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6 Tips for Digital Transformation without changing your Current ERP

gfoa alberta
government finance officers association

Meet Your Speakers

- **GP Support North - Scott Jorgens**
- **Endeavour Solutions - James McInnis**

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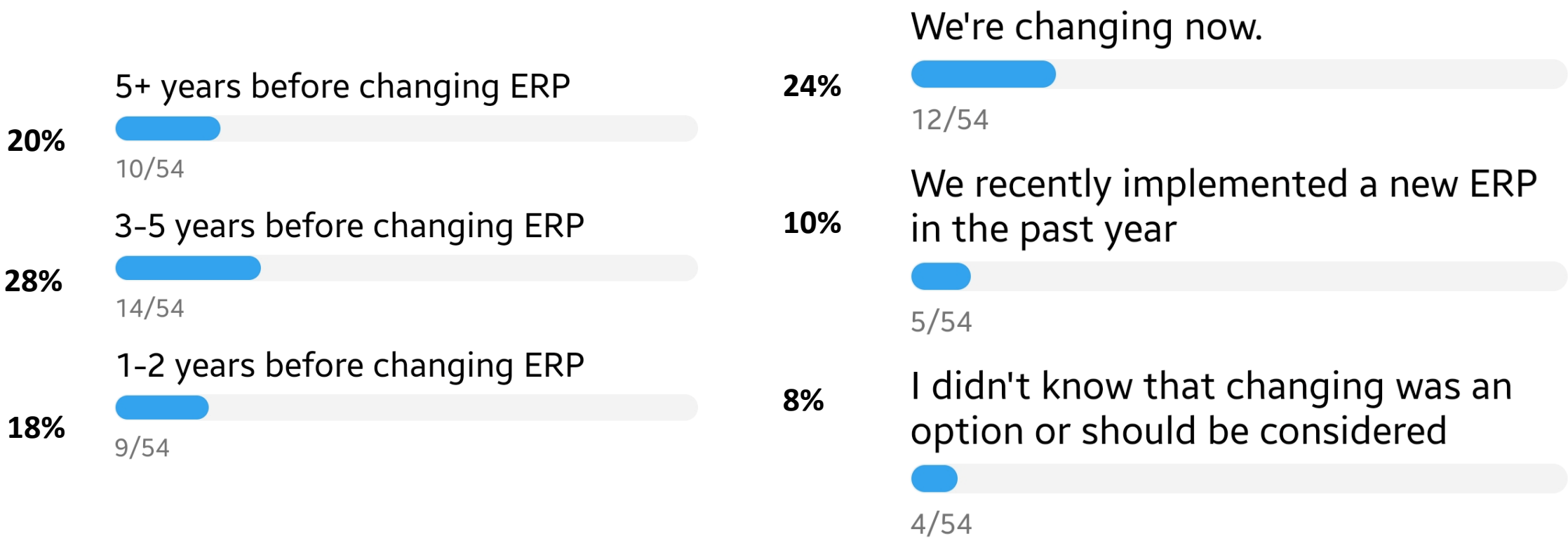
Poll Results – 54 sample size



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Background to our Presentation

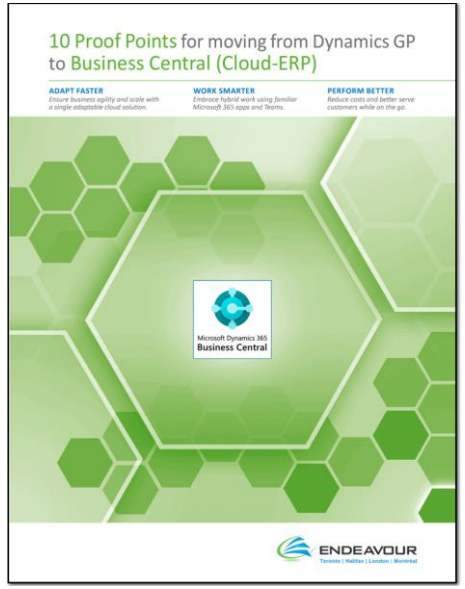
Microsoft Solutions Partner

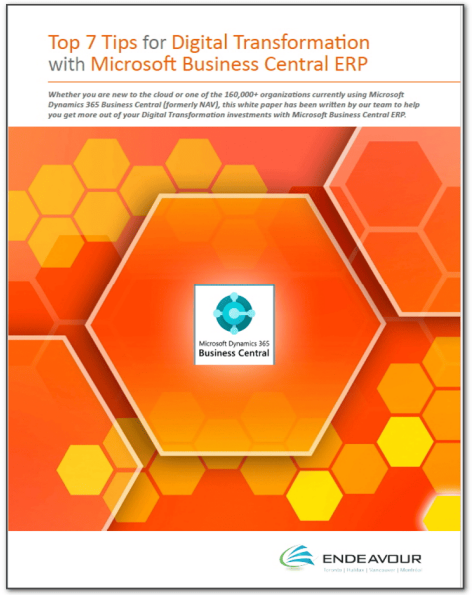
Business Applications

Microsoft Partner

Microsoft

- Gold Small and Midmarket Cloud Solutions
- Gold Enterprise Resource Planning
- Gold Data Analytics
- Gold Cloud Platform
- Gold Cloud Productivity





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ERP Tip 1 - REVIEW YOUR BUSINESS PROCESSES

- Back to the Basics – Individual process review and time studies.

- What to Look for:
  - Manual data entry
  - Business processes – open, view, edit, send, sort, save, attach, close, export etc.
  - Approvals process – who, what, where, why, when etc.

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ERP Tip 1 - REVIEW YOUR BUSINESS PROCESSES

- How to Resolve
  - Start digital, stay digital
  - Look for process optimization opportunities
  - Machine-based OCR (optical character recognition) has improved 10X with AI - ie AP automation
  - Look to increase your adoption of current advanced functions within ERP and Add-on – Budgeting
  - Look for new perspectives
    - Recent hires, user groups, or external experts

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Tip 2

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ERP Tip 2 - FURTHER AUTOMATE FINANCE PROCESSES

- Follow the bouncing ball. Create a process map to follow key documents and touchpoints.

- What to Look for
  - eMail request for authorization to spend/pay
  - Repetitive tasks
    - Transactions that are consistent and repeated – ie lease, electric bill, or water cooler bill
    - Month-end reporting and close
    - Council reporting

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ERP Tip 2 - FURTHER AUTOMATE FINANCE PROCESSES

- How to Resolve
  - Change and optimize finance processes (80-20)
  - Consolidate reports and create self-serve reports
  - Create decision trees
    - “Guard rails’ for auto approvals
    - Automated alerts focused on exceptions
    - Quarterly summary vs monthly
  - Workflow automation
    - Available 3rd party ISV (Independent Software Vendors)
      - Expense Management
      - AP Automation
      - Permits

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Tip 3

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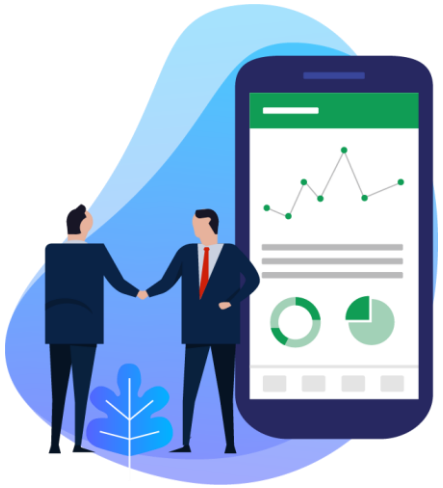
ERP Tip 3 - DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS

- Review of business value and value-added functions – OKRs.



- What to Look for
  - Departmental apps, forms and reports
  - Administrative tasks that could be automated
  - Measurable outputs – Map out value-chain
  - Are there ERP financial metrics that support or validate OKRs in line of business?

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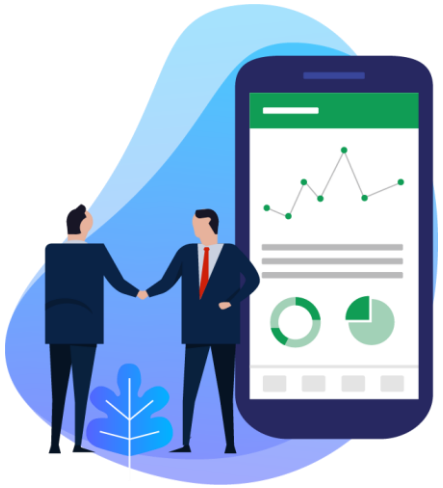
ERP Tip 3 - DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS

- How to Resolve
  - Find data and metrics that can help other departments create OKR/ KPI dashboards
  - Automate tasks for line-of-business
  - Cross-functional workshops
  - Multi-entity manager for central shared-services
  - IT and Business Analysts can build PowerApps, Power Automate, and PowerBI with Dataverse or Azure SQL Server Datamart
  - 3rd Party Reporting Tools
    - PowerBI, Questica, Vena, PSD Citywide Budget, other



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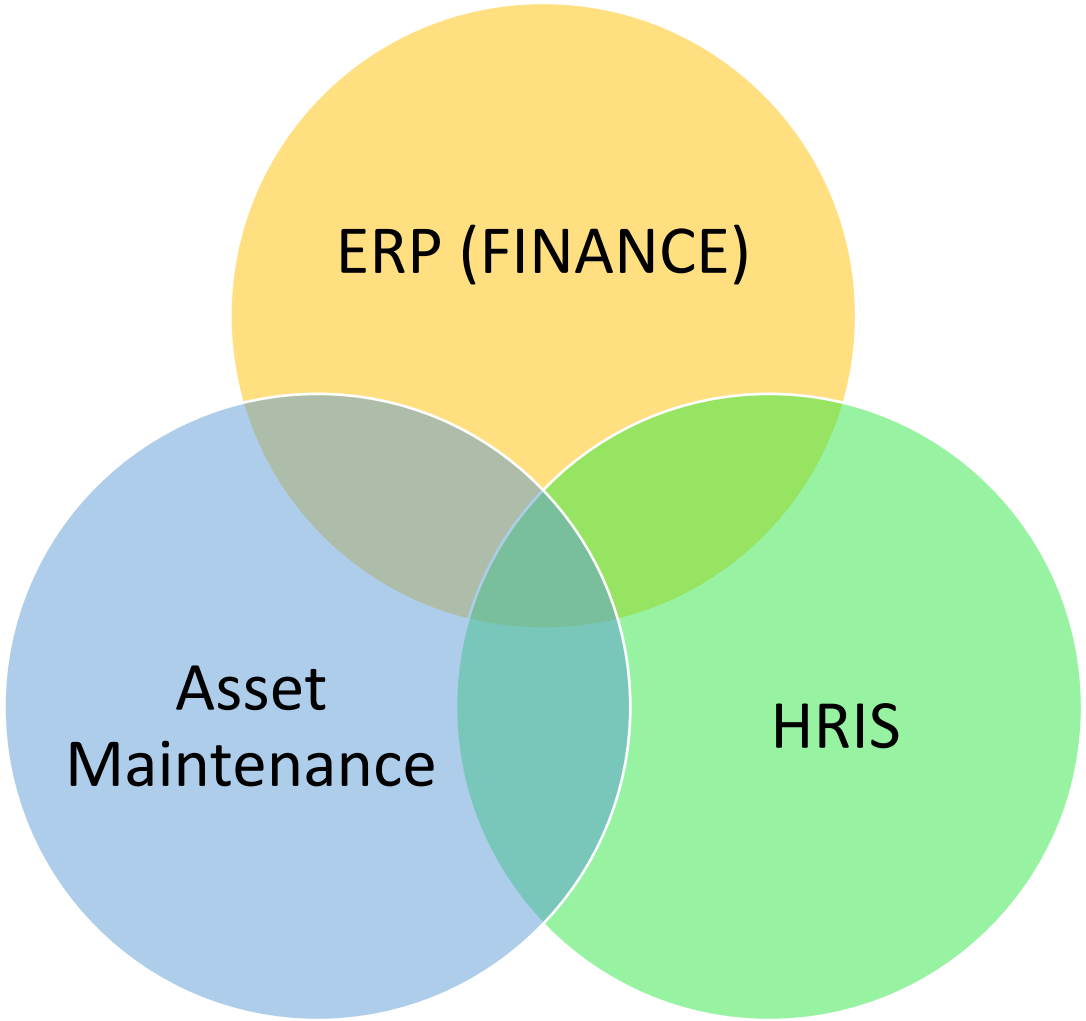
ERP Tip 3 - DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS



RECAP (ERP Tips 1-3)

- YOUR Municipal ERP of Choice
- Top 6 Tips for Digital Transformation

1. REVIEW YOUR BUSINESS PROCESSES
2. FURTHER AUTOMATE FINANCE PROCESSES
3. DESIGN AND BUILD AN ADDITIONAL LINE OF BUSINESS METRICS

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Tip 4

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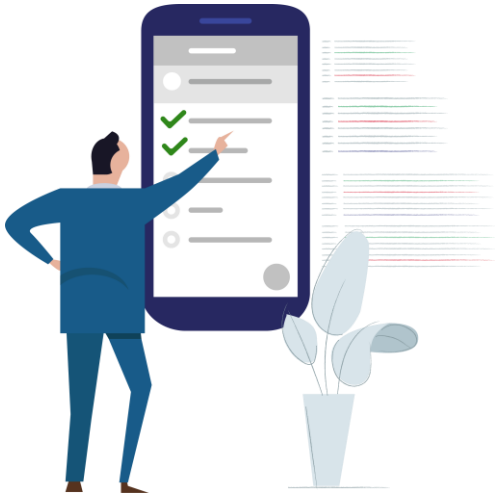
ERP Tip 4 - EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE

- Set up integrated web portals and cloud apps for internal and external stakeholders.



- What to Look for
  - Explore remote submissions, self-service reports, and remote approvals
  - Build some metrics on time taken per task, frequency and prevalence across each LoB
  - Inspiration from apps or providers serving common market needs. You are not alone.
    - Citizen Portal – Property tax, Utilities, Licensing, Permits, etc.

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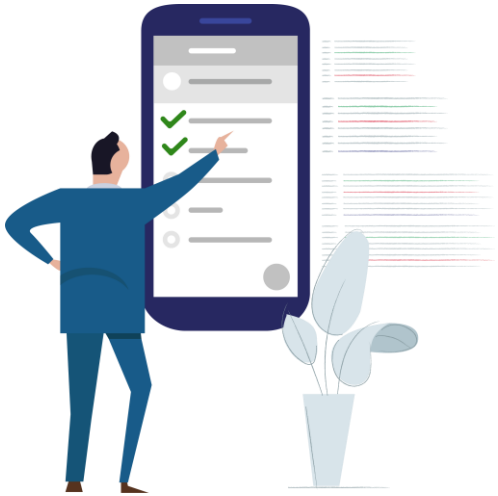
ERP Tip 4 - EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE

- How to Resolve
  - There are a number of Cloud-based add-ons
    - Vendor specific
    - Vendor neutral
  - PO requisition and approvals
  - AP invoice, OCR, and approvals
  - Online billing and payment processing
  - Time & Expense management
  - Leave / Vacation tracking and approvals
  - Budget, forecast, scenario planning
  - Report packages for period-end close



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Tip 5

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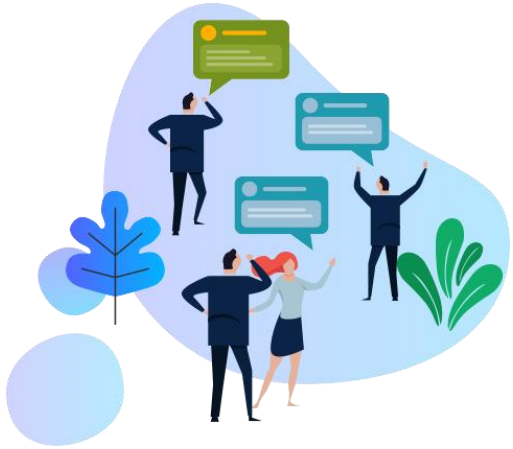
ERP Tip 5 - CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

- Leverage digital communications tools internally and with customers.



- What to Look for
  - Citizen and B2B communications (finance, taxes, facilities etc)
  - C-Sat surveys to citizens and vendors
  - Eliminate paper, send digital and attachments
  - Review document retention, retrieval, and storage policies (especially for approvals)
    - ISO Standards – only 7 years and only relevant info

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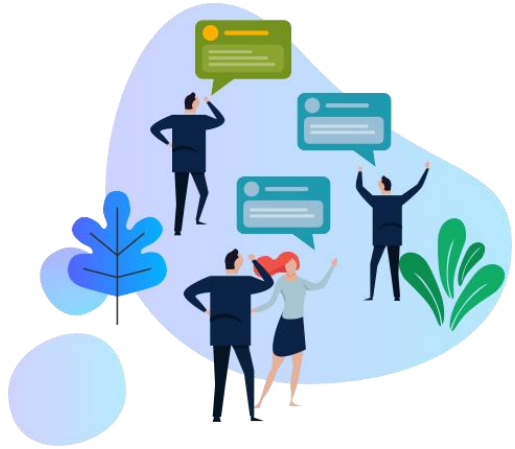
ERP Tip 5 - CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

- How to Resolve
  - eMail is easy and universal – Create share mailboxes for AR, Finance, AP etc
  - Internal Business Central workflow approval and Power Automate can attach docs from document storage such as OneDrive, SharePoint Online, and other cloud systems.
  - Many ISV applications available
    - Billing and customer statements
    - Collections management
    - Budgeting workflow / collaboration
    - PO requests / approvals / collaboration
    - AP and expense approvals / collaboration



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RECAP ERP (Tips 1-5)

- YOUR Municipal ERP of Choice
- Top 6 Tips for Digital Transformation

1. REVIEW YOUR BUSINESS PROCESSES
2. FURTHER AUTOMATE FINANCE PROCESSES
3. DESIGN AND BUILD AN ADDITIONAL LINE OF BUSINESS METRICS
4. EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE
5. CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

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Tip 6

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ERP Tip 6 – EMBED ANALYTICS THROUGHOUT YOUR PROCESSES

- Most ERP Support Power BI Analytics.
- Most reporting tools support dashboards.
- What to Look for
  - Financial Reports and common analysis performed by your executive team and line of business
  - Challenge major strategic decisions to see if key ERP data was used as part of the decision criteria
  - Uncover best practices for metrics and related actions
  - Moving from Good to Great will require knowing what good and great looks like, and whether the data (ERP) is trusted

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ERP Tip 6 – EMBED ANALYTICS THROUGHOUT YOUR PROCESSES

- How to Resolve
  - Build a Center of Excellence around data analytics
  - If TRUSTED data is lacking, find a means of capturing data on a more consistent and reliable basis
  - Leverage the Analysis Mode within ERP to create on-demand pivot tables. Educate users on these advanced functions
  - Microsoft Power BI visualizations and analytics can be shared on mobile, website, Teams, SharePoint etc.
  - Scenario Planning and FP&A can be further enhanced with 3rd party tools including budgeting automation

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Recap

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6 TIPS for DIGITAL TRANSFORMATION

- YOUR Municipal ERP of Choice

1. REVIEW YOUR BUSINESS PROCESSES
2. FURTHER AUTOMATE FINANCE PROCESSES
3. DESIGN AND BUILD AN ADDITIONAL LINE OF BUSINESS METRICS
4. EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE
5. CREATE AN EXPANDED FOCUS ON COMMUNICATIONS
6. EMBEDD ANLAYTICS THROUGHOUT YOUR PROCESSES

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Four Additional Bonus Tips (Top 10)

7. Keep your ERP System up to Date
8. Test your Back-ups with a FULL restore
9. Cyber Security
10. Plan 2-3 Years Ahead of Your ERP Replacement
    - Procurement Process
    - Council Approval
    - 8-12 Month Implementation
    - Black-out Periods
    - Start Date vs Go-Live Date

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THANK YOU

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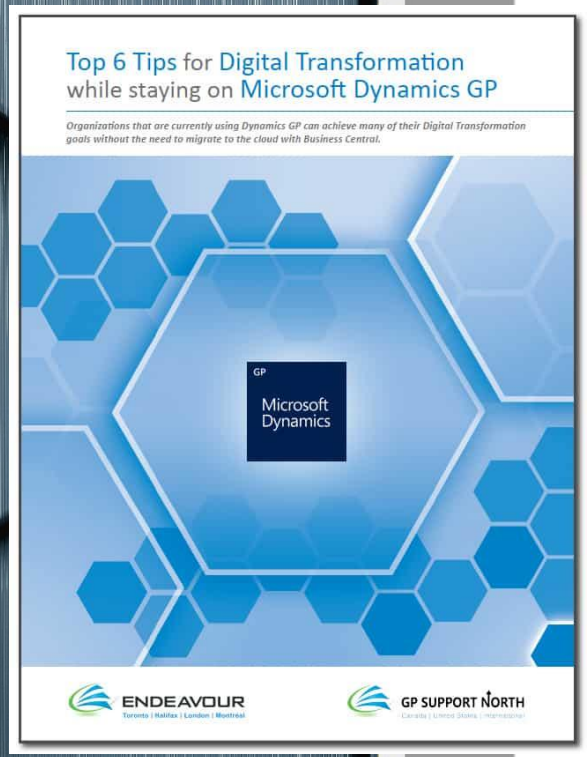

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GP TIP 2 – FURTHER AUTOMATE FINANCE PROCESSES 4
GP TIP 3 – DESIGN AND BUILD ADDITIONAL LINE OF BUSINESS METRICS 5
GP TIP 4 – EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE 6
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APPENDIX A: WHY ORGANIZATIONS SHOULD STAY ON DYNAMICS GP 11

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GP 6-TIPS White Paper

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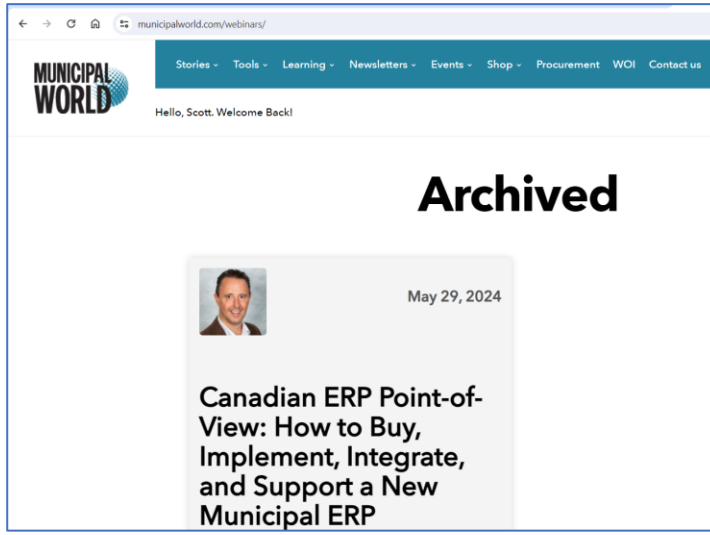
Contact James McInnis

Municipal World Magazine (online)

- How to choose a new Municipal ERP
  - Endeavour
  - Sylogist
- Webinar On-Demand Recording
- Best Practices
  - Procurement Process (See a demo first)
  - Looking at Software Needs
  - Looking at Implementation Team/Partner
  - Looking at Long Term Support



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