

## ERP Case Study

### ERP Implementation and Enterprise IT Strategy for a non-profit agency

**The Client:**

The client is a \$5B non-profit agency focused in research and policy changing that includes environment, state policy, economic policy and health and human services.

**Business Need:**

Client implemented an ERP financials systems and was not able to close books. They needed additional help to stabilize the system, build a skilled support team and create a vision for the IT.

**Challenges:**

- ✓ Data conversations were incorrect, integrations were inaccurately done and reports were not getting generated properly. The implementation was seen as a complete failure by the upper management.
- ✓ In-house staff was poorly skilled and inadequately staffed.
- ✓ Supplier contracts remained open in the system.
- ✓ Donors were eager to see a more robust platform to review their donations and track spending against projects or initiatives.
- ✓ 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 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.

**Our Solution:**

iLynx 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 reports while working closely with the business to close books.

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 ERP system can be configured when business is ready to implement it.



In order to build long term stability, we setup IT Governance and a Program Management Office (PMO). Together, we created 3 years budget, strategy and IT initiatives. We used cross training, hired new employees and hired the ERP vendor 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 replacing the ERP grants module. We designed the integration between Salesforce and ERP billing, receivable, project costing and customer contract modules in order to track spending against donor donations and to run complete reports from Salesforce.

iLynx also created RFP and selected a vendor to provide ERP upgrade and additionally, assessed current business need for a cloud based HCM solution. Lastly, vendor contract for the support was re-negotiated to demand project hours to make it more effective for the customer need.

**Strategy:**

Our strategy was simple, 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 will make the client self-independent in the long run.

**Benefits:**

iLynx completed stabilizing this newly implemented ERP system, corrected data conversion issues and streamlined invoicing. We setup IT governance and a PMO that worked with iLynx to create an IT strategy and vision to support future initiatives. iLynx also provided IT staffing strategy and training to create a robust support team that can handle business needs. Lastly, iLynx integrated a new CRM, selected a vendor partner for upgrade and provided software assessment to select a cloud based HCM software all within seven (7) months of service.

**About iLynx:**



iLynx Inc., is a DC Metro based ERP and Cloud certified IT consulting and Staffing Company providing services that align technology to business requirements. For over a decade (since 2006), iLynx has delivered a wide range of technology support, experience and innovation to state-local, non-profit and federal industry clients with an emphasis on quality and demonstrated leadership.

iLynx provides Enterprise Governance, Independent Verification and Validation, Software and Partner Selection, Cloud Assessment and Governance, Program/Project Management, ERP Upgrade/Support and IT Staffing services.