UNITE PROJECTS UPDATE
COMMITTEE OF THE WHOLE

OCTOBER 2020

AGENDA

1. Recap of UNITE Program
2. Highlights 2020 projects
    - Payroll Modernization
    - Project Management Improvement
    - CRM Phase II
3. Conclusions

1.0 BUSINESS DRIVERS AND ROADMAP

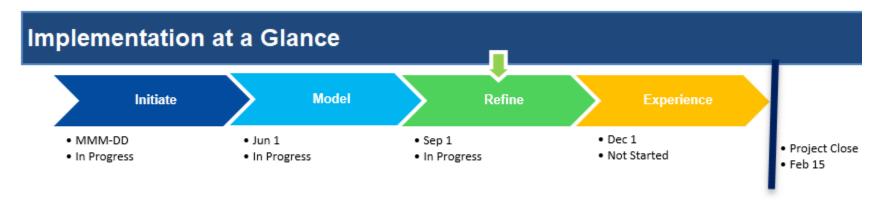|	2019 – 2020				2021 - 2023		
	2019 Q1-Q2	2019 Q3-Q4	2020 Q1-Q2	2020 Q3-Q4	2021	2022	2023
1. Payroll Modernization and Talent Management: Evaluate and implement, a payroll, staff scheduling and talent management (HCM) solution.		Planning	Execute	Execute			
2. CRM Streamlining: Improve the usability 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 / Planning Procurement / Planning Budgeting / Planning 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/Cashering.				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 PAYROLL MODERNIZATION (PHASE II - EXECUTION)

This project focuses on removing manual processes and streamlining the payroll function.

- All workshops are completed; Ceridian payroll configuration is completed.

- Starting parallel testing in October and continues for 8 weeks

- Starting user testing in October using new streamlined processes

- Internal team working well; on schedule and budget - No issues to report.

- On target for January go-live.

Implementation at a Glance

Initiate	Model	Refine	Experience	
• MMM-DD	• Jun 1	• Sep 1	• Dec 1	• Project Close
• In Progress	• In Progress	• In Progress	• Not Started	• Feb 15

2.0 PAYROLL MODERNIZATION (PHASE II - EXECUTION)

This project focuses on removing manual processes and streamlining the payroll function.

- Pushing time entry to remote workers and reducing double entry

No more paper timesheets.
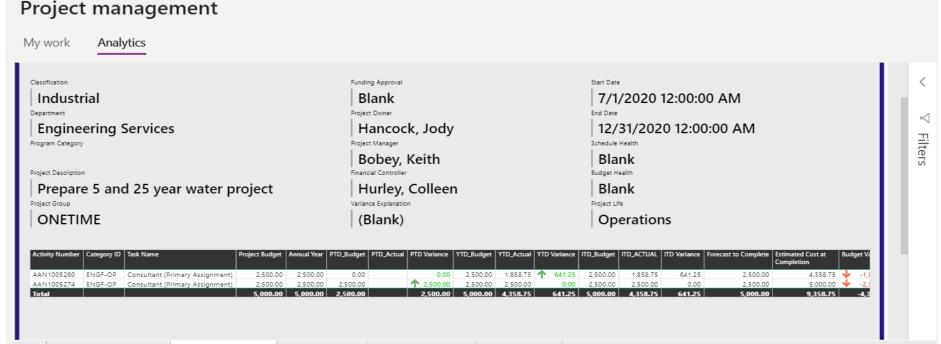*No more double entry.*

2.0 PROJECT MANAGEMENT IMPROVEMENT PROJECT

Project timelines are May – July 2020. The goal is to streamline processes and reduce manual reporting.

- System in production!!!
  - 40 spreadsheets used in the current process are being retired for new projects
  - Engineering Services feedback is very positive regarding new processes.

Project management

My work   **Analytics**

Classification	Funding Approval	Start Date
Industrial	**Blank**	**7/1/2020 12:00:00 AM**
Department	Project Owner	End Date
Engineering Services	**Hancock, Jody**	**12/31/2020 12:00:00 AM**
Program Category	Project Manager	Schedule Health
	Bobey, Keith	**Blank**
Project Description	Financial Controller	Budget Health
Prepare 5 and 25 year water project	**Hurley, Colleen**	**Blank**
Project Group	Variance Explanation	Project Life
ONETIME	**(Blank)**	**Operations**

Activity Number	Category ID	Task Name	Project Budget	Annual Year	PTD_Budget	PTD_Actual	PTD Variance	YTD_Budget	YTD_Actual	YTD Variance	ITD_Budget	ITD_ACTUAL	ITD Variance	Forecast to Complete	Estimated Cost at Completion	Budget Va
AAN1005260	ENGF-OP	Consultant (Primary Assignment)	2,500.00	2,500.00	0.00		0.00	2,500.00	1,858.75	↑ 641.25	2,500.00	1,858.75	641.25	2,500.00	4,358.75	↓ -1.8
AAN1005274	ENGF-OP	Consultant (Primary Assignment)	2,500.00	2,500.00	2,500.00		↑ 2,500.00	2,500.00	2,500.00	0.00	2,500.00	2,500.00	0.00	2,500.00	5,000.00	↓ -2.
Total			**5,000.00**	**5,000.00**	**2,500.00**		**2,500.00**	**5,000.00**	**4,358.75**	**641.25**	**5,000.00**	**4,358.75**	**641.25**	**5,000.00**	**9,358.75**	**-4,3**

parkland county

3.0 CRM PHASE II

Project timelines are May – Aug 2020. The goal is to streamline processes and reduce manual processes.

- Offering **more** online services to residents in this phase

- Accessible from a smartphone and auto-feeds the Customer Services CRM system.

- Target to get this project completed by end-of-year

Scope:

- Agriculture (Complaints process)

- Land Management inventory

- PW – Solid waste card + Vemax WRR tickets replaced with CRM (Sept 30)
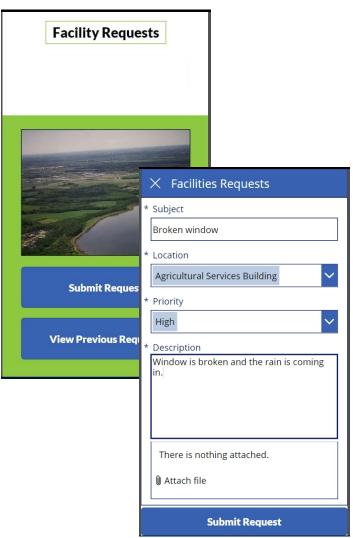
3.0 CRM PHASE II

Project timelines are May – Aug 2020. The goal is to streamline processes and reduce manual processes.

- Taking the opportunity to automate other paper processes by having smart phone apps feed requests directly into CRM

3. CONCLUSIONS

- The UNITE program remains tracking **on plan** for 2020.

- Teams working effectively remotely.

- Governance and oversight of the UNITE projects remains high.

- Vendors being actively managed; no significant issues to report at this time.

- Starting to plan 2021 UNITE projects such as retiring Bellamy ERP and implementing a modern Planning and Development system with on-line services.