

BEING THE BURSAR

IMPLEMENTATION BEST PRACTICES

Turning your vision and operational goals into sustainable outcomes.

Patrick Beirne

Senior Director; Bursar & Student Financial Services

Wayne State University



My Background and Perspective



INSTITUTIONS

*Three different environments.
The same learner focus.*



Public | Large | Comprehensive



Private | Jesuit | Urban



WAYNE STATE
UNIVERSITY

Public | Urban | Research



ERP SYSTEMS

*Functional experience
across leading higher ed
ERP platforms.*



INTEGRATED PAYMENT SYSTEMS

*Experience implementing
and operating a range
of payment solutions.*



SERVICERS

*Partnerships to support
student health and
compliance.*



Implementation That Earned Recognition



2025 Transact Distinction Award

Student Experience • Wayne State University

Transact 360 Annual Users Conference | Las Vegas

1

The Goal

Enhance, modernize and connect the student financial experience through centralized integration.

2

The Work

Developed an integrated payments suite recognized as a model for other institutions.

3

The Recognition

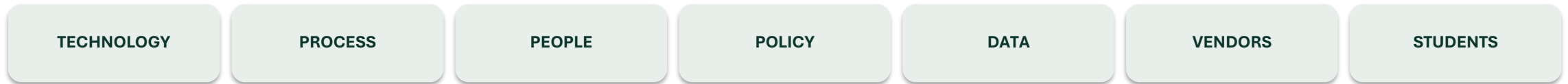
Recognized for technology initiatives that improve the student experience and drive operational efficiencies.

Turning vision into results for students.

Sources: Transact 2025 Distinction Awards winners page; Transact + CBORD award announcement, March 2025.



Implementation is where vision and goals become reality



Successful implementation happens when all these pieces work together — not simply when the system turns on.

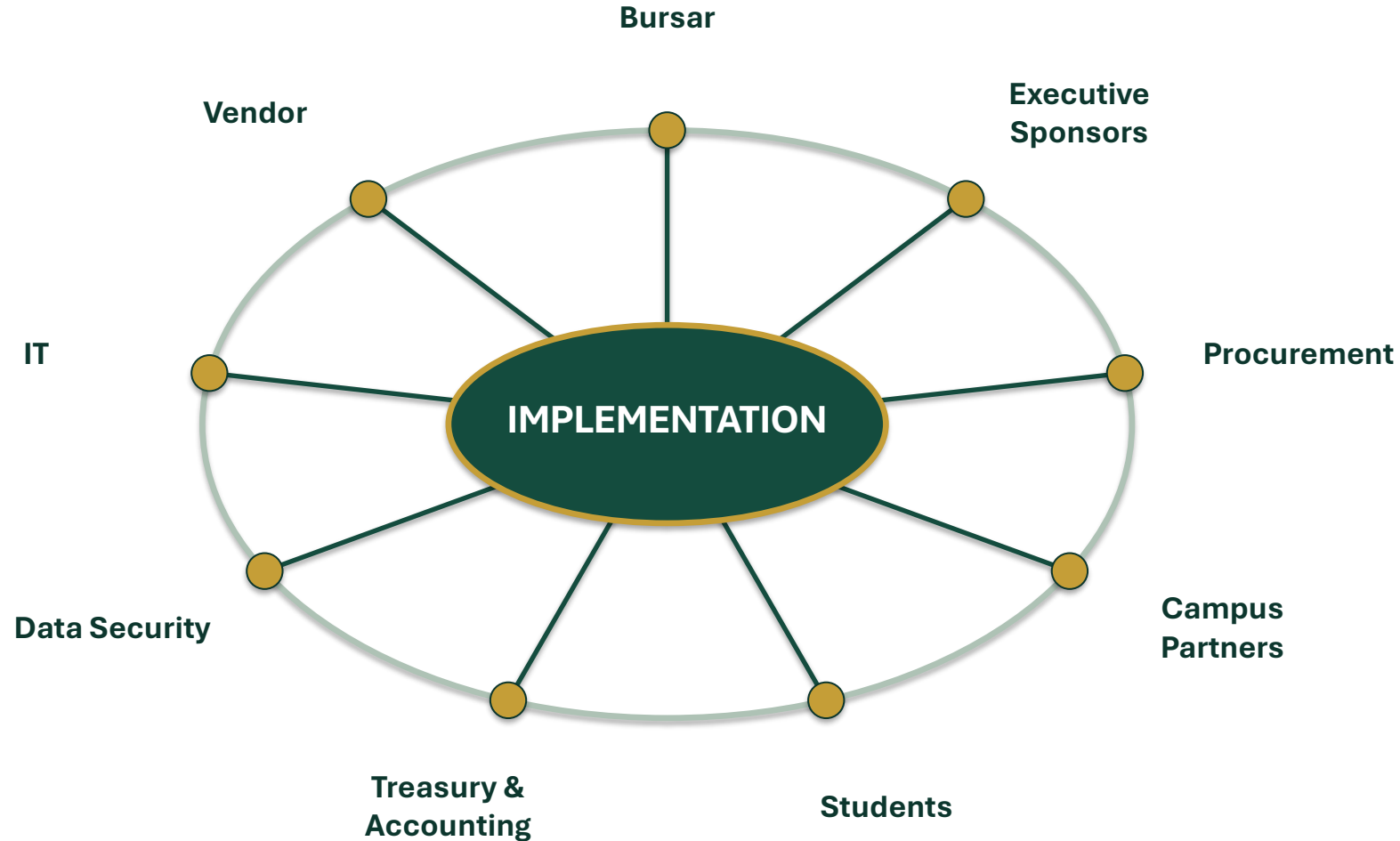
Successful implementation is manageable when the right people share the work, the decisions, and the accountability

The technology is only one part of the implementation

The work is connecting the technology to the people, processes and institutional realities around it

The people matter as much as the technology

The team changes as the implementation moves from vision to execution to integration



Three Parts of Successful Implementation

01

VISION & EXPLORATION

Define the need, explore possibilities, and align the vision

02

PROJECT EXECUTION

Turn the plan into action through disciplined implementation

03

INTEGRATION

Embed the change into the enterprise and make it sustainable

A successful implementation moves from possibility → action → sustainable operation

Vision & Exploration

Define the need, explore the possibilities, and establish the institutional path forward

WHO IS AT THE TABLE

Bursar • Executive Sponsors • Procurement • Campus Partners

Bursar

- Frame the business problem
- Define desired outcomes
- Consider policy
- Bring the operational perspective

Executive Sponsors

- Set direction & priorities
- Provide sponsorship
- Fund solutions
- Remove institutional barriers

Procurement

- Guide sourcing strategy
- Contracting requirements
- Vendor-selection process

Campus Partners

- Surface needs & dependencies
- Challenge assumptions
- Shape the future-state vision

Start with the problem — not the product

Before requirements, demos, RFPs or project plans: What are we trying to solve?

CURRENT STATE

What happens today?

PROBLEM

What isn't working?

FUTURE STATE

What should be different?

SUCCESS

How will we know it worked?

What is the issue you are fixing? Limited resources - Operational gaps - ERP limitations – Clunky processes for staff/students

Success is not “we implemented the system” - it is the outcome the system was meant to create

Project Execution

Turn the selected solution into a working, secure, financially sound operation

WHO IS AT THE TABLE

Bursar • Vendor • IT • Data Security • Treasury & Accounting

Bursar

- Own functional decisions
- Validate workflows
- Drive readiness & issue resolution

Vendor

- Configure the solution
- Provide product expertise
- Manage deliverables & defects

IT

- Build integrations
- Manage environments/data
- Support technical testing

Data Security

- Review access & controls
- Protect institutional data
- Assess third-party risk

Treasury & Accounting

- Validate settlement & posting
- Design reconciliation
- Protect financial integrity

Build for reality — not the demo

THE DEMO

Payment → Posts → Done.

Everything follows the happy path. Every integration responds.
Every user does what we expect.

REALITY — Exceptions are the work

Failed integrations • Batch issues
Reconciliation differences • Edge cases

Don't only test whether the system works - Test what happens when it doesn't

Integration

Move from a successful go-live to a solution that works in the real campus environment.

WHO IS AT THE TABLE

Bursar • Campus Partners • Students

Bursar

- Own the operational transition
- Lead communications management
- Monitor outcomes & exceptions
- Refine process after launch

Campus Partners

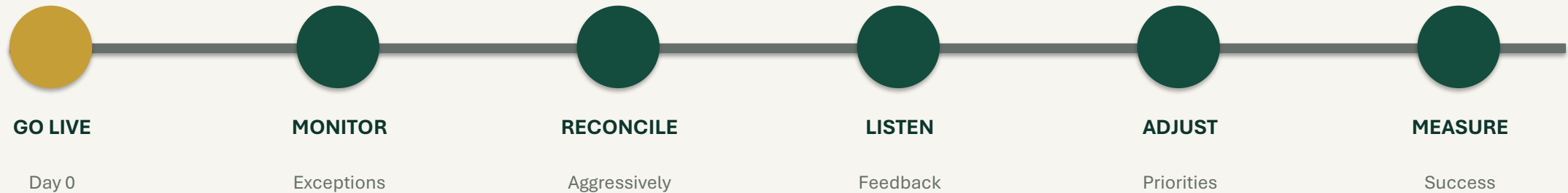
- Embed the new process
- Coordinate downstream impacts
- Provide feedback & escalation

Students

- Experience the solution
- Expose real-world friction
- Provide the ultimate usability test

Go-live is not the finish line

The first weeks after launch are part of the implementation — not the aftermath



Stabilization is implementation

Keep the project discipline long enough to prove that the new process is working

What ERP/SIS and integrated payment systems have you used, and do you have any implementation experiences you can share about?

Do you have any implementation success stories to share? What went well and made it successful? What made the difference?

How have you successfully worked with campus partners and executive sponsors during an implementation? How have you gotten buy-in, collaboration, and shared ownership across campus?

On the flip side, think about an implementation that struggled. Where did it start to go wrong, and what would you do differently today?

What have you learned about working with vendors during implementation? Where should the institution rely on the vendor, and where does the institution need to maintain ownership?

What is something that looked great in a demo but became much more complicated once you tried to make it work in your actual environment?

After go-live, how do you determine whether the implementation was successful? What do you monitor, measure, or listen for?