



Orange County Sheriff Enterprise Resource Planning (ERP) Training

AGENDA

The training will focus on preparing Orange County Sheriff staff to participate in an ERP selection and implementation project and preparing the organization for an ERP project. Participants will better understand what can make these projects so difficult, and how to overcome common challenges with proper preparation, planning, and readiness activities. acquire an overall understanding of the ERP market, common features of ERP software. Special emphasis will be placed on tasks that the Sheriff's Office can be doing next to increase chance of project success.

Day 1 Module 1 – Getting Started – ERP Governance

Time	Topic
	What is ERP?
9:00 to 10:30	• Software Market Overview • Typical Project Experience • Keys to Success • Approach to an ERP Project
	ERP Market Overview
10:30 – 11:00	• Software Vendors • Use of Third Party Consultants • “Best of Breed” Software • Cloud Impacts • Trends
	Project Governance
11:00 – 12:00	• Steering Committee • Project Management • Staffing the Project Team • Project Team Skillsets / Where to Find? • Use of Consultants
	Lunch



Day 1 Module 2 – Experiences from ERP Projects

Time	Topic
1:00 – 1:30	Why ERP? • Project Purpose • Project Goals • Defining Success and Tracking Results
1:30 – 3:00	What to Expect from the Project? • Overall Implementation Experience • Timelines and Major Phases ○ Project Management ○ Training / Knowledge Transfer ○ Design ○ Configuration ○ Testing ○ Go-Live • Agile / Prototype Implementation Approach
3:00 – 3:30	Mitigating Risks and Managing Quality • Role of Deliverables • Testing Practices • Requirements Traceability
3:30 – 4:00	Key Considerations – Organizing Staff • Who to Include? • Driver for Change • Project Champions



Day 2 Module 3 – ERP Business Case

Time	Topic
9:00 – 10:30	Process / Policy Change • Approach to Process Improvement • “Lean” Process Improvement • Best Practices / Modernization • Scope of Project
10:30 – 12:00	Process Documentation • Process Mapping • Building Requirements • Use Cases
Lunch	

Day 2 Module 4 – Procurement Overview

Topic	
1:00 – 2:30	Procurement Considerations • Vendor Research • Planning for the Cost of an ERP System • Writing an RFP • Vendor Due Diligence • Contract Negotiations

Day 2 Module 5 – Readiness Activities

Time	Topic
	Overview of ERP Project Readiness
2:30 – 3:15	• Overall Timelines • Avoiding Common Mistakes • Staffing Readiness Activities
3:15 – 3:45	Readiness Tasks • Data Conversion / Interfaces / Reports • Chart of Accounts • HR/Payroll Readiness • Project Management Tools
3:45 – 4:00	Other Issues for Project Success • Open Discussion