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Best Practices and Lessons Learned with Enterprise Initiatives

Best of New York

March 19, 2008

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Commonwealth of Pennsylvania Enterprise Project Implementation “ImaginePA”



Pennsylvania’s successful enterprise project known as “ImaginePA” is the basis for this presentation

Best practices utilized and lessons learned during each phase of the Imagine PA project

- Pre-project preparation
- Project Planning
- Design
- Build
- Implementation
- Post-implementation

It takes an enterprise to do a successful enterprise initiative

- It is all about the “people”



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Project Overview

Project Scope

Functionality-Finance, Budget, Procurement, Human Resources, Payroll, Travel Planning and Management, Construction Project Administration, Business Information Warehouse

Number of agencies-53

Number of employees-83,000 salary employees and 11,000 wage employees

Number of trainer end-users

- 23,000 users trained-Finance, Budget, Procurement, Construction Project Administration
- 16,000 users trained-Human Resources, Payroll, Travel Planning and Management
- 94,000 users trained-Employee Self-service

Project Start Date-March 21, 2001

Project Completion Date-July 1, 2004

Making Government Work Smarter



Return on Investment

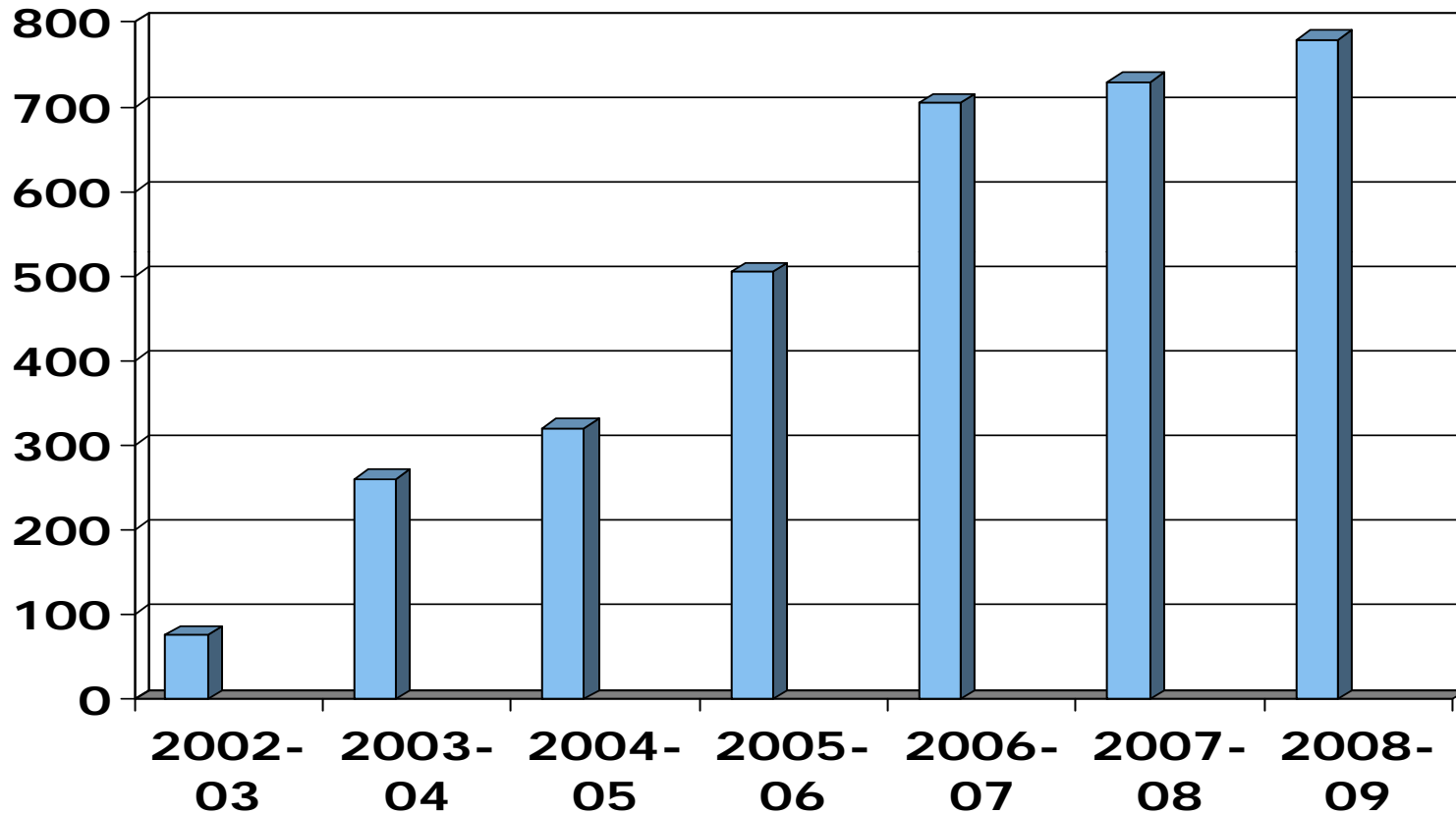
January 2003-December 2007

Strategic Sourcing	\$ 216M
Just In Time Inventory	\$ 4M
Employee Self-Service	\$ 53M
Decommissioning of Legacy Personnel/Payroll System	\$ 10M
Mandatory Direct Deposit	\$ 2M
Attrition of Vacant Full-Time Positions (3,500)	\$ 200M
Total	\$ 485M

Agencies are spending 2.3 percent less on administrative costs in FY 2007-08 than in FY 2002-03

Fiscal Stability

Rainy Day Fund Balance is \$730 million (FY 2007-08)



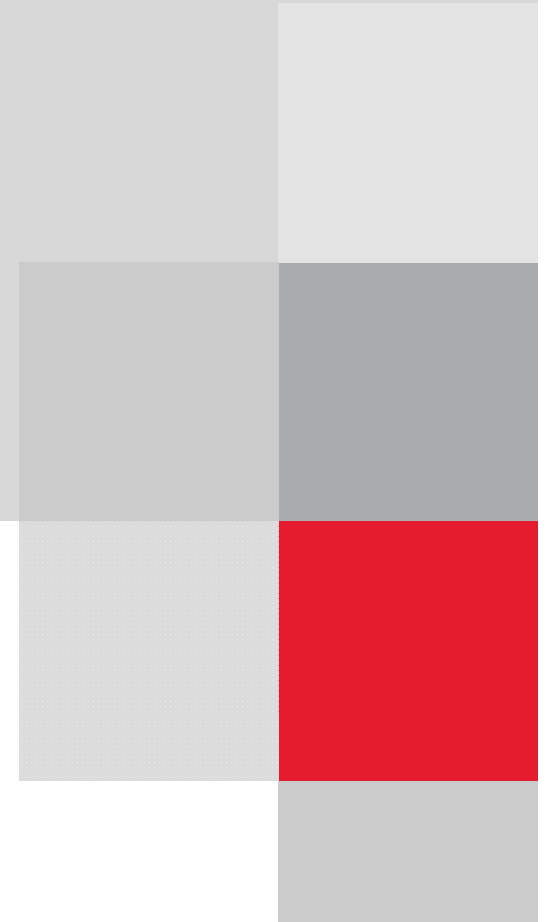
Projected surplus in excess of \$400 million for fiscal year 2007-08 will provide additional funds for transfer to Rainy Day Fund in 2008-09



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Business Transformation



Business Transformation



**An enterprise initiative is a business transformation effort,
not a technological project.**

The focus is:

- ✓ Redesigned Business Processes
- ✓ Empowerment of Employees
- ✓ Adoption of an Enterprise Approach
- ✓ Elimination of Risk-Outdated Legacy Systems
- ✓ Elimination of Duplication and Inefficiency
- ✓ Improving Skills of Client's Staff to Maintain Solution

"Business Drives, Technology Enables"



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Pre-Project Preparation Phase

Best Practices

Pre-Project Preparation Phase



Governance Structure comprised of Advisory and Steering Committees

Developed and executed a communication plan that kept the enterprise informed of the preparatory and procurement activities to keep the project moving forward

- Governor, as Executive Sponsor, made ImaginePA a standing agenda item for all cabinet meetings

Business process owners were required to document the business rules and approval processes associated with transaction processing in each of their functional areas

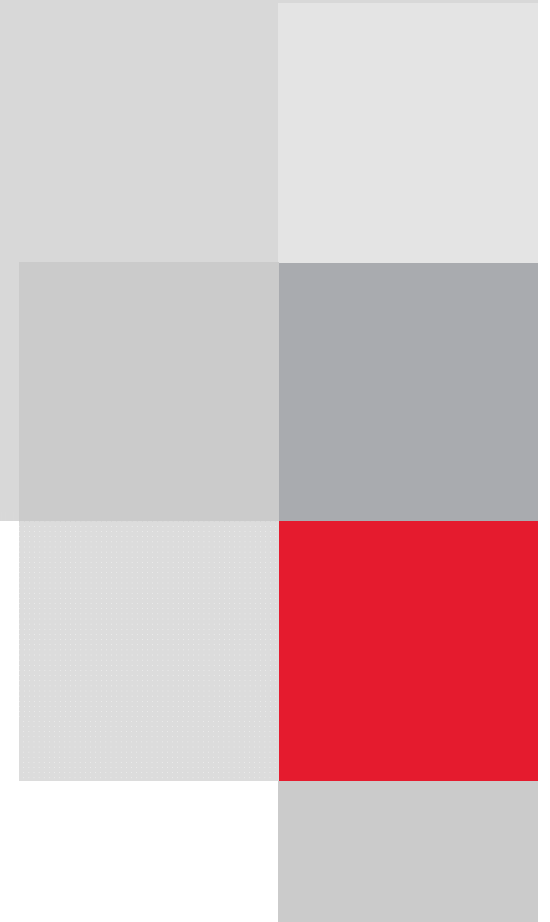
Each functional area established a team to document their end-to-end business processes and the business requirements that drive the processes



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Project Planning Phase



Best Practices

Project Planning Phase



Meet and discuss events with legislative leadership and bargaining units

Identification of employees covered by American Disabilities Act and an inventory of hardware/software assistive technology utilized by each employee

Developed and completed stakeholders analysis to help project team understand the culture and needs of the enterprise

Developed communication plan to keep all levels of government at all locations informed of project status, activities and events and to facilitate input from all employees

- Communicate “the good, the bad and the ugly”

Identification of risks and development of mitigation plan

Lessons Learned

Project Planning Phase



Do not underestimate resource needs

Prepare a project timeline estimate based on project scope and your resources

Review your project scope with a focus on the integration that the software provides

Be prepared for the loss of trained and experienced project staff during and after implementation

Constant debate and delayed decisions are the “quick sand” of an enterprise project

Be aware of other factors that will impact your effort

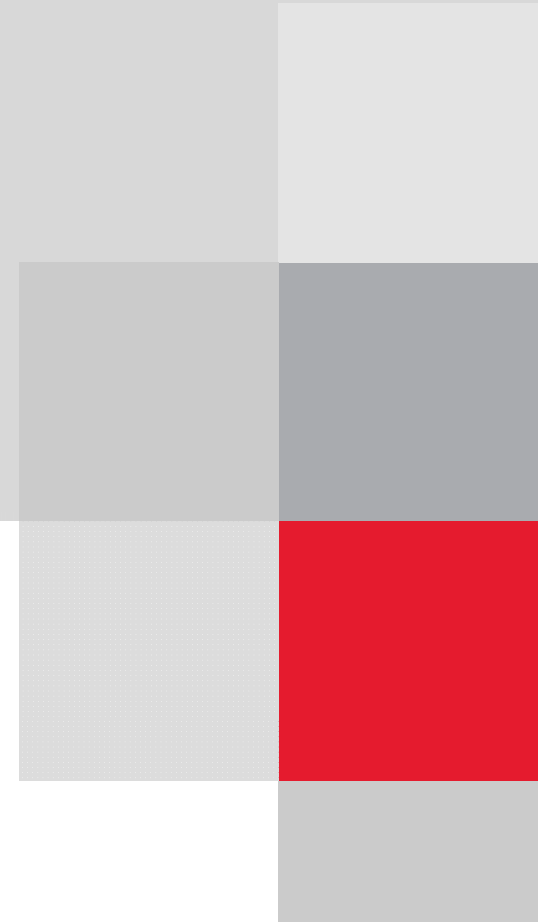
- Budget
- Labor Contracts
- Legal compliance
- Administration change



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Design Phase



Best Practices

Design Phase



Business process redesign workshops

- Enterprise-wide participation in business process redesign workshops
- Participants empowered by Project Sponsor to make decisions
- Included attorneys, auditors, labor relations, EEOC as advisors in workshops

Disapproval criteria for redesigns

- Regulations and laws can't be changed in the allotted implementation time frame
- Policies can't be changed in time
- Can't operate core agency functions
- Doesn't fit agreed upon Case for Change Vision
- Doesn't fit with external agency requirements – State and Feds
- Adversely affects service delivery level to public
- Doesn't fit in-force collective bargaining unit agreements
- Doesn't satisfy generally accepted internal controls / segregation of duty principles

Best Practices

Design Phase



Following final approval of business process redesigns by Advisory Committee the enterprise was briefed on the redesigns and their impact to business operations by each functional team

Project team worked with business owners to establish end-user groups for each individual functionality

Advisory/focus groups were established to work with project team on specific aspects of project

Lessons Learned

Design Phase



Do not over sell user expectations

Realistically assess best practices and determine if you can/will adopt best practices

Training is critical

- Train the trainer approach
- Allow the agencies to be responsible for delivery of process-oriented training

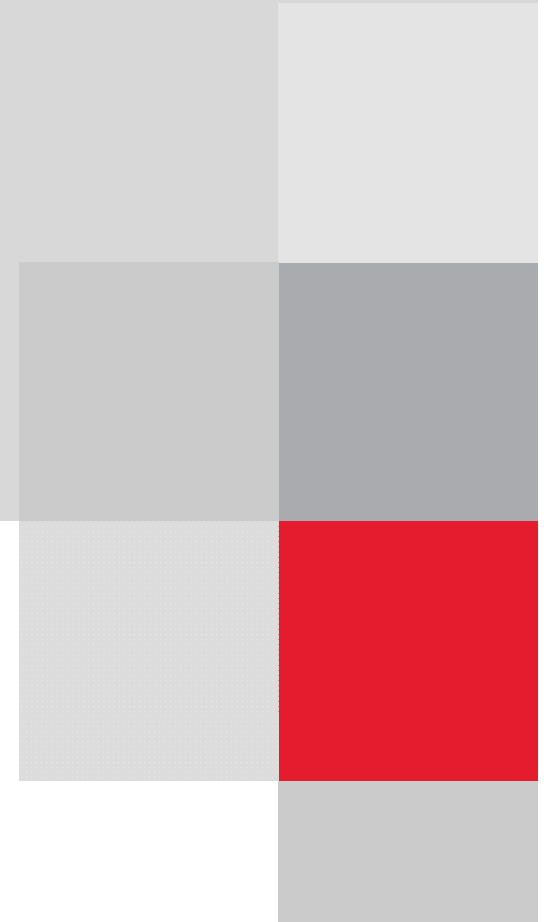
If using an agency phased approach for implementation, develop a process to monitor what each wave of users are doing in the system to avoid performance issues down the road



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Build Phase



Best Practices

Build Phase



Buy-in and support leadership from Senior and Middle Managers

Deployment team to ensure readiness of system, project team and end-users

Agency implementation teams to help communicate and prepare agencies for implementation

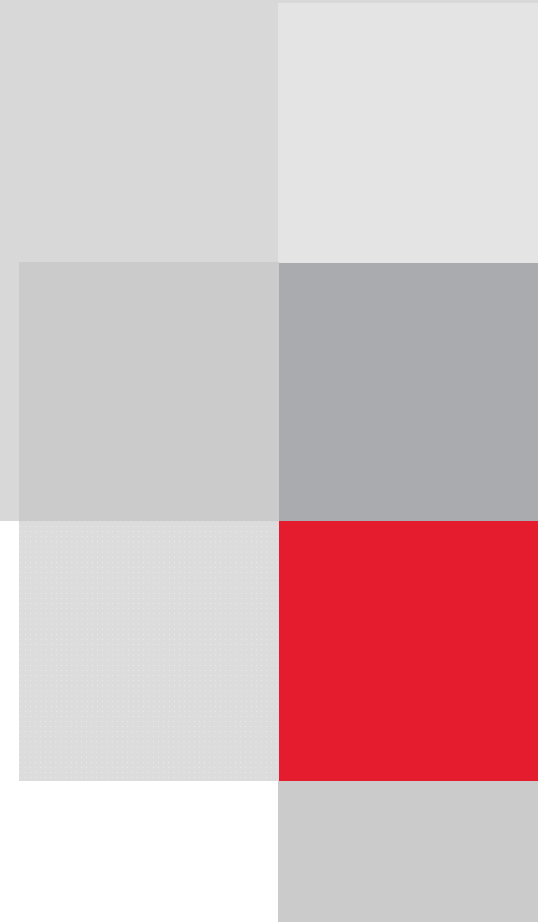
Separate project team to handle testing

Part-time staffing support for project team



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Implementation Phase



Best Practices

Implementation Phase



Implementation Leadership Committee

Implementation Support for Phased Implementation

- SWAT teams for initial wave
- Implemented agencies partnered with agencies planned for implementation in subsequent waves

Knowledge Sharing Workshop User Group



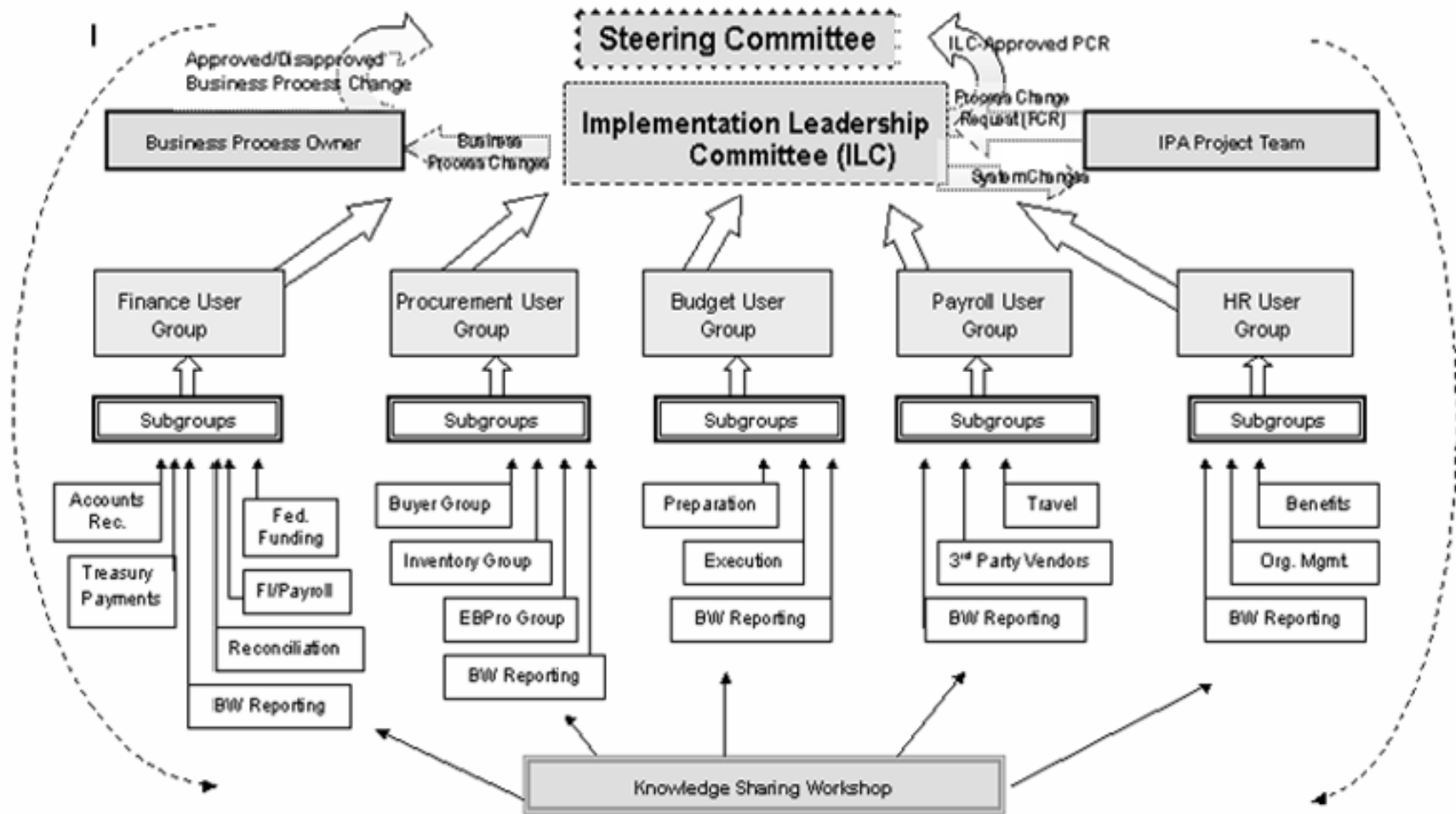
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Post-Implementation Phase

Best Practices

Post-Implementation Phase

Continuous Improvement-Business Process and System Changes



Best Practices
Post-Implementation Phase



Public ROI-Advancing Return on Investment
Analysis for Government IT
The Commonwealth of Pennsylvania's
Integrated Enterprise System (formerly ImaginePA)

Case Study
Center for Technology in Government
University of Albany, SUNY

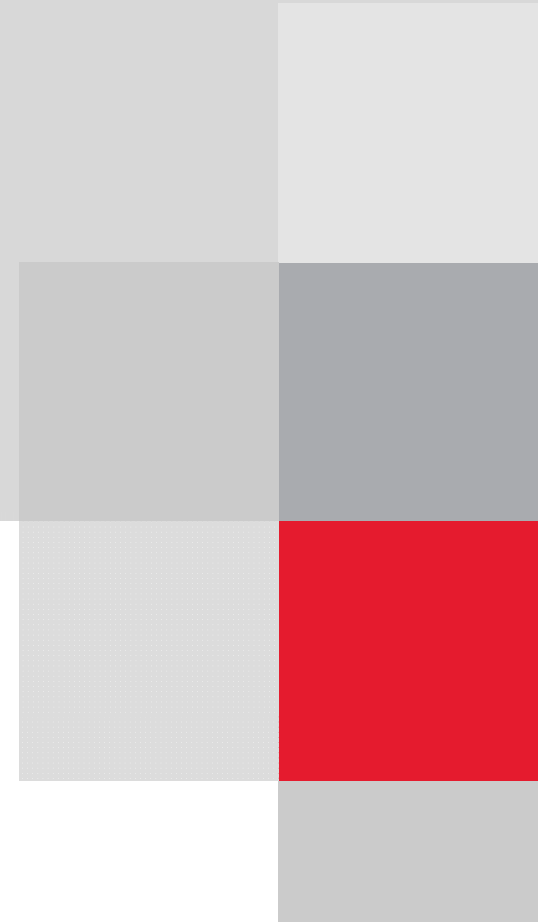
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Closing Remarks



Ten Keys to a Successful Enterprise Implementation



1. Define Vision and Project Drivers
2. Avoid Scope Creep at all Costs
3. Build and Maintain Executive Buy-In
4. Build a Solid Technical Infrastructure
5. Secure Sufficient Project Resources and Co-Locate Project Team
6. Communicate, Communicate, Communicate
7. Invest in Change Management
8. Over-Invest in Training
9. Say "NO" to Software Customization When Using COTS
10. Plan for Post Implementation Support

Author



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