PROJECT PHOENIX

Enterprise Resource Planning

# ERP Project
# Update to County Council

**March 17, 2026**

Snohomish County

PHOENIX
an ERP modernization project

# Today's Agenda

- ❑ Time-machine journey
- ❑ Project overview and status
- ❑ Project management approach
- ❑ How we engage with County staff
- ❑ Closure and Q&A

Snohomish County
PHOENIX
an ERP modernization project

# Time Machine:

*Presented to County Council Q3 2023 - Key Tenants for an ERP Project*

- Adhere to Snohomish County IT Strategic focus of "**cloud first**"
- Identify a solution that is **platform based** (Composable ERP)
- **Leverage knowledge** and **experience** from our peer counties (and other agencies) who have implemented ERPs recently
- Invest in **external partner advice** to support pre-planning related to business and technical capabilities
- Invest in **external systems integrators** to support implementation of chosen ERP solution
- High focus on **internal change management** to ready the organization for a new ERP

# PROJECT OVERVIEW

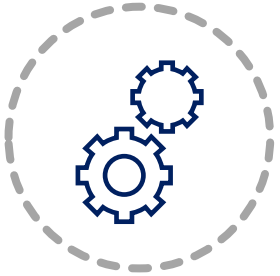
## Why are we doing this?

- **Current System Limitations**: Cayenta lacks modern cloud solutions and integration capabilities, leading to technical debt and sustainability concerns.
- **Digital Transformation need**: Addressing long-term viability by modernizing systems and processes is crucial.
- **Cloud-First Principle**: Preference for cloud solutions, with a cloud-based ERP as a central component.
- **Comprehensive ERP Solution**: Integration of HR and Finance functions with a modular approach using composable ERPs.
- **Data Protection & Security**: Our current mix of cobbled together solutions and workflows increase our data protection risks very dramatically. Security is built in by definition in Oracle Fusion

## Project Objective:

### Enhance Employee Productivity

- Implement user-friendly tools and workflows to empower employees, streamline tasks, and improve overall productivity.
- Comprehensive training to ensure employees are proficient with new technology, fostering confidence and maximizing the benefits of the Oracle Cloud Fusion ERP.
- Promote collaboration: Encourage departments to work together via a growth mindset and use new technical skills to drive innovation.



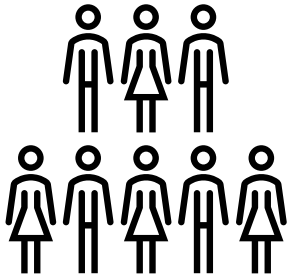
### Optimize and Integrate Processes

- Consolidate disparate systems into a unified ERP solution to simplify processes, reduce redundancy, and improve operational efficiency.

### Improve Data Management and Reporting

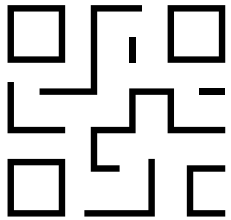
- Simplify reporting and data analysis by leveraging integrated, real-time data to support informed decision-making and reduce costs.
- Reduce security risks and ensure compliance with all security standards
- Reduce costs

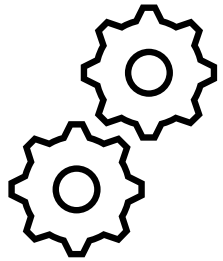
# ERP | By The Numbers



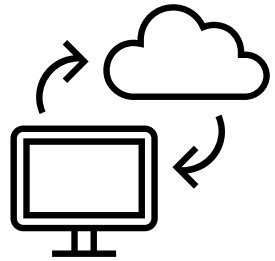
- ✓3,000+ Employees
- ✓43 Collective Bargaining Agmts
- ✓25+ Offices & Dept's
- ✓40+ Junior Taxing Districts
- ✓1,300+ Supplemental Staff

- ✓800+ Job Codes
- ✓1,400+ Pay Codes
- ✓125 Benefit Plans





- ✓250+ Active Grants
- ✓15,000+ Assets

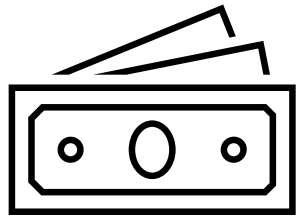


- ✓80+ Apps
- ✓100+ Integrations
- ✓1,000+ Access Databases

**Snohomish County Government**

**Founded January 14, 1861**

- ✓34,000+ G/L Codes
- ✓250,000+ Vendors
- ✓10,000+ Invoices/Mo.



Snohomish County

PHOENIX an ERP modernization project

# High Level Project Status

- ✓ The project remains on track, on schedule, on budget
- ✓ We have reached final agreement with IBM (systems integrator) with contract currently in final legal review
- ✓ Council can expect to see approval package by EOM
- ✓ Phase0 – ~April 1
- ✓ Phase1 implementation work kicking off this summer

# Project Updates

## 2024 2025 2026

### BUILDING THE FOUNDATION

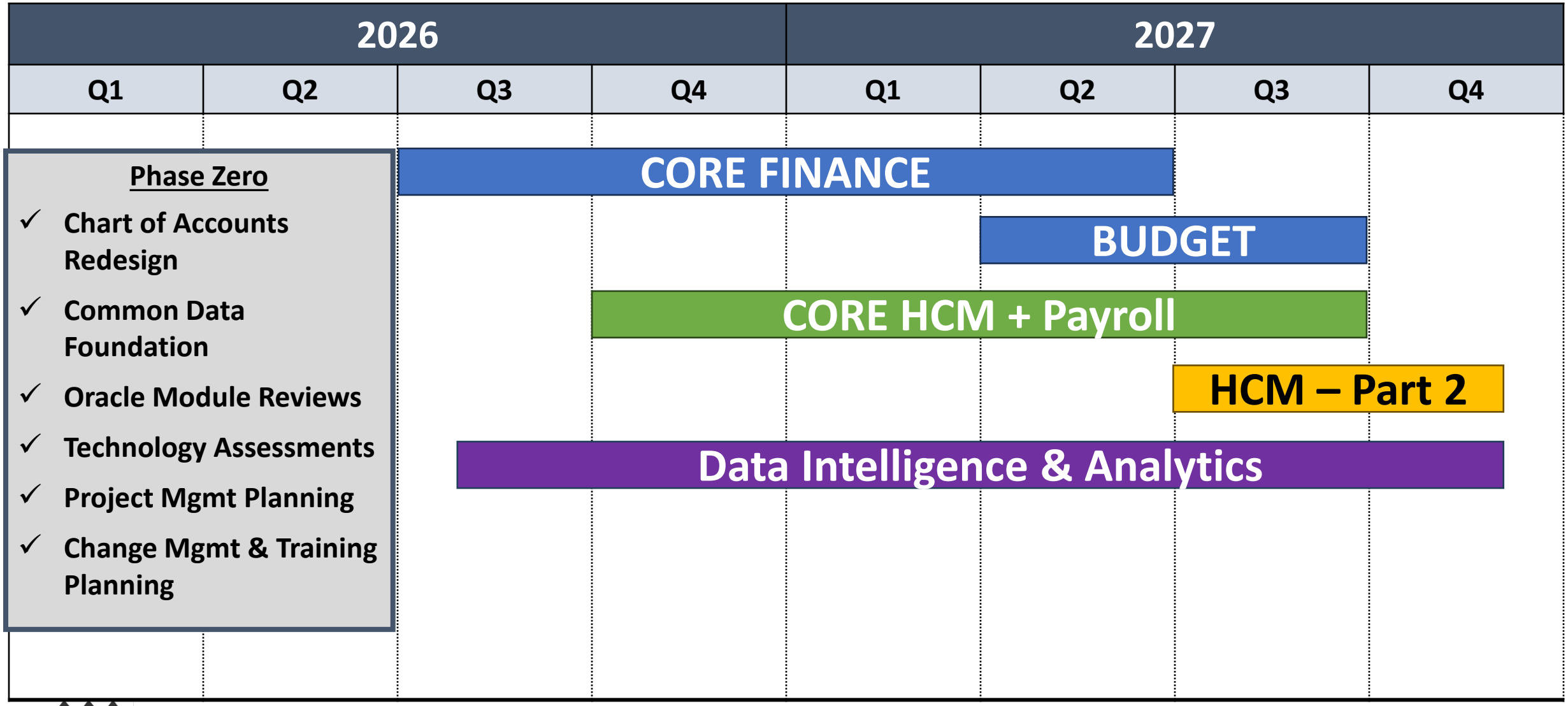
- ✓ Selected Oracle as the ERP platform
- ✓ Formed the Steering Committee
- ✓ Completed baseline business analysis
- ✓ Department outreach: early engagement and needs assessment

### MOBILIZATION AND READINESS

- ✓ Selected IBM as the Systems Integrator
- ✓ Formed the ERP Project Office (EPO)
- ✓ Finalized governance and project controls
- ✓ Department outreach: preparing leaders and teams for change
- ✓ Planning workshops and analysis
- ✓ Training strategy

Snohomish County
PHOENIX
an ERP modernization project

# Highlevel Project Schedule




Snohomish County
PHOENIX
an ERP modernization project

# ERP Modernization Project | Steering Committee Feb 10, 2026

Snohomish County

| PROJECT STATUS | | |
|---|---|---|
| **Project Governance** | ⬇ | Risks/Issues/Decisions accumulating |
| **Project Execution** | ⬌ | P-0 scope at risk due to compressed timeline |
| **Project Team Readiness** | ⬌ | Project FTE turnover & undecided scope |
| **Technical Readiness** | ⬌ | Initial system inventory complete and moving to next steps |
| **County Readiness** | ⬇ | Need for greater awareness & comms at the department level |

## CELEBRATING THE TEAM

- ✓ *SI SOW negotiations complete*
- ✓ *Systems Inventory and analysis framework complete*
- ✓ *Training strategy complete*
- ✓ *Tech Team and HR workshops completed*
- ✓ *2026 Comms Plan w/ updated newsletter*

## Current Activities

- Leadership Forum rescheduled to March 5th (1 hour, virtual)
- Lock on Leadership Key Messages b Feb 27th
- Schedule 3-hour Steering Worksho for March
- Lock on Steering Guiding Principles prior to Steering Workshop (schedule TBD)

## Risks, Issues, Decisions

- (Risk) Phase Zero: Compressed timeline, potential resource gaps

To be updated prior to Council Meeting

gement: The d non-ERP

Vacation requests for the re increasing - Guidelines needed

## Looking Ahead

**Phase-0 Checklist (By March 31)**

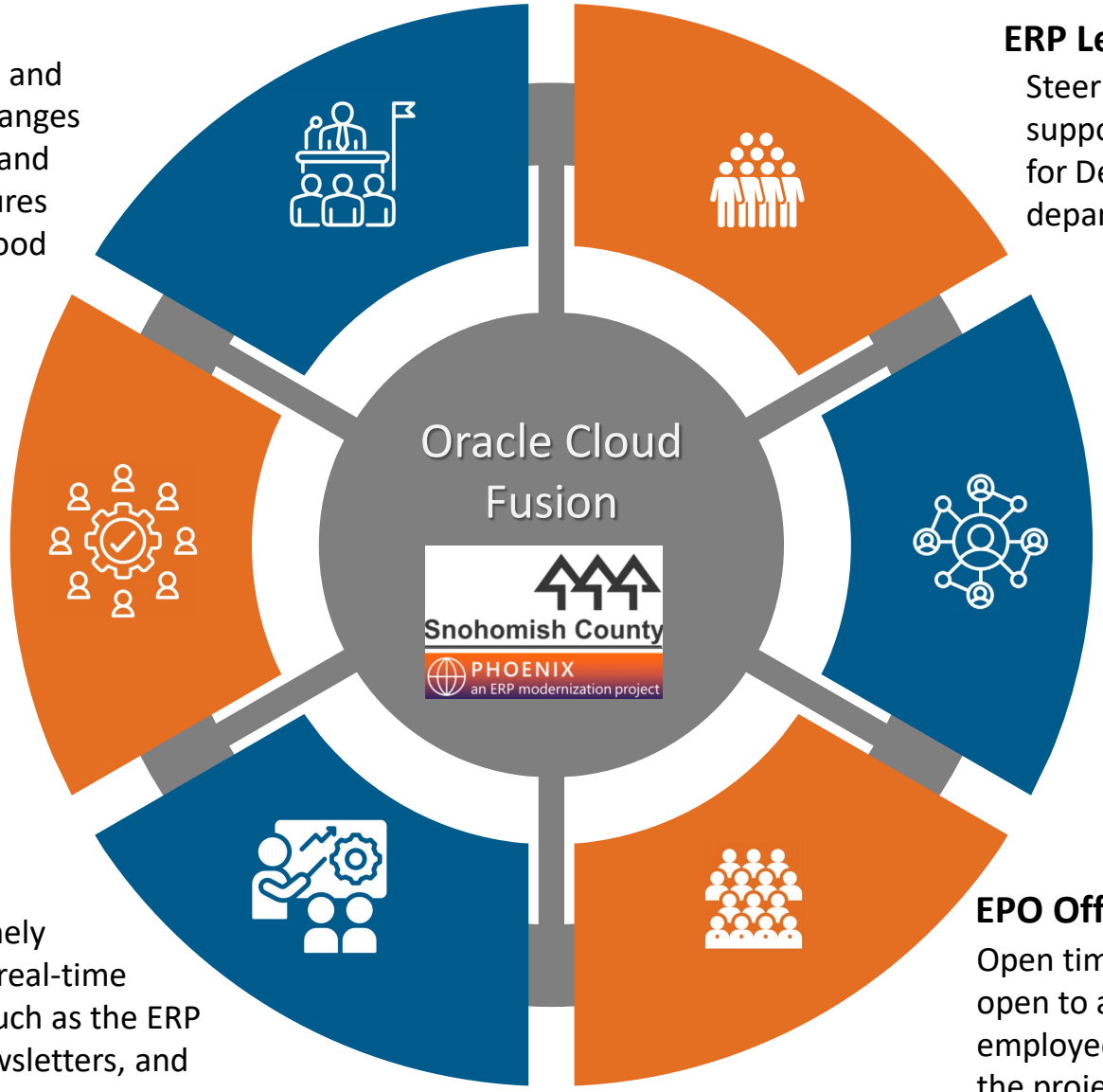
- SI contract signed by March 15
- Complete Steering workshop
- Project team R&Rs and SME assignments
- Project governance infrastructure
- Integrations and data prep work
- Communities of practice launched
- Change Mgmt for Executives

# ERP Modernization Project | Engagement Strategy

Snohomish County

### ERP Community Forum
EPO provide messaging, support, and ways to prepare for upcoming changes for Dept Managers, Supervisors, and their teams. This forum also ensures departmental needs are understood and supported

### ERP Leadership Forum
Steering Committee and EPO provide messaging, support, and ways to prepare for upcoming changes for Dept Executives. This forum also ensures departmental needs are understood and supported




### Sponsor Townhalls
Visible and accessible executive sponsor engagement. Open to all county staff to hear from the sponsors about the project and engage in panel-based Q and A.

### Communities of Practice
Workstream SMEs and Training team focused on building knowledge and timely demonstrations of Oracle

### Project Resources
Recurring, available, and timely communications to provide real-time updates about the project such as the ERP SharePoint and Monthly newsletters, and training materials

### EPO Offices Hours
Open time for Q and A open to all county employees to learn about the project

# ERP Project Office (EPO) Team

- ✓Ensuring cross-functional teamwork, alignment, and delivery
- ✓Structure, focus, and expertise needed to manage a project of this scale and complexity
- ✓Driving the people-side of transformation for long-term success

# Dept Engagement Model & Frequency

| Area | Mar | Apr | May | Jun | Jul | Aug | Notes |
|---|---|---|---|---|---|---|---|
| **Quarterly Leadership Forum** | **SA** | | **SA** | | | **SA** | Audience-Department Executives<br>Owner-Chris Syberg |
| **Community Forum** | **A** | **A** | **A** | **A** | **A** | **A** | Audience-Department managers, supervisors, and their teams<br>Owner-OCM Lead |
| **Sponsor Townhall** | | | **SA** | | **SA** | | Audience-All staff<br>Owner-OCM Lead/Chris Syberg |
| **Community of Practice** | | | | | **A** | **A** | Audience-SMEs and Adv Users<br>Owner-Training Lead |
| **EPO Office Hours** | **A** | **A** | **A** | **A** | **A** | **A** | Audience-All staff<br>Owner-Brian Mark/EPO Leads |
| **Monthly Newsletter** | **A** | **A** | **A** | **A** | **A** | **A** | Audience-All staff<br>Owner-OCM Lead |
| **County Newsletter** | | **A** | | **A** | | **A** | Audience-All staff<br>Owner-Kari Bray |

**A=Active** **SA=Sponsor Focused/Active**

# Key Takeaways and Success Factors

- **Leadership engagement and sponsorship.** Specifically:
  - Exec Office/Council/Separate Elected and all department leader's support
  - Department resourcing to support deliverables
- **Protection of project funding**. Specifically:
  - IBM contract approval followed by strict adherence to contract SOW & deliverables
  - Project impact if planned resources can't support project –> stay on time, on budget
- **Future savings potential**. Specifically:
  - Deliver financial roadmap that shows expected savings through portfolio simplification through retirement of old systems

QUESTIONS
ANSWERS