


MUNIBALL: *THE ART OF WINNING*
2018 CMTA ANNUAL CONFERENCE
April 25-27, 2018 OAKLAND, CA

Upgrading Financial Software: Challenges and Opportunities

A Practical Guide to Help Ensure
Maximum Return on Investment

Thursday, April 26, 2018
4:30 – 5:30 pm



Today's Session

- ▶ ERP Implementation
 - Challenges
 - Must-Haves
 - Critical Success Factors
 - Measuring Success
 - Ensuring Continued Success

Michael Solorza



Director of Administrative Services
City of Pico Rivera

- ▶ 20+ year career in public sector
 - State, County and City
 - Budget, treasury, accounting, information technology, human resources
- ▶ Cities of Huntington Beach, Mission Viejo, La Palma, Westminster
- ▶ CMTA Board Member South
- ▶ Fiscal Officers Department appointee to League Policy Committee

City of Pico Rivera Overview

- ▶ Tyler “New World Systems”
 - Contract awarded August, 2015
 - Finance Module Go-Live September, 2016
 - Community Development Go-Live November, 2017
 - Utility Billing Go-Live ANTICIPATED July, 2018

ERP System Implementation Challenges

- ▶ Support for the project
- ▶ Managing Change: the People Aspect
- ▶ Resource availability

ERP System Implementation Must-Haves

- ▶ Top Down Buy-In
- ▶ Executive Level Sponsorship and Support
- ▶ Organization-wide Awareness and Support

ERP System Implementation Must-Haves

- ▶ Organizational Acceptance
- ▶ Resource Alignment
- ▶ Effective Project Management

Critical Success Factors

- ▶ Clear Definition of Goals for New ERP System
 - What works now?
 - What needs to be fixed?
 - What does the organization need/want?
 - Better, Easier and Faster Data Extraction
 - Improved Chart of Accounts Design
 - User Friendly Interfaces
 - Improved business processes

Critical Success Factors

- ▶ Clear Definition of Goals for New ERP System
 - Increased Transparency
 - Access to real-time financial data
 - Budget Document Production and reporting
 - CAFR Builder
 - Improved Processes / Increased Efficiencies
 - Business process review

Critical Success Factors

- ▶ Realistic and Attainable Timeline
- ▶ Training Plan
- ▶ Communication Plan
- ▶ Business Process Review

Measuring Success

- ▶ Success of Each Module Go-Live
 - Timely, Accurate Launches
- ▶ Improved Customer Service to Residents and City Departments
- ▶ Post Implementation Evaluation Review (PIER)

Measuring Success

- ▶ Additional Module Implementations
- ▶ Module “Clean-Up” Post Go-Live
- ▶ Surveying Staff and Management About Go Live Process
- ▶ Surveying Again 1 Year After Go Live

Ensuring Continued Success

- ▶ Actively Participate in Software User Group Meetings and Conferences
- ▶ Establish and Regularly Conduct Training
- ▶ Be a Champion for Exploring Unmet Needs Through the ERP System

- ▶ Questions?

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