



## How Partnering with Everforth TopBloc Enabled CM Group to Better Understand and Operate their Workday Platform

### Executive Summary

When CM Group (formerly Campaign Monitor) transitioned to Workday in 2019, the company was engaged with more than one Workday Services Partner to help them with different aspects of their deployment and the subsequent day-to-day management of the platform. The company initially brought in Everforth TopBloc to help resolve payroll issues. Following the success of their initial engagement, the two organizations have deepened their relationship. From acting as an extension of resources to integrating global acquisitions and deploying additional Workday features, Everforth TopBloc has supported CM Group as the organization took on increasingly complex initiatives to expand both their company and their investment in Workday.

With each subsequent project, Everforth TopBloc's team has provided CM Group with not only the agreed-upon deliverables from the project scope, but also the training and knowledge transfer necessary to allow for CM Group to confidently manage their business. As a result, CM Group has learned how to better utilize Workday to manage their day-to-day operations and is well-positioned to continue to adapt Workday to suit the needs of their ever-growing organization, while Everforth TopBloc remains engaged and committed to

acting as an extension of CM Group's team as a trusted partner.

### Background

CM Group completed its initial deployment of Workday Human Capital Management (HCM) and Payroll in 2019. Shortly before going live on the platform, the company recognized that, as a small team with no prior Workday experience, they could benefit from engaging with external partners to gain both supplemental resource support and Workday expertise. As such, they began relationships with a couple of Workday Services Partners to assist with their application management.

Everforth TopBloc was brought in as the Workday Services Partner focused on assisting CM Group with their payroll execution. However, after several months of working together, CM Group began to replace their other Workday services providers with Everforth TopBloc. Soon, Everforth TopBloc became CM Group's primary application support provider, with the company subscribing to both of Everforth TopBloc's Workday support packages: Payroll Managed Services and Help Desk.

When it came time to expand their suite of Workday applications in 2020 following an acquisition, CM Group engaged both Everforth TopBloc and another Workday Services Partner in separate projects to globally integrate the newly acquired company into the larger organization.

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We completed two acquisition onboardings, one with Everforth TopBloc and one with another Workday partner. The Everforth TopBloc team was significantly more involved, leading to a smoother transition for our HR team, as well as the new population of employees. This led us to re-evaluate our partnerships and commit to Everforth TopBloc as our primary Workday consultant, which turned out to be a game-changer.

**Virginia Grayson** | Director of People Operations

Since then, CM Group has continually chosen to engage Everforth TopBloc on additional projects. First to address underutilized Workday capabilities, then to facilitate further acquisition integrations and assist with streamlining business processes, and, most recently, for advisory services related to the development of a strategic roadmap for future expansion of their Workday solution to support the growth of their team.

## Strategy & Solutions

### Payroll Processing & Support

When CM Group first went live with their new Workday solution, they experienced challenges related to their payroll execution stemming from both an unfamiliarity with how to operate their new Workday software as well as some inherent issues with how their payroll tenant was set up by another Workday partner. The company engaged Everforth TopBloc to help.



Everforth TopBloc enrolled CM Group in our Payroll Managed Services practice and began to provide payroll processing advisory support, payroll health assessments, and assistance with troubleshooting payroll-related challenges. Together, we partnered to get the company's payroll out, accurately and on time, while also addressing some flaws in how their Workday Payroll tenant was designed and set up.


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Everforth TopBloc's Payroll team has partnered with us through every challenge. They've given up personal time – even staying late to help meet deadlines several times.

**Farrah Irby** | Director of Payroll & Benefits

Although the company no longer requires the high-touch payroll processing support they initially engaged Everforth TopBloc for, CM Group remains a Payroll Managed Services client and receives ongoing payroll advisory services each pay period. They have received payroll guidance from Everforth TopBloc for over 3 years.

CM Group's Vice President of People and Finance Operations, Susan Adams, advocates for Everforth TopBloc's continued involvement in the company's payroll management "We view Everforth TopBloc as an extension of our team and will always maintain a level of payroll support. With our ever-changing Workday tenant, things arise



unexpectedly that may have an impact on processing timely payrolls. In these situations, we are on a deadline to submit. Everforth TopBloc is able to jump in, help problem solve and provide the extra knowledge and support needed to ensure payroll deadlines are achieved.”

### Workday Optimization

As CM Group realized Workday-related benefits from partnering with Everforth TopBloc for Payroll Managed Services, the company expanded their partnership with Everforth TopBloc by signing up for our Help Desk Application Management Services (AMS) to tackle several smaller-scale enhancements of their Workday solution.

As CM Group’s Susan Adams explains, “We had available modules going unused as we didn’t have the bandwidth internally to roll them out.” With Help Desk, CM Group was able to systematically begin addressing these enhancements by submitting tickets each month. Not only that, but because of Everforth TopBloc’s flexible contracts which enable customers to scale their Help Desk support up or down from month to month, CM Group was able to tackle each project at a pace that fit their needs. Tiering up to take on more projects when they had additional bandwidth and scaling back during months when they needed to focus their attention on other projects.

Susan credits Everforth TopBloc’s flexible model for providing a positive customer experience, noting that not being “locked-in” to a service



has made the relationship feel more like a mutually beneficial partnership. Summarizing CM Group’s thoughts on Help Desk, Susan reflected that “it has been vital to our Workday evolution. With Everforth TopBloc’s support, we have been able to build out and enable functionality across various HCM and Payroll SKUs. As an added benefit, our team has gained a great deal of Workday knowledge from the Everforth TopBloc team by working together on these projects. ”

“ I feel so much more comfortable in Workday across all modules because of my work with Everforth TopBloc. Not only did they help to build configurations, but they also took the time to teach and answer questions, so that I could become more self-sufficient.

**Virginia Grayson** | Director of People Operations

### Acquisition Integration

In addition to maintaining a continuous relationship with Everforth TopBloc as a consumer of both of Everforth TopBloc’s ongoing Workday support services, CM Group has also turned to Everforth TopBloc for larger-scale projects.

Everforth TopBloc has provided CM Group with acquisition support on three separate occasions, to help the organization consolidate newly acquired companies into their existing Workday system and establish consistency throughout their global business processes. Everforth TopBloc has also worked with CM Group to integrate other software systems into their Workday solution and to deploy additional Workday SKUs, as the organization continues to grow and mature, and therefore require more of the robust features that Workday provides.



We've been with Everforth TopBloc for going on 3 years. In that time our company has grown and acquired other companies. Everforth TopBloc has taken time to learn about our company and help tailor our Workday tenant to meet our needs for now and in the future. They are quick to spot areas for improvement, and they help us make those improvements quickly.

**Farrah Irby** | Director of Payroll & Benefits

### Advisory Services & Roadmapping

Most recently, CM Group partnered with Everforth TopBloc to undergo a full-system assessment to map where the company is today and roadmap future enhancements to get them to where they want to go. Everforth TopBloc's advisory program led CM Group through a project that enabled them to review the efficiency of each of their individual software systems, as well as the effectiveness of the systems as a whole.

Continued growth and the need to justify additional headcount drove the organization's decision to engage with Everforth TopBloc on this latest project. Susan Adams shared, "We are very excited about our latest acquisition. The vision for where we want to be and what we want to accomplish is there yet the work to get there can feel overwhelming. Having Everforth TopBloc's expertise to help lay out a roadmap and set attainable timelines has been hugely helpful. Additionally, the Everforth TopBloc team validated the volume of work and time required to achieve this vision. This was very reassuring for our team and helped us to plan for our internal team growth as well. Having Everforth TopBloc's support as we tackle each project on our roadmap is invaluable for attaining success in our goals."

Together, the two organizations worked to identify areas of improvement and to develop a two-year roadmap that would enable CM Group to complete a digital transformation of their systems to support the company's goal to operate in a more advanced, highly strategic manner with a fully integrated technology ecosystem.



### Results

Over the course of their 3+ year partnership with Everforth TopBloc, CM Group has broadened their Workday system to deploy new functionality across their expanding organization. By using Workday, the company has improved business processes and built a consistent employee experience for individuals across its consolidated, multi-brand organization.

By leveraging Everforth TopBloc's services, CM Group has gained the knowledge to independently manage their Workday system. They can now confidently justify why business processes are in place and complete the day-to-day tasks required to keep the platform operating at its best. Despite their ability to fully support their Workday system in-house, CM Group chooses to continue to work with Everforth TopBloc for supplemental resource support, guidance on complex matters, and advice on how to optimize their technology systems going forward. We at Everforth TopBloc are proud to support CM Group on their Workday journey and look forward to what this partnership will bring in the years to come.