

# Migrating PeopleSoft to the AWS Cloud

6 Lessons From  
Higher Ed Leaders



Colleges and universities are under increasing pressure to stay agile in today's competitive landscape. Even before the pandemic, administrative costs were under scrutiny as major news outlets reported on industry-wide increases in spending that didn't align with enrollment growth. Teams were expected to work smarter and spend less. That pressure increased under Covid as colleges and universities navigated unpredictable work environments and were forced to reimagine how they operate.

Against this backdrop, institutions are seeking more agile, cost-effective, and modern enterprise resource management (ERP) systems to transform their business processes. As such, many have turned to the AWS Cloud. At the recent 2021 Educause Annual Conference, we sat down with a panel of three ERP experts to learn how administrative leaders can get started migrating their PeopleSoft (and similar ERP systems) to the cloud. Today, we'll share six lessons our experts learned during AWS Cloud migrations to help you transform your workflows.



## 1

## Convince leadership with a well-defined elevator pitch that speaks to your target audience

You may fully understand the need to migrate, but you'll also need to get your leadership on board. The best way to do that is to have a firm idea of what you'll get in the cloud that you can't get on-premises and be ready to communicate those benefits—especially from a financial perspective.

“I made it easy on my boss, who's the CFO, because I knew his top concern would be capital,” says Ellen Keohane, chief information officer at College of the Holy Cross. “I knew that migrating meant shifting some of our IT staff resources, so I started earmarking a couple of positions where the current employees were retiring. Those two positions, plus one other turnover I didn't anticipate, ended up covering the shift in operating funds that would be required to move to PeopleSoft's ERP in the AWS Cloud. I was able to show my boss those figures, and that made all the difference.”

According to Kari Robertson, Executive Director of Infrastructure Services at the University of California Office of the President, your elevator pitch should also vary depending on who you're speaking to, and what you're trying to achieve. “I really had to tailor my message to the audience that I was talking to,” she notes. “When speaking with engineers, for example, I got them excited about the potential for innovation and scalability. For business leaders, I focused more on the fact that we'd no longer need funding for capital purchases. It's all about knowing your audience.”

### Takeaway

*Taking the time to define the many benefits of cloud migration and preparing a series of talking points that speak to the diverse concerns of your stakeholders will streamline your approval process and ensure everyone is on board with this transition.*



## 2

## To fight cultural resistance, show your staff where they fit in the cloud

Once you've achieved leadership buy-in, you'll need to convince your staff. People are naturally afraid of change, especially when it comes to technology. That means administrative leaders need to be prepared for some cultural resistance.

"I had many staff come up to me and say, 'You're trying to eliminate my job with all your wonderful automation. What am I going to do?'" says Jess Evans, chief operating & digital transformation officer at Arizona State University. "I had to explain to them that the whole point of cloud transformation is to empower engineers and other staff to do more relevant and innovative work. I told them: 'We are building this platform to give your career relevancy and long-term sustainability. Simply put, this is an investment in you.'"

Although many staff members may fear that cloud will make their jobs obsolete, the truth is that by retooling their skillsets, engineers now have the intellectual capacity to advance innovative work. Through building cloud native solutions and taking advantage of automating mundane operational tasks, engineers can be elevated to work on more complex solutions. However, this strategy is a journey, and to succeed tech leadership must communicate that message and show their people where, and how, they'll fit in the new ecosystem. Our experts also noted that you should never assume your staff will be as excited about this change as you are.

### Takeaway

*Your staff will only be excited about modernization if they know that their jobs are secure and can imagine a future for themselves in the cloud. Don't forget to invest time in change management as you migrate.*



## 3

## Know your motivation for migrating, and have a firm deadline

The cloud journey can feel endless—which is why our experts recommend you have both a firm deadline and a compelling reason to migrate. Starting your migration with a purpose in mind will guide your project and prioritize your business goals. The deadline will keep you from endlessly tinkering with your environment. Robertson, who has migrated to the AWS Cloud at two different institutions, reflects: “I had to have a strong impetus and a firm deadline to be successful. At my first institution, we had a data center on campus that needed to be repurposed. It was time to pay for a hardware refresh, and we weren’t going to do it, so we decided we would move all our enterprise applications out of the data center and onto AWS. We had about two years to complete the project. The project was successful because it was a high priority, and we had to hit our deadline.”

When she moved to the University of California Office of the President, Robertson was required by her managed services provider (MSP) to migrate within six months or lose access to her service—a tight deadline for any project. She decided to use that forced migration as an opportunity to innovate, and she chose to leave her old MSP and move to the AWS Cloud instead. Because they were still operating under that tight six-month time frame, Robertson and her team called in Sierra-Cedar’s PeopleSoft and AWS experts to help the University meet its deadline. “We knew we couldn’t do it ourselves in six months,” Robertson says. “So we found a migration partner and were able to successfully re-platform our entire payroll system for all 260,000 employees. We migrated under budget and in less than six months, and a lot of that was because we had a clear goal in mind and a partner to guide us.”

### Takeaway

*A deadline and clear goals will keep you on track, and motivate your team to keep moving forward through uncertainty.*



## 4

## Don't just rehost; become cloud-native

When you move to the AWS Cloud, there are two primary approaches: rehosting and re-platforming. With rehosting (also called “lift-and-shift”), you simply take your existing systems and workflows and move them into a cloud environment. This is generally a quicker process but won't necessarily allow you to embrace all the benefits of the cloud. Re-platforming, on the other hand, takes your existing processes and breaks them down into their component parts, so you can completely reimagine your systems for the cloud.

“I cannot emphasize enough that only moving your environment as-is, also known as lift and shift, is a practice that limits your cloud journey” says Evans. “The power of the cloud allows engineers to redesign workflows by utilizing the native toolsets provided by AWS. But lift and shift prevents organizations from taking advantage of the resiliency and capabilities of cloud native practices. Instead, Evans recommends re-platforming, which allows you to take advantage of cost savings and rethink how you can work smarter in the cloud. “Re-platforming, or becoming cloud-native, is the only way to benefit from the scalability, sustainability, resiliency, and intellectual capacity of your environment. Additionally, it reduces your human capital dependencies because you're upskilling your engineers. When you go cloud-native, the benefits are exponential.”

### Takeaway

*It's worth the extra time and effort to re-platform and optimize your systems in the cloud, because integrated systems will save you money in the present and prepare you for future modernization.*



## 5

## Train your team on the ins-and-outs of cloud spending

Paying for services in the cloud is fundamentally different than paying for on-premises costs, so you'll need to train your team—especially your engineers and IT staff—on how to optimize costs. You should also consider how your decision-making process and workflows might need to shift controlling costs and making the best use of your infrastructure. “One of our challenges was trying to understand the cost model of going to the cloud,” says Evans. “When you have a server in your data center, you know that you're buying that server and paying for it forever. But in the cloud, you have to think strategically. Your engineers are used to writing code, not thinking about how much it'll cost to stand up an instance.”

Evans' team decided to hire a cloud accountant to address this gap in understanding. “I can tell you that the savings was astonishing,” Evans says. “I physically had our accountant sitting shoulder-to-shoulder with our engineers, and he could show each engineer how much their decisions cost. It was a wonderful partnership because they both learned from each other about how to optimize our spending.”

Robertson adds that she appreciates the transparency she got from migrating to AWS. “Now, I can go and see minute-by-minute what our costs are,” she explains. “And I can leverage that into real savings. For example, we recently found an environment we didn't need to run 24/7, and turned it off. And that saved us \$30,000 a month. Plus, we can spin it up again when we need it—so we don't even have to worry about pulling the plug.”

### Takeaway

*Don't assume your team knows how cloud spending works. Instead, invest time and money into training your people on cloud processes and optimization to get the most out of your migration.*



## 6

## Dive in, learn from others, and don't give up

If you're feeling intimidated by cloud migration, even after all these tips and tricks—don't worry. Evans, Robertson, and Keohane say they also felt overwhelmed initially. Just because you're uncertain doesn't mean you're going to fail. They recommend preparing yourself with resources and advice from peer institutions, and then taking the plunge.

"You're never going to be ready," says Robertson. "Just start working and prepare to pivot frequently." Keohane adds that you shouldn't underestimate the value of asking around. "I think we could have done a little more preparation and relied more on the [Educause cloud computing group](#) and our peer institutions. There's so much you can learn from your community if you just reach out and ask."

Finally, Evans notes: "Don't give up. There are tangible benefits to migration if you just stay the course. The only way out is through. You won't unlock transformation if you aren't willing to take the leap."

### Takeaway

*If you feel uncertain right now, it's okay. Migration is about learning as you go—and there's no one right way to move your ERP system to the cloud.*



## When in Doubt, Ask an Expert

These six tips are the keys to getting prepared—but if you're still feeling uncertain, don't be afraid to call in an expert. Sierra-Cedar's cloud migration consultants have done this many times before, and they know how to build cloud infrastructure that will support your institution's business goals, save money, and shrink the migration timeline. "I was surprised by how much using a third-party partner helped us," says Keohane. "They've been through this before, and you can trust their methodology. Plus, there was no fighting over decision-making because Sierra-Cedar already knew what we needed. They make it easy to just lean in and trust the process."

*With more than 375 higher education clients and 150 AWS certifications, Sierra-Cedar is the ideal partner for your ERP migration. To learn more, go to <https://www.sierra-cedar.com/amazon-web-services/>.*

