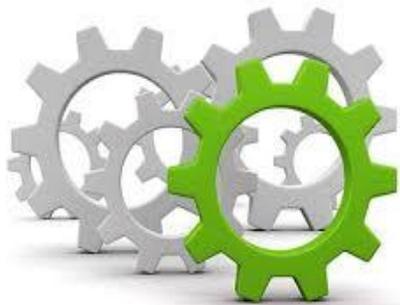




UNITE PROJECTS UPDATE



NOVEMBER 19, 2019

AGENDA

1. Recap of Projects
2. Update on 2019 - 2020 projects
3. Conclusions

1.0 BUSINESS DRIVERS AND ROADMAP



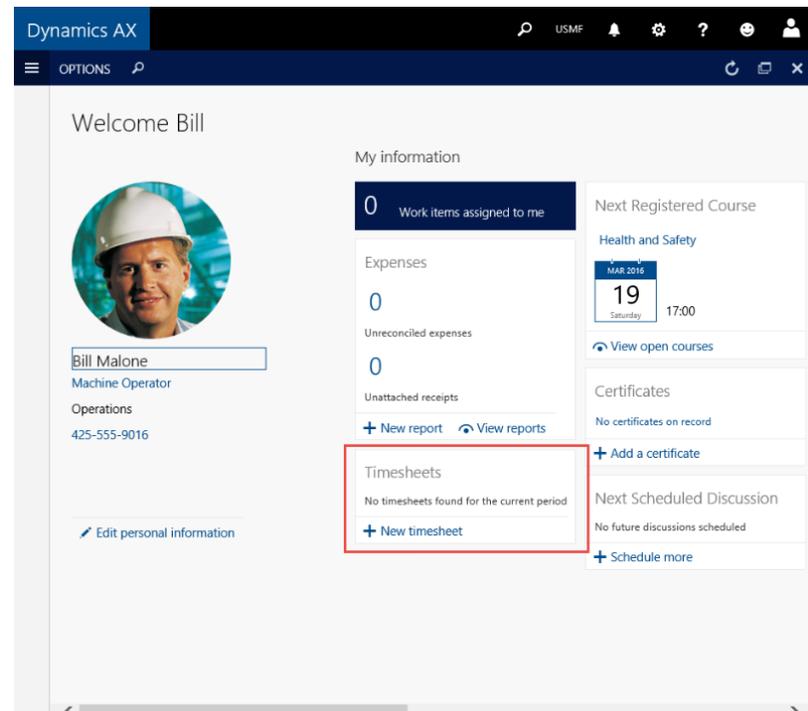
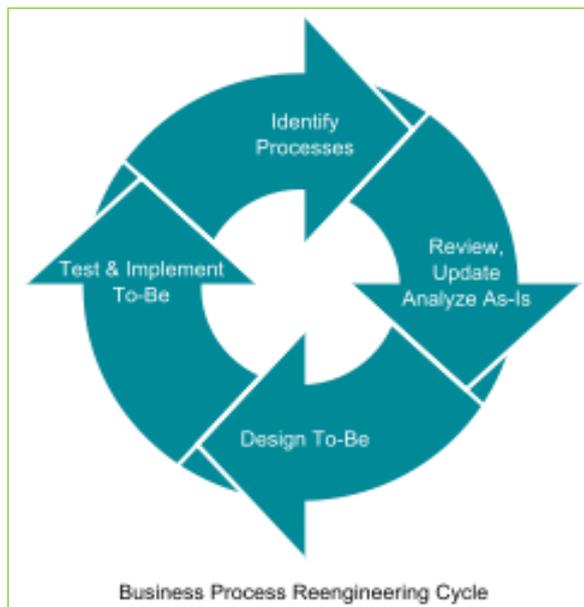
	2019 – 2020				2021 - 2023		
	2019 Q1-Q2	2019 Q3-Q4	2020 Q1-Q2	2020 Q3-Q4	2021	2022	2023
1. Payroll Modernization and Talent Management: Evaluate and implement, a payroll, staff scheduling and talent management (HCM) solution.		Planning	Execute	Execute			
2. CRM Streamlining: Improve the usability of Dynamics CRM for Customer Service area and related stakeholders.		Execute					
3. Dynamics 365 F&O Enhancements: List of sub-projects includes: (1) fix project accounting; (2) streamline procurement and; (3) implement budgeting/grants and; (4) review VeMax integration.		Planning	Projects	Procurement	Budgeting	VeMax	
4. Office 365 Roll-Out: Migrate to O365. Targeting email and teams and reviewing other opportunities.			Planning	Execute			
5. CRM Phase II - One Parkland Portal: Extend internal rollout and implement Citizen portal for on-line inquiries and reporting issues.				Planning	Execute		
6. Bellamy Retirement: Evaluate utility billing/AR/Property Tax/Cashiering.				Planning	Execute	Execute	
7. Planning and Development Modernization: Evaluate alternatives and select a preferred option.					Planning	Execute	
8. Records Management: Staff training, creating tools, implementation, FOIP backup. Focus areas: Ag, Smart Parkland, Community Sustainability (bio reports, ESAs), cemeteries, community grants, OH&S and TRIM.						Planning	Execute
9. CRM Phase III Portal Update: Placeholder to enhance the portal with other Services.						Planning	Execute

2.0 UPDATE ON 2019 PROJECTS

Payroll Modernization Update:

This project focuses on removing manual processes and streamlining the payroll function. This is the *largest technology project* that will be undertaken in 2020.

- Completing last remaining due diligence work regarding pay rule complexity analysis and integrating into Parkland County's Corporate ERP system – MS Dynamics 365.
- Finalizing RFP for professional services to assist with implementation in early January 2020.



2.0 UPDATE ON 2020 PROJECTS

CRM Streamlining:

This small project builds on the CRM project completed earlier in 2019:

- We are adding some minor enhancements such as automated workflows so staff can work across departments more effectively.
- Creating training videos on the system to assist with on-boarding new CSR staff.
- Identify and improve training for selected CRM “power users”.
- The project is scheduled to be completed by January 2020.

2.0 UPDATE ON 2020 PROJECTS

Purchase to Pay Process Improvement:

This is scheduled for Q1/2020 with the purpose of addressing long-term operational issues including:

- End user errors due to knowledge gaps and budget owners/end users not understanding what budget codes to use. Overall, there is a significant knowledge and skill deficit within the organization due to limited training.
- Process for setting up new vendors is inefficient and cumbersome with too many touch points.
- Currently, POs can only be approved by logging into the environment through VMWare or Citrix

Project Management Process Improvement:

This is scheduled for Q3/2020 with the purpose of addressing long-term operational issues including:

- Project reporting is difficult. Develop project dashboards to provide better transparency
- Reduce the use of Excel spreadsheets for project management
- Streamline processes associated with forecasting and year-end/carry-forward manual processes
- There is a limited use budget's and forecasts within the system

2020 SPEND

Payroll and Talent Management - \$830,000

System functionality enhancements - \$1,000,000

CRM phase 2 (Customer portal) - \$150,000

Business process improvement - \$450,000

System support - \$120,000

3. CONCLUSIONS

- Pleased with 2019 results -- tracking on plan for 2020.
- Continuing to undertake due diligence as part of our "Pre-Planning work" on payroll.
- Finalizing budgets required to complete 2020 projects.
- Finalizing a comprehensive 3 year Business Systems Roadmap