



WEBINAR

**Weathering the ERP Storm: A Survival Guide
for Finance Departments | Earn 1 CPE Credit**

**Thur, Mar 26
9:00AM PST**

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Agenda

1. Preparing for the Storm
 - How to prepare BEFORE you really start
2. Weathering the Storm
 - Keys to success DURING implementation
3. Recovering from the Storm
 - Ensuring success AFTER go-live



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POLLING QUESTION #1

Where is your organization in the ERP journey?

- A. We are considering a new ERP system
- B. We have selected a system but haven't started implementation
- C. We are currently implementing
- D. We recently went live
- E. We are not planning an ERP change (yet)

A dramatic, dark, and stormy sky dominates the upper two-thirds of the image. The clouds are heavy and dark grey, with some lighter patches where light breaks through. Below the sky, a dark, flat landscape stretches across the bottom third. In the distance, a few silhouetted trees and a barn are visible against the horizon. The overall mood is ominous and foreboding.

PREPARING FOR THE STORM

Set Clear Objectives and Goals

 Ease of Use

 Workflow

 Paperless

 Automation

 Reporting

- Recognize Pain Points
 - Why are you changing systems?
 - What challenges is your team currently encountering?
 - In what ways does your existing system fall short?
 - What enhancements do you expect from the new system?
 - Which tasks are still handled manually or through spreadsheets?

Set Clear Objectives and Goals

- Commit to Change and Necessity of Updating Processes
 - Transition from old system and processes to new ones
 - Opportunity to boost efficiency and reduce stress
 - Opportunity to implement automation
 - Opportunity to eliminate outdated data
 - Opportunity to rethink a critical systems

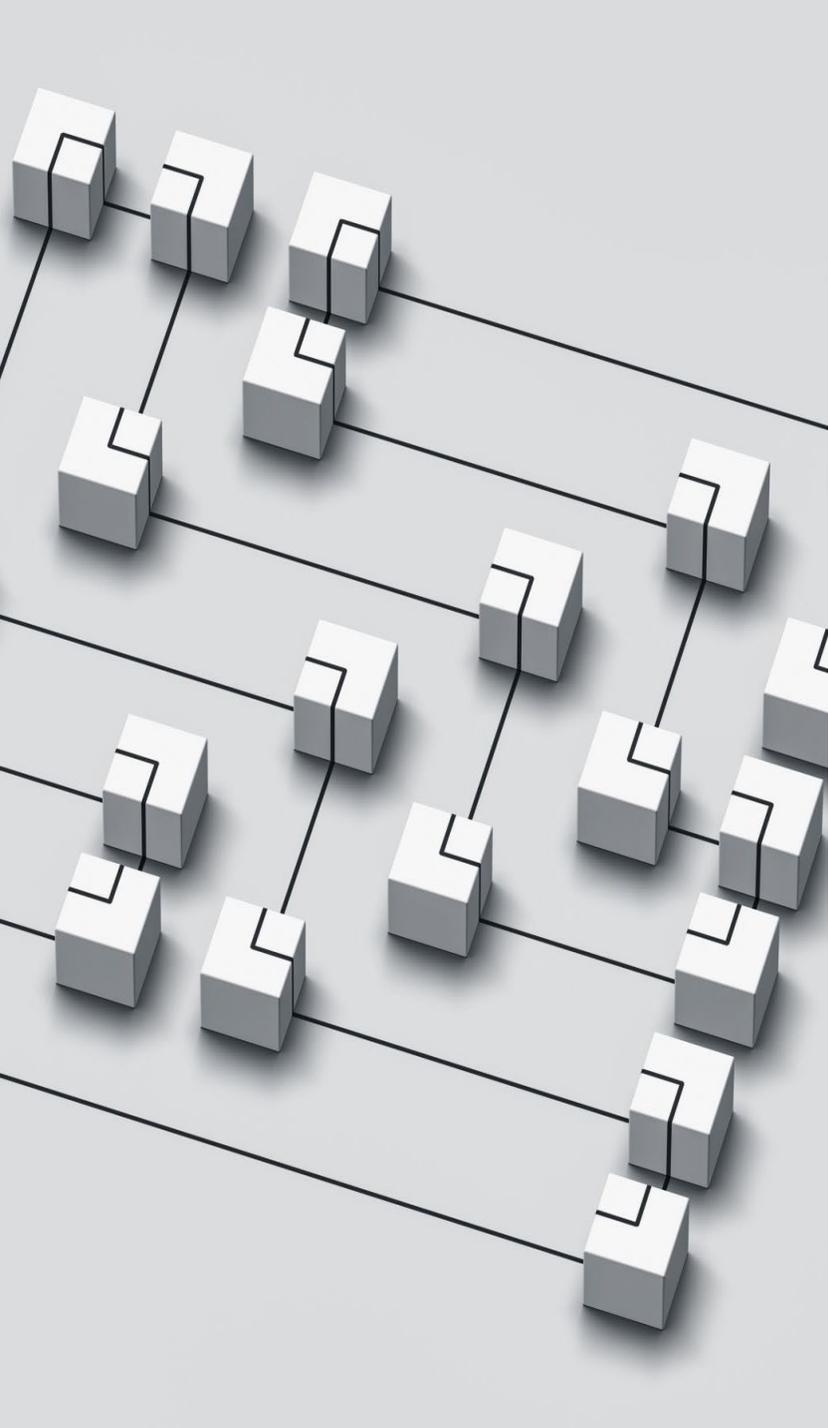


Communicate with the Finance Team

- Involve your finance team from the beginning.
- Recognize that change may not be accepted by everyone.
- Clearly outline the benefits and final objectives.
- Assure your team that resources will be allocated to address overtime and increased workloads.
- Acknowledge that feeling nervous is normal.
- Provide chances for involvement and open discussions about difficulties so they don't face them alone.

Communicate Across Organization

- As a department leader, ensure that other departments understand the challenges with your current system and the reasons driving the need for change.
- Engage with staff from other departments to learn how they interact with your system and what issues they hope a new system could address.
 - Consider appointing champions within each department to serve as key problem solvers and expert users.
 - Inquire about any processes they manage outside of the current system and allow them to assist with the solutions to bringing it into the new system.
- Inform your City Council or Board of Directors about the difficulties with the existing system and explain why an upgrade is necessary.



Data Readiness

- Is the current chart of accounts working for you?
 - Clear out unused funds
 - Do you need new departments/programs?
 - Define nomenclature to ensure consistency and cleanliness
- Do we have balances that are not reconciled?
 - After cutover, you may not have access to historic details
- Do your subsidiary ledgers reconcile to the general ledger?
- Do we have outdated vendors or customer listings?
- Where does your data live?
 - Are capital assets in excel, in a separate system?
 - Are AR balances in your current system or in another system?
- What systems do other departments use that will need to integrate with your new system.

POLLING QUESTION #2

How confident are you in your current data before implementation?

- A. Very confident — data is clean and reconciled
- B. Somewhat confident — minor cleanup needed
- C. Not confident — significant cleanup required
- D. Not sure — haven't evaluated yet

A dramatic, dark, and stormy sky with heavy, dark clouds hangs over a dark, flat landscape, possibly a field or a road. The overall mood is ominous and intense. The text is overlaid on the sky portion of the image.

WEATHERING THE STORM

Process Redesign

- What processes are manual or time consuming and how can we improve the process in the new system?
 - Involve other departments that are involved in the process to ensure everyone's pain points are addressed.
- What processes are performed outside of the system?
- What processes do not fit organically in your new system?
- Implement a “process freeze” in your old system to prevent major redesigns of your legacy processes.

Staff Augmentation



Identify critical roles early
(AP, AR, payroll, etc.)



Hire temporary
employees/contractors or
redistribute work



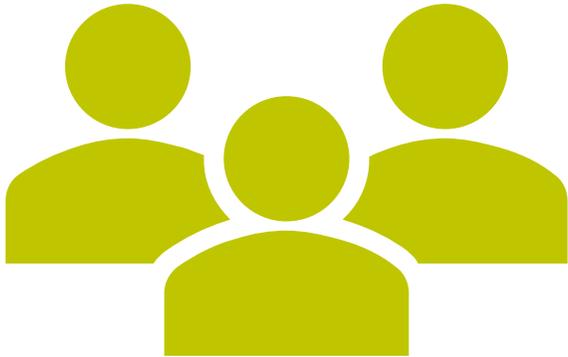
Protect employee
implementation time, that needs
to be the priority

POLLING QUESTION #3

What is your biggest concern during ERP implementation?

- A. Staff capacity and workload
- B. Data conversion and accuracy
- C. Training and adoption
- D. Process redesign
- E. Timeline pressure

UAT Training



- Commit to the user acceptance training early and schedule the time in advance, ideally no less than 30 days prior to go-live.
- Provide training in manageable pieces, not large volume of information.
- Ensure employees are practicing in the test database, not just working through generic examples.



**EXPECT
ISSUES**

Data Testing and Validation

- Have you dedicated the time and resources to fully validate converted data.
 - Is the data complete?
 - Do the prior year balances tie to the legacy system.
- **Test workflow**
 - Approvals are set up correctly
 - Steps are efficient and functioning properly
- Test individual transactions and batches of transactions
 - IC should provide you with a full testing script to follow
- Test integrations with outside systems and modules within the system

If processes are revised, RETEST EVERYTHING!!!

Design Interim Processes for Phase 2+ Implementations

- Identify systems and processes that are not a part of go-live (payroll, FA, purchasing)
- Define a clear posting strategy early
 - Evaluate how you will integrate the data into your new ERP system
 - How will the information get into the new ERP
 - Journal entry, uploads, etc.
 - How frequent will the information be posted?
 - Summary vs. detailed postings
 - How will reversals and corrections be handled
 - How will you make sure the information posted is correct?
 - Validation by person responsible for accuracy of both systems
- Perform a tie-out regularly to ensure the two systems stay in sync
 - Especially important if legacy system is “source of truth” for an unaudited year



SLOW DOWN!!!!

**It's easy to pull the
trigger but impossible
to go back!**

RECOVERING FROM THE STORM

Stabilization Period

- Nothing New....Business As Usual!!!!
 - Reaffirm new processes
 - Be supportive to the departments who will struggle
 - Continue reminding them of why you changed and how they will benefit once the transition is over
 - Continue with support from consultants and temporary staff
 - Continue Champion meetings to keep communication ongoing



Prepare for the Next Phase

- Are there plans for additional phases following the implementation of the GL?
- In what ways can the lessons learned from this phase support your team in upcoming phases?
- What aspects were successful, and what difficulties were encountered?
- What resources are necessary to guarantee the success of future phases?
- How can we maintain data continuity?

Measure What Matters

- Are new processes improving efficiencies?
- Are there less errors and rework?
- Are we able to reduce the time on the financial close and reporting?
- Is the data more accurate and reliable?
- Is the finance team satisfied with the end result?
 - Be patient, this may take time!

POLLING QUESTION #4

After go-live, what matters most to your organization?

- A. Faster financial close
- B. Better reporting and visibility
- C. Fewer manual processes
- D. Improved data accuracy
- E. Higher staff satisfaction

Ongoing Training



- Move from “project training” to an ongoing “continuous learning” approach.
- Host roadshows such as Workday Wednesdays or Munis Mondays
 - Use these sessions to answer frequent questions or highlight process updates in brief segments.
- Leverage Superusers and ERP Champions
- Emphasize the platform’s training program along with step-by-step guides for easy reference.
- Explore microlearning and on-demand content



Stay
POSITIVE

Buy-in will
take time!

Questions?

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