



2026

FGFOA

Annual Conference

June 13-17, 2026

Loews Sapphire Falls Resort
at Universal



Evolution Series: ERP Implementation without the Headaches

June 14, 2026

Loews Sapphire Resort at Universal Orlando

Evolution Panel



Christia Johnson, Polk County Board of County Commissioners

Budget & Management Services Director

Lana Hicks, Polk County Clerk of the Circuit Court and Controller

Fiscal Functional Analyst

Herminio Rodriguez, City of Sarasota

Information Technology Director

Nichole Wood, Pinellas County Clerk of the Circuit Court and Controller

Assistant Director

Moderator

Amy Clark, Berry, Dunn, McNeil & Parker, LLC

Senior Consultant

Who in this room is planning an ERP Implementation?



Polk County – Budgeting

Legacy / System Challenges

- Limitations with out-of-the-box budgeting tools and increasing technical debt from unsupported software
- Selection Process included a disciplined evaluation including peer feedback, demonstrations, and prioritizing integration with the existing financial and HR systems
- Selected Cloud based system for integration with existing financial and HR systems
- Stakeholders expressed concern regarding data security, customization limits, and job impact during transition to cloud budgeting



Polk County – Budgeting

Lessons Learned

People and Process over Technology

- Communication – functional and technical teams often used the same words but with different meanings
- Include Change Management as part of the process
- Internal Communication is vital to success
- Documentation – assigning a dedicated notetaker was key
- Timing and Testing – start data extraction, automation, and validation early – testing directly improved confidence in budget numbers



City of Sarasota – ERP

Lessons Learned

- Understand and evaluate your processes
- Prepare and clean your data
- Decide on historical data strategy
- Manage change proactively
- Plan realistically and build in buffer time
- Invest in training and knowledge transfer
- Assign change managers for each functional area



City of Sarasota – ERP

Lessons Learned

- Communicate frequently and transparently
- Test thoroughly and early
- Don't underestimate data conversion and integration
- Focus on security and compliance from day one
- Plan for post go-live support
- Leverage vendor and peer resources



Polk County – Finance and Human Resources

Lessons Learned

- Include IT in every part of implementation
- Prepare clear documentation related to your environment
- Clear rules / policies and all leads on the same page
- Willingness to pivot and change business rules if needed
- Test testing – follow your procedures from start to finish, especially if they cross modules



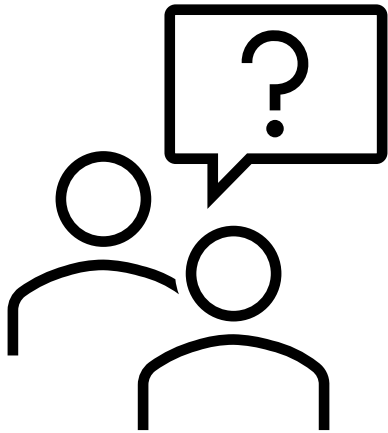
Pinellas County Clerk of Circuit Court

Lessons Learned

- Preplan for the RFP
- Be clear with your Statement of Work
- Don't be afraid to take it back to basics
- Rethink Chart of Accounts
 - Don't try to account for every single thing in the COA
 - Use system functionality in other areas
- Don't build for behavior
- Don't be afraid to ask for help
- Make a plan for backfill / resource management

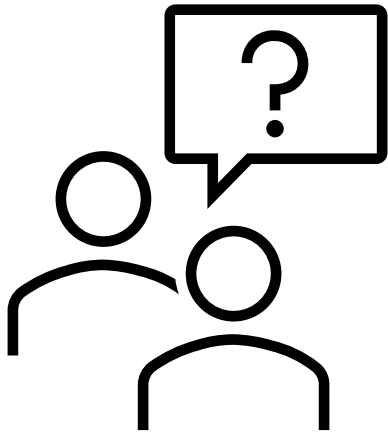


Moderator



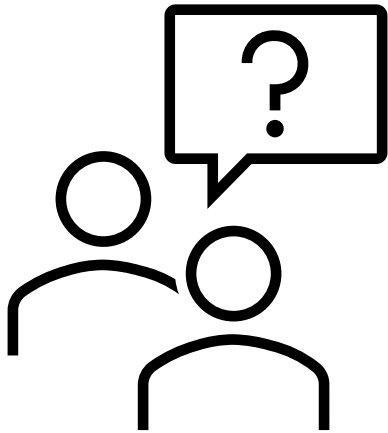
Did your organization plan to incorporate Change Management into your implementation?

Moderator



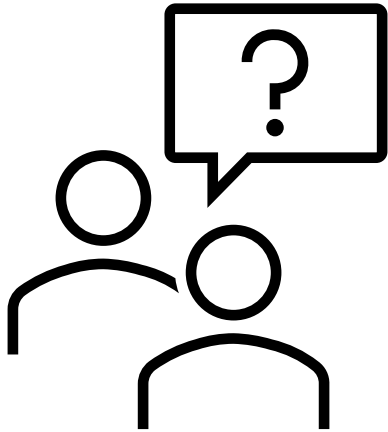
What influenced the organization's decision to select a particular vendor / product?

Moderator



Did your organization intend to use one vendor or a multi-vendor approach to the selected ERP solution?

Moderator



Did your organization's staff have previous implementation experience?

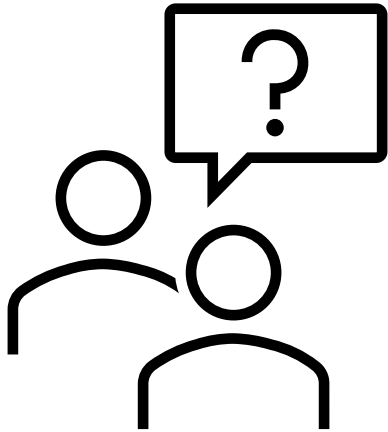
Did it deliver:

On time?

On budget?

Within scope?

Moderator



Did your organization's staff have previous implementation experience?

Did it deliver:

On time?

On budget?

Within scope?

Planning Phase



Challenges

- Resource availability
- Project budget
Identification
- Establishing governance
structure
- Current/modern
marketplace education
and awareness



Considerations

- Do not plan for short term
internal resource reductions
- Identify all potential costs of
the initiative
- Establish governance
structure as early as possible
- Understand and document
as-is processes



Solutions

- Opportunities to learn new
skills and backfill positions
- Distribute a Request for
Information (RFI)
- Emphasize the need for
business process change

Managing Change



Configuration Training

- Maintain focus of future environment. Refrain from “We have always done it that way”.
- Avoid analysis paralysis



User Acceptance Testing

- Critical entrance and exit criteria
- Pass vs Fail: Configuration, Ability, Software Defect
- Timeline for resolution



End User Training Planning

- Easy and effective planning
- Staff Augmented Training vs Train the Trainer
- Modes of training: Pre-recorded, live, define internal support structure

Platform and Partner Selection Phase



Challenges

- Limited vendor engagement
- Navigating single or multiple RFPs
- Elongated evaluation process timelines
- Data conversion requirements



Considerations

- Engage vendors through pre-RFP activities
- One ERP RFP or separate point system RFPs
- Alternative procurement methods



Solutions

- Vendor outreach sessions
- Include multiple decision points through the process
- Leverage master and cooperative contract vehicles
- Vendor contract scoping prior to negotiations

Implementation Phase



Challenges

- Resource availability
- Change resistance
- Roles and responsibilities acceptance and adherence
- System expectations
- Cross-collaboration
- Data conversion validation
- Training
- Internal Change Management
- Operational Process Standardization



Considerations

- Hybrid deployment approach
- Client and vendor change management
- Stakeholder engagement
- Role of a business analyst
- Multiple conversion strategies
- Multiple hybrid training approaches



Solutions

- Identify remote and onsite activities
- Establish Change Management Team
- Stakeholder Orientation Sessions
- Stage Acceptance and Testing
- Cross-Functional Team meetings
- Data warehouse strategy

Stabilization Phase



Challenges

- We're live, now what?
- Not planning for stabilization
- Managing deferred items for post-live
- The "next project" starts



Considerations

- Manage expectations that the project is not done at production cutover
- Confirm roles and responsibilities
- Reinforce business process changes
- Continued collaboration with process owners



Solutions

- Identify post go-live assistance
- Develop support plan
- Implement change control process
- Maintain contract compliance due diligence

We're live – now what?



Issue Resolution

- WAR Room
- Establish responsibility – IT, Power User
- Software Defect
- Trust, but verify – compare system generated reports to the general ledger



Continuous Improvement

- Monitor work
- Reject errors
- Lack of training
- Lack of desire / ability



Further Training

- Are there sessions not fully covered
 - Budget
 - Month end processes
 - Year end processes
 - Advanced reporting