

The Client:

Undisclosed Non-Profit Agency

Business Need:

The client is a \$7B non-profit focused in research and policy changing that includes environment, state policy, economic policy, and health and human services.

Client implemented Oracle/PeopleSoft financials systems in 2011 and the implementation was seen as a complete failure by the stakeholders and sponsors. Donors were eager to see a more robust platform to review their donations and track spending against projects or initiatives.

Key challenges included:

- ✓ Data conversations were incorrect, integrations were inaccurately done, and reports were not getting generated properly.
- ✓ In-house staff was poorly skilled and inadequately staffed.
- ✓ Closed supplier contracts remained open in the system.
- ✓ Budgets were done outside of the system and multi-currency transactions were calculated manually.
- ✓ A property management sub-system was not integrated with the ERP system.
- ✓ Client had a support contract with a global consulting company that was not properly utilized.
- ✓ Business showed low confidence in the IT team and there was a huge communication gap.
- ✓ There were no clear vision for the future IT initiatives.
- ✓ Lack of pre-award management system.

Our Role:

- ✓ Project and Program Management
- ✓ IT Governance and IV&V
- ✓ Product Expertise

Project Objectives:

- ✓ Stabilize newly implemented ERP system and create a trained internal support team.
- ✓ Implement and integrate a pre-award management system.
- ✓ Prepare 3-year budget, resource, and project plan.
- ✓ Select Cloud HCM Provider.
- ✓ Issue RFP and select an ERP Financials Upgrade consulting partner.

Our Solution:

Our strategy was simple but strategic: Focus on a long-term solution while fixing short-term issues. We were determined to setup an enterprise IT strategy that has been implemented by iLynx team in multiple organizations and has been proven to be successful. We were also focused on utilizing a staffing strategy that makes the client self-independent in the long run.

iLynx team's first focus was to identify implementation issues and help the system go live properly. Data that flowed from sub-systems into General Ledger and Project Costing were not flagged properly, which created a major reconciliation issue. We were able to zero-in on 127,000 transactions that needed manual updates. Once reconciliation between Project Costing, General Ledger, Purchasing, and Payables were complete, we focused on producing proper financial reports while working closely with the business to close books and setup an optimized financial close schedule.

Our second focus was to integrate the property management system while fixing issues around invoicing and closing supplier contracts that remained open over the years. Both of these issues required a combination of technical and functional expertise from both iLynx and the internal team. We built an integration to utilize the current budgeting system and provided overview of how project budget within the PeopleSoft can be configured when business is ready to implement it.

In order to build long term stability, iLynx setup IT Governance and a Program Management Office (PMO). Together, we created a 3-year budget, strategy, and IT initiatives. We used cross-training, hired new employees, and engaged Oracle to provide module specific trainings to build a skilled team that could support the system successfully. We also crafted security roles alongside training need in order to make it more dynamic.

Salesforce was selected as the CRM and we configured it to work as the pre-award management system. We designed the integration between Salesforce and PeopleSoft billing, receivable, project costing, and customer contract modules in order to track spending against donations and to run complete donor reports from Salesforce.

iLynx also created RFP and selected a vendor to provide PeopleSoft upgrade and additionally, assessed current business need for a cloud-based HCM solution, which led to the selection of Workday HCM system. Lastly, iLynx led the re-negotiated of PeopleSoft financials support contract to demand additional project hours and make it more effective for the customer need.

Results:

- ✓ A Clear vision for the future IT initiatives and budget and resource need to support the initiatives.
- ✓ A stable and fully integrated ERP solution and internal team supporting complete Grants, Financials, Supply Chain and Property Management solution.
- ✓ A clear path to take the ERP system to its latest version and a newly selected cloud HCM solution.