developed.
- ☐ End-to-end scenarios are developed.
- ☐ User readiness scenarios are developed for high-impact processes.
- ☐ Testing schedules are established for integrations.
- ☐ Vendor timelines and communications are reflected in testing schedules.
- ☐ Test-ready environments are prepared.
- ☐ Defect intake and resolution processes are established.

Phase 2: Architect & Configure (cont.)

Before Moving Into Formal Testing

Change Management & Readiness

- ☐ Knowledge transfer is ongoing during configuration sessions.
- ☐ Change agent network is active.
- ☐ Leadership engagement is active.
- ☐ Training needs assessment is complete.
- ☐ Training approach is defined.
- ☐ Training plan documents curriculum, training method, stakeholder analysis, and impact analysis.
- ☐ Quick Reference Guide tracker is established.
- ☐ Survey results are documented where applicable.
- ☐ Change strategy is reassessed for effectiveness.
- ☐ Sustainment and post-go-live support model is finalized.
- ☐ Teams are being prepared for formal testing and ownership.
- ☐ Production walkthrough is complete, with the institution leading a pilot group through production processes.

Architect & Configure Phase Gate

- ☐ Deliverables are approved through the defined acceptance process.
- ☐ The ERP solution is configured, validated, and test-ready.
- ☐ Design decisions are documented.
- ☐ Required environments are prepared.
- ☐ Teams are enabled to execute formal testing and assume long-term ownership.

Phase 3: Testing

Before Moving Into Deploy

Strategy, Governance & Planning

- ☐ Cross-workstream testing dependencies are identified and resolved.
- ☐ Testing-related decisions are documented.
- ☐ Project plan is updated to reflect critical paths.
- ☐ Testing governance is defined.
- ☐ Defect triage cadence is established.
- ☐ Cutover planning is refined and sequenced based on testing outcomes.
- ☐ Sustainment and hypercare readiness is validated.

End-to-End Testing

- ☐ Configured processes are validated across the program architecture and scope.
- ☐ Real business scenarios are run across applicable Workday areas and connected applications.
- ☐ Handoffs between teams, systems, and roles are verified.
- ☐ Workflows are validated against day-to-day operations.
- ☐ Workflows are validated against applicable peak operational cycles.
- ☐ Required unit testing is complete.
- ☐ Required lifecycle testing is complete.
- ☐ Required end-to-end testing is complete.
- ☐ Required regression testing is complete.
- ☐ Required parallel testing is complete.
- ☐ User readiness testing is complete.
- ☐ User readiness scenarios confirm high-impact, real-world workflows.
- ☐ Testing progress is measured against defined entry and exit criteria.

Data, Integrations & Reporting

- ☐ Converted data is validated for accuracy.
- ☐ Converted data is validated for completeness.
- ☐ Converted data is validated for usability.
- ☐ Data conversion reconciliation results are confirmed.
- ☐ Integrations execute successfully.
- ☐ Downstream impacts are validated.
- ☐ Reports are validated.
- ☐ Reports produce reliable, decision-ready data.
- ☐ Security roles and access are validated.
- ☐ Segregation of duties is validated.
- ☐ Integration and reporting jobs execute successfully at scale.

Phase 3: Testing (cont.)

Before Moving Into Deploy

Defect Management & Quality

- ☐ Testing Scenario Tracker contains pass/fail results.
- ☐ Defects are being logged.
- ☐ Defects are being prioritized.
- ☐ Defect ownership is assigned.
- ☐ Defects are being resolved.
- ☐ Fixes are being retested.
- ☐ Defect Log reflects severity, ownership, resolution, and retest status.
- ☐ Daily testing status and decisions are documented.
- ☐ Payroll, financial, and/or student parallel testing results and reconciliations are complete where applicable.

Change Management & Deployment Readiness

- ☐ Stakeholder readiness is validated through testing.
- ☐ Change Impact Assessment is updated based on tested future-state processes.
- ☐ Communication updates reflect testing outcomes and risks.
- ☐ Training materials are refined based on testing feedback.
- ☐ Role-based training content is aligned to tested configuration.
- ☐ Quick reference guides are aligned to tested configuration.
- ☐ Readiness Assessment is updated.
- ☐ Cutover checklist includes owners, timing, dependencies, and catch-up activities.
- ☐ Support readiness and escalation paths are finalized.
- ☐ End-to-end testing environments are validated and stabilized.
- ☐ Parallel and regression tenants are executed and approved where applicable.

Testing Phase Gate

- ☐ System meets defined test exit criteria.
- ☐ System is confirmed deployment-ready based on those criteria.
- ☐ Phase-gate review is complete.
- ☐ Required deliverables are formally accepted.
- ☐ Formal approval to proceed to Deploy is received.

Phase 4: Deploy

Before Transitioning to Steady-State Operations

Cutover

- ☐ Cutover plan is finalized.
- ☐ Cutover sequencing is clearly defined.
- ☐ Cutover owners are identified.
- ☐ Approved configuration is promoted to production.
- ☐ Final data conversion is complete.
- ☐ Final data is validated.
- ☐ Required data catch-up activities are complete.
- ☐ Required catch-up transactions are complete.
- ☐ Cutover checklist is executed as planned.
- ☐ Go-live activities are coordinated across functional and technical teams.

Production Readiness

- ☐ Production environments are live and operational.
- ☐ Functional processes are confirmed in the live environment.
- ☐ Critical business processes are verified after go-live.
- ☐ Security roles are verified in production.
- ☐ Access is verified in production.
- ☐ Approvals function as expected.
- ☐ Integrations are operating successfully in production.
- ☐ Scheduled jobs are operating successfully.
- ☐ Reports are validated for operational use.
- ☐ Reports are validated for compliance use where applicable.
- ☐ Payroll simulation into production is successfully completed where applicable.
- ☐ System, users, and support teams are confirmed ready for day-one operations.

Stabilization & Hypercare

- ☐ Early production activity is being monitored.
- ☐ System performance is being monitored.
- ☐ Early transactions are being reviewed to confirm stability.
- ☐ Production issues are being logged.
- ☐ Production issues are being prioritized and triaged.
- ☐ Issues are being resolved through hypercare.
- ☐ Fixes are being revalidated.
- ☐ Quality thresholds for steady-state operations are confirmed.
- ☐ Initial production cycles are stabilized.

Phase 4: Deploy (cont.)

Before Transitioning to Steady-State Operations

Training, Support & Ownership

- ☐ End-user training is complete.
- ☐ Training guides reflect live business processes and configuration.
- ☐ Job aids and quick reference materials are available.
- ☐ Go-live communications are complete.
- ☐ Support model is communicated.
- ☐ Escalation paths are communicated.
- ☐ Sustainment model is active.
- ☐ Production governance cadence is confirmed.
- ☐ Teams are prepared to assume ongoing ownership.
- ☐ Transition from deployment to steady-state operations is underway.

Deploy Phase Gate

- ☐ Deliverables are approved through the defined acceptance process.
- ☐ The system is live in production.
- ☐ Users are enabled.
- ☐ The solution is formally accepted by the institution for ongoing operations.

Not Sure Whether You're Ready to Move Forward?

A phase-gate review can help identify what is complete, what remains unresolved, and where additional attention may be needed before the project advances.

Talk With Andrea About Your Project

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