

# ERP Implementation

## Balancing the Project Among Multiple City Projects

### Future Administration

The ERP project is entering the early phases of implementation and it is now where resources supporting the project will need to be focused. As we begin this focused effort, we need to establish rules for balancing the effort of this task with the daily work of the implementation team and affected departments and minimizing distractions.

The implementation team will be responsible for a considerable workload during the implementation period. This work varies from highly technical to subtle techniques to improve the adoption of the system with each element having a comparable weight on success. Success is an efficient implementation process which maintains time commitments and a high adoption rate. We will also touch on what it may take in the long term to support the effort and reinforce the objectives of the project.

**Prioritization and Resources:** This project must remain a priority for the duration of the implementation and adoption. This means allowing staff dedicated time to ensure projects success. It also means that we need to be very mindful about distractions and reducing existing workload clutter.

**Staffing Commitments:** The implementation of the ERP will take existing staff resources away from the daily work they do. The staff selected for this project are all highly capable staff who have been relied upon for the delivery and management of complex projects and service delivery.

Here is an estimated time commitment chart:

| Role                                                                     | Estimated Time Commitment | Duration                              |
|--------------------------------------------------------------------------|---------------------------|---------------------------------------|
| Sponsor                                                                  | 30%                       | Ongoing                               |
| Project Manager                                                          | 100%                      | Start to 4 months post implementation |
| Business Process Manager                                                 | 80%                       | Start to 4 months post implementation |
| Change Manager Training Leadership                                       | 80%                       | Start to 4 months post implementation |
| Technical Manager                                                        | 100%                      | Ongoing                               |
| Tech <ul style="list-style-type: none"> <li>• Data Conversion</li> </ul> |                           | Ongoing                               |

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| <ul style="list-style-type: none"> <li>• Integrations</li> <li>• System Administrator</li> <li>• Testing lead</li> <li>• Security</li> <li>• Business System Analyst</li> </ul> |                                               |                                                                        |
| BP Team Member                                                                                                                                                                  | 40%                                           | Start to 4 months post implementation                                  |
| CM Team Member                                                                                                                                                                  | 40%                                           | Start to 4 months post implementation                                  |
| Subject Matter Experts (SME)                                                                                                                                                    | 20%                                           | Focused during process documentation phase and testing training phases |
| Steering Committee                                                                                                                                                              | 35% Implementation<br>20% Post Implementation | Ongoing (Membership may change overtime)                               |
| ERP Administrators                                                                                                                                                              |                                               | 80-100% Ongoing                                                        |

**Impact on Existing Work:** There is a need to look closely at the impact on daily operations and management of several workgroups. The project is largely impacting Finance, Human Resources and the management professionals with other departments supporting Finance and Human Resources business processes. However, the project has pulled resources from Public Services, CAN, and the mayor's office in support of the overall project management. The impacts here are significant as they will largely be unable to fulfill their existing roles during the implementation process.

Public Services: Nole Walkingshaw (Deputy Department Director)

CAN:

Mayor:

Finance:

IMS:

HR:

**Governance:**

- Develop a Governing/Steering group and rules and roles for project governance.
  - Advises on project vision, mission, organization, goals, and budget
  - Balance competing interests and agendas
  - Ensure appropriate resources are available

- Resolve escalated issues
- Approve key deliverables
- Verify project is meeting goals/objectives and timeframes
- Consider other projects competing for staff implementation resources. City needs to consider either which projects are most needed or if the same staff is needed to implement all projects. Example is CAMP replacement. The CAMP replacement effort using Central Square will be shut down so that we can focus efforts relating to data migration and process documentation for contract management towards the new system.
- New requests or intermediate scope creep; consider the timeframe needed to fully implement the ERP and staff resources needed throughout the implementation process.
- Process improvements or changes to processes need to be documented with the team. Moving forward any changes to process needs to be documented and that needs to be sent forward to the business process team so that they can capture the changes and consider them in the implementation.
- Emergency efforts: events like the wind event or earthquake require rapid team efforts. We need to consider how those events impact this project and if resources are taken away even for a short period how we mitigate impacts.
- Develop rules for prioritizing efforts and support decision making.
- Develop rules for consistency across the platform when appropriate

### **Agile Team Formation**

We are looking to develop an Agile effort to support the efforts relating to data migration, integrations and other technical efforts. *Summary of that structure*

### **Administration On-going:**

The ERP represents a transition in technology and business management away from a departmentalized approach to an enterprise approach. This shift requires us to adjust the administrative and governance functions of the system. A sample of a comparable shift can be seen in the Cartegraph implementation for asset management and operations. Cartegraph serves five divisions spread out over two departments. Prior to Cartegraph we had five unique systems. To administrate Cartegraph we first built up a team of Business System Analysts or other technologists, within each division, who support the individual work group. This group works together and makes common system decisions via governance process. The governance process is supported by IMS and IMS supports the more technical elements of the system such as upgrades and integrations. This group and the administration of the system is improving overtime. The Cartegraph implementation is not complete as we continue to build out areas of

the system and identify new areas where we could include additional teams. Throughout the process we have tried to include representatives from the various work groups in on the meetings and build so that we ensure consistency in how we capture data and common workflow efforts, this improves reporting as well as builds redundancy in the long-term administration of the system.

**Administration On-going Proposed structure:**

Governing Body: Technical and business managers

Business Systems Team Lead: Becomes the product owner guiding the development and maintenance of the system

Business Systems Analysts: Work within the business groups supporting the development and maintenance also works as a team to help guide the overall development and maintain consistency. HR, Finance (3 broken out over the divisions), Airports, Public Utilities.

IMS: Supports development and maintenance of higher technical needs such as integrations, advanced reporting, upgrade testing and supports the administration of the governing body.

Detailed table of the roles the city will play during the implementation

| City Role          | Description of Role                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| Executive Sponsor  | <ul style="list-style-type: none"> <li>• Actively and visibly champion the project</li> <li>• Legitimize project business objectives</li> <li>• Drive leadership alignment across functions</li> <li>• Secure project funding and resources</li> <li>• Approve scope changes and major deliverables</li> <li>• Support Project Manager</li> <li>• Resolve conflicts</li> </ul>                                                                                                                                            |
| Steering Committee | <ul style="list-style-type: none"> <li>• Participate in Monthly Steering Committee meeting</li> <li>• Advises on project vision, mission, organization, goals, and budget</li> <li>• Balances competing interests and agendas</li> <li>• Ensuring appropriate Client resources are available for the project</li> <li>• Resolve issues escalated by Executive Sponsor in a timely manner</li> <li>• Approve key deliverables</li> <li>• Verify that the project is meeting the goals/objectives and timeframes</li> </ul> |
| Project Manager    | <ul style="list-style-type: none"> <li>• Manage issue and key decision log</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                     |

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|                        | <ul style="list-style-type: none"> <li>• Management of efforts occurring ancillary to the ERP project (i.e. ADP upgrade, 3rd party integrators)</li> <li>• Assures that planning, execution of plans, communications, issue management, and other critical implementation factors are addressed</li> <li>• Coordinate work of Functional and Technical team members</li> <li>• Monitor project progress and reports status to appropriate groups</li> <li>• Report status across the program</li> <li>• Monitors project budget</li> <li>• Escalate issues to Executive Sponsor as appropriate</li> <li>• Act as Named Support Contact (NSC) and WD Community Administrator</li> </ul>                                                                          |
| Change Management Lead | <ul style="list-style-type: none"> <li>• Develop overall change strategy and plan for the project</li> <li>• Coach sponsors and managers in their roles, as they lead their teams through the change</li> <li>• Drive adoption and utilization of the new system</li> <li>• Establish and report on change readiness metrics</li> <li>• Ensure execution of communications and training plans</li> <li>• Report status of change management activities to executive sponsor and steering committee</li> <li>• Draft leader toolkits and other user-focused communications</li> <li>• Execute, maintains, and updates communication plan</li> <li>• Participate in planning for demonstrations and other employee awareness and engagement activities</li> </ul> |
| Training Lead          | <ul style="list-style-type: none"> <li>• Become familiar with Training and customer resources</li> <li>• Review scheduled training offerings for required training</li> <li>• Schedule and maintains the Client Workday Training Center portal</li> <li>• Assign courses to team members</li> <li>• Track progress and manage completion deadlines</li> <li>• Track and optimize Workday training unit utilization</li> </ul>                                                                                                                                                                                                                                                                                                                                   |

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|                                | <ul style="list-style-type: none"> <li>• Schedule Workday learning in-person (LIP) courses, dates, locations, and registrations for project leads and subject matter experts (SMEs)</li> <li>• Execute training plan</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                 |
| Business Process Leads         | <p>Defines business requirements for configuration in ERP</p> <ul style="list-style-type: none"> <li>• Support mapping of data and data validation</li> <li>• Provides reporting requirements</li> <li>• Participate in data conversion validation at each tenant build</li> <li>• Help lead and coordinate functional SMEs by area</li> <li>• Primary leads for testing effort for areas of responsibility including development of test scenarios and test execution</li> <li>• Attend appropriate ERP training prior to key events</li> <li>• Help the project team identify, document and analyze change impacts</li> </ul> |
| Subject Matter Experts (SME's) | <ul style="list-style-type: none"> <li>• Attend appropriate ERP training prior to key events</li> <li>• Participate in key sessions, such as Design, Testing, etc.</li> <li>• Provide data setup values via workbook population</li> <li>• Answer ad-hoc questions</li> <li>• Execution of testing activities</li> <li>• Help the project team identify, document and analyze change impacts</li> <li>• Responsible for 3rd party vendor relationships</li> </ul>                                                                                                                                                               |
| Security Lead                  | <ul style="list-style-type: none"> <li>• Be familiar with the ERP configurable security model</li> <li>• Complete ERP training to learn the overall security capabilities and functionality of the Workday Service</li> <li>• Participate in security design sessions</li> <li>• Create, maintain, and edit system roles</li> <li>• Map appropriate roles to employees</li> </ul>                                                                                                                                                                                                                                               |
| Testing Lead                   | <ul style="list-style-type: none"> <li>• Coordinates development of</li> <li>• Testing strategies</li> <li>• Test plans</li> <li>• Scenarios</li> <li>• Testing resources</li> <li>• Test execution issue tracking</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                   |

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|                                                                                  | <ul style="list-style-type: none"> <li>• Coordinates testing issue resolution</li> </ul>                                                                                                                                                                                                                                                                                                                       |
| Data Conversion Lead                                                             | <ul style="list-style-type: none"> <li>• Acts as a single point of contact for all conversion related activities</li> <li>• Defines data extraction approach across all legacy systems</li> <li>• Responsible for extraction, consolidation, cleansing and transformation of conversion data from legacy systems.</li> </ul>                                                                                   |
| Integrations Lead                                                                | <ul style="list-style-type: none"> <li>• Acts as a single point of contact for all integration related activities</li> <li>• Participates in integration design workshops</li> <li>• Primary point of contact for vendor communication</li> <li>• Provides integrations requirements</li> <li>• Provides sign-off on Navigator integration build specifications</li> </ul>                                     |
| ERP Administrator (Business Systems Analysts, IMS Software Support, Engineering) | <ul style="list-style-type: none"> <li>• Serves as a “super user”</li> <li>• Creates, maintains, and manages business process definitions</li> <li>• Monitors and maintains business process steps, roles assigned, and organizations assigned</li> <li>• Assists ERP users in resolving issues involving business process steps</li> <li>• Addresses support items reported by Client system users</li> </ul> |